Public Document Pack

Mid Devon District Council

Cabinet

Tuesday, 7 February 2023 at 10.00 am
Phoenix Chamber, Phoenix House, Tiverton

Next ordinary meeting
Tuesday, 7 March 2023 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.

Join the Zoom meeting here.

Meeting ID: 834 7984 7070
Passcode: 720825

Join by Skype for Business
https://us06web.zoom.us/skype/83479847070

Membership

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

Committee Administrator: Andrew Seaman
Tel: 01884 234229
Email: aseaman@middevon.gov.uk
This document is available on the Council's Website at: *www.middevon.gov.uk*

A G E N D A

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 7 - 12)*
   To consider whether to approve the minutes as a correct record of the meeting held on the 3 January 2023 and the minutes of Extraordinary Cabinet Meeting held on 31 January 2023.

5. **Update from the Cabinet Member for Continuous Improvement**
   To receive a verbal update from the Cabinet Member on the progress in driving improvement in services across the Council.

6. **Qtr. 3 Budget Monitoring** *(Pages 13 - 36)*
   Report from the Deputy Chief Executive (S151)

7. **2023/24 Budget** *(Pages 37 - 62)*
   Report from the Deputy Chief Executive (S151)

8. **2023/24 Capital Strategy** *(Pages 63 - 84)*
   Report from the Deputy Chief Executive (S151)

9. **2023/24 Treasury Management Strategy** *(Pages 85 - 118)*
   Report from the Deputy Chief Executive (S151)

10. **2023/24 – 2026/27 Procurement Strategy** *(Pages 119 - 144)*
    Report from the Deputy Chief Executive (S151)

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11. **The Council Tax Reduction Scheme & Exceptional Hardship Policy** *(Pages 145 - 280)*
Following a report from the Deputy Chief Executive (S151), the Community Policy Development Group made the following recommendations to Cabinet:

1) To increase the maximum reduction from 85% to 100%.
2) To disregard the housing element of universal credit in the calculation.
3) To increase the income bands by inflation each year.
4) That any income from welfare provision to be disregarded.
5) That this policy is adopted.

12. **Pay Policy** *(Pages 281 - 306)*
Report from the Corporate Manager for People, Governance and Waste

13. **Establishment** *(Pages 307 - 316)*
Report from the Corporate Manager for People, Governance and Waste

14. **National Non Domestic Rates (NNDR1)** *(Pages 317 - 324)*
Report from the Deputy Chief Executive (S151)

15. **Shared Prosperity Fund and the Rural Prosperity Fund** *(Pages 325 - 334)*
Following a report from the Director of Place, the Economy Policy Development Group made the following recommendations that Cabinet:

1) Approves the UKSPF expenditure & Delivery Plan for Year One (2022/23) as outlined throughout the report.
2) Approves delegated authority to the Director of Place, in conjunction with the Cabinet Member for Finance, to finalise the detailed SPF Policy & grant arrangements;
3) Approves delegated authority to the Director of Place, in conjunction with the Cabinet Member for Planning and Economic Regeneration, to approve variations to the Delivery Plan, Investment Plan and/or grant scheme criteria.

16. **Cullompton Town Centre Masterplan** *(Pages 335 - 474)*
Report from the Director of Place.

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17. **Tiverton Town Centre Masterplan** *(Pages 475 - 492)*
Following a report from the Director of Place, the Economy Policy Development Group made the following recommendations to Cabinet:

1. A budget of up to £60k is set aside from the Brown Field Register Fund (up to £35k) and Custom and Self Build Burdens Fund (up to £25k) for the completion of the Draft Masterplan SPD and accompanying Delivery Plan;
2. That Officer's commence the process to engage consultants to complete the Tiverton Town Centre Masterplan SPD and Delivery Plan process including commissioning assessments as required; and that
3. The timetable for the adoption of the Tiverton Town Centre Masterplan and Delivery Plan be agreed.

18. **East Cullompton (Culm Garden Village) Masterplan SPD**
(Pages 493 - 612)
Report from the Director of Place.

19. **Revised Procurement Strategy** *(Pages 613 - 638)*
Following a report from the Deputy Chief Executive (S151), the Audit Committee made the recommendation to Cabinet that:

1. The revised Procurement Strategy be approved by the Cabinet

20. **Housing Assistance Policy** *(Pages 639 - 690)*
Following a report from the Corporate Manager for Public Health, Regulation and Housing, the Homes Policy Development Group made the following recommendations to Cabinet:

1. It approves the revised Housing Assistance Policy 2022-2025 attached in Annex A.
2. That delegated authority is given to the Corporate Manager for Public Health, Regulation and Housing, in consultation with the Cabinet Member for Housing, to make minor adjustments to the policy based on demand and local priorities.
3. That delegated authority is given to the Corporate Manager for Public Health, Regulation and Housing, in consultation with the Cabinet Member for Housing, to suspend some or all non-mandatory parts of the revised Housing Assistance Policy attached in Annex A (all elements of the Policy other than Section 4 Mandatory Disabled Facilities Grants) if adequate funding is not available.

21. **Replacement Roofing 2023 – 2026, Award report** *(Pages 691 - 696)*
Report from the Corporate Manager for Public Health, Regulation and Housing

22. **Policy Framework** *(Pages 697 - 716)*
To consider a report of the Chief Executive.

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23. **Schedule of Meetings 2023-2024** *(Pages 717 - 718)*
To consider the Schedule of Meetings for 2023/24 and make recommendation to Council

24. **Notification of Key Decisions** *(Pages 719 - 728)*
To note the contents of the Forward Plan.

Stephen Walford
Chief Executive
Monday, 30 January 2023

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.

Please note that a reasonable amount of hardcopies at the meeting will be available, however this is a limited number. If you are attending the meeting and would like a hardcopy of the agenda we encourage that you notify Member Services in advance of the meeting to ensure that a hardcopy is available. Otherwise, copies of the agenda can be found on our website.

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

Public Wi-Fi is available in all meeting rooms.

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MID DEVON DISTRICT COUNCIL

MINUTES of a **MEETING** of the **CABINET** held on 3 January 2023 at 10.00 am

Present Councillors R M Deed (Leader)
C J Eginton, R J Chesterton, Mrs C P Daw, S J Penny and C R Slade

Also Present Councillors F Letch, J Berry, Mrs M Squires, B Warren, J Buckowski, S Clist, R Stanley, Mrs S Griggs

Also Present Officers: Stephen Walford (Chief Executive), Andrew Jarrett (Deputy Chief Executive (S151)), Richard Marsh (Director of Place), Maria De Leiburne (District Solicitor and Monitoring Officer), Andrew Busby (Corporate Manager for Property, Leisure and Climate Change), Paul Deal (Corporate Manager for Finance), Dean Emery (Corporate Manager for Revenues, Benefits and Recovery), Simon Newcombe (Corporate Manager for Public Health, Regulation and Housing) and Matthew Page (Corporate Manager for People, Governance and Waste), Andrew Seaman (Member Services Manager)

105. **APOLOGIES**

Councillor D J Knowles had given his apologies.

106. **PUBLIC QUESTION TIME**

The following questions were received from members of the public:

Nick Quinn

My first Question concerns Item 8: **Budget 23/24 Update**

The Summary of Capital Expenditure and Funding, at Appendix 4 of the Budget Update, now shows "*Other General Fund Projects*" costing more than £50 Million over the next 5 years. The expenditure figures for these projects very closely match the increased "*Borrowing 50yr*" funding figures.

This is extremely long borrowing term to be used to fund 3 Rivers projects and is in direct contradiction to the assurance given by the Deputy Chief Executive to the Audit Committee, in November, that the Council "*would not conduct medium to long term borrowing on projects that had a lifespan of less than 2 years*".

Since it started, 3 Rivers has never paid any dividends to the Council and the External Auditor has publicly stated that 3 Rivers are increasing their current loan impairment to £1.6 Million.

Q1. Are Cabinet seriously considering recommending that the Council should mortgage itself, for the next 50 years, to fund some short term building projects by a commercial Company that has never paid any dividends and is about to further impair its existing loans?

My second question concerns Item 14: 3 Rivers Business Plan

The Public Report shows that the 3 Rivers Business Plan was critically assessed by Scrutiny and Audit Committees - the feedback was that "*the business plan in its current form was not supported*".

Now, it seems, a "Mark 2" plan has been produced - but neither Scrutiny nor Audit Committees have been given the opportunity to comment on it.

Q2: Why is Cabinet considering a revised 3 Rivers Business Plan without the input of Scrutiny and Audit Committees?

The Leader thanked the resident for their questions and responded to question 2, the Leader explained that the 5 year business plan had gone through the Audit and Scrutiny Committees and they had made their recommendations.

Question 1 was answered during item 8 and it was explained by the Deputy Chief Executive that with regards to capital borrowing within the capital medium term financial plan, the Council's capital borrowing will always match the lifespan of a capital project. Any borrowing taken over 25 to 50 years would be for housing delivery. Capital would always match life of assets

Note – The Leader had rejected questions from two members of the public.

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

None declared. Members were reminded of the need to make declarations where appropriate.

108. **MINUTES OF THE PREVIOUS MEETING**

The minutes of the previous meeting were approved as a correct record and signed by the Leader.

109. **FINANCIAL MONITORING**

The Cabinet were presented, and **NOTED** a financial update in respect of the income and expenditure so far in the year. The following was highlighted:

- There had been a circa £500k overspend for the general fund and the next government support scheme would be delivered at the end on January 2023.
- The solar farm planning appeal was to be reviewed.
- The ground source and air heat pumps were close to completion.
- Collection rates on council tax and business rates were on budget.

110. **LGA PEER CHALLENGE REVIEW – FOLLOW UP**

The Cabinet were presented and **NOTED** a *report from the Chief Executive which updated Member's on the progress made towards addressing or implementing the recommendations arising from the peer review team during 2022.

It was highlighted that the Local Government Association held a meeting with Mid Devon District Council on the 20 December 2022 to which a number of Officers and Members attended.

In addition disagreement was raised on part of the report that related to the cost of planning decisions. The Leader explained that the decisions of Committees were not relevant to the agenda item before the Cabinet.

Note: *report previously circulated and attached to the minutes

111. **CULLOMPTON TOWN CENTRE RELIEF ROAD - UPDATE**

The Cabinet were presented a *report from the Director of Place which presented Members with a recommendation to request the release of a tranche of Housing Infrastructure Fund (HIF) monies. This was to facilitate the continued progression of technical work relating to the Cullompton Town Centre Relief Road (CTCRR) until the end of March 2023, by which time a decision from Government regarding the Council's pending Levelling Up Fund bid should have been received and any grant agreement agreed.

Members discussed the following:

- There was a need to have a relief road in order for further development to take place.
- It was hoped that the levelling up fund would be granted. The Director of Place explained that the submission submitted should be attractive to Government and that it was important for this relief road to be delivered.
- It was discussed that other authorities were given better treatment when it came to similar projects.
- The progress was welcomed.
- the Cabinet Member for Planning and Economic Regeneration confirmed that discussions were ongoing with Devon County Council and the Government regarding Junctions in Mid Devon

The Chief Executive added that the levelling up bid decisions should be announced by the end of January 2023. He also explained that the Junction 25 project had been planned for a number of years and that this development in particular was on a much larger scale.

It was therefore **RESOLVED:**

1. To endorse the request for a drawdown and expenditure of a further tranche of the Housing Infrastructure Fund (HIF) funding, totalling £210k, subject to agreement on appropriate indemnity, to enable the progression of further technical work relating to the Cullompton Town Centre Relief Road (CTCRR) until the end of March 2023.

(Proposed by Cllr R Chesterton and seconded by Cllr C Slade)

Reason for Decision: As stated in the report.

Note: *report previously circulated and attached to the minutes

112. **BUDGET 23/24 - UPDATE**

The Cabinet were presented a *report from the Deputy Chief Executive (S151) which provided an update on the 2023/24 Budget position and discussed further options for cost savings or income generation.

The Deputy Chief Executive (S151) highlighted that the financial settlement had been delivered with estimates that were close to the Council's financial position. This settlement provided a 3% minimum baseline for all Councils.

In addition, the resident survey responses would be provided to the Policy Development Groups (PDG) for comment and that the Council's general fund was circa £900,000 away

from a balanced position. In addition, proposals with facilitated discussion were upcoming with the four PDGs.

Members discussed the following:

- Asked what the Council's estimated shortfall would likely be for the year end for 2022/23, the Deputy Chief Executive explained that the position would have worsened due to the increased costs of utilities and therefore would be estimated to be over £500,000.
- That an update paper had not yet been circulated, the Deputy Chief Executive (S151) explained that this was to be sent out soon.

It was therefore **RESOLVED:** That Cabinet

1. Considered the updated 2023/24 budget position for the General Fund, Capital Programme and the HRA;

2. Considered the further options as set out in Appendix 3, or any additional suggestions to balance the remaining shortfall and circulate them to the Policy Development Groups for further input during their January suite of meetings prior to the formal recommendation back to Cabinet and Council in February.

(Proposed by Cllr R Deed and seconded by Cllr C Slade)

Reason for Decision: As stated in the report.

Note: * report previously circulated and attached to the minutes

113. **COUNCIL TAX BASE**

Cabinet were presented a *report which provided detail on the statutory calculations necessary to determine the Tax Base for the Council Tax. The calculations followed a formula laid down in Regulations.

The Deputy Chief Executive (S151) highlighted that the collection rate would be lowered by 1% in light of the cost of living crisis. In addition, from 2024, provided that legislation be approved, there would be the doubling of the second home council tax charge. Finally, the premium council tax charge on long term empty properties would not be enacted until April 2024.

Members discussed the following:

- That this report was welcomed.
- It was asked that by lowering the collection rate what impact would that have on debts and how would the gap be mitigated. The Deputy Chief Executive explained that this would make the financial position worse. But there would be proactive recovery measures, signposting for hardship help for residents along with an increased level of council tax support.
- It would be hoped that the difference would be recovered in the next financial year.
- Asked when this could be implemented once legislation was approved by government, the Deputy Chief Executive explained that should the legislation be approved by March 2023, 12 months' notice could be provided and therefore could be implemented by April 2024.

It was therefore **RESOLVED to RECOMMEND** to Council:

1. That the calculation of the Council's Tax Base for 2023/24 be approved in accordance with The Local Authorities (Calculation of Tax Base) (England) Regulations 2012 at 29,832.98 an increase of circa 21.57 Band D equivalent properties from the previous financial year.

2. That the current collection rate of 97.5% be decreased to 96.5% detailed in paragraph 2.

3. That the doubling of the second home Council Tax charge from 01/04/2024 is adopted. Details at 3..7.2

4. That the premium Council Tax charge on long term empty properties is billed after 12 months from 01/04/2024. Details at 3.8.2.

(Proposed by Cllr R Deed and seconded by Cllr C Eginton)

Reason for Decision: As stated in the report.

Note: *report previously circulated and attached to the minutes

114. **ACCESS TO INFORMATION - EXCLUSION OF PRESS AND PUBLIC**

The Leader indicated that discussion with regard to the following items, may require the Cabinet to pass the following resolution to exclude the press and public having reflected on Article 12 12.02(d) (a presumption in favour of openness) of the Constitution. This decision may be required because consideration of this matter in public may disclose information falling within one of the descriptions of exempt information in Schedule 12A to the Local Government Act 1972. The Cabinet would need to decide whether, in all the circumstances of the case, the public interest in maintaining the exemption, outweighs the public interest in disclosing the information.

RESOLVED: That, in accordance with Part I of Schedule 12A to the Local Government Act 1972, the press and public be excluded from the meeting for the following items 11, 12, 13 and 14 of business, for the reason set out below:

- Information under paragraph 3 (contains information relating to the financial or business affairs of any particular person including the authority holding that information).

(Proposed by the Leader)

115. **PLANNING AND DESIGN CONSULTANCY SERVICES 2023 - 2026, AWARD REPORT**

The Cabinet received a *report from the Corporate Manager for Public Health, Regulation and Housing which advised Members on the results for the tendering of the Planning and Design Consultancy Services 2023-2026 and to confirm the award of the contract.

The meeting returned to open session.

It was therefore **RESOLVED:**

1. That the new three year Planning and Design Consultancy Services Contract is awarded to Contractor 3.

2. Delegated authority be granted to the S151 Officer (in consultation with the Cabinet Member for Housing and Property Services) to complete the associated Planning and Design Consultancy Services Contract.

(Proposed by Cllr S Penny and seconded by Cllr R Chesterton)
Reason for Decision: As stated in the report.

Note: *report previously circulated to Members but not attached to the minutes as restricted

116. **3 RIVERS DEVELOPMENTS LTD BUSINESS PLAN AND THE 3 RIVERS PROJECT APPRAISAL FOR DEVELOPMENT IN BAMPTON AND PARK ROAD, TIVERTON**

The Cabinet received a *report from the Deputy Chief Executive which asked Members to review the business plan of 3 Rivers Developments Ltd. As well as 2 reports from items 12 and 13 which provided Cabinet with a business case for a second development scheme at Bampton and a business case for a 6 unit residential development scheme in Tiverton which were included in the 3 River's Developments Ltd company's recent Business Plan.

The meeting returned to open session.

It was therefore **RESOLVED that**

1. The 3 Rivers Developments Ltd 5 year business plan 2023 – 2028 be referred to an extraordinary meeting of Full Council for a decision.

2. The paper regarding 3 Rivers Developments Ltd Project Plan for the Park Road Development to an Extraordinary Meeting of Full Council for a decision.

3. The paper regarding 3 Rivers Developments ltd Project Plan for the Bampton 2 Development to an extraordinary meeting of Full Council for a decision.

(Proposed by Cllr R Deed and seconded by Cllr C Eginton)

Reason for Decision: Cabinet agreed with the Scrutiny Committee's recommendation. But Scrutiny did not recommend that the developments in Bampton and Park road be referred to Council?

117. **NOTIFICATION OF KEY DECISIONS**

The Cabinet had before it, and **NOTED**, the notification of *Key Decisions

Note: *Key Decisions previously circulated and attached to the minutes

(The meeting ended at 12.45 pm) **CHAIRMAN**

CABINET
7 February 2023

FINANCIAL UPDATE FOR THE THREE MONTHS TO 31 DECEMBER 2022

Cabinet Member Cllr Bob Deed, Leader and Cabinet Member for Finance

Responsible Officer Andrew Jarrett – Deputy Chief Executive (S151)

Reason for Report: To present a financial update in respect of the income and expenditure so far in the year.

RECOMMENDATION(S):

1. The Cabinet are asked to:
- **a) Note the financial monitoring information for the income and expenditure for the nine months to 31 December 2022 and the projected outturn position;**
- **b) Note the use of Waivers for the Procurement of goods and services as included in Section 10.0;**

Relationship to the Corporate Plan: The financial resources of the Council impact directly on its ability to deliver the Corporate Plan; prioritising the use of available resources brought forward and any future spending will be closely linked to key Council pledges from the updated Corporate Plan.

Financial Implications: Good financial management and administration underpins the entire document. A surplus or deficit on the Revenue Budget will impact on the Council's General Fund balances. The Council's financial position is constantly reviewed to ensure its continued financial health.

Legal Implications: There are no direct implications from the content of this report.

Risk Assessment: Regular financial monitoring information mitigates the risk of unforeseen over or underspends at year end and allows the Council to direct its resources to key corporate priorities. Members will be aware that the Council continues to face a financially difficult and uncertain future. As such, the Strategic Risk Register (monitored by Audit Committee) includes a specific risk relating to this issue.

Equality Impact Assessment: There are no direct impacts from the content of this report.

Impact on Climate Change: There are no direct impacts from the content of this report.

1.0 Introduction

1.1 The Council agreed the 2022/23 Annual Budget at its meeting on 23 February. The aim is to keep a tight control on spending on services within a flexible budget management framework, allowing budget holders to manage savings within controllable budgets to help mitigate budget pressures and thus contain or minimise a budget deficit for the Council as a whole.

1.2 The purpose of this report is to highlight to Cabinet our current financial status and the likely reserve balances at 31 March 2023. It encompasses both revenue, in respect of the General Fund, the Housing Revenue Account (HRA), and Capital Programme. The detail under pinning these projections is included within the body of report in the following sections / appendices:

- The projected General Fund outturn position for 2022/23 (**Section 3 + Appendices A to D**);
- The projected HRA Outturn position for 2022/23 (**Section 4 + Appendix E**);
- The projected Capital Outturn position for 2022/23 (**Section 5 + Appendix F**);
- The projected Reserves Outturn position for 2022/23 (**Section 6**);
- 3 Rivers Development Ltd update (**Section 7 + Part 2 Appendix G**);
- Summary Treasury Management position (**Section 8**);
- Collection Fund Update (**Section 9**);
- The Procurement Waivers utilised during the quarter (**Section 10**).

1.3 Favourable variances generating either increased income or cost savings are expressed as credits (negative numbers), whilst unfavourable overspends or incomes below budget are debits (positive numbers). Any variance against the agreed budget will impact on the Council's reserves.

1.4 The Council's financial position will be constantly reviewed to ensure its continued financial health and delivery of excellent Value for Money.

1.5 This report also includes Section 10.0 which updates Members on the use of Procurement Waivers during the third quarter of 2022/23. A procurement waiver is were contract procedure regulations have not be applied due to exceptional circumstances, such as urgency of the goods/services being required, or the specialist nature of the goods/services where there is no effective competition to provide it.

2.0 Executive Summary of 2022/23

2.1 The report indicates a projected General Fund outturn variance of £436k over spend and a HRA outturn variance of £48k under spend. In respect of the Capital Programme, there is a variance of £5,597k against the 2022/23 Deliverable Budget, this is explained through a forecast £1,418k underspend, £2,022k overspend and slippage of £6,201k across various projects. These forecasts will continue to be refined during the year.

2.2 Since Quarter 2, further refinement of the cost and income projections have made as we progress through the year, which should result in more accurate year end forecasts. Forecast expenditure has reduced, but so has income, although to a lesser extent leading to a slightly reduced overspend projection.

2.3 Previous forecasts included substantial utilities cost increases included based on projections from our provider. Our provider have now confirmed the fixed price for the period 1 October 2022 to 30 September 2023 and these are significantly higher again. Although protected by the Government's cap, the projected additional forecast charges have been increased from £188k to £370k. The 2023/24 Budget has been updated accordingly. Efficiency savings will be made wherever possible.

2.4 The Council continues to struggle with recruitment and retention. Key services, particularly Waste and Planning have higher usage of agency staff than planned although this is partially offset by underspends on the staffing establishment, leading to a net additional cost of £281k. Some of these additional agency costs will be further mitigated through the use of Earmarked Reserves.

2.5 Income remains lower than pre-Covid-19 levels in both Leisure and Car Parks. The latter is showing it may recover more than originally expected, whereas Leisure is showing slower recovery in membership numbers and bookings, although anecdotally January numbers are looking positive and wetside income remains above forecast, but has reduced from earlier forecasts. Other services such as Planning and Waste continue to see higher than forecast income levels, although the housing market and the increased prices per tonne for recycled materials are showing signs of retraction. This also affects Building Control which is below budget.

2.6 Considering the additional cost of the pay award, increased requirements for agency staff, higher than budgeted energy costs, the reduced forecast overspend of £436k shows that good budget management continues within services in order to mitigate this funding pressure. This has been achieved through the "soft freeze" on recruitment and the use of agency staff has been implemented, along with a thorough review of essential expenditure commitments. The revisions to fees and charges should also contribute to reducing the forecast.

2.7 If the forecast level of overspend is required to be covered from General Reserves, this will reduce the balance to £1.779m, below the agreed minimum £2m balance. Therefore action needs to be taken to address the matter.

2.8 In addition, another planning appeal has been lost leaving the Council at risk of meeting the costs of the appeal. This is not known and is therefore not built into this forecast, but could be material and will impact further on reserve balances.

3.0 The General Fund

3.1 The forecast General Fund over spend for the current year is £436k after transfers to and from Earmarked Reserves as shown at **Appendix A**. **Appendix B** provides the significant service variances and those above £20k.

3.2 The current incomes from our major fee income streams are shown in **Appendix C**. It shows that the full year forecast Income variance has increased to £56k below budget (up from £9k in Quarter 2). The lower than forecast income in Building Control, Land Searches and Leisure are offset by increases in Planning, Car Parks and Waste. Other Service income streams remain relatively close to expectations.

3.3 The current employee costs are shown at **Appendix D**. It shows a full year forecast under spend of £508k (up from £324k in Quarter 2). This increase in the bottom-line is due to further increases in vacancies. The under spend in Public Health has increased, along with Legal and Democratic Services and Planning and Regeneration. This partially offset by the additional costs in Leisure and Waste. As previously reported, the anticipated funding to offset the additional costs incurred in delivering the Government's Energy Rebate Scheme have yet to be received. The HRA is also showing a number of vacancies, particularly in Tenancy Services.

3.4 Agency Spend has increased by £25k since Quarter 2 essentially due to covering vacancies and/or sickness in Public Health, Legal, and Waste. Planning agency costs have reduced slightly but remain significantly above normal salary cost levels. Sickness levels and staff turnover is also higher than expected leading to services experiencing significant pressure in delivering planned service levels.

4.0 Housing Revenue Account (HRA)

4.1 This is a ring-fenced account in respect of the Council's social housing function. The forecast position of £48k under spend, £74k lower than the Quarter 2 position. An explanation of the key variances and those above £20k are highlighted within **Appendix E.**

4.2 The main variances are again due to vacancies and the difficulty in recruiting to those roles. In total, this sums to £206k inclusive of the agreed higher pay award across Building Services and Tenancy Services. Investment returns are also significantly higher than budgeted, but are partially offset by higher bank charges (net £229k). This is offset by the rising cost of materials and contractor costs (£255k), less work funded by Disabled Facilities Grant (£107k) and costs associated with empty properties.

4.3 It is anticipated that the forecast variance will increase the budgeted transfer to the Housing Maintenance Fund and so the HRA reserve balance will remain at £2m.

5.0 Capital Programme

5.1 Actual, committed and planned expenditure across the remainder of the financial year is currently forecast to be £21,952k leaving a variance of £5,597k against the 2022/23 Deliverable Budget. Of which, £1,418k is an under spend, £2,022k is an over spend, and £6,201k will slip into future years. The status of the Capital Programme is shown at **Appendix F.**

5.2 This can be explained by the following key variances (+/- £100k):

-£1,418 underspend:

- -£979k – 3R future Projects (following reallocation during previous additional borrowing request);
- -£100k – Disabled Facilities Grant.

+£2,022k Overspend:

- +£401k – 3R Knowle Lane;

- +£467k – HRA Modular Housing (Shapland Place – largely due to additional planning requirements);
- +£661k – HRA Additional S106 on Post Hill.

-£6,201 Slippage:

- -£150k Shops & Industrial Units – feasibility and procurement now due in 2023/24;
- -£3,608k Cullompton HIF – delayed awaiting outcome of Levelling-Up bid (now known to be unsuccessful again);
- -£184k IT (server farm upgrades, WiFi replacement, Firewall) depending on resources available;
- -£616k 3R Bampton forecast to be complete in 2023/24;
- -£500k 3R Post Hill approval delayed;
- -£175k HRA major repairs related to the modernisation contract;
- -£150k HRA Housing development (projects 1, 8, 11, 14, 18, 9, 10, 15)
- -£278k Modular Housing (Shapland Place)
- -£300k HRA Garage Redevelopment further scoping work required

6.0 Reserves

6.1 The table below shows the opening position of key operational balances of the Council, the forecast in year movements and final predicted position at 31 March 2023:

Table 1 – Summary of Key Reserves

Usable Reserves	**31/03/2022**	**Forecast In Year Movement**	**31/03/2023**
REVENUE	**£000's**	**£000's**	**£000's**
General Fund (See Section 3)	(2,215)	436	(1,778)
Earmarked Reserves	(20,655)	2,206	(18,449)
HOUSING REVENUE ACCOUNT (See Section 4)	(2,000)	0	(2,000)
CAPITAL Receipts Reserve	(6,529)	26	(6,503)

6.2 The movement in Earmarked Reserves is notably less than the Quarter 2 forecast. This is due to (movements +/- £100k):

+ £1,442 Transfer Into Reserves, being:

- -£120k no longer contributing to Rough Sleeping reserve;
- +£800k J28 Cullompton;
- +£200k Leisure maintenance;
- +£109k NNDR deficit;
- +£433k S106.

-£110k increase in drawdown from EMR, as follows:

- +£110k Public Sector Housing Grant;
- +£198k Prior Year Council Tax deficit;
- -£587k J28 Cullompton;
- +£131k New Homes Bonus.

6.3 The General Fund is the major revenue reserve of the Council. It is increased or decreased by the surplus or deficit generated on the General Fund in the year. This reserve held a balance of £2,215k as at 31/03/22 and as shown above is currently forecast to decrease to £1,778 due to the forecast £436k over spend. This falls below the agreed minimum of £2,000k and as outlined in paragraph 2.7 action is being taken to minimise the impact. However, should this forecast be the final outturn position, a review of Earmarked Reserves will be undertaken to realign funds and potentially a review of the recommended minimum level may be considered.

7.0 3 Rivers Developments Ltd – Update

7.1 In Quarter 3 of 2022/23 the Council lent £785k of further borrowing to 3 Rivers to fund project payments and capital commitments. No loans were due to be repaid during the quarter but a further £201k of interest payments has been earnt relating to interest charged for Quarter 2. A further £228k of interest has been charged for Quarter 3 of this financial year, and a projection of £247k is included covering Quarter 4. This will bring the total receivable interest for the year to £852k. An updated financial forecast is included as a Part 2 Appendix which shows the latest trading position.

7.2 A summary of the transactions to date are shown in the table below:

	Up to 31/03/2022 £k	2022/23 Year to date £k
Interest	£1,377	£604
Recharges	£387	£1
Loans	£15,941	£4,492
Loans Repaid	(£2,406)	

7.3 The Part 2 confidential Appendix G provides the companies summary management accounts and the latest project evaluation.

8.0 Collection Fund

8.1 Council Tax

8.1.1 The predicted collection rate at the end of Quarter 3 remained at 96.6% with £64,195k actually collected. As highlighted in the Quarter 1 report, the original Energy Rebate Scheme had ended and resources redeployed back to their substantive roles which is having a positive impact on collection. A new Energy Scheme has been announced covering “off-grid” homes which has required additional resources to be sought/realigned again.

8.2 Business Rates

8.2.1 The forecast deficit on the collection of Business Rates rose from £129k at Quarter 2 to £448k, an increase of £381k leading to a lower levy payment. There are also largely offsetting movements in S31 Grant and improved Renewable Energy income. The Council’s share of the projected £448k deficit is £179k (40%).

9.0 Treasury Management

9.1 The £840k budgeted Net Interest position for the Council incorporates interest payable on loans and finance leases and interest receivable on investments. Since the budget was set interest rates have risen to 3.50% and is predicted to increase further, potentially to 4.5% in July 2023. Therefore interest receivable is above budget across both temporary investments and loans to third parties by a further £90k compared to Quarter 2. Based on the Deliverable Capital Programme, no additional external borrowing is expected during the year which also provides a favourable variance against budget.

10.0 Procurement Waivers

10.1 The Council undertakes a range of procurement approaches to ensure that it awards contracts to suppliers in line with procurement legislation. In exceptional circumstances, there are sometimes justifiable reasons to act outside the contract procedure regulations. These include the following reasons:

I. The work, goods or materials are urgently required, and loss would be entailed by delay arising from advertising;
II. The work, goods or materials required are of such special nature that no advantage would accrue by inviting competitive tenders;
III. There is no effective competition for the goods or materials required by reason of the fixing of prices under statutory authority or that such goods or materials are patented or proprietary articles or materials;
IV. Transactions, which, because of special circumstances, may (either individually or as a class) be excepted from time to time by the Cabinet of the Council.

10.2 In such circumstances, prior written approval of the Deputy Chief Executive (S151) is required and Cabinet will be informed. Below is a list of the Procurement Waivers utilised during the third quarter of this financial year:

Ref	Subject of the Waiver	Expected Spend £	Reason Code
1	LDA Design – East Cullompton Masterplan – funded by Homes England	£20,000	I

10.3 The remainder of contracts awarded use best endeavours to ensure that the successful supplier complies with the ethical standards applied within our Procurement Partnership with Devon County Council, including having policies on Equalities and Diversity, Data Protection, Modern Slavery and Human Trafficking and Fair Tax Mark.

11.0 Summary

11.1 Members are asked to note the Revenue and Capital forecasts for the financial year and the use of procurement waivers during the quarter.

11.2 We continue to closely monitor the financial position and amend our expectations accordingly. The budget process for 2023/24 is now underway and Managers are working hard to develop proposals to mitigate the future year's forecast shortfalls.

Contact for more information: Andrew Jarrett,
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Paul Deal
Corporate Manager for Financial Services
pdeal@middevon.gov.uk

Circulation of the Report: Cllr Bob Deed, Cabinet, Leadership Team

GENERAL FUND FINANCIAL MONITORING INFORMATION FOR THE PERIOD FROM 01 APRIL TO 31 DECEMBER 2022

General Fund Summary	Appendix B Note Ref	2022/23 Annual Budget £	2022/23 Full Year Forecast £	2022/23 Full Year Variance (0 = On budget) £	%
Cllr Bob Deed					
Corporate Management	A	1,702,694	1,795,934	93,240	5.5%
Cllr Colin Slade					
Grounds Maintenance	B	559,523	540,223	(19,300)	-3.4%
Cemeteries & Bereavement Services	C1	(67,230)	(37,230)	30,000	-44.6%
Waste Services	D	1,907,674	2,901,404	993,730	52.1%
Cllr Dennis Knowles					
Community Development	E	138,500	138,500	0	0.0%
Enforcement and CCTV	C1	157,530	153,530	(4,000)	-2.5%
IT Services	F	1,337,150	1,531,700	194,550	14.5%
Land charges	G	(24,561)	(24,561)	0	0.0%
Public Health incl. Licensing	C	677,190	487,550	(189,640)	-28.0%
Open Spaces	H	180,190	251,970	71,780	39.8%
Recreation & Sport	I	903,485	1,566,285	662,800	73.4%
Cllr Bob Deed					
Financial Services	J	773,070	788,150	15,080	2.0%
Revenues & Benefits	K	608,000	606,720	(1,280)	-0.2%
Car Parks	L	(489,680)	(489,680)	0	0.0%
Cllr Stuart Penney					
Private Sector Housing	C	(1,490)	(1,490)	0	0.0%
General Fund Housing	M	269,192	269,292	100	0.0%
Property Services	N	1,610,240	1,659,340	49,100	3.0%
Cllr Richard Chesterton					
Community Development: Markets	E	70,320	80,320	10,000	14.2%
Planning & Regeneration	G	1,946,110	751,826	(1,194,284)	-61.4%
Cllr Clive Eginton					
Customer Services	O	749,318	693,878	(55,440)	-7.4%
Human Resources	P	616,470	535,620	(80,850)	-13.1%
Legal & Democratic Services	Q	1,182,601	1,134,201	(48,400)	-4.1%
All General Fund Services		**14,806,296**	**15,333,482**	**527,186**	**3.6%**
Net recharge to HRA		(1,714,560)	(1,714,560)	0	0.0%
Statutory Adjustments (Capital charges)		686,660	686,660	0	0.0%
Net Cost of Services		**13,778,396**	**14,305,582**	**527,186**	**3.8%**
Net Interest Payable / (Receiveable)		(840,013)	(1,158,995)	(318,983)	38.0%
Transfers into Earmarked Reserves		1,759,064	3,712,553	1,953,489	111.1%
Transfer into NNDR Smoothing Reserve		0	143,085	143,085	0.0%
Transfers from Earmarked Reserves		(3,808,859)	(5,446,261)	(1,637,402)	43.0%
Net Contribution to/(from) New Homes Bonus Reserve		(627,429)	(615,746)	11,683	-1.9%
Total Budgeted Expenditure		**10,261,160**	**10,940,219**	**679,059**	**3.5%**
FUNDED BY:					
Business Rates					
Retained Business Rates		(1,082,910)	(1,231,474)	(148,564)	13.7%
S31 Grant associated with COVID-19 Reliefs		(2,449,280)	(2,317,147)	132,133	-5.4%
Business Rates (Surplus)/Deficit (2021-22)		1,677,640	1,634,532	(43,108)	-2.6%
Business Rates Benefit from Devon Pool		0	(168,000)	(168,000)	0.0%
Council Tax					
Council Tax		(6,523,930)	(6,523,930)	0	0.0%
Council Tax (Surplus)/Deficit (2021-22)		(401,030)	(401,030)	0	0.0%
Council Tax Family Annexe		(21,000)	(34,484)	(13,484)	64.2%
Un-Ringfenced Grants					
New Homes Bonus Grant		(719,072)	(719,072)	0	0.0%
Lower Tier Services Grant		(99,272)	(101,242)	(1,970)	2.0%
Rural Services Delivery Grant		(489,742)	(489,742)	0	0.0%
2022/23 Services Grant		(152,564)	(152,564)	0	0.0%
Total Budgeted Funding		**(10,261,160)**	**(10,504,153)**	**(242,993)**	**2.4%**
Forecast in year (Surplus) / Deficit		**0**	**436,066**	**436,066**	
General Fund Reserve 31/03/22				**(2,214,602)**	
Forecast General Fund Balance 31/03/2023				**(1,778,536)**	

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GENERAL FUND FINANCIAL MONITORING INFORMATION FOR THE PERIOD FROM 01 APRIL TO 31 DECEMBER 2022

Note	Description of Major Movements or those above £20k	2022/23 Full year variance (net of transfer to EMR) £	PDG
A	**Corporate Management**		
	Salary costs for new performance management posts	82,640	Cabinet
	Salary saving due to vacancies	(40,400)	Cabinet
	Executive Assistant post not budgeted	15,300	Cabinet
	Recharge of salaries to capital project	(11,800)	Cabinet
	Additional external audit fees - Previous years	9,500	Cabinet
	Additional external audit fees - Current financial year	22,000	Cabinet
	Overspend on bank and transaction charges	16,000	Cabinet
		93,240	
B	**Grounds Maintenance**		
	Salary underspend due to vacancies	(27,300)	Environment
	Agency costs increased due to vacancies	21,400	Environment
	Additional adhoc internal income	(14,000)	Environment
	Additional grass cutting contributions	(3,000)	Environment
	Additional fuel costs due to price rises	3,600	Environment
		(19,300)	
C	**Public Health (combined)**		
	Salary underspend due to vacant posts and external grant funding	(162,300)	Community
	Water Sampling income below budget due to staff shortages	17,000	Community
	S106 Air Quality, net expenditure and receipts	(44,340)	Community
		(189,640)	
C1	**Enforcement, CCTV & Cemeteries & Bereavement Services**		
	Staff vacancies and new starters at bottom of grade	(4,000)	Economy
	Cemetery income below budget	30,000	Environment
		26,000	
D	**Waste Services**		
	Salary underspend due to vacancies	(62,100)	Environment
	Pay enhancements and additional estimated pay award	224,000	Environment
	Agency cover increased due to long term sickness and higher than budgeted sickness levels	144,280	Environment
	Additional recycling boxes due to demand from public as a result of 3 weekly rollout	50,000	Environment
	Additional fuel costs due to price rises	133,700	Environment
	Recycling income rates are higher than expected although rates are now dropping	(231,000)	Environment
	Refuse bins, seagull sacks, salaries and printing costs for 3 weekly rollout - £750k funded by EMR	877,850	Environment
	Clinical waste increased charges	10,000	Environment
	Street Cleansing internal income	(11,500)	Environment
	Garden waste additional permit sales	(14,800)	Environment
	Wheelie bins sales suspended due to 3 weekly roll out	3,300	Environment
	Keep Britain Tidy Grant	(15,000)	Environment
	Increased bulky waste collections	(5,000)	Environment
	Chewing Gum Removal Machine - funded by grant	8,000	Environment
	Trade waste income including ad hoc requests	(118,000)	Environment
		993,730	
F	**I.T. Services**		
	Initial 3 years of virus & security protection included in Capital project - Sophos extension required	(9,000)	Cabinet
	IT Projects (Unifed Comms, CRM replacement, Digital Transformation - £135k to be funded by reserves)	219,000	Cabinet
	Data lines - partially now charged to services	(14,000)	Cabinet
	Cyber Project - grant funded	75,000	Cabinet
	Disaster Recovery Project delayed - Budget to move to EMR	(75,000)	Cabinet
	Rev & Bens Northgate external support	35,350	Cabinet
	Pay award impact reduced by vacancies in year	6,800	Cabinet
	Vacancy saving to move to EMR	(43,600)	Cabinet
		194,550	
G	**Planning & Regeneration**		
	Enforcement - Agency staffing to clear backlogs and cover sickness - EMR release of £133k	133,000	Cabinet
	Development Management - Staffing. Includes pay award and agency costs to cover vacancies, partially offset by vacancies and £7.7k EMR release	100,500	Cabinet
	Development Management - Income exceeding budget	(147,000)	Cabinet
	S106 Public Open Space, net expenditure and receipts	(540,977)	Community
	Forward Plan, Joint Strategy procurement for MDDC, Teignbridge DC, Exeter and EDDC (funded by former GESP) and advice on how to support Community Land Trusts (fully funded by Housing Adviser EMR)	54,943	Community
	Forward Plan - receipt from former GESP partnership to fund the Joint Strategy work	(29,943)	Community
	Local Plan spend slipped to 23/24	(142,500)	Cabinet
	Repurpose of spend to Tiverton TC Masterplan which will now be incurred in 23/24 (Funds to be transferred to EMR)	(61,260)	Cabinet
	Building Control - agency staffing, partially offset from vacancies during the year - EMR EQ775 release of £11,500	11,500	Community
	Building Control - Income less than budgeted - EMR EQ775 release of £11,000	32,000	Community
	Building Control - Share of partnership costs (transfer of costs from NDC to MDDC, see lines above)	(21,000)	Community
	Business Development - staffing underspend through vacancies	(52,000)	Economy
	Business Development - project work underspend (£5k to be transferred to be EMR)	(25,000)	Economy
	Crediton Masterplan - slippage on spend to 2023/24	(55,000)	Cabinet
	Cullompton Heritage Action Zone - slippage on spend to 2023/24	(238,547)	Economy
	J28 Cullompton Feasibility - grant income less spend (£213,000 to be transferred to EMR)	(213,000)	Cabinet
		(1,194,284)	
H	**Open Spaces**		
	Contribution for Play Area transfer - Funded from New Homes Bonus	29,780	Community
	Play Area maintenance & cleaning overspend - Funded from EMR	42,000	Community
		71,780	

GENERAL FUND FINANCIAL MONITORING INFORMATION FOR THE PERIOD FROM 01 APRIL TO 31 DECEMBER 2022

Note	Description of Major Movements or those above £20k	2022/23 Full year variance (net of transfer to EMR) £	PDG
I	**Recreation & Sport**		
	Decarbonisations works carried out across all 3 site - Fully funded from EMR	201,000	Community
	Increase in income from updated dual use agreement not as high as budgeted	20,000	Community
	Wetside income higher than budget mainly due to swimming lesson programme and pool hire	(50,000)	Community
	Fitness income behind budget due to slower than expected recovery in membership numbers	214,000	Community
	Dryside income behind budget mainly due to fewer sports hall & ATP bookings than expected	86,000	Community
	Increase in salaries due to pay award and regrading of swimming teachers & recreation assistants	90,000	Community
	Increased Utility costs due to price rises across Leisure	301,800	Community
	Underspend on specific maintenance projects due to slippage of work will be put into an EMR	(200,000)	Community
		662,800	
J	**Financial Services**		
	Proposed pay award	20,580	Cabinet
	Annual memberships savings	(5,500)	Cabinet
		15,080	
K	**Revenues & Benefits**		
	Council Tax staffing, including new RIO post, and administration of Energy Rebate scheme (direct costs only -EMR funding of £4,077	85,000	Cabinet
	Income & Grant receipts; Court Costs & Fines, Administration of Energy Rebate Scheme and LCTS Admin Grant	(17,280)	Cabinet
	Housing Benefits - unbudgeted grant receipts from DWP	(45,000)	Cabinet
	DHP grant less than budgeted	24,000	Cabinet
	Housing Benefits Subsidy, improved forecast over budgeted	(24,000)	Cabinet
	Grant Receipts - Administration of Household Support Fund	(24,000)	Cabinet
		(1,280)	
L	**Car Parks**		
	Half yearly forecast shows P&D Parking Income above profile, although this income is unpredictable in nature	(30,000)	Economy
		0	
M	**General Fund Housing**		
	Increased Homelessness costs for B&B & reduction in our impairment of Bad Debt	90,500	Homes
	Salary underspend due to vacant posts and external grant funding	(90,400)	Homes
		100	
N	**Property Services**		
	Staffing underspends due to vacant posts	(80,000)	Environment
	Phoenix House increased utility costs due to price rises	41,000	Homes
	Salary pressure due to pay award	29,100	Environment
	Fore Street shops rental down due to vacant unit and rent reductions	19,000	Economy
		49,100	
O	**Customer Services**		
	Salaries - underspend due vacancies and secondments. RIO post funded by Revs and Bens	(50,040)	Community
	Supplies and Services underspend across service, incl switch charges & telephones	(5,400)	Community
		(55,440)	
P	**Human Resources**		
	Salaries - Acting up & secondment pay, additional apprentice and pay award	29,050	Cabinet
	Senior staff member salary moved to CM	(37,900)	Cabinet
	Reduced training requirement	(3,000)	Cabinet
	Saving achieved by alteration to Zellis upgrade plan	(60,000)	Cabinet
	Occupational Health costs now remaining in HR	3,000	Cabinet
	Income related to apprentices under 18	(6,000)	Cabinet
	Consultancy now charged to service areas	(6,000)	Cabinet
		(80,850)	
Q	**Legal & Democratic Services**		
	Legal Services - 3 vacancies offset by Agency costs and costs for exteranl advice. Includes other small variances	(48,400)	Cabinet
		(48,400)	
	FORECAST (SURPLUS)/DEFICIT AS AT 31/03/2023	**527,186**	

Note the sum of the explanations above do not equal the full variance - they are only those key variances or above £20k

Cabinet	**(212,920)**
Community	**(3,977)**
Homes	**41,100**
Environment	**1,003,530**
Economy	**(300,547)**
	527,186

GENERAL FUND FINANCIAL MONITORING INFORMATION FOR THE PERIOD FROM 01 APRIL TO 31 DECEMBER 2022

Fees and Charges	2022/23 Annual Budget £	2022/23 P9 Profiled Budget £	2022/23 P9 Actual £	2022/23 P9 Variance £	2022/23 Full Year Forecast Variation £	2022/23 Full Year Forecast Variation %
Building Control Fees	(252,350)	(189,263)	(168,469)	20,793	35,000	-14%
Planning Fees	(828,000)	(621,000)	(739,801)	(118,801)	(126,000)	15%
Land Search Fees	(120,000)	(90,000)	(57,952)	32,048	18,000	-15%
Car Parking Fees - See Below	(732,330)	(557,746)	(590,364)	(32,618)	(30,000)	4%
Leisure Fees & Charges	(2,827,485)	(2,040,388)	(1,598,155)	442,233	270,000	-10%
Trade Waste Income	(830,860)	(828,367)	(915,860)	(87,493)	(88,000)	11%
Garden Waste	(547,100)	(476,715)	(444,820)	31,895	(14,800)	3%
Licensing	(137,200)	(111,975)	(121,021)	(9,046)	0	0%
Market Income	(82,290)	(63,745)	(71,562)	(7,817)	(8,000)	10%
	(6,357,615)	**(4,979,199)**	**(4,708,004)**	**271,195**	**56,200**	**-0.9%**

Car Parking Fees	2022/23 Annual Budget £	2022/23 P9 Profiled Budget £	2022/23 P9 Actual £	2022/23 P9 Variance £	Spaces	2022/23 Budgeted Income pa per space £
Beck Square, Tiverton	(65,000)	(50,050)	(50,586)	(536)	40	(1,625)
William Street, Tiverton	(25,000)	(19,000)	(22,395)	(3,395)	45	(556)
Westexe South, Tiverton	(45,000)	(35,100)	(43,407)	(8,307)	51	(882)
Wellbrook Street, Tiverton	(15,000)	(10,800)	(9,497)	1,303	27	(556)
Market Street, Crediton	(35,000)	(27,300)	(29,707)	(2,407)	39	(897)
High Street, Crediton	(70,000)	(52,500)	(57,088)	(4,588)	190	(368)
Station Road, Cullompton	(40,000)	(28,400)	(29,959)	(1,559)	112	(357)
Multistorey, Tiverton	(175,000)	(122,500)	(113,749)	8,751	631	(277)
Market Car Park, Tiverton	(175,000)	(133,000)	(142,551)	(9,551)	122	(1,434)
Phoenix House, Tiverton	(3,000)	(1,980)	(3,381)	(1,401)	15	(200)
P&D Shorts & Overs	0	0	(158)	(158)	-	0
Total Pay and Display	**(648,000)**	**(480,630)**	**(502,478)**	**(21,848)**	**1,272**	**(7,153)**
Day Permits	(22,000)	(22,000)	(29,562)	(7,562)		
Allocated Space Permits	(37,600)	(31,050)	(31,050)	0		
Overnight Permits	(600)	(444)	(987)	(543)		
Day & Night Permits	(16,500)	(16,500)	(18,283)	(1,783)		
Other Income	(7,630)	(7,123)	(8,004)	(881)		
Total Permits	**(84,330)**	**(77,116)**	**(87,886)**	**(10,770)**		
Total Car Parking	**(732,330)**	**(557,746)**	**(590,364)**	**(32,618)**		
Standard Charge Notices (Off Street)	**(43,200)**	**(31,104)**	**(43,827)**	**(12,723)**	**0**	**0%**

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GENERAL FUND FINANCIAL MONITORING INFORMATION FOR THE PERIOD FROM 01 APRIL TO 31 DECEMBER 2022

Employee Costs	2022/23 Annual Budget £	2022/23 P1 - P9 Profiled Budget £	2022/23 P1 - P9 Actual £	2022/23 P1 - P9 Variance £	2022/23 Full Year Forecast Variation £	%
General Fund						
Cemeteries & Bereavement Services	25,760	19,320	20,206	886	0	0.0%
Community Development	85,180	63,885	65,048	1,163	1,250	1.5%
Corporate Management	679,074	509,306	538,774	29,468	45,740	6.7%
Customer Services	688,318	516,239	471,980	(44,259)	(58,000)	-8.4%
Enforcement & CCTV	132,950	99,713	91,680	(8,033)	(4,000)	-3.0%
Public Health	754,400	565,800	447,298	(118,502)	(232,300)	-30.8%
Financial Services	556,620	417,465	432,017	14,552	20,580	3.7%
General Fund Housing	405,057	303,793	285,753	(18,040)	(110,400)	-27.3%
Grounds Maintenance	473,510	355,133	339,065	(16,068)	(27,300)	-5.8%
Human Resources	452,520	339,390	330,924	(8,466)	(8,850)	-2.0%
I.T. Services	700,990	525,743	478,086	(47,657)	(36,800)	-5.2%
Legal & Democratic Services	685,940	514,455	448,167	(66,288)	(77,500)	-11.3%
Open Spaces	14,090	10,568	11,510	942	0	0.0%
Planning & Regeneration	1,972,719	1,479,539	1,199,003	(280,536)	(323,000)	-16.4%
Property Services	727,970	545,978	486,233	(59,745)	(80,000)	-11.0%
Recreation & Sport	2,183,747	1,637,810	1,696,017	58,207	90,000	4.1%
Revenues & Benefits	790,670	593,003	667,609	74,606	92,000	11.6%
Waste Services	2,713,700	2,035,275	2,169,643	134,368	201,000	7.4%
Total General Fund	**14,043,215**	**10,532,415**	**10,179,014**	**(353,401)**	**(507,580)**	**-3.6%**
Housing Revenue Account						
BHO09 Repairs & Maintenance	1,021,456	766,092	811,263	45,171	(69,000)	-6.8%
BHO10 Supervision & Management	2,047,454	1,535,591	1,373,104	(162,487)	(139,000)	-6.8%
BHO11 Special Services	0	0	0	0	0	0.0%
Total Housing Revenue Account	**3,068,910**	**2,301,683**	**2,184,367**	**(117,316)**	**(208,000)**	**-6.8%**
Total Employee Costs	**17,112,125**	**12,834,098**	**12,363,380**	**(470,718)**	**(715,580)**	**-4.2%**

Agency Staff (within Employee costs)	2022/23 Annual Budget £	2022/23 P1 - P9 Profiled Budget £	2022/23 P1 - P9 Actual £	2022/23 P1 - P9 Variance £	2022/23 Full Year Forecast Variation £	%
General Fund						
Car Parks	0	0	0	0	0	0.0%
Cemeteries & Bereavement Services	0	0	0	0	0	0.0%
Community Development	0	0	0	0	0	0.0%
Corporate Management	0	0	0	0	0	0.0%
Customer Services	0	0	8,709	8,709	8,709	0.0%
Enforcement & CCTV	0	0	0	0	0	0.0%
Public Health	0	0	60,643	60,643	70,000	0.0%
Financial Services	0	0	0	0	0	0.0%
General Fund Housing	0	0	18,973	18,973	20,000	0.0%
Grounds Maintenance	10,500	7,875	27,692	19,817	21,400	203.8%
Human Resources	0	0	0	0	0	0.0%
I.T. Services	0	0	0	0	0	0.0%
Legal & Democratic Services	0	0	11,520	11,520	24,000	0.0%
Open Spaces	0	0	0	0	0	0.0%
Planning & Regeneration	0	0	303,312	303,312	462,110	0.0%
Property Services	0	0	3,257	3,257	3,257	0.0%
Recreation & Sport	0	0	0	0	0	0.0%
Revenues & Benefits	0	0	12,256	12,256	12,256	0.0%
Waste Services	171,880	128,910	253,992	125,082	166,430	96.8%
Total General Fund	**182,380**	**136,785**	**700,355**	**563,570**	**788,162**	**432.2%**
Housing Revenue Account						
BHO09 Repairs & Maintenance	0	0	0	0	0	0.0%
BHO10 Supervision & Management	0	0	23,525	23,525	21,780	0.0%
BHO11 Special Services	0	0	0	0	0	0.0%
Total Housing Revenue Account	**0**	**0**	**23,525**	**23,525**	**21,780**	**0.0%**
Total Agency Costs	**182,380**	**136,785**	**723,880**	**587,095**	**809,942**	**444.1%**

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HOUSING REVENUE ACCOUNT FINANCIAL MONITORING INFORMATION FOR THE PERIOD FROM 01 APRIL TO 31 DECEMBER 2022

Note	Housing Revenue Account (HRA)	2022/23 Annual Budget £	2022/23 Full Year Forecast Variance £	%
	Income			
A	SHO01 Dwelling Rents Income	(12,673,660)	0	0%
B	SHO04 Non Dwelling Rents Income	(488,360)	0	0%
D	SHO07 Leaseholders' Service Charges	(29,000)	0	0%
E	SHO08 Contributions Towards Expenditure	(80,920)	(30,000)	37%
G	SHO10 H.R.A. Investment Income	(25,000)	(242,000)	968%
H	SHO11 Miscellaneous Income	(7,000)	0	0%
	Services			
I	SHO13A Repairs & Maintenance	3,825,730	299,000	8%
J	SHO17A Housing & Tenancy Services	1,730,710	(75,000)	-4%
	Accounting entries 'below the line'			
L	SHO29 Bad Debt Provision Movement	150,000	0	0%
M	SHO30 Share Of Corporate And Democratic	173,900	0	0%
N	SHO32 H.R.A. Interest Payable	1,077,320	0	0%
O	SHO34 H.R.A. Transfers between earmarked reserves	1,311,720	0	0%
Q	SHO37 Capital Receipts Reserve Adjustment	(20,800)	0	0%
R	SHO38 Major Repairs Allowance	2,465,000	0	0%
S	SHO45 Renewable Energy Transactions	(105,000)	0	0%
		(2,695,360)	**(48,000)**	**(0)**

Note	Description of Major Movements	2022/23 Full Year Forecast £
E	**Rechargeable Repairs** estimated to generate income above budget	(30,000)
G	**Investment Income** due to the improvement on interest rates the returns are significantly higher than budgeted	(242,000)
I	**Building Services:** **-Staffing** - the service has filled a number of vacancies since Q1, however there are still a number of posts vacant at present resulting in a forecast £76k underspend. **-Vehicles** - due to the increase in fuel costs and vehicle hire costs, the service is estimated to exceed budget by £44k **-Overheads** - Q3 estimate of contractor and materials spend is £211k above budget, this will likely reduce slightly at Q4 **-Income** - forecast work on Private Sector DFGs estimated to be below budget at year end £107k **-Various** minor expenses net additional spend £13k	299,000
J	**Tenancy Services:** **-Staffing** - there has been delays to the service filling posts therefore it is carrying an underspend across their establishment £132k **-Overheads** - £12k estimated additional spend on bank charges, Estates budget cost pressures of £60k,this is due to penalties for empty properties increasing, additionally there are no exemptions applicable for LAs relating to properties pending demolition or in very poor condition **-Various** other net underspends £15k	(75,000)
S	**Renewable Energy:** net underspend on the budget of £50k, this will be a transfer to reserves so no overall effect on the forecast balance	(to note)
	FORECAST (SURPLUS)/DEFICIT AS AT 31/03/2023 **TOTAL**	**(48,000)**

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CAPITAL PROGRAMME MONITORING INFORMATION FOR THE PERIOD FROM 01 APRIL TO 31 DECEMBER 2022

Code	Scheme	Total Budgeted Capital Programme	Total Deliverable Programme 2022/23	Actual Expenditure 2022/23	Committed Expenditure 2022/23	Forecast spend for remainder of 2022/23	Total Actual, Committed & Forecast Expenditure 2022/23	Variance (Underspend) to Deliverable Programme 2022/23	Variance Overspend to Deliverable Programme 2022/23	Forecast Slippage against Deliverable Programme 2022/23	Capital Programme Forecast spend (in addition to Deliverable Prog Slippage) in 2023/24 to 2026/27	Budget no longer required	Notes
		£	£	£	£	£	£	£	£	£	£	£	
	General Fund Projects												
	Leisure												
CA642	Reception infrastructure review - All sites	120,000	40,000	-	-	-	-	-	-	(40,000)	80,000	-	Projected completion Q3 23/24. Additional costs flagged in draft MTFP
CA643	All Leisure Etarmis - Security Swipe - (linked to security project)	30,000	10,000	-	-	-	-	(10,000)	-	-	-	20,000	Projected completion Q3 23/24. This project is part a wider scheme 'Replacement of all Leisure sites access system' at a value of £200k included in 23/24 MTFP.
CA644	EVLC - Boilers and CHP	30,000	-	-	-	-	-	-	-	-	-	30,000	This sum (funded by UCR) will be used to partially offset MDDC contribution for Salix projects on CA650 & CA651
CA645	EVLC - Fitness Studio renewal of equipment	153,000	153,000	-	157,398	5,602	163,000	-	10,000	-	-	-	Projected completion Q3 22/23. Budget shortfall to be covered by sale of existing equipment
CA646	CVSC - Remodelling of Ground Floor	204,000	30,000	-	-	30,000	30,000	-	-	-	174,000	-	Feasibility & Procurement exercise in 22/23. Project delivery likely in 24/25
CA649	CVSC - Sports Hall Ceiling asset review	260,000	30,000	-	-	30,000	30,000	-	-	-	230,000	-	Procurement exercise in 22/23. Project delivery in 24/25 once expenditure under dual use agreement agreed
CA650	EVLC - ASHP - Salix Round 3 Funding	818,000	752,770	320,567	153,925	61,508	536,000	(216,770)	-	-	-	-	Link to Cabinet report 30/11/21 & Full Council approval 15/12/21 - ASHP reduced in Salix change request (15/07/2022)
CA651	EVLC - GSHP - Salix Round 3 Funding	351,000	927,694	543,898	307,431	128,670	980,000	-	52,306	-	-	-	Link to Cabinet report 30/11/21 & Full Council approval 15/12/21 - GSHP increased in Salix Change Request (15/07/2022)
CA652	LMLC - ASHP - Salix Round 3 Funding	656,000	912,315	474,694	373,298	167,009	1,015,000	-	102,685	-	-	-	Link to Cabinet report 30/11/21 & Full Council approval 15/12/21 - Includes both ASHP & GSHP
CA653	EVLC - Solar - Salix Round 3 Funding	750,000	228,400	4,500	284,364	28,136	317,000	-	88,600	-	-	-	Link to Cabinet report 30/11/21 & Full Council approval 15/12/21 - Salix change request (15/07/2022) reduced from PSDS3 agreed value
CA654	LMLC - Solar - Salix Round 3 Funding	350,000	52,928	11,770	4,102	61,128	77,000	-	24,072	-	-	-	Link to Cabinet report 30/11/21 & Full Council approval 15/12/21 - reduced from PSDS3 agreed value
	Phoenix House												
CA487	Etarmis - Security Swipe - (linked to security project)	50,000	20,000	-	-	-	-	-	-	(20,000)	30,000	-	Projected completion Q3 23/24
	Play Areas												
CA472	Open Space Infrastructure (incl Play Areas)	40,000	35,216	-	-	-	-	-	-	(35,216)	-	4,784	£4.8k used towards play area contribution please see note on CA648 below. Remaining Project delivery expected in Q1 23/24
CA632	Play area refurbishment - Amory Park Tiverton	130,000	130,000	123,499	6,500	-	129,999	(1)	-	-	-	-	Additional £56k approved at S106 Project Board. Project complete Q3
CA648	Play Area Chestnut Drive Willand	25,000	-	-	-	-	-	-	-	-	-	25,000	£25k Play area contribution coded to Revenue & will be funded by NHB (also see comment on CA472 above)
	MDDC Shops & Industrial Units												
CA584	Market Walk Unit 17 - remodelling options	510,000	80,000	-	-	20,000	20,000	-	-	(60,000)	430,000	-	Current lease agreement until 31/03/23. Feasibility & Procurement exercise in 23/24. Project delivery in 24/25
CA574	36 & 38 Fore Street including Flat above structure & cosmetic works	197,000	90,000	-	-	-	-	-	-	(90,000)	107,000	-	Feasibility & Procurement exercise in 23/24.
	Other Projects												
CA491	Fire Dampeners - Corporate sites	80,000	80,000	-	-	60,000	60,000	-	-	(20,000)	-	-	Projected completion Q1 23/24
CA490	West Exe South - Remodelling - additional parking spaces	90,000	30,000	-	-	10,000	10,000	-	-	(20,000)	60,000	-	Feasibility & Procurement exercise in 23/24. Project delivery in 25/26
CA473	Land drainage flood defence schemes - St Marys Hemyock	50,000	-	-	-	-	-	-	-	-	50,000	-	Environment Agency are the lead organisation on this project
CA420	Land drainage flood defence schemes - Ashleigh Park Bampton	87,000	20,000	-	-	-	-	-	-	(20,000)	67,000	-	Environment Agency are the lead organisation on this project
CA576	Tiverton Town Centre improvements	140,000	-	-	-	-	-	-	-	-	-	140,000	This expenditure will be revenue in nature
CA832	Land acquisition for operational needs	1,000,000	-	-	-	-	-	-	-	-	1,000,000	-	This project is dependent on availability of land in the appropriate location
CA835	Depot Design & Build - Waste & Recycling	250,000	-	-	-	-	-	-	-	-	250,000	-	This project is likely to be commence in 24/25
CA497	Cemetery Lodge - Structural solution for damp	62,000	-	-	-	-	-	-	-	-	62,000	-	This project is likely to be delivered in 24/25
CA511	Regeneration Project 2	500,000	-	-	-	-	-	-	-	-	-	500,000	This project is no longer required
	HIF Schemes												
CA719	Cullompton Town Centre Relief Road (HIF bid)	12,052,000	4,044,000	212,999	12,630	210,000	435,629	0	-	(3,608,371)	8,008,000	-	This project is subject to a Levelling-up bid as per previous Cabinet report 28/06/22
CA720	Tiverton EUE A361 Junction Phase 2 (HIF bid)	4,640,000	115,000	40,132	-	85,000	125,132	-	10,132	-	-	4,514,868	This project is currently under review as outlined in the Cabinet report of 12/07/22
	Economic Development Schemes												
CA582	Hydromills Electricity generation Project - Tiverton Weir	1,220,000	20,000	-	-	10,000	10,000	-	-	(10,000)	1,200,000	-	Feasibility & Procurement exercise in 23/24. Project delivery in 24/25
	* All Economic Development schemes are subject to acceptable Business Case												

Code	Scheme	Total Budgeted Capital Programme	Total Deliverable Programme 2022/23	Actual Expenditure 2022/23	Committed Expenditure 2022/23	Forecast spend for remainder of 2022/23	Total Actual, Committed & Forecast Expenditure 2022/23	Variance (Underspend) to Deliverable Programme 2022/23	Variance Overspend to Deliverable Programme 2022/23	Forecast Slippage against Deliverable Programme 2022/23	Capital Programme Forecast spend (in addition to Deliverable Prog Slippage) in 2023/24 to 2026/27	Budget no longer required	Notes
		£	£	£	£	£	£	£	£	£	£	£	
	ICT Projects												
CA425	Server farm expansion/upgrades	74,000	74,000	-	-	-	-	-	-	(74,000)	-	-	Forecast project completion Q1 2023/24. This has a dependency on the reliability of the supply chain which is & will be effected for the foreseeable future due to the shortage in availability of various components.
CA433	Additional Unified Communications budget	96,000	-	-	-	-	-	-	-	-	-	96,000	This Project will be cloud based and will be charged to Revenue. This has a dependency on the reliability of the supply chain which is & will be effected for the foreseeable future due to the shortage in availability of various components.
CA456	CRM replacement	175,000	-	-	-	-	-	-	-	-	-	175,000	This Project will be cloud based and will be charged to Revenue. This has a dependency on the reliability of the supply chain which is & will be effected for the foreseeable future due to the shortage in availability of various components.
CA437	Digital Transformation	33,000	-	-	-	-	-	-	-	-	-	33,000	This Project will be cloud based and will be charged to Revenue. This has a dependency on the reliability of the supply chain which is & will be effected for the foreseeable future due to the shortage in availability of various components.
CA480	Lalpac Licensing System replacement	80,000	-	-	-	-	-	-	-	-	-	80,000	This Project will be cloud based and will be charged to Revenue. This has a dependency on the reliability of the supply chain which is & will be effected for the foreseeable future due to the shortage in availability of various components.
CA496	Hardware replacement of Network Core Switch	-	-	30,015	2,985	0	33,000	-	33,000	-	-	-	Forecast project completion Q4 2022/23.
CA498	Laptop/desktop refresh - Workstation	150,000	150,000	69,297	-	93,703	163,000	-	13,000	-	-	-	Forecast project completion Q4 2022/23. Additional costs associated with Member laptops to be funded by Revenue EMR.
CA463	Secure WIFI Replacement	60,000	60,000	-	-	-	-	-	-	(60,000)	-	-	Forecast project completion Q3 2023/24. This has a dependency on available staffing resource & the reliability of the supply chain which is & will be effected for the foreseeable future due to the shortage in availability of various components.
CA499	Network Switch/Firewall Refresh (all sites except P/House)	50,000	50,000	-	-	-	-	-	-	(50,000)	-	-	Forecast project completion Q4 2023/24. This has a dependency on available staffing resource & the reliability of the supply chain which is & will be effected for the foreseeable future due to the shortage in availability of various components.
	Other General Fund Development Projects												
CA493	3 Rivers Scheme - Bampton	3,117,000	2,818,000	1,230,426	-	971,564	2,201,990	(0)	-	(616,010)	299,000	-	Project due to complete 2023/24. Budget amended in line with additional drawdown request approved at Cabinet 22/09/22.
CA462	3 Rivers Scheme - Riverside Development (rear of Town Hall) Tiverton	2,573,000	2,573,000	2,494,661	-	78,339	2,573,000	-	-	-	-	-	Project due to complete Q4 2022/23. Budget amended in line with additional drawdown request approved at Cabinet 22/09/22.
CA486	* 3 Rivers scheme - Knowle Lane, Cullompton	7,954,000	255,580	119,725	-	537,035	656,760	-	401,180	-	7,297,240	-	Planning permission being sought
CA495	* 3 Rivers Schemes - Future Projects	3,929,000	3,929,000	-	-	2,950,000	2,950,000	(979,000)	-	-	-	979,000	A range of projects are currently being assessed, reflecting Cabinet agreement 06/09/22
CA581	Post Hill Tiverton	4,460,000	500,000	-	-	-	-	-	-	(500,000)	3,960,000	-	
CA494	Park Road (Delivery of this project is yet to be determined until conclusion of marketing exercise & therefore maybe a Capital Receipt)	2,140,000	886,085	85,085	-	814,915	900,000	-	13,915	-	1,240,000	-	Tender exercise to complete
	** These schemes require signed loan agreements before they can be progressed further*												
	Private Sector Housing Grants												
CG201	Disabled Facilities Grants-P/Sector	577,000	500,000	217,515	-	182,485	400,000	(100,000)	-	-	-	177,000	Forecast spend £400k during 22/23. Forecast underspend of £77k & underspend of £100k on deliverable budget (Total £177k) will remain in the EMR for future spending
CA303	HMO Scheme 1	353,000	353,000	326,653	-	26,347	353,000	-	-	-	-	-	Approved at 09/08/22 Cabinet
CA304	HMO Scheme 2	336,000	336,000	299,686	-	36,314	336,000	-	-	-	-	-	Approved at 09/08/22 Cabinet
	Total General Fund Projects	**51,002,000**	**20,285,988**	**6,605,121**	**1,302,632**	**6,597,755**	**14,505,509**	**(1,305,771)**	**748,889**	**(5,223,597)**	**24,544,240**	**6,774,652**	

Code	Scheme	Total Budgeted Capital Programme	Total Deliverable Programme 2022/23	Actual Expenditure 2022/23	Committed Expenditure 2022/23	Forecast spend for remainder of 2022/23	Total Actual, Committed & Forecast Expenditure 2022/23	Variance (Underspend) to Deliverable Programme 2022/23	Variance Overspend to Deliverable Programme 2022/23	Forecast Slippage against Deliverable Programme 2022/23	Capital Programme Forecast spend (in addition to Deliverable Prog Slippage) in 2023/24 to 2026/27	Budget no longer required	Notes
		£	£	£	£	£	£	£	£	£	£	£	
	HRA Projects - Existing Housing Stock												
CA100	Major Repairs to Housing Stock	2,824,000	2,824,000	1,943,534	859,990	(154,525)	2,649,000	-	-	(175,000)	-	-	£175k Forecast slippage is related to the Modernisation contract. Negative value shown (re forecast spend) as contract value correctly raised as a Commitment - in reality a proportion of actual spend will occur in 23/24
CA111	Renewable Energy Fund	250,000	250,000	129,253	233,900	(113,153)	250,000	-	-	-	-	-	Delivery assumed on budget. Negative value shown (re forecast spend) as orders raised - in reality a proportion of actual spend will occur in 23/24
CG200	Home Adaptations - Disabled Facilities	300,000	300,000	250,215	-	49,785	300,000	-	-	-	-	-	Delivery assumed on budget
	**** Housing Schemes (1:4:1 Receipt) Projects**												
CA147	Affordable Housing/ Purchase of ex RTB	400,000	400,000	-	-	289,900	289,900	(110,100)	-	-	-	-	Assumed to be fully spent in 22/23. 1 RTB buyback purchase in Q2 detailed on Ca179 (line below)
CA179	RTB Buyback - 12 Shortridge Mead Tiverton		-	110,100	-		110,100	-	110,100	-	-	-	This is an RTB Buyback, budget on CA147 (line above)
CA158	Housing 1-4-1 Scheme - Project 1	35,000	35,000	-	-	-	-	-	-	(35,000)	-	-	Projected completion 23/24 - additional £10k Budget reflected in the draft MTFP
CA159	Housing 1-4-1 Scheme - Project 2	150,000	150,000	134,196	2,000	18,804	155,000	-	5,000	-	-	-	Projected completion Q4 22/23
CA160	Future Housing schemes - 1:4:1 - Project 3 (15% enabling budget)	113,000	8,000	-	-	8,000	8,000	-	-	-	105,000	-	Projected project completion 23/24
CA161	Future Housing schemes - 1:4:1 - Project 4 (15% enabling budget)	21,000	5,000	-	-	5,000	5,000	-	-	-	16,000	-	Projected project completion 23/24
CA162	Future Housing schemes - 1:4:1 - Project 8 (15% enabling budget)	360,000	60,000	-	-	-	-	-	-	(60,000)	300,000	-	Projected project completion 24/25 - Currently budgeted under 1:1 projects - This project will be a bid from Homes England & if successful categorised under Housing Development schemes
CA155	Modular Housing - St Andrews, Cullompton	341,000	341,000	-	-	371,000	371,000	-	30,000	-	-	-	Projected completion Q4 22/23 - Additional costs associated with Planning Permission including mature planting & additional parking. Please note £120k additional funding from BRLFT2 Fund has been secured
	**** Housing Development Schemes**												
CA154	Modular Housing - Shapland Place, Tiverton	1,023,000	1,023,000	751,760	630	459,787	1,212,177	-	466,785	(277,608)	-	-	Projected completion Q1 23/24 - Additional total projects costs £467k associated with Planning Permission - including additional EV charging points & communal glazing. Please note £692k contribution agreed from Homes England & £160k additional funding from BRLFT2 Fund has been secured
CA163	Housing Scheme - Project 11	1,500,000	84,000	73,633	-	-	73,633	-	-	(10,367)	1,416,000	-	Projected project completion 23/24
CA164	Housing Scheme - Project 14	800,000	49,000	40,500	-	-	40,500	-	-	(8,500)	751,000	-	Projected project completion 23/24
CA165	Housing Scheme - Project 16	900,000	2,000	-	-	-	-	(2,000)	-	-	-	898,000	The Housing Delivery programme has been reviewed following consultation with stakeholders, feasibility studies & available funding. This project has been flagged in new MTFP for delivery in 26/27
CA166	Housing Scheme - Project 18	900,000	49,000	44,955	-	-	44,955	-	-	(4,045)	851,000	-	Projected project completion 23/24
CA167	Housing Scheme - Project 19	1,400,000	-	-	-	-	-	-	-	-	-	1,400,000	This Project will be delivered as a traditional build 1:4:1 scheme as site not suitable for Pod construction - please see scheme CA160 above
CA168	Housing Scheme - Project 17 (15% enabling budget)	150,000	-	-	-	-	-	-	-	-	-	150,000	The Housing Delivery programme has been reviewed following consultation with stakeholders, feasibility studies & available funding. This Project has been removed from the Housing Delivery Programme
CA169	Housing Scheme - Project 9 (15% enabling budget)	195,000	73,000	66,676	-	-	66,676	-	-	(6,324)	122,000	-	Projected project completion 23/24
CA170	Housing Scheme - Project 10 (15% enabling budget)	195,000	77,000	67,089	-	-	67,089	-	-	(9,911)	118,000	-	Projected project completion 23/24
CA171	Housing Scheme - Project 15 (15% enabling budget)	690,000	175,000	159,200	-	-	159,200	-	-	(15,800)	515,000	-	Projected project completion 23/24
CA172	Housing Scheme - Project 12 (15% enabling budget)	225,000	-	-	-	-	-	-	-	-	-	225,000	The Housing Delivery programme has been reviewed following consultation with stakeholders, feasibility studies & available funding. This project has been flagged in new MTFP for delivery in 26/27
CA173	Housing Scheme - Project 13 (15% enabling budget)	165,000	-	-	-	-	-	-	-	-	-	165,000	The Housing Delivery programme has been reviewed following consultation with stakeholders, feasibility studies & available funding. This project has been flagged in new MTFP for delivery in 26/27
CA174	Housing Scheme - Project 29 (15% enabling budget)	150,000	-	-	-	-	-	-	-	-	150,000	-	Projected project completion 24/25, however there will be enabling spend in 23/24
CA175	Housing Scheme - Project 30 (15% enabling budget)	165,000	-	-	-	-	-	-	-	-	-	165,000	The Housing Delivery programme has been reviewed following consultation with stakeholders, feasibility studies & available funding. This project has been flagged in new MTFP for delivery in 26/27
	**** Proposed Council House 1:4:1 & Housing Development schemes subject to full appraisal**												
	HRA Other Projects												
CA176	Westexe - Structural Communal area work (stairwells, steps)	100,000	20,000	-	-	20,000	20,000	-	-	-	-	80,000	Projected completion Q4 22/23. Assessment of work/value on project completion - potentially revenue in nature
CA151	Garages Block - Redevelopment	500,000	300,000	-	-	-	-	-	-	(300,000)	-	200,000	£300k of this project budget will be slipped into 23/24. Further work required in order to scope this project
CA152	Post Hill, Tiverton	5,417,000	513,000	327,426	114,904	731,670	1,174,000	-	661,000	-	4,243,000	-	Tender returns due 10/02/23 & subject to Committee approval.
CA177	Old Road Depot remodelling options - forecast expenditure to maintain operations	50,000	50,000	-	-	-	-	-	-	(50,000)	-	-	This budget will be utilised during 23/24
CA124	Queensway (Beech Road) Tiverton (3 units)	550,000	450,000	195,300	320,234	(65,534)	450,000	-	-	-	100,000	-	Projected completion Q1 23/24. Negative value shown (re forecast spend) as contract value correctly raised as a Commitment - in reality a proportion of actual spend will occur in 23/24
CA126	Sewerage Treatment Works - Washfield	25,000	25,000	-	-	-	-	-	-	(25,000)	-	-	Projected Project completion during 23/24
	Total HRA Projects	**19,894,000**	**7,263,000**	**4,293,837**	**1,531,658**	**1,620,736**	**7,446,230**	**(112,100)**	**1,272,885**	**(977,555)**	**8,687,000**	**3,283,000**	
	CAPITAL PROGRAMME GRAND TOTAL	**70,896,000**	**27,548,988**	**10,898,958**	**2,834,290**	**8,218,491**	**21,951,739**	**(1,417,871)**	**2,021,774**	**(6,201,152)**	**33,231,240**	**10,057,652**	

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of the Local Government Act 1972.

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Cabinet
07 February 2023

2023/24 Budget

Cabinet Member: Cllr Bob Deed, Leader and Cabinet Member for Finance
Responsible Officer: Andrew Jarrett, Deputy Chief Executive (S151)

Reason for Report: This report provides the proposed budgets for the General Fund and the Housing Revenue Account for the year 2023/24 and recommends the Band D Council Tax charge for 2023/24.

RECOMMENDATIONS:

Cabinet are asked to recommend to Council the following:

1. **A Council Tax Requirement of £6,724,350 calculated using a Council Tax of £225.40 for a Band D property, an increase of £6.56 or 2.99% from 2022/23 and a Tax Base of 29,832.98, in accordance with the Local Authorities (Calculation of Tax Base) Regulation 1992, as amended, after the relevant adjustments in respect of the Council tax support scheme approved by Cabinet on 3 January 2023;**
2. **The overall budgeted Cost of Services within the General Fund of £16,720,364 for 2023/24 is approved as detailed across Appendices 1 – 2 and inclusive of the adjustments included within Table 1 in paragraph 5.1;**
3. **The 2023/24 budget requires no transfer from the General Fund Balance and a further temporary transfer of £57,657 from the New Homes Bonus EMR in order to balance and agree all of the transfers to and from Earmarked Reserves as detailed in Appendix 3;**
4. **HRA budget for 2023/24 be approved – Appendix 4;**
5. **HRA fees/charges are approved based on the attached Appendix 5;**
6. **Work on strategic planning for delivering a balanced budget for 2024/25 is commenced immediately.**

Relationship to Corporate Plan: This budget delivers the Corporate Plan priorities within existing financial resources.

Financial Implications: This is a financial report and the implications are contained within it. This report proposes a balanced GF and HRA budget for 2023/24 without materially reducing service delivery.

Legal Implications: None directly arising from this report, although there is a legal obligation to balance the budget. There are legal implications arising from any future consequential decisions to change service provision, but these would be assessed at the time.

Risk Assessment: In order to comply with the requirement to set a balanced budget, management must ensure that the proposed savings are robust and achievable. We must also ensure that the assumptions we have used are realistic and prudent. Failure to set a robust deliverable budget puts the Council at risk of not being able to meet its commitments and casts doubt on its “going concern” and “Value for Money” status.

Equality Impact Assessment: There are no Equalities Impact implications relating to the content of this report. All Policy Development Group meetings have considered and

made decisions based on summary feedback from the recently completed resident's survey.

Climate Change Assessment: The General Fund, Capital Programme and the Housing Revenue Account all contain significant investment in order to work towards the Council's Carbon Reduction Pledge.

1 Introduction

1.1. The balancing of the Council's budget continues to be a challenge year-on-year following the Government's austerity measures and the subsequent reduction in funding. Adding to this pressure, the financial impacts of Covid-19 continue to disrupt service delivery and reduce fee income and now the Cost of Living Crisis significantly adds to our costs and is likely to increase demand for services.

1.2. To mitigate these austerity measures, the Council has already secured and delivered significant savings for over a decade in order to "balance the books" and maintain service delivery during the austerity period.

1.3. Leadership Team, Corporate Managers and the Finance Team have been involved in discussions to secure savings, without reducing service delivery as far as possible. However it is now a fundamentally more difficult challenge year-on-year and therefore, looking to the future, a new more strategic process will be required to match service provision to available funding. This needs to begin as soon as possible to give time for options to be identified and implemented.

1.4. On 1 November 2022, the report to Cabinet advised that the General Fund (GF) forecast a budget deficit of £2,111k in 2023/24 rising to over £5,219k by the end of the 5-year timeframe, based upon a number of key assumptions (e.g. Government funding, inflation rates, pay award, Council Tax levels, use of balances/reserves, etc.). Following a detailed review, particularly of fees and charges income, the 2023/24 deficit had reduced to £960k as reported to Cabinet on 30 November 2022. Within the 3 January Cabinet report, this has further reduced to £905k through additional service efficiencies.

1.5. During the January suite of Policy Development Group (PDG) meetings, further options largely around vacancy management were discussed with a view to achieving a savings target to balance the 2023/24 Budget. In addition, the PDG's were asked to identify what they viewed as the highest priority services, and those of a lower priority where additional savings could be considered.

1.6. This report shows the progress made towards balancing the 2023/24 General Fund Budget and recommends the associated Band D Council Tax charge for 2023/24 and summarises the Capital Programme and Housing Revenue Account for the year 2023/24.

2. January PDGs and Cabinet – Budget Update

2.1. Policy Development Group (PDG) and Scrutiny Committee meetings in January received an update on the latest budget shortfall position, which, as stated in paragraph 1.4, had reduced to £905k due to minor service efficiencies following a further review.

2.2. Throughout the budget process Scrutiny Committee and the PDGs have been kept informed and have considered various options during the drafting of the proposed 2023/24 Budget. During their January meetings, Scrutiny and the individual PDGs were asked to determine what they viewed as the highest priority services, and those of a lower priority where additional savings could be considered to help reduce the budget deficit. The following recommendations were made:

2.2.1. Environment Policy Development Group agreed:

- The Weed Team should not be reinstated;
- Waste Collection/Recycling/Open Spaces should be protected from budget and service provision reductions;
- Property Service Staff Unit and Administration Buildings could be considered for budget and service provision reductions.

2.2.2. Economy Policy Development Group agreed:

- The Economic Development team be considered a high priority service area which should be protected and recognised as generating income for the Council at a high ratio (relative to the cost of the service).

2.2.3. Homes Policy Development Group

Although no formal recommendations were made, the committee were comfortable to:

- To promote the Piper Alarm scheme to increase the customer base for this important service to the community;
- To support the HRA budget as set out.

In addition, the committee were keen to explore opportunities to generate additional income through the Repairs and Maintenance Team and through the redevelopment of garages into dwellings.

2.2.4. Community Policy Development Group agreed:

- That a vacancy factor should be set for Leisure services, as long as this does not impact on health and safety or income generation;
- That planned maintenance could be reduced, as long as this does not impact on health and safety;
- That community safety should be considered a high priority service area which should be protected;
- That Public Health should be considered a high priority service area which should be protected.

2.2.5. Scrutiny Committee agreed:

- Officers provide a report on a system of vacancy control that is transparent and inclusive of Members and the Scrutiny Committee. To include the projected targets for vacancy control and how it might be implemented;

- Officers to provide a report on the future funding of the Leisure Centres including the possibility of an inclusive budgeting exercise involving the electorate on the future funding of the leisure centres.

In addition, the committee reinforced the recommendation from Environment PDG regarding not reinstating the Weed Team.

3. Key Assumptions for the 2023/24 Budget

3.1. Members and Officers have carefully scrutinised all existing budgets and the service risks associated with delivering them. It has also examined all material income sources, especially discretionary fees and charges which have been increased, where applicable, to reflect the additional cost pressures faced.

3.2. In such rapidly and frequently changing circumstances (not to mention unprecedented), assumptions soon become superseded by events. Many of the original assumptions included within the original MTFP report on 1 November 2022 have now been replaced with actual numbers, such as the Financial Settlement. However, those related to inflation largely remain, for example the Pay Award will not be agreed prior to setting the Budget and fuel/commodity prices will fluctuate throughout the year. In respect of the Pay Award, the assumption has been updated to 5.5% (from 3%) based on the latest information available. This should be broadly sufficient for a flat cash increase similar to the 2022/23 uplift.

3.3. It is also difficult to assess levels of demand for services with continuing recovery from Covid-19, but likely implications arising from the Cost of Living Crisis, for example increases in benefits claimants but possibly reductions in planning applications. Therefore careful monitoring of service demands will need to be undertaken to ensure the organisation flexes to meet demand. This could have an impact on costs, i.e. agency costs to meet short term peaks, but may also offer opportunities to deliver savings through vacancy management and reductions in energy consumption.

3.4. Corporate Managers, in conjunction with the Finance Team, review all areas of income and expenditure for known increases / decreases based on both prevailing and predicted changes in demand, price inflation, contractual obligations, etc., when proposing the 2023/24 Budget. More volatile budgets are subject to sensitivity analysis and a reasonably prudent assessment is made.

3.5. In addition to the above, regard has been made to our existing and future levels of reserves and balances which are required. We have a number of ongoing commitments already made against these reserves and balances (e.g. future capital contributions, economic development and building projects, “spend to save” projects, business transformation, town centre regeneration, future grant settlements).

3.6. However, given the prevalence of uncertainty, it should be noted this budget may well vary to a material extent. The Deputy Chief Executive (S151 Officer) proposes this budget on the basis of the information that is available at this time and his judgement of the most likely outcomes. Any adverse movement in these numbers will require support from other areas of the General Fund, or potentially utilising reserves as a last resort. Therefore there will be a need for much earlier

intervention on reducing spend if financial monitoring indicates a shortfall position at the year end.

3.7. In January 2019 Cabinet amended the minimum level of general reserves required to be maintained at £2m. Although this level continues to be prudent due to the resilience offered by the level of Earmarked Reserves which the Council holds for specific projects, the potential implications of the 2022/23 outturn forecast may require this level to be reviewed. Furthermore, Government are highlighting the level of local authority reserves and advising that they should be used to mitigate the impact of the Cost of Living Crisis.

3.8. Using these reserves to fund recurrent General Fund expenditure must be considered an option of last resort. It is inherently unsustainable (they can only be spent once) and with the forecast financial challenges this Council will face in the coming years, it is imperative that they are maintained at the highest level possible.

4. Requirements for Council Tax Setting

4.1. In recent years the Government (via the DLUHC) has become far more prescriptive with regard to acceptable levels of Council Tax increases. The implementation of the Localism Act has effectively replaced Government set "capping limits" and replaced them with principles that allow the local electorate to call for a referendum if the Council is planning to increase its Council Tax above an acceptable level. The level for District Councils announced as part of the Autumn Statement and confirmed within the Settlement was set at a maximum of the greater of 3% or £5 for the 2023/24 budget year.

4.2. Although lobbying continues from the sector to increase this "cap" to £10, the 'acceptable level' is defined by the Chancellor as part of the national budget-setting process and all government calculations on 'spending power' of local authorities are on the basis that authorities increase Council Tax to the maximum amount permitted.

4.3. The Council Tax income included in the proposed budget includes a £6.56 (2.99%) increase. This equates to a Band D charge of £225.40 (a 1% variation to our Council Tax changes the income generated by approximately £65k).

5. General Fund Budget 2023/24

5.1. The proposals contained in this report result in a balanced budget for the General Fund (see **Appendices 1 and 2**). The forecast budget deficit last reported to Cabinet stood at £905k. The following table shows the recommended actions necessary to move towards a balanced position.

Table 1 – Reconciliation of proposed balancing adjustments

Movements	Amount £k
Budget Shortfall presented to January Cabinet, PDG's / Scrutiny	**905**
Implications of the Finance Settlement and other Government Grants	7
Additional Business Rates Growth / Revaluation – net of contributions to EMR	(205)
Introduction of vacancy management targets – Supported by PDGs / Scrutiny	(400)
Further refinement of the Planned Maintenance budget – Supported by Community PDG	(250)
Further Service savings (in lieu of contributions from Town/Parish Councils):	
Grounds Maintenance – reduction in grass cutting	(66)
A review of Paddling Pools – leading to possible mothballing	(70)
Refinement of Service Budgets (assumptions for Fuel, 3-Weekly Recycling)	(86)
Net Refinement of Salary Budgets (including the increase to 5.5% pay award)	+ 281
Finalisation of the recharges to HRA	(12)
Contribution to Planning Appeals EMR	+ 100
Further increase in the Council Tax in-year collection surplus	(25)
Refinement of Contributions from Reserves	(121)
Current Budget Shortfall for 2023/24 (see 5.8)	**58**
Temporary transfer from New Homes Bonus EMR	**(58)**

5.2. Members have previously been provided with a summary of the Finance Settlement implications. Further analysis and subsequent grant announcements have further improved the position from the £180k gain indicated within the previous summary.

5.3. The significant element of this settlement gain relates to Business Rates. The Business Rates NNDR1 return is included as a separate report on this meeting's agenda. This has shown a healthy increase in the rateable value of the businesses within the district. In addition, as highlighted previously to Cabinet, following the recent national Business Rates Revaluation exercise, the Rateable Value of many local businesses has increased. This is mainly because we have a higher proportion of industrial category companies, as opposed to Retail or Office based companies whose Rateable Values have reduced. The ever-present risk of appeals, which the Valuation Office consider on a daily basis, and the heightened risk of bad debts arising necessitates that we prudently set aside significant funds in our Business Rates Smoothing Reserve to mitigate these risks.

5.4. The vacancy factor has been considered by all PDG's and Scrutiny. Although not ideal, Members understood the need for this and the potential implication for service delivery during 2023/24. Scrutiny requested regular progress updates against this target which will be provided.

5.5. Further short-term reductions to scheduled maintenance has been identified. This is where maintenance is due, but following a review of the assets it has been deemed low risk to delay that maintenance. There is no health and safety risk with this reduction, and all assets will continue to be monitored to ensure that works can be undertake if the need is identified.

5.6. As previously outlined, the Council has approached the Town and Parish Councils for additional financial support. Although there is on-going dialogue, it appears that no additional funding has been agreed. Therefore, Environment PDG considered some specific service reductions in relation to reducing the number of Grass Cuts per annum, and a review of paddling pools, which could result in them being mothballed if insufficient funds are available to maintain them adequately. The PDG did not endorse these ideas, but due to the scale of the budget shortfall, it is proposed these savings are approved.

5.7. Despite further analysis work and discussions with Members and Budget Holders, and a number of other further savings options identified by officers, it was not possible to identify the full £905k ongoing savings target set.

5.8. Therefore the remaining budget shortfall has been reduced on a one-off basis in the very short term by the use of reserves. To set a balanced budget, that continues to provide the current level of service provision wherever possible, will require an additional use of £58k from the New Homes Bonus Earmarked Reserve.

5.9. Members should note that the Final Settlement will not be announced until after publication of this report (indeed possibly after Cabinet have met). Any additional funding announced will reduce the need to draw further from the New Homes Bonus reserve. With the demise of this as an ongoing funding source, the Council has started planning for a balanced budget without drawing on this historic funding source.

6. Future Funding Concerns/Cost Pressures

6.1. It is clear that Members' preference is to explore all revenue-raising options before cutting services. However, due to the increasing pressures on our budgets and the continuing reduction in our Central Government funding, the Council will need to reassess its overall corporate priorities and therefore where it allocates future budgets, it will also need to consider:

- Statutory vs Discretionary service provision;
- Resident priorities – as per the recent consultation undertaken (budget related summary previously circulated);
- How it can work more closely with Towns/Parishes;
- Explore more commercial and regeneration opportunities (being aware of the risks);
- Continue to consider any partnership possibilities;
- Review Treasury options;
- Maximise all income possibilities;
- Impact of funding changes: Fair Funding Review; NNDR baseline reset; changes to NHB;
- The need to create investable propositions for our carbon reduction ambitions.

6.2. The Council has stated its intent to try and achieve a net zero carbon operation by 2030. There remains a substantial challenge ahead if this target is to be achieved. From a carbon accounting perspective, the fact that we retain direct control (and ownership) over the majority of services means that while our

influence is unfettered by long-term commissioning or contractual arrangements, we retain ownership of the significant challenges around decarbonisation. The future year's Capital Programme includes a range of investments in improving the energy efficiency of our property estate, subject to securing sufficient funding.

6.3. Not least in the area of social housing provision, where we have to balance the long-term viability of our social housing stock for the needs of future generations, with the need to invest substantially to reduce emissions (housing stock makes up the bulk of MDDC emissions). The Capital Programme includes a number of substantial housing developments increasing the amount of housing stock with highly efficient (zero carbon) modular buildings, subject to securing sufficient external funding. This continues across the 5-year Medium Term Financial Plan with the aim of developing 500 new properties.

6.4. However, with limited funding available from Government, and any such funding subject to a bidding process, in the short term we will be trying to achieve the maximum possible locally, while taking every opportunity to bid into future funding pots as they arise.

6.5. The NHB grant monies have been considered at risk for some time. It's possible that a further one-off allocation could be announced for 2024/25. It remains unclear what will happen to the funding associated with the current scheme. While we do not yet know what any new scheme may include, it can be assumed that meeting and exceeding our growth targets will be critical to ensuring that we access whatever revised distribution methodology the government implements.

6.6. As such, it's important to highlight how much New Homes Bonus is being used to help fund our General Fund and Capital Budgets in 2023/24. A total of £1,700k is being used to contribute towards various one-off General Fund projects, including:

- £364k one-off annual grant for 2023/24
- £218k towards the Cullompton HAZ from the existing EMR;
- £80k towards Business Development from the existing EMR;
- £45k to the Grand Western Canal from the existing EMR; and
- £993k to support the existing Capital Programme from the existing EMR.

As stated in para 5.8 above, to close the budget gap, it is recommended that this be increased by a further £58k, as referred to in **Recommendation 3** of this report.

6.7. It is clear is that local authorities are in desperate need of a multi-year funding agreement rather than the current year-to-year arrangements which do not allow a considered medium term view of the resources that will be available, and, how these may be managed to optimise service provision within the scope of the Corporate Plan.

7. Overall General Fund (GF) position at 31 March 2023

7.1. Recent verbal updates, and the detailed report included alongside this Cabinet report, indicate the in-year budget position is trending towards a substantial overspend. This largely relates to the Pay Award, which significantly exceeded the assumed 2% uplift. Similarly, the increases in energy and fuel costs also dwarf the assumed budget increases. If the Outturn position does continue as forecast, the General Fund Reserve balance will reduce below the current agreed minimum level of £2,000k. The S151 will review this position at year end and may recommend an alteration to that minimum balance, or the release of Earmarked Reserves to bolster the General Reserve back to that recommended minimum level. Therefore, no draw on General Reserves is recommended to support the 2023/24 Budget.

8. Transfers To and (From) Earmarked Reserves

8.1. **Appendix 3** shows in detail which amounts are being contributed to, or drawn down from, various earmarked reserves in 2023/24.

8.2. It is proposed to transfer £1,598k into earmarked reserves to help mitigate future pressures. This includes:

- £1,161k into various Sinking Funds relating to property, plant and equipment maintenance, and Vehicle replacement and repairs;
- £137k into Business Rates Smoothing;
- £120k into the Statutory Development Plan;
- £100k into a Planning Appeals reserve;
- £50k into a Business Systems Migration reserve; and
- £25k into District Elections.

8.3. It is also proposed to drawdown £3,266k to fund expenditure in 2023/24, this includes:

- £965k utilisation of Sinking Funds and Maintenance budgets supporting the investment in our assets;
- £478k utilisation of vehicle reserves supporting the investment in our vehicle fleet;
- £358k of funds to cover prior year deficits on the Collection Fund;
- £343k utilisation of New Homes Bonus (as outlined within para 6.6)
- £270k supporting the Statutory Development Plan;
- £205k towards the delivery of the Cullompton HAZ;
- £182k towards the cost of the Homes for Ukraine Scheme;
- £125k towards the cost of the District Election and Member development;
- £122k supporting the development of the Garden Village; and
- £116k towards the one off costs forecast with services
- £80k released back to the General Fund.

This gives a net reduction in Earmarked Reserves of £1,667k, prior to the proposed £58k balance adjustment through NHB.

9. Housing Revenue Account Budget 2023/24

9.1. The Housing Revenue Account (HRA) is ring fenced and accounts for the income and expenditure associated with the Council's statutory housing obligations to its tenants. The HRA has an obligation to provide a high quality, value for money service for its tenants coupled with affordable rent levels.

9.2. The Council continues to undertake valuable benchmarking work in conjunction with Housemark. These findings are then used to inform the budget setting process. In doing so, MDDC are able to better identify their position in relation to other authorities in the sector and identify areas for improved efficiency.

9.3. The overall HRA budget has been constructed on a detailed line-by-line examination of expenditure and income, having regard to last year's outturn, this year's forecast position and the on-going improvement of the housing service.

9.4. Some items of expenditure can be defined quite accurately whilst others require managers to exercise business judgement based upon their experience, particularly in the case of new commitments. Where such judgement has been applied, the proposals before Members are based upon realistic assumptions.

9.5. The main proposals for the 2023/24 budget can be summarised as follows:

Expenditure:

- An update to the base budget to reflect the additional cost of the higher than expected pay award for 2022/23;
- An assumed pay award for 2023/24 equivalent to 5.5%;
- An Increase in the Pension Contribution rate of 2.4% to 19.0%;
- Increased energy costs of c180% and fuel costs of c40%, along with a significant increase in waste disposal costs;
- The increased financing costs associated with the ambitious development programme.

Income

- A below inflation increase of 7% is proposed on existing rents in line with the Governments cap for 2023/24;
- Garage rents and Garage plot ground rents to be frozen, remaining unchanged at £10.71 per week and £275 per annum respectively.
- Increased interest yields on balances held.

9.6. The overall rental income was materially affected by the Governments previous policy to reduce Rents by 1% each year for four consecutive years. Although the current policy is to enable rents to be increased by 1% above inflation, the Government have capped this to 7% given the current level of inflation. A more detailed analysis of the proposed rent increase can be found in **Appendix 5** that shows that the average housing rent will increase to £89.88 on a 52 week basis.

9.7. Current legislation on Right to Buy means that we're likely to sell several properties in future years. We estimate, based on historic data that 16 will be sold next year.

9.8. Similarly, we forecast that we will have a number of void properties during the year. We have a prudent forecast of 70 voids across the year in line with previous years to reflect the financial implications on tenants of the Cost of Living

Crisis (this was previously increased to reflect the move to Universal Credit and Covid-19). This is broadly in line with the forecast Council Tax collection rate of 96.5%. Combined, these reductions affect our ability to fund property maintenance and development as well as servicing any existing or new debt.

9.9. Budget continues to be included to address legislation post Grenfell and to undertake further Fire Risk remedial action. However, significant further investment will be required to further contribute to the decarbonisation of the Housing Estate and achieve Net Zero by 2030.

9.10. It has been deemed as prudent to maintain the HRA reserve balance at £2,000k and it is expected to remain so throughout 2023/24. At the start of 2022/23, other HRA reserves totalled £21,233k. This included £15,863k in the Housing Maintenance Fund (HMF); £814k in the Renewable Energy Fund (REF) and £255k in Major Repairs Reserve. It is intended that any expenditure funded from the REF monies be used on renewable energy schemes.

9.11. The final budget summary for the 2023/24 HRA is shown in **Appendix 4**. It will continue to provide for an enhanced housing service which will allow for more capital investment and additions to our existing stock.

9.12. The ambition to build a significant number of new properties continues across the 5-year Medium Term Financial Plan. The prospect of building new social housing raises the issue of significant future capital financing requirements. Budget at assumed interest rates of circa 5% is included within the future years of the MTFP to finance the build of a number of new highly efficient (zero carbon) modular buildings, subject to securing sufficient funding. Members are reminded that the constraint on increasing stock is still an issue of affordability, not the access to borrowing.

10. Capital Programme 2023/24

10.1. Full detail on this matter is included within in a separate agenda item on this meeting.

10.2. In summary, it shows that the 2023/24 programme includes projects expected to start in 2023/24 totalling £98,375k. In addition, there is £39,432 rolling forward from the current programme. The nature of capital projects means that they span more than one year, therefore, within this overall approval, £64,826k is expected as the Deliverable Budget for 2023/24.

10.3. The Deliverable Budget includes a significant investment in Housing, either through the HRA Housing delivery programme (£15,655k) or through 3 Rivers (£26,108k – subject to approval of a Business Plan). A prudent assumption has been included for the utilisation of 1-4-1 receipts or for additional grant funding to be made available from Homes England; although a substantial element of the cost remains with the Council.

10.4. In addition, plans continue with the HIF projects in Cullompton at a cost of £13,105k. The latest Levelling-Up bid was again rejected, therefore the associated funding is yet to be identified but the Council is actively pursuing all avenues. As with all capital projects, these are all subject to a full appraisal.

10.5. The most significant funding source required to support the 2023/24 programme is the £43,294k of assumed borrowing from the Public Works Loan Board (PWLB). The associated capital financing costs are included within the relevant GF or HRA budget. However, it should be recognised that wherever possible, the Council will continue to maximise its usage of internal borrowing to minimise the financing costs.

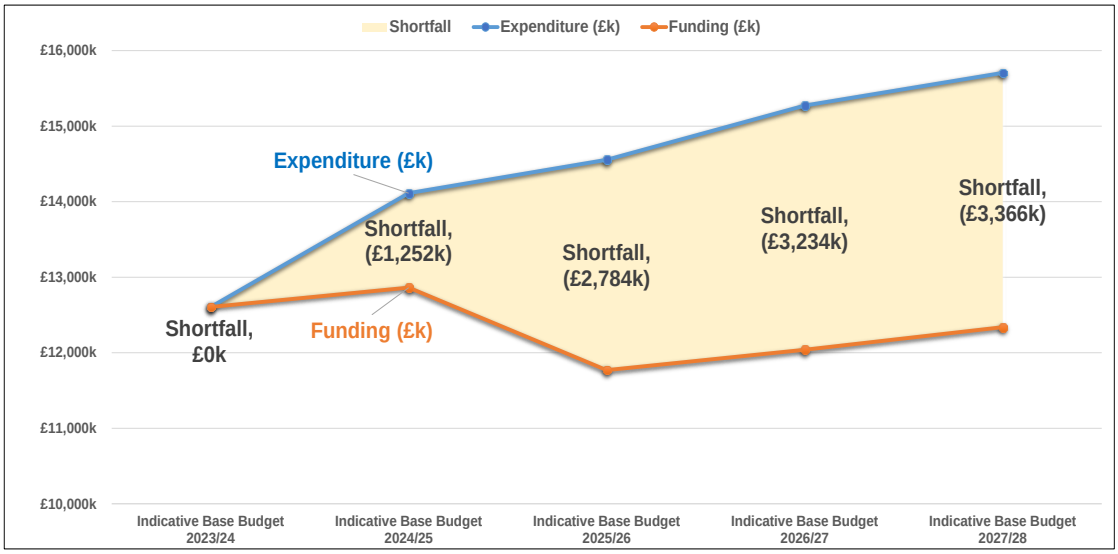
10.6. The future year's Capital Programme shows increased investment in improving the energy efficiency of our property estate and the continuation of investment to increase the HRA Housing stock. The overall borrowing requirement rises accordingly and therefore so does the capital financing costs within the Revenue Budget. These projects will be further refined over time and will be subject to sufficient funding being available.

11. Updated MTFP position

11.1. The new General Fund MTFP summary position is shown in the table below. It shows a cumulative shortfall of £3,366k over the remaining four-years of this MTFP which remains to be addressed.

Table 2 – Future Medium Term Financial Plan – General Fund

	2024/25 £k	2025/26 £k	2026/27 £k	2027/28 £k
Annual Surplus / Deficit	1,252	1,532	450	132
Cumulative Surplus/Deficit	**1,252**	**2,784**	**3,234**	**3,366**



11.2. The underlying budget shortfall falls largely in 2024/25 due to a reduced assumption of Earmarked Reserves supporting expenditure, and in 2025/26 due to the expectation of the implementation of the long overdue funding reforms. The latter years are forecast to be broadly more manageable.

11.3. This forecast position also makes a number of prudent assumptions, including:

- No new grant due to MDDC within the replacement New Homes Bonus Scheme and no further one-off allocations of NHB from 2025/26;
- A loss of historic growth in business rates above the baseline, on reset of the business rates system in 2025/26;

- No collection fund surplus or deficit from Council Tax or Business Rates until 2025/26;
- No Business Rates pooling income, which would probably not continue after a reset of the system;
- No further continuation of the allocation of Lower-Tier Services grant (initially announced as one-off);
- No grant funding continuing post 2025/26 other than the Rural Services Delivery Grant;
- The reduction in Council Tax referendum principles back to previous levels (£5 or 2%) from 2025/26;
- Pay Award and general inflation in line with assumptions reverting back to "normal" levels across the MTFP timeframe.

11.4. The same level of uncertainty will be facing all local authorities across the country.

12. Conclusion

General Fund

12.1. The General Fund budget has been set against a backdrop of over a decade of cuts to Public Sector funding, a global pandemic and now a once in a generation Cost of Living Crisis. However, the proposed balanced budget protects service delivery at current levels. This has been achieved with the use of a small amount of one-off funding from reserves and balances and that the vacancy management savings can be managed to minimise any impact on service delivery. However, further ongoing budget savings options will need to be identified to mitigate the underlying budget shortfall across the remainder of this MTFP.

12.2. Significant uncertainty remains for the future funding of Local Government. Further delays were announced to the outcomes of the Fair Funding Review and potential changes to both Business Rates and New Homes Bonus. These changes are now due in 2025/26.

HRA

12.3. The HRA budget for 2023/24 continues to address a number of important factors, such as the Post Grenfell and Fire Risk Assessment requirements and a marked increase in the overall number of units through significant investment. These investments continue across the whole 5-year MTFP period.

12.4. Rents are proposed to increase by 7% in line with the Government's guidance and neighbouring authorities. A prudent allowance has been made for voids and non-collection, in line with that applied to Council Tax, taking into account the current economic climate.

12.5. This report has set out a proposed balanced budget for the HRA for 2023/24, with appendices attached showing the following:

Appendix 4 – The overall makeup of the budget at summary level
Appendix 5 – The proposed rent and fees and charges for 2023/24

12.6. Similarly to the General Fund, the longer term position for the HRA shows the funding shortfall although not to the same degree. Along with 2023/24, 2024/25 is indicatively balanced with relatively small shortfalls in years 2025/26 to 2027/28, as follows:

Table 3 – Future Medium Term Financial Plan – HRA

	2024/25 £k	2025/26 £k	2026/27 £k	2027/28 £k
Annual Surplus / Deficit	0	62	193	212
Cumulative Surplus/Deficit	**0**	**62**	**255**	**468**

12.7. Work continues to refine the position in order to balance the budget for the years ahead.

Capital Programme

12.8. The Capital Programme for 2023/24 includes the beginning of a programme of significant investment in social and affordable housing. The capital MTFP also includes investment into improving the energy efficiency of our property estate, and in the economic regeneration of the district. However these projects, as with any capital project, are subject to the Council receiving sufficient grant funding and a robust business case.

12.9. Therefore assumptions are built in that the Council will be successful in attracting funding through the increasing number of bid schemes for grant funding. Additional borrowing is also projected which is forecast to increase our Capital Financing Requirement to c.£97m (see Treasury Management Strategy included elsewhere on this agenda), although wherever possible, this will be mitigated through maximising the use of internal borrowing. The Revenue MTFP includes the associated financing implications.

12.10. It is, therefore, imperative that capital funds are only spent on those projects that enable the Council to deliver its Corporate Plan objectives, reduce operational cost, or generate a financial return.

Future Budgets

12.11. The Council will need to prepare for the future in a timely manner and this is why it will continue to discuss how it can provide a wide range of services in a much reduced funding envelope. The process will continue to involve all staff, Members and our local residents/businesses.

12.12. Cabinet are asked to agree the contents of this report and recommended its approval by Council in February 2023.

Contact for more information: Andrew Jarrett, Deputy Chief Executive (S151)
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Paul Deal, Corporate Manager for Financial Services
pdeal@middevon.gov.uk

Circulation of the Report:	Leadership Team, Cabinet
Background Papers:	November & January Cabinet & PDG's (MTFP, Budget Draft and Budget Update reports)

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Appendix 1

The Table below gives an overall summary of the Council's General Fund MTFP position (which includes a wide range of assumptions).

MTFP General Fund Summary

2022/23 £'000		Notes	2023/24 £'000	2024/25 £'000	2025/26 £'000	2026/27 £'000	2027/28 £'000
14,785	**Net Direct Cost of Services**		16,720	15,356	15,918	16,416	16,973
(1,715)	Net recharge to HRA	1	(1,872)	(1,926)	(1,963)	(2,001)	(2,040)
687	Provision for Repayment of Borrowing	2	703	929	1,039	1,150	1,146
13,757	**Net Service Costs**		**16,720**	**15,356**	**15,918**	**16,416**	**16,973**
(993)	Net Interest Payable / (Receipts)	3	(1,532)	(1,365)	(1,585)	(1,745)	(1,745)
153	Finance Lease Interest Payable		180	200	126	116	106
(2,677)	Net Transfers to / (from) Earmarked Reserves	4	(1,594)	918	1,019	1,338	1,264
10,240	**Total Budget Requirement**		**12,606**	**14,113**	**14,554**	**15,274**	**15,704**
	Funded By:						
(1,855)	Retained Business Rates	5	(4,319)	(4,360)	(3,997)	(4,040)	(4,106)
0	Revenue Support Grant	6	(98)	(98)	0	0	0
(99)	Lower Tier Services Grant	6	0	0	0	0	0
(490)	Rural Services Delivery Grant	6	(490)	(490)	(490)	(490)	(490)
(719)	New Homes Bonus	6	(395)	(395)	0	0	0
(153)	2022/23 Services Grant	6	(86)	(86)	0	0	0
0	Funding Guarantee	6	(469)	(469)	0	0	0
(6,925)	Council Tax–MDDC	7	(6,749)	(6,963)	(7,284)	(7,510)	(7,742)
(10,240)	**Total Funding**		**(12,606)**	**(12,862)**	**(11,770)**	**(12,040)**	**(12,338)**
0	**Annual Shortfall – Increase / (Decrease)**		**0**	**1,252**	**1,532**	**450**	**132**
0	**Cumulative Shortfall**		**0**	**1,252**	**2,784**	**3,234**	**3,366**

Notes:

1. Recharges have been calculated based upon the updated salary budgets.
2. The Provision for Repayment of Borrowing incorporates the financial implications of the proposed Capital Programme shown in Appendix 4.
3. The increase in Net Interest Costs / (Receipts) reflects the increase in interest rates and a prudent assumption of the interest earnt from 3 Rivers Developments Ltd in line with the Business Plan. At present, no new external borrowing is forecast, which lowers the previous assumption in Interest Payable.
4. Net Transfers to / (from) Earmarked Reserves reflects planned contributions to, or drawdowns from reserves, including the balancing contribution of £58k from New Homes Bonus. The 2023/24 value includes the final drawdown from the Business Rates and Council Tax Smoothing Reserves to offset the loss caused by Covid-19 reliefs being applied (see Note 4).
5. The Retained Business Rates income has increased in 2023/24 due to growth and the revaluation. Income drops in 2025/26 to reflect the potential changes the Government might implement to the Business Rates Retention Scheme. These include Re-Baselining and Resource Equalisation.

6. The Government announced the Provisional Local Government Finance Settlement for 2023/24. It includes a funding guarantee that all Councils receive a 3% increase in “Core Spending” before taking into account any increases to Council Tax. The Council will received Revenue Support Grant again due to two other grants being transferred into the overall settlement consideration.
7. Council Tax income is forecast assuming Band D charge increases in line with the 3% referendum limit and the agreed Taxbase.

Appendix 2 - Detailed Budget Movements by Service

Service Unit	Direct Costs Detail	2022/23 Annual Budget £	MTFP Adjustment £	Round 1 Detailed Update £	Round 2 Detailed Update £	Provisional 2023/24 Budget £	Increase / (Decrease) £	Increase / (Decrease) %
	Cabinet							
SCM01	Leadership Team	534,019	1,152,454	(1,107,880)	12,780	**591,373**	57,354	10.7%
SCM02	Corporate Functions	108,465	40,028	26,964	4,130	**179,587**	71,122	65.6%
SCM03	Corporate Fees	258,730	200,065	(93,055)	(300,000)	**65,740**	(192,990)	(74.6%)
SCM06	Pension Backfunding	801,480	100,000	(254,906)	-	**646,574**	(154,906)	(19.3%)
SES01	Emergency Planning	7,500	-	-	-	**7,500**	0	0.0%
SFP01	Accountancy Services	478,460	128	39,044	10,960	**528,592**	50,132	10.5%
SFP02	Internal Audit	97,480	-	(2,720)	-	**94,760**	(2,720)	(2.8%)
SFP03	Procurement	101,340	24	7,480	1,480	**110,324**	8,984	8.9%
SFP04	Purchase Ledger	48,460	19	5,755	1,210	**55,444**	6,984	14.4%
SFP05	Sales Ledger	47,330	19	5,810	1,210	**54,369**	7,039	14.9%
SHR01	Human Resources	497,080	114	(49,780)	9,180	**456,594**	(40,486)	(8.1%)
SHR02	MDDC Staff Training	25,000	-	(5,000)	-	**20,000**	(5,000)	(20.0%)
SHR03	Payroll	40,960	13	2,100	1,060	**44,133**	3,173	7.7%
SHR04	Learning And Development	53,430	13	7,575	1,170	**62,188**	8,758	16.4%
SIT01	IT Gazetteer Management	76,400	26	4,840	1,880	**83,146**	6,746	8.8%
SIT03	IT Information Technology	1,260,750	(44,811)	(14,502)	14,970	**1,216,407**	(44,343)	(3.5%)
SLD01	Electoral Registration	218,278	52	131,732	2,870	**352,932**	134,654	61.7%
SLD02	Democratic Rep And Management	544,662	31,373	15,886	3,990	**595,911**	51,249	9.4%
SLD04	Legal Services	419,661	97	42,339	(43,250)	**418,847**	(814)	(0.2%)
SPR01	Building Regulations	17,390	166	17,761	(26,392)	**8,925**	(8,465)	(48.7%)
SPR04	Local Land Charges	(24,561)	24	(19,266)	1,297	**(42,506)**	(17,945)	73.1%
SRB01	Collection Of Council Tax	382,270	35,380	59,957	76,010	**553,617**	171,347	44.8%
SRB02	Collection Of Business Rates	(98,870)	-	11,660	-	**(87,210)**	11,660	(11.8%)
SRB03	Housing Benefit Admin & Fraud	180,920	89	29,480	10,540	**221,029**	40,109	22.2%
SRB04	Housing Benefit Subsidy	65,000	-	-	-	**65,000**	0	0.0%
SRB06	Debt Recovery	78,680	47	14,490	3,500	**96,717**	18,037	22.9%
TOTAL CABINET PDG		**6,220,314**	**1,515,320**	**(1,124,236)**	**(211,405)**	**6,399,993**	**179,679**	**2.9%**
	Community PDG							
SCD01	Community Development	138,500	-	-	-	**138,500**	0	0.0%
SCS20	Customer Services Admin	23,720	-	(5,490)	-	**18,230**	(5,490)	(23.1%)
SCS22	Customer First	725,598	506	28,700	16,609	**771,413**	45,815	6.3%
SES03	Community Safety - C.C.T.V.	16,390	5	41,390	-	**57,785**	41,395	252.6%
SES04	Public Health	3,990	-	(500)	-	**3,490**	(500)	(12.5%)
SES11	Pool Cars	1,884	967	(1,712)	(520)	**619**	(1,265)	(67.1%)
SES16	Public Health Staff Units/Recharges	792,330	32,192	(10,688)	18,040	**831,874**	39,544	5.0%
SES17	Community Safety	6,070	-	(2,200)	-	**3,870**	(2,200)	(36.2%)
SES18	Food Safety	(25,340)	6	10,500	-	**(14,834)**	10,506	(41.5%)
SES21	Licensing	24,030	61	(959)	4,010	**27,142**	3,112	13.0%
SES22	Pest Control	2,500	-	(1,500)	-	**1,000**	(1,500)	(60.0%)
SES23	Pollution Reduction	7,250	-	6,020	-	**13,270**	6,020	83.0%
SPR02	Enforcement	92,800	93	7,677	2,250	**102,820**	10,020	10.8%
SPR03	Development Control	587,570	(252,605)	117,104	27,476	**479,545**	(108,025)	(18.4%)
SPR09	Forward Planning	306,890	(84,578)	91,590	6,560	**320,462**	13,572	4.4%
SPR11	Regional Planning	234,760	31,740	3,000	-	**269,500**	34,740	14.8%
SRS01	Recreation And Sport	903,485	(25,935)	830,151	(305,985)	**1,401,716**	498,231	55.1%
TOTAL COMMUNITY PDG		**3,842,427**	**(297,548)**	**1,113,083**	**(231,560)**	**4,426,402**	**583,975**	**15.2%**
	Economy PDG							
SCD02	Economic Development	70,320	12,135	(5,494)	2,300	**79,261**	8,941	12.7%
SCP01	Parking Services	(489,680)	(105,475)	(70,355)	-	**(665,510)**	(175,830)	35.9%
SPR06	Economic Development	706,700	(150,495)	286,392	9,040	**851,637**	144,937	20.5%
SPS12	GF Properties Shops/Flats	(306,890)	2,178	112,762	-	**(191,950)**	114,940	(37.5%)
TOTAL ECONOMY PDG		**(19,550)**	**(241,657)**	**323,305**	**11,340**	**73,438**	**92,988**	**(475.6%)**

Appendix 2 - Detailed Budget Movements by Service

Service Unit	Direct Costs Detail	2022/23 Annual Budget £	MTFP Adjustment £	Round 1 Detailed Update £	Round 2 Detailed Update £	Provisional 2023/24 Budget £	Increase / (Decrease) £	%
	Environment PDG							
SES02	Cemeteries	(67,230)	1,701	33,160	130	**(32,239)**	34,991	(52.0%)
SES05	Open Spaces	180,190	3,162	211,947	(69,920)	**325,379**	145,189	80.6%
SGM01	Grounds Maintenance	559,523	14,808	27,665	(56,720)	**545,276**	(14,247)	(2.5%)
SPS01	Asset Management	188,310	15,343	(5,980)	1,390	**199,063**	10,753	5.7%
SPS03	Flood Defence And Land Drain	26,020	12	-	-	**26,032**	12	0.0%
SPS04	Street Naming & Numbering	8,070	2	(1,430)	81	**6,723**	(1,347)	(16.7%)
SPS05	Administration Buildings	425,140	89,103	139,162	-	**653,405**	228,265	53.7%
SPS06	MDDC Depots	499,720	35,316	(43,934)	-	**491,102**	(8,618)	(1.7%)
SPS07	Public Transport	(6,110)	1	(17,320)	-	**(23,429)**	(17,319)	283.5%
SPS09	Property Services Staff Unit	734,650	6,729	34,092	5,842	**781,313**	46,663	6.4%
SPS11	Public Conveniences	41,330	(27,725)	20,345	-	**33,950**	(7,380)	(17.9%)
SWS01	Street Cleansing	472,798	17,510	48,405	6,550	**545,263**	72,465	15.3%
SWS02	Waste Collection	435,192	134,846	100,246	13,760	**684,044**	248,852	57.2%
SWS03	Recycling	620,030	43,875	215,994	(24,730)	**855,169**	235,139	37.9%
SWS04	Waste Management	377,770	104	3,362	9,000	**390,236**	12,466	3.3%
TOTAL ENVIRONMENT PDG		**4,495,403**	**334,787**	**765,714**	**(114,617)**	**5,481,287**	**985,884**	**21.9%**
	Homes PDG							
SES15	Private Sector Housing Grants	(1,490)	-	(1,670)	-	**(3,160)**	(1,670)	112.1%
SHG03	Homelessness Accommodation	269,192	6,917	61,271	5,025	**342,405**	73,213	27.2%
TOTAL HOMES PDG		**267,702**	**6,917**	**59,601**	**5,025**	**339,245**	**71,543**	**26.7%**
	Net Direct Services Costs	**14,806,296**	**1,317,819**	**1,137,467**	**(541,217)**	**16,720,365**	**1,914,069**	**12.9%**
5000	Net Recharge to HRA	(1,714,560)	(85,728)	(71,942)	(11,580)	**(1,883,810)**	(169,250)	9.9%
6000	Capital Financing	686,660	(224)	16,828	-	**703,264**	16,604	2.4%
	Net Service Costs	**13,778,396**	**1,231,867**	**1,082,353**	**(552,797)**	**15,539,819**	**1,761,423**	**12.8%**
SIE03/6	Net Interest Costs /(Receipts)	(992,613)	(12,500)	(526,734)	-	**(1,531,847)**	(539,234)	54.3%
4115	Finance Lease Interest Payable	152,600	12,500	15,260	-	**180,360**	27,760	18.2%
4694	Transfers TO Earmarked Reserves	1,759,064	(629,764)	16,510	579,692	**1,725,502**	(33,562)	(1.9%)
7709	Transfers (FROM) Earmarked Reserves	(2,758,647)	1,342,917	(1,465,074)	(426,710)	**(3,307,514)**	(548,867)	19.9%
	Net Budget Requirement	**11,938,800**	**1,945,020**	**(877,685)**	**(399,815)**	**12,606,320**	**667,520**	**5.6%**
SIE11	Business Rates	(3,532,190)	(26,000)	(324,000)	(436,770)	**(4,318,960)**	(786,770)	22.3%
SIE08	Council Tax	(6,945,960)	192,430	(4,820)	9,320	**(6,749,030)**	196,930	(2.8%)
SIE10	Un-Ringfenced Grant Funding	(1,460,650)	-	-	(77,680)	**(1,538,330)**	(77,680)	5.3%
	Total Funding	**(11,938,800)**	**166,430**	**(328,820)**	**(505,130)**	**(12,606,320)**	**(667,520)**	**5.6%**
	Annual Shortfall	**0**	**2,111,450**	**(1,206,505)**	**(904,945)**	**0**	**0**	**0.0%**

2023/24 Transfers To / (From) Earmarked Reserves — Appendix 3

2023/24 BUDGETS
Transfers To Earmarked Reserves

SERVICE	EMR		Total
IE440	EQ659	NNDR SMOOTHING EMR	136,770
PS990	EQ685	FORE STREET MAINT S.FUND	5,000
PS992	EQ685	MARKET WALK MAINT S.FUND	20,000
CP540	EQ686	PAYING CAR PARKS (MACHINE REPLACEMENT SINKING FUND)	3,000
LD201	EQ720	ELECTION COSTS - DISTRICT	25,000
PR810	EQ728	STATUTORY DEVELOPMENT PLAN	120,000
EQ756	EQ756	FLEET CONTRACT FUND	639,600
GM/WS	EQ760	STREET SCENE SMALL PLANT	19,010
EQ761	EQ761	RECYCLING PLANT SFUND	30,000
EQ763	EQ763	RECYCLING MAINT SINKING FUND	2,700
PS880	EQ765	BUS STATION	5,000
ES100	EQ766	CEMETERIES	25,000
ES450	EQ767	PARKS & OPEN SPACES	25,000
RS140	EQ837	LEISURE SINKING FUND	75,000
PS980	EQ837	PROPERTY MAINTENANCE	311,580
PR100	EQ775	BUILDING CONTROL	5,420
PR200	EQ774	PLANNING LEGAL EXPENSE RESERVE	100,000
IT200	EQ749	BUSINESS SYSTEMS MIGRATION	50,000
TOTAL			**1,598,080**

2023/24 BUDGETS
Transfers (From) Earmarked Reserves

SERVICE	EMR	Description	TOTAL
CD200	EQ653	COMMUNITY DEVELOPMENT	(45,000)
EQ638	EQ638	DEV CONT LINEAR PARK	(4,170)
EQ640	EQ640	W52 POPHAM CLOSE COMM FUND	(1,950)
EQ641	EQ641	W67 MOORHAYES COM DEV FUND	(1,630)
EQ642	EQ642	W69 FAYRECROFT WILLAND EX WEST	(4,620)
EQ643	EQ643	W70 DEVELOPERS CONTRIBUTION	(6,650)
EQ644	EQ644	DEV CONT WINSWOOD CREDITION	(3,080)
CP530	EQ707	RESURFACING AMENITY CAR PARKS	(21,000)
CP540	EQ708	RESURFACING P&D & PERMIT CAR PARKS	(26,000)
EQ756	EQ756	FLEET CONTRACT FUND	(477,920)
RS100	EQ764	LEISURE MAINT SINKING FUND	(321,000)
CB100	EQ766	CEMETERY MAINT SINKING FUND	(80,000)
OS455	EQ767	PARK & OPEN SPACES MAINT SINKING FUND	(97,000)
PS991	EQ771	INDUSTRIAL UNIT SPECIFIC MAINT	(41,900)
IE420	EQ777	C/TAX SMOOTHING EMR	(62,401)
IE440	EQ659	NNDR RESERVE	(295,105)
PR225	EQ824	GARDEN VILLAGE PROJECT	(121,865)
PS810	EQ827	PHOENIX HOUSE MAINT	(144,000)
PS810	EQ828	PHOENIX HOUSE AIR CON	(6,400)
PS850	EQ829	OLD ROAD DEPOT	(35,000)
OS450	EQ837	PROPERTY MAINT RESERVE	(183,000)
PR400	EQ653	BUSINESS DEVELOPMENT	(80,000)
PR402	EQ653	CULLOMPTON HAZ	(218,143)
PR402	EQ652	CULLOMPTON HAZ	(199,633)
PR402	EQ722	CULLOMPTON HAZ	(5,098)
PR810	EQ728	STATUTORY DEVELOPMENT PLAN	(269,500)
PR400	EQ722	BUSINESS DEVELOPMENT	(51,640)
RB100/RB600	EQ787	NNDR NEW BURDENS	(16,950)
IT900	EQ655	IT PROJECT MANAGER	(46,863)
OS455	ER005	AMORY PARK	(10,000)
LD201	EQ720	DISTRICT ELECTIONS	(100,000)
LD300	EQ721	ELECTED MEMBERS TRAINING	(10,000)
LD201	EQ721	DISTRICT ELECTIONS	(15,000)
PH733/PH373	NEW CODE	HOMES FOR UKRAINE	(182,280)
	EQ660	Releasing of Reserves to fund the 2023/24 GF Budget	(80,722)
TOTAL			**(3,265,520)**

Net Transfer To / (From) Earmarked Reserves **(1,667,440)**

Proposed Transfer (From) NHB Reserve to Balance remaining deficit on 2023/24 Budget			
	EQ653	NHB to fund the GF Deficit	(57,657)

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Housing Revenue Account - by service

Code	Service Unit	Base Budget 2022/2023	Movement	Budget 2023/2024
		£	£	£
	Income			
SHO01	Dwelling Rents Income	(12,673,660)	(882,780)	(13,556,440)
SHO04	Non Dwelling Rents Income	(488,360)	790	(487,570)
SHO07	Leaseholders' Charges For Services	(29,000)	0	(29,000)
SHO08	Contributions Towards Expenditure	(80,920)	(109,580)	(190,500)
SHO10	H.R.A. Investment Income	(25,000)	(375,000)	(400,000)
SHO11	Miscellaneous Income	(7,000)	1,000	(6,000)
			0	
	Services		0	
SHO13A	Repairs & Maintenance	3,825,733	364,597	4,190,330
SHO17A	Housing & Tenancy Services	1,730,707	359,253	2,089,960
	Accounting entries 'below the line'		0	
SHO29	Bad Debt Provision	150,000	150,000	300,000
SHO30	Share Of Corp And Dem	173,900	(12,730)	161,170
SHO32	H.R.A. Interest Payable	1,077,320	154,960	1,232,280
SHO34	H.R.A. Trf To/From Emr	1,311,720	135,910	1,447,630
SHO37	Capital Receipts Reserve Adjustment	(20,800)	0	(20,800)
SHO38	Major Repairs Allowance	2,465,000	70,000	2,535,000
SHO45	Renewable Energy Transactions	(105,000)	(55,000)	(160,000)
	Total	**(2,695,360)**	**(198,580)**	**(2,893,940)**

Subjective analysis

Code	Best Value Unit	Base Budget 2022/2023	Movement	Draft Budget 2023/2024
1000	Employees	3,323,740	382,630	3,706,370
2000	Premises	267,900	179,440	447,340
3000	Transport	240,040	23,730	263,770
4000	Cost Of Goods And Services	6,929,300	630,190	7,559,490
7000	Income	(13,456,340)	(1,414,570)	(14,870,910)
	Total	**(2,695,360)**	**(198,580)**	**(2,893,940)**

Code	Best Value Unit	Base Budget 2021/2022	Movement	Draft Budget 2022/2023
5000	Internal Recharges	1,714,560	169,250	1,883,810
6000	Capital Charges	980,800	29,330	1,010,130
	Total	**2,695,360**	**198,580**	**2,893,940**
	Grand Total	**0**	**0**	**0**

Notes:

SHO01	Income assumption is a 7% increase for 2023/24. The increase is not 7% in real terms as the assumed Void and RTBs impact this.
SHO08	Forecast increase in rechargeable works by Building Services
SHO10	Returns on invested cash balances forecast to rise based on increased interest rates
SHO13A	**Salary** inflation assumed at 5.5% for 2023/24, additionally the pay award for 2022/23 was above the original forecast of 2%. Net of increased DLO works (a reduction to the salary base) £454k has been built on to the base salary budget **Waste/disposal** charges anticipated to increase significantly next year therefore have provided an additonal £111k to fund this **Contractor/materials** spend-provided an additional £70k to the budget, this may need to be revised further **Vehicle** costs-fuel inflation and a slight increase in the fleet lease charge £30k additional requirement
SHO17A	**Salary** inflation assumed at 5.5% for 2023/24, additionally the pay award for 2022/23 was above the original forecast of 2% therefore £144k has been built into the 2023/24 budget **Utilities** spend-due to the uncertainty around energy costs an additional £54k has been provided for **Development Programme** provision has been made for decant costs that may arise from in-year projects, £100k, additionally an increased budget for council tax charges on Housing properties that are temporarily void or held as part of the build programme, £85k
SHO29	As per the MTFP an additional £150k has been budgeted for in terms of bad/doubtful debts this is a provision to take account of the current cost of living pressures and to ensure the HRA is in a position to cope with any potential impact
SHO32	Forecast interest costs on future build programme (see Capital MTFP for details)
SHO34	Contributions to reserves: £50k towards vehicle cost sinking fund, £854k to the Loan deficit reserve, £160k to the Renewables reserve, £149k to the Affordable Rent Surplus reserve Based on the current budget forecast, a contribution to the Housing Maintenance reserve of £234k would be allowable
SHO38	This expenditure is budgeted in line with the planned Works Programme for the next year
SHO45	Expenditure forecast has been refined for 2023/24 therefore an increased contribution to the Renewable Energy reserve will be possible

Appendix 5

HRA Rent Budget 2023/24

Description	Average rent (52 week basis) £	Average properties 2023/24	Annual rent total £	Void level	Annual rent total (less voids)
Social rent (in use)	89.81	2,861	**13,362,770**	2.45%	13,035,860
Affordable rent properties	129.43	90	**605,732**	4.44%	578,810
TOTAL		**2,951**	**13,968,502**		**13,614,670**
Rent written off					(70,000)
Write-offs recovered					1,000
HO700 budget					**13,545,670**
Affordable rent surplus					**149,130**

HRA: Proposed Fees and Charges 2023/24

		2022/23	Increase	Increase %	2023/24
Garage rents per week (52 week basis)		£10.71	£0.00	0.00%	£10.71
It should be noted that council tenants receive a discount of £1.85 per week on any garage rent					
Garage ground rents	(Annual charge)	£275	£0	0.00%	£275
				(charges shown exclude any applicable VAT)	
MDDC Formula Rent on average (52 weeks)		£83.99			**£89.88**

General Fund: (Community Alarms) Proposed Fees and Charges 2023/24

	2022/23	Increase	Increase %	2023/24
Private Clients (weekly charge)	£3.47	£0.17	4.90%	£3.64
Housing tenants (weekly charge) *(applies to existing tenants formerly under sheltered housing)*	£3.05	£0.15	4.92%	£3.20
Installation charge *(new clients)*	£30.00	£10.00	33.33%	£40.00
			(charges shown exclude any applicable VAT)	

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CABINET
7 FEBRUARY 2023

Capital Strategy 2023/24 & Capital Programme 2023/24 – 2027/28

Cabinet Member	Cllr Bob Deed, Leader and Cabinet Member for Finance
Responsible Officer	Andrew Jarrett, Deputy Chief Executive (S151)

Reason for Report: To agree the proposed 2023/24 Capital Strategy and to seek approval of the 2023/24 Capital Programme and note the indicative Capital Programmes for 2024/25 to 2027/28.

RECOMMENDATIONS: That Cabinet recommend to Full Council:

1. **That the proposed 2023/24 Capital Strategy is approved.**
2. **To approve in principal the current estimated amounts of Slippage of £6,201k from the 2022/23 Deliverable Capital Programme and £33,231k of 2022/23 Capital Programme expenditure profiled over the life of the MTFP. This will be finalised and formal approval sought as part of 2022/23 Outturn report.**
3. **The overall Capital Programme for projects commencing in 2023/24 of £98,375k be approved and the indicative Capital Programmes across the four remaining years of this Medium Term Financial Plan covering 2024/25 to 2027/28 be noted.**
4. **To approve the 2023/24 Deliverable Budget based on the forecast spend profile of £64,826, this will include elements of amounts detailed in recommendations 2 & 3 above and will form the budget to monitor against in 2023/24, subject to any changes referred to in recommendation 2 at Outturn.**

Relationship to the Corporate Plan: A strategic approach to Asset Management supports our Corporate Plan priorities of business retention, growth and development. Maximising our return from all associated treasury activities enables the Council to support current levels of spending in accordance with our Corporate Plan. The Capital Programme identifies the capital investment proposed across all strands of the Corporate Plan over the next five years.

Financial Implications: Good financial management and administration underpins the entire strategy. The Capital Strategy sets the boundaries in which the Council's capital and treasury management functions operate. The Capital Programme submitted for 2023/24 of £98,375k is fully funded. It does, however, include £46,170k of anticipated PWLB borrowing to fund various projects. Future capital receipts are now estimated at such a low level that the Council needs to continually evaluate ways of making additional provision to fund its long-term capital programme or reduce its property portfolio. This is especially relevant due to the uncertainty around the future of New Homes Bonus and its availability as an income stream going forward.

Legal Implications: Authorities are required by regulation to prepare a Capital Strategy for each financial year that needs to be approved by Full Council prior to the start of the financial year. Authorities must also have regard to the Prudential Code when carrying out their duties under Part 1 of the Local Government Act 2003.

Risk Assessment: The S151 Officer is responsible for the administration of the financial affairs of the Council. A co-ordinated approach to Asset Management and Financial Planning will help mitigate the risks associated with holding and utilising assets. Financial risk is mitigated by sound Treasury Management practices and defined limits. There is a risk of clawback of external funds if sums received are not spent in accordance with the terms on which they were given, or not within agreed timescales. New Capital Receipts for 2023/24 have been projected at a prudent level of £1,324k but there is a risk that if these do not materialise, the Authority may need to delay scheme start dates to the following financial year or identify an alternative funding mechanism to ensure full programme delivery. Other risks, such as cashflow management are managed through the operation of the Treasury Management Strategy.

Equality Impact Assessment: Each of the capital investments will be, where appropriate, subject to an impact assessment. This is done with a view to identifying possible actions to mitigate negative impacts. However, many of the proposals do not have a direct impact on the public and therefore do not require an Impact Assessment.

Impact on Climate Change: The Council has committed to a net zero carbon policy by 2030. Any major asset replacements/upgrades will consider the environmental impact in relation to carbon footprint.

The Capital Strategy 2023/24

1. Introduction

1.1. The Capital Strategy gives a high-level overview of how capital expenditure, capital financing and treasury management activity contribute to the provision of local public services, along with an overview of how associated risk is managed and the implications for future financial sustainability.

1.2. The strategy is designed to be a user-friendly document, which can direct stakeholders to the relevant documents relating to Treasury decisions, Asset Management and the Capital Programme for the coming years. It provides a link between these activities and reiterates the need for these to be co-ordinated to support the objectives of the Corporate Plan.

1.3. This strategy brings together the statutory requirements of the Chartered Institute of Public Finance Accountants (CIPFA) and the CIPFA Prudential Code for Capital Finance in Local Authorities. There is also a strong link with the Treasury Management Strategy that provides a framework for the borrowing and lending activity of the Council.

1.4. The Capital Strategy needs to be relevant in the current financial and economic climate and therefore needs a cautious and measured, yet flexible, approach that reflects the fact that:

- The impact on the Revenue Budget arising from the Capital Investment Programme must be affordable and sustainable, and be used to aid the bottom line;
- Capital resources available to the Council are limited, with little direct funding provided from Government and currently limited scope to raise income from Capital Receipts;
- Local Government's range of responsibility is constantly changing along with the role that it plays within the community, leading to an expectation that Society will assist in the delivery of services.

1.5. The Council is required, by regulation, to publish a number of indicators relating to the Capital Investment Programme, Treasury Management and the revenue implications of the programme, known as the Prudential Indicators. This report, along with the Treasury Management Strategy, publishes those indicators, based on the assumption that Cabinet / Council will approve the proposals contained within the Revenue Budget and Capital Programme.

2. Strategic Aims

2.1. The key objective of the Capital Strategy is to deliver a Capital Programme that:

- Ensures that the Council has assets that are fit for purpose and enable the delivery of the priorities set out in the Corporate Plan;
- Supports the Council's service specific plans and strategies;
- Facilitates income generation that aids the Revenue Budget;
- Is affordable, financially prudent and sustainable.

This should not however prevent the authority from:

- Reducing the on-going liability of holding assets by engaging with communities to develop alternative service delivery options including asset transfer;
- Fully utilising resource opportunities available for Capital Investment from outside sources where this does not create ongoing revenue liabilities or commitments that cannot be met.

3. Priorities

3.1. The Council's priority areas for investment can be summarised as:

3.1.1 **Asset replacement and/or enhancement**: The services delivered by the Council depend upon a variety of assets such as Plant, Property and Equipment (PPE) or vehicles. These need to be updated/upgraded on a

regular basis to ensure service delivery is maintained or enhanced. Asset maintenance is a revenue cost; the purchase or enhancement is a capital cost.

3.1.2 **Income Generation:** The Council is looking to identify investments that generate an income to replace the lost grant funding and ease the pressure on the Revenue Budget. Specific projects / investment opportunities will be brought forward for approval by the Cabinet as they are identified.

3.1.3 **Economic Regeneration:** The Council is committed to investing in the District's future through regeneration projects. Any schemes will need to be self-financing so that borrowing costs are covered by either Grant, investment income or capital receipts leaving no ongoing impact on the Council's Revenue Budget.

3.1.4 **Invest to save**: The Council is always looking for opportunities to deliver future efficiencies in service provision, known as 'Invest to Save'. This could include investment in technology or processes. The "green" investments are a good example of this, where investment in more efficient heating systems reduces the ongoing cost of energy consumption.

3.1.5 **Health and Wellbeing:** The Council's receives the Disabled Facilities scheme, which pays for essential housing adaptations to help disabled people stay in their own homes. In the current climate, it is also important that the Council plays a wider role in the health and wellbeing of its local community.

4. Capital Expenditure and Financing

4.1. Capital expenditure is where the Council spends money on assets, such as property or vehicles that will be used for more than one year. In Local Government, this includes spending on assets owned by other bodies, or loans and grants to other bodies enabling them to buy/build assets. The Council has limited discretion on what counts as capital expenditure, for example assets costing below £20k are deemed deminimis and are not capitalised but are instead charged to revenue in-year.

4.2. The detail of our approach to capitalisation is shown in our Accounting Policies in the Statement of Accounts that are produced each year. The Audit Committee have approved the latest draft Accounts subject to some minor outstanding queries. The Accounts for the year 2021/22 can be found here:

https://www.middevon.gov.uk/your-council/finance/annual-accounts/

4.3. Service managers bid annually to include projects in the Council's Capital Programme. Bids are collated by Finance who calculate the financing cost (which can be nil if the project is fully externally financed). The relevant PDGs consider the Capital Programme and the funding thereof and can make recommendations to Cabinet and are able to. The final Capital Programme is then presented to Cabinet in February who recommend it to Full Council for approval the same month each year.

4.4. In 2023/24, the Council is requesting approval of new capital expenditure of £98,375k for projects due to start in 2023/24 as well as estimated £39,432k of expenditure approved in prior years that has slipped in timescale or was planned for future years. These projects have an expenditure profile within 2023/24 of £64,826k which forms the Deliverable Budget for the year (as detailed in Appendices 1 & 2). It can be summarised as follows:

Table 1: Prudential Indicator: Estimates of Capital Expenditure

Capital Expenditure £000	**2021/22 Actual**	**2022/23 Estimate**	**2023/24 Estimate**	**2024/25 Estimate**	**2025/26 Estimate**
General Fund Projects	3,836	5,224	17,084	23,992	2,855
HRA Projects[1]	4,196	7,446	21,634	32,574	26,705
Loans to Subsidiary Company*	3,591	9,282	26,108	11,162	14,138
Total	**11,623**	**21,952**	**64,826**	**67,728**	**43,698**

*This figure is gross loans and excludes repayments and working capital loans (which are treated as Revenue)

4.5. A summary of the projects included in the 2023/24 Capital Programme are included in paragraphs 11.5 and 11.7 below.

4.6. All capital expenditure must be financed, whether from external sources (Government grants and other contributions), the Council's own resources (Revenue, Reserves and Capital Receipts) or Debt (Borrowing, Leasing and Private Finance Initiative).

4.7. Borrowing may be internal or external:

4.7.1. **Internal borrowing** uses the cash balances of the Council. Currently, these balances yield small returns on the investment market and is therefore cheaper than the interest rate payable on an external loan and so is maximised as far as possible. This has been a significant funding source in recent years.

4.7.2. **External borrowing** is via loans. Within Local Government, the main provider for long-term borrowing has traditionally been the Public Works Loan Board [PWLB]. However, the Council also uses other organisations, such as other Local Authorities for shorter-term cash flow requirements.

4.8. An increasing number of assets are leased, such as the new vehicles within our fleet. These are normally taken through Finance Leases where the asset remains owned by the finance company, but the Council rents them.

4.9. The planned financing of the expenditure in Table 1 above is as follows:

[1] The Housing Revenue Account (HRA) is a ring-fenced account, which ensures that council housing does not subsidise, or is itself subsidised, by other local services. HRA capital expenditure is therefore recorded separately.

Table 2: Capital financing

Financing of Capital Expenditure £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
Capital receipts	1,484	1,190	1,575	2,426	1,587
Capital grants	1,367	4,934	15,023	29,652	11,016
Capital reserves	0	0	0	0	0
Revenue Contributions	2,889	4,733	4,934	5,661	2,927
Borrowing	5,883	11,095	43,294	29,989	28,168
Total	**11,623**	**21,952**	**64,826**	**67,728**	**43,698**

4.10. Debt is only a temporary source of finance, as loans and leases must be repaid and is therefore replaced over time by other financing, usually from revenue, which is known as Minimum Revenue Provision (MRP). Alternatively, proceeds from selling capital assets (known as Capital Receipts) may be used to replace debt finance.

4.11. The Council's full Minimum Revenue Provision / loans fund repayments statement is shown in Appendix 1 of the Treasury Management Strategy Statement. This strategy is also included elsewhere on the meeting agenda. Planned MRP is as follows:

Table 3: Planned MRP payments

Planned MRP Payments £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
General Fund	671	689	703	898	970
Housing Revenue Account	962	976	1,010	1,196	1,309
Total	**1,633**	**1,665**	**1,713**	**2,094**	**2,279**

4.12. The Council's cumulative outstanding amount of debt finance is measured by the Capital Financing Requirement (CFR). This increases with new debt-financed capital expenditure and reduces with MRP / loan repayments and capital receipts used to replace debt. The CFR is expected to increase by £25,814k during 2023/24. This increase mainly consists of £10,114k relating to projects undertaken by 3 Rivers Developments Ltd, £4,315k relating to General Fund projects associated with the Cullompton Relief Road and strategic land acquisition and £9,884k relating to other HRA projects. Based on the above figures for expenditure and financing, the Council's estimated CFR is as follows:

Table 4: Prudential Indicator: Estimates of Capital Financing Requirement

Capital Financing Requirement £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
General Fund Services	10,162	9,877	14,223	19,411	18,856
Council Housing (HRA)	39,603	40,580	51,934	64,400	76,626
Loans to Subsidiary Company*	11,363	20,522	30,636	15,622	14,138
Total CFR	**61,128**	**70,979**	**96,793**	**99,433**	**109,620**

** Loans to Subsidiary Company investments relate to capital expenditure on housing developments and investment properties.*

This table is cumulative including existing and future borrowing. This is reduced as and when repayments are scheduled.

4.13. At present, the Council does not charge MRP on it loans to 3 Rivers. This is because it funds assets that are under construction – to which MRP does not apply. Once the assets are complete and MRP would normally become chargeable, they are sold by 3 Rivers and the loan is repaid. However, CIPFA previously consulted on this matter to enforce MRP to be applicable on loans to third parties, despite the regulations around "assets under construction". As yet, no formal outcome of the consultation had been announced, therefore if formally implemented, it is assumed this will apply from 2024/25 at the earliest.

5. Treasury Management

5.1. Treasury Management is concerned with keeping sufficient, but not excessive cash, available to meet the Council's spending needs, while managing the risks involved. To avoid excessive credit balances or overdrafts in the bank current account, surplus cash is invested until required while a shortage of cash will be met by borrowing. The Council is typically cash rich in the short-term as revenue income is received before it is spent, but cash poor in the long-term as capital expenditure is incurred before being financed. The revenue cash surpluses are offset against capital cash shortfalls to reduce overall borrowing.

5.2. Due to decisions taken in the past, at 31 March 2023 the Council is forecast to have £33,310k of borrowing (excluding finance leases) at an average interest rate of 2.91% and £20,000k treasury investments earning interest at an average rate of 3.63%.

5.3. **Borrowing strategy:** The Council's main objectives when borrowing are to achieve a low but certain cost of finance while retaining flexibility should plans change in the future. These objectives are often conflicting, and the Council therefore seeks to strike a balance between cheap short-term loans (up to 1 year, mainly through other Local Authorities - currently available at around 4%) and long-term fixed rate loans where the future cost is known but higher (currently around 4.5% from PWLB[2]).

[2] As at the time of drafting this report – 26 January 2023

5.4. Projected levels of the Council's total outstanding debt (which comprises borrowing and leases) are shown below, compared with the Capital Financing Requirement.

Table 5: Prudential Indicator: Gross Debt and the Capital Financing Requirement

Gross Debt and The Capital Financing Requirement	2021/22	2022/23	2023/24	2024/25	2025/26
£000	Actual	Estimate	Estimate	Estimate	Estimate
Debt (including Leases)	37,423	35,625	45,910	50,222	59,656
Capital Financing Requirement (CFR)	61,128	70,979	96,793	99,433	109,620

5.5. Statutory guidance is that Debt should remain below the Capital Financing Requirement, except in the short-term. As can be seen from table 5, the Council expects to comply with this in 2023/24 through to 2025/26.

5.6. **Affordable borrowing limit:** The Council is legally obliged to set an affordable borrowing limit (also termed the Authorised Limit for external debt) each year and to keep it under review. In line with statutory guidance, a lower "Operational Boundary" is also set as a warning level should debt approach the limit. Further details on borrowing are included with the Treasury Management Strategy, which is also included elsewhere on the meeting agenda.

Table 6: Prudential Indicators: Authorised Limit and Operational Boundary for external debt

Authorised Limit and Operational Boundary for External Debt	2022/23	2023/24	2024/25	2025/26
£000	Limit	Limit	Limit	Limit
Authorised Limit	81,000	107,000	110,000	119,000
Operational Boundary	72,000	98,000	101,000	110,000

5.7. **Investment strategy:** Treasury investments arise from receiving cash before it is paid out again. Investments made for service reasons or for pure financial gain are not generally considered to be part of Treasury Management.

5.8. The Council's policy on treasury investments is to prioritise Security and Liquidity over Yield (SLY Principle), to focus on minimising risk rather than maximising returns. Cash that is likely to be spent in the near term is invested securely, for example with the Government, other local authorities or selected high-quality banks, to minimise the risk of loss. Money that will be held for longer terms is invested more widely, including in bonds, shares and property, to balance the risk of loss against the risk of receiving returns below inflation. Both near-term and longer-term investments may be held in pooled funds, where an external fund manager makes decisions on which particular investments to buy and the Council may request its money back at short notice.

Further details on treasury investments is included within the Treasury Management Strategy, but can be summarised as follows[3]:

Table 7: Treasury Management investments

Treasury Management Investments £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate
Short-Term Investments	36,832	20,000	10,000
Long-Term Investments	5,000	5,000	5,000
Total	**41,832**	**25,000**	**15,000**

5.9. **Governance:** Decisions on Treasury Management investment and borrowing are made daily and are therefore delegated to the S151 (Deputy Chief Executive) and finance staff, who must act in line with the Treasury Management Strategy approved by Full Council annually. Reports on Treasury Management activity are presented to Cabinet three times per year.

6. Investments for Commercial and Economic Development Purposes

6.1. The Council makes investments to assist local public services, including making loans to other public sector bodies to promote economic development and provide an income stream. In light of the public service objective, the Council is willing to take more risk than with other treasury investments; however it is still a requirement for such investments to generate a profit after all costs, and after conducting all appropriate due diligence.

6.2. For example, during 2021/22, the Council facilitated a loan to fund a GP Surgery/NHS Hub in Crediton. Not only will this provide the Council with a return on its loan, it will also provide an important, modern NHS Hub in Crediton, replacing two existing GP Surgeries and offering further NHS services to the public.

6.3. The principal risk exposures include the timing of debt repayments; development market values; development costs and profitability of the subsidiary. These risks are managed by due diligence of business cases. Although there is no cap on the level of lending between the Authority and the subsidiary, advance approval of the level of lending is required from Cabinet before the start of each financial year, with reference to the company's Annual Business Plan.

6.4. With Central Government financial support for local public services declining and the tightening of regulations within the Prudential Code that prohibits the Council from investing primarily for financial return, the options for the Council to invest in Commercial and for Economic Development purposes is limited. However, it is able to lend to its subsidiary 3 Rivers Developments Ltd to

[3] As at the 31 March of the appropriate year

develop land and commercial income generating projects and charge interest on loans at a commercial rate.

6.5. The Council also has commercial activities in retail properties, which expose it to normal commercial risks. The over-arching ethos behind these activities is economic regeneration and retention of premises within the town centre rather than the income stream.

6.6. **Governance:** Decisions on commercial investments are made by the S151 (Deputy Chief Executive) in conjunction with the Leadership Team, in line with the criteria and limits approved by Council in the Treasury Management Strategy Statement (TMSS). Property and most other commercial investments are also capital expenditure and asset purchases will therefore also be approved alongside the capital programme.

7. Asset Management

7.1. In order to ensure the Council is allocating its resources in the most effective way, an Asset Management Plan (AMP) is maintained. It outlines where capital investment can assist the Council achieve its goals or where investment and use of resources plays a contributing role to shared priorities. Therefore the AMP helps set out the Council's approach to the Strategic Management of its land and building assets. It has been developed in consultation with the Senior Officers and Members of the Council who form the Capital Strategy Asset Management Group (CSAG). The AMP seeks to ensure that assets are used in the most effective and efficient way to support the delivery of the Corporate Plan.

7.2. The latest version of the AMP was considered and approved by Cabinet on 4 March 2021. It can be found here:

https://www.middevon.gov.uk/media/353719/supplement-revised-format-for-asset-management-and-capital-strategy-plan-04032021-v1.pdf

7.3. The AMP enables the Council to consider the best use of its assets by identifying those that require investment in planned maintenance; those that it should consider disposal of, those that could generate additional income from leasing out etc. These considerations will then inform the Capital Programme and funding decisions.

7.4. **Asset disposals:** When a capital asset is no longer needed, it may be sold so that the proceeds, known as Capital Receipts, can be spent on new assets or to repay debt. The Council expects to receive £1,324k of Capital Receipts in 2023/24 (net of Government Pooling); these are associated with the sale of Council Houses through the 'Right to Buy' scheme. Capital Receipts are summarised in the table below:

Table 8: Capital Receipts

Capital Receipts £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
Asset Sales	2,519	1,163	1,324	1,324	1,324

8. Liabilities

8.1. In addition to debt of £45,910k in 2023/24 detailed in Table 5 above, the Council is committed to making future payments to cover its pension fund deficit (valued at £69,572k in 2021/22).

8.2. **Governance:** The risk of liabilities crystallising and requiring payment is monitored by Finance and Legal. Any new material liabilities would be reported to Full Council for approval/notification as appropriate.

9. Revenue Budget Implications

9.1. Although capital expenditure is not charged directly to the Revenue Budget, interest payable on loans and Minimum Revenue Provision (MRP) are charged to revenue, offset by any investment income receivable. The net annual charge is known as Capital Financing Costs; this is compared to the net revenue stream i.e. the amount funded from Council Tax, Business Rates and general Government Grants.

Table 9: Prudential Indicator: Proportion of financing costs to net revenue stream

Proportion of Financing Costs to Net Revenue Stream %	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
General Fund	0.95%	-3.55%	-4.89%	-3.14%	-3.45%
Housing Revenue Account	15.06%	12.56%	12.59%	15.63%	17.16%

*Further details on the revenue implications of capital expenditure are found in the Revenue Budget report.

9.2. **Sustainability:** Due to the very long-term nature of capital expenditure and financing, the Revenue Budget implications of capital expenditure incurred in the next few years will extend for up to 50 years into the future. The S151 (Deputy Chief Executive) is satisfied that the Council has adequate means of financing and repaying any required borrowing and therefore the proposed Capital Programme is prudent, affordable and sustainable. .

10. Knowledge and Skills

10.1. The Council employs professionally qualified and experienced staff in senior positions with responsibility for making capital expenditure, borrowing and investment decisions. For example, the S151 (Deputy Chief Executive) is a qualified accountant with 18 years' of experience and the Corporate Manager for Property, Leisure and Climate Change is experienced across the full range of Property responsibilities. In addition, the Council employs ten finance staff who hold one or more of the following qualifications CIPFA, ACA, CIMA, ACCA and AAT.

10.2. To support those staff, use is made of external advisers and consultants that are specialists in their field. The Council currently employs Link Group as treasury management advisers and Ichabod Industries as technical advisers on accountancy matters. This approach is more cost effective than employing such staff directly, and ensures that the Council has access to knowledge and skills commensurate with its risk appetite.

The Capital Programme 2023/24 and Capital Medium Term Financial Plan (CMTFP)

11. The Capital Programme 2023/24

11.1. The 2023/24 programme includes significant new investment into Council House building projects and future years indicative programmes include 'spend to save' projects improving the energy efficiency of our property estate that will only be undertaken if the Council is successful in securing sufficient external funding and is accompanied by a robust business case that demonstrates an acceptable payback.

11.2. There is also projected slippage detailed on the appendices from 2022/23, relating to the 2022/23 Deliverable Programme currently estimated to be £6,201k that will roll into the 2023/24 Capital Programme. In addition there is £33,231k within the 2022/23 Capital Programme with spend profiled over future years. Both these are detailed in recommendation 2 and are estimates at this stage. The approval of final figures will be sought as part of the Outturn Report to either add to the 2023/24 Capital Programme or relevant year of the CMTFP.

11.3. Full project approval is now requested at project inception, for 2023/24 this amounts to £98,375k. This is then profiled by spending managers as their best estimate of when spending will take place to form the Deliverable Budget of £64,826k. This gives a better indication of what is deliverable each year and will better inform our Treasury Management activities.

11.4. **Appendix 1** shows the proposed 2023/24 Capital Programme, which totals £98,375k. The Deliverable Budget includes the proportion of expected spend within the 2023/24 Capital Programme and the estimated slippage and profiled

spend of the 2022/23 Capital Budget forecast to be spent in 2023/24. This is the value that will be monitored against in-year.

11.5. **Appendix 2** shows the detailed schemes in the General Fund and the HRA that reflect the spending aspirations summarised in **Appendix 1** and the table below:

Table 10: 2023/24 Capital Programme (based on project inception)

General Fund Projects	**Expenditure 2023/24 £000's**
Leisure Schemes	622
Leisure - Climate Change/Net Zero	396
Phoenix House	133
Cullompton Relief Road	18,030
Private Sector Housing	525
ICT Projects	460
Other General Fund Development Projects	12,196
General Fund Subtotals	**32,362**
HRA Projects	**Expenditure 2023/24 £000's**
Existing Housing Stock	2,990
Housing Schemes (1:4:1 Projects)	5,066
Housing Development Schemes (HE)	42,200
Other HRA Projects	15,757
HRA Subtotals	**66,013**
Grand Totals	**98,375**

11.6. **Appendices 1 and 2** also show the updated indicative Capital Programme for the remaining years within this CMTFP, refreshed with up to date information on expenditure and funding. These projections are likely to alter, as we get closer to those years as greater information becomes available. Therefore, only the Capital Programme for 2023/24 is proposed for approval; the indicative future years are only for information and noting.

11.7. General Fund Investment.

11.7.1. Within the investment in our Leisure Service, there are a number of projects ranging from investment in new equipment to maintain a competitive service offering; together with improvement to disabled toilet facilities that is reliant on external grant. A spend to save project is also included to improve self-service access for the customer and reduce future staffing requirements. There is also a project at Culm Valley Sports Centre that will help the Council deliver its commitment to climate change and reducing carbon emissions. It is anticipated that external funding will assist with the funding of this bid, with a contribution also from MDDC.

11.7.2. There is an assumption included in respect of the Cullompton Relief Road. Currently, funding has been secured to cover the initial projected estimated cost of this project. However, costs have dramatically increased since that funding was received. Therefore, the Council submitted a bid to the Levelling Up Fund to cover the forecast difference for the Cullompton project. This bid was rejected on 19/01/23 and currently other forms of funding are actively being sought to enable this project to be delivered.

11.7.3. Further investment within our ICT assets is required to enable the Council to update its infrastructure, including upgrading servers and audio-visual equipment within Phoenix House. In addition, the planned refresh of staff laptops and associated devices will continue. This will be completed in a phased roll out to ensure that the cost is spread over a number of years.

11.7.4. As in previous years, the Disabled Facilities Grant funding will be used to improve homes across the district that will enable residents with health problems to remain in their homes, therefore avoiding or delaying the need for them to enter the health care system.

11.7.5. The Capital Programme for 2023/24 includes further 3 Rivers Projects in line with their draft Business Plan. This is in addition to the slippage to projects approved in prior years. Cabinet will give further consideration to the Business Plan after this report has been published.

11.8. Housing Revenue Account Investment

11.8.1. A number of projects to enhance the quality of our existing housing stock (a programme of £2,990k) are undertaken each year through the planned maintenance scheme. In 2023/24, provision has been made to invest in garage refurbishments, replace roofing, windows and doors in properties where required, along with general modernisation works, including updating heating systems.

11.8.2. Significant new investment of £47,266k is planned to deliver new housing within the district predominantly through highly efficient (zero carbon) modular buildings. To fund the proposed Housing Development Schemes, a prudent assumption has been included for the utilisation of 1-4-1 receipts or for additional grant funding to be made available from Homes England and One Public Estate Funding; although a substantial element of the cost remains with the Council. In total, £21,624k is assumed to be secured from 1-4-1 receipts or external grant funding, leaving £23,718k to be funded by borrowing and the remaining £1,924k from existing reserves. The investment in Other HRA projects includes the development of Post Hill in Tiverton.

11.9. A significant amount of work was undertaken when producing the Council's Capital Medium Term Financial Plan (CMTFP) during the year, which helped to scope the size and funding of the 2023/24 Capital Programme. A number of subsequent meetings were held with Corporate Managers, which focused on the essential projects (in terms of end of life asset replacement or health and safety) and involved reprioritising or rescheduling expenditure to future years

12. Funding the Capital Programme

12.1. The 2023/24 Capital Programme is fully funded by a combination of:

Table 11: 2023/24 Capital Programme Funding (based on project inception)

General Fund Projects - Funding Sources	Funding 2023/24 £000's
Funding from Revenue EMR's	465
Funding from Government Grants	18,973
Usable Capital Receipts	229
Borrowing	12,695
General Fund Subtotals	**32,362**
HRA Projects - Funding Sources	**Funding 2023/24 £000's**
S106 (Revenue) Contributions	1,000
MRA Reserve	2,435
Funding from Revenue EMR's	475
Funding from Government Grants	26,005
Usable Capital Receipts	1,004
UCR 1:4:1 Replacement Homes	1,619
Borrowing	33,475
HRA Subtotals	**66,013**
Grand Totals	**98,375**

12.2. The projected level of usable capital receipts (this includes unringfenced useable capital receipts and capital receipts ringfenced for 1:4:1 replacement homes) available for 2023/24 is £1,324k. All other previously generated capital receipts have been used to balance the subsequent years of the MTFP. This only enables a small number of Council funded schemes to be incorporated into the Capital Programme. The figures assumed for receipts from the sale of assets have been calculated prudently and therefore if any additional receipts are generated, the Council could reduce the need for external borrowing, or return to some of the projects which could not be funded in the first instance and consider their inclusion. Any decision to increase the Capital Programme (subject to constraints within the financial rules) would require Full Council approval and be linked to the Corporate Plan priorities.

12.3. The Government Pooling arrangements mean a proportion of the Council House sale proceeds are pooled to the Government; a proportion is retained in a ring-fenced reserve for replacement house building (linked to the HRA self-financing arrangements that have been in place since 01/04/12). The balance is retained by the Authority as a useable capital receipt, which can be used to support our Capital Programme.

12.4. The programme of £2,990k identified to maintain our existing council house stock will be funded mainly from the Major Repairs Reserve (MMR). The balance of available monies will remain in the MMR in order to deal with future additional spend that has been identified by the stock condition survey.

12.5. The Council continues to set aside sinking funds for future asset maintenance, replacement of Leisure plant and equipment and for future replacement of ICT systems and equipment. This ensures the Revenue base budget is more robust. However, given the pressure on its finances, the Council will need to assess whether this remains affordable, or whether alternative options should be explored.

13. Council Borrowing

13.1. Prudential borrowing has been estimated for 2023/24 at £46,170k, this will be used to fund General Fund schemes amounting to £12,695k and HRA schemes amounting to £33,475k. All schemes will be subject to a rigorous business case assessment; their cost and timing of spend will determine the amount of actual prudential borrowing required. The use of internal borrowing will be applied wherever possible.

13.2. New Borrowing is also envisaged across the remainder of this MTFP i.e. 2024-25 to 2027-28 amounting to £56,217k (excluding those projects being rolled forward from the already approved 2022/23 Capital Programme); of this £47,645k will be used to deliver General Fund projects and £8,572k to deliver HRA projects.

13.3. Borrowing will be supported or supplemented with short and medium term Treasury Management decisions based on prevailing and future interest rates and will only be considered in exceptional circumstances. This is in relation to the projects detailed above or for spend to save projects following a robust cost/benefit analysis exercise that would be able to demonstrate both an acceptable ’payback period’ and that savings would be generated in excess of the annual revenue cost of servicing the debt.

14. Conclusion

14.1. As previously mentioned, the Capital Programme for the next five years is limited due to the scarce availability of funding (with the exception of borrowing). It is, therefore, imperative that capital funds are only spent on those projects that enable the Council to deliver its Corporate Plan objectives, reduce operational cost, or generate a financial return.

14.2. The Capital Programme encompasses a broad range of expenditure including operational assets, which will be used for more than one year; assets owned by other bodies, or loans and grants to other bodies enabling them to buy/build assets.

14.3. Funding for this programme includes significant borrowing. The Council's borrowing will be affordable, sustainable and prudent and consideration will be given to the management of interest rate risk and refinancing risk. The source from which the borrowing is taken, and the type of borrowing should allow the Council transparency and control over its debt.

14.4. The Treasury Management Strategy Statement details the approach that the Council will take in ensuring it has sufficient cash available to meet the Council's spending needs. Reports on Treasury Management policies, practices and activities, including, as a minimum, an annual strategy and plan in advance of the year, a mid-year review, and an annual report after its close, will be taken to Full Council via the Cabinet.

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Circulation of the Report	Leadership Team, Cabinet
Background Papers:	November and January Cabinet and PDG's (MTFP, Budget Draft and Budget Update reports) and Capital Bid Submissions

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Appendix 1

Capital Expenditure Summary		To be rolled f/wd from 22/23		Total Project Costs for Approval							Spend Profile						
Area	Sub Area	Forecast Slippage from 22/23 to be C/fwd to 2023/24 £000's	Forecast Budget from 22/23 to be spent over life of MTFP £000's	2023/24 £000's	2024/25 £000's	2025/26 £000's	2026/27 £000's	2027/28 £000's	Total £000's	Grand Total £000's	2023/24 £000's	2024/25 £000's	2025/26 £000's	2026/27 £000's	2027/28 £000's	Beyond 2028/29 £000's	Total £000's
Leisure	Exe Valley Leisure Centre	-	-	83	250	-	-	-	**333**	**333**	83	250	-	-	-	-	**333**
Leisure	Lords Meadow Leisure Centre	40	80	243	-	-	200	-	**443**	**563**	363	-	-	200	-	-	**563**
Leisure	Culm Valley Sports Centre	-	404	96	360	-	-	-	**456**	**860**	96	764	-	-	-	-	**860**
Leisure	Leisure - Other	-	-	200	-	-	-	-	**200**	**200**	200	-	-	-	-	-	**200**
Leisure	Leisure - Climate Change/Net Zero	-	-	396	-	260	400	-	**1,056**	**1,056**	396	-	260	400	-	-	**1,056**
Other MDDC Buildings	Other - Climate Change/Net Zero	10	1,200	-	815	-	240	-	**1,055**	**2,265**	10	2,015	-	240	-	-	**2,265**
Other MDDC Buildings	Phoenix House	20	30	133	-	150	-	-	**283**	**333**	183	-	150	-	-	-	**333**
Other MDDC Buildings	MDDC Depots	-	1,250	-	3,500	-	-	-	**3,500**	**4,750**	1,000	3,750	-	-	-	-	**4,750**
Other MDDC Buildings	MDDC Shops/Industrial Units	150	537	-	-	-	-	-	**-**	**687**	257	430	-	-	-	-	**687**
Other MDDC Buildings	Public Conveniences	-	-	-	285	-	-	-	**285**	**285**	-	100	185	-	-	-	**285**
HIF	HIF Schemes	3,608	8,008	18,030	-	-	-	-	**18,030**	**29,646**	13,105	15,041	1,500	-	-	-	**29,646**
Private Sector Housing	Private Sector Housing	-	-	525	550	575	600	625	**2,875**	**2,875**	525	550	575	600	625	-	**2,875**
Other	General Car Parks	20	60	-	-	-	-	-	**-**	**80**	80	-	-	-	-	-	**80**
Other	Parks & Play Areas	35	-	-	-	-	-	-	**-**	**35**	35	-	-	-	-	-	**35**
Other	ICT Projects	184	-	460	150	185	160	540	**1,495**	**1,679**	644	150	185	160	540	-	**1,679**
Other	Other Projects	40	179	-	830	-	-	-	**830**	**1,049**	107	942	-	-	-	-	**1,049**
Other GF Development Projects	Other General Fund Development Projects	1,116	12,796	12,196	11,162	14,138	9,304	7,953	**54,753**	**68,665**	26,108	11,162	14,138	9,304	7,953	-	**68,665**
General Fund Subtotals		**5,223**	**24,544**	**32,362**	**17,902**	**15,308**	**10,904**	**9,118**	**85,594**	**115,361**	**43,192**	**35,154**	**16,993**	**10,904**	**9,118**	**-**	**115,361**
HRA Projects	Existing Housing Stock	175	-	2,990	3,035	2,860	2,885	2,770	**14,540**	**14,715**	3,165	3,035	2,860	2,885	2,770	-	**14,715**
HRA Projects	Housing Schemes (1:4:1 Projects)	35	271	5,066	1,700	2,500	400	-	**9,666**	**9,972**	2,429	3,113	1,780	2,290	360	-	**9,972**
HRA Projects	Housing Development Schemes (HE)	393	4,073	42,200	4,400	10,700	-	-	**57,300**	**61,766**	13,226	17,720	13,110	17,710	-	-	**61,766**
HRA Projects	Other HRA Projects	375	4,343	15,757	-	-	-	-	**15,757**	**20,475**	2,814	8,706	8,955	-	-	-	**20,475**
HRA Subtotals		**978**	**8,687**	**66,013**	**9,135**	**16,060**	**3,285**	**2,770**	**97,263**	**106,928**	**21,634**	**32,574**	**26,705**	**22,885**	**3,130**	**-**	**106,928**
Grand Totals		**6,201**	**33,231**	**98,375**	**27,037**	**31,368**	**14,189**	**11,888**	**182,857**	**222,289**	**64,826**	**67,728**	**43,698**	**33,789**	**12,248**	**-**	**222,289**

Capital Funding Summary		To be rolled f/wd from 22/23		Total Funding							Funding Profile						
Funding Type	Funding Description	Forecast Slippage from 22/23 to be C/fwd to 2023/24 £000's	Forecast Budget from 22/23 to be spent over life of MTFP £000's	2023/24 £000's	2024/25 £000's	2025/26 £000's	2026/27 £000's	2027/28 £000's	Total £000's	Grand Total £000's	2023/24 £000's	2024/25 £000's	2025/26 £000's	2026/27 £000's	2027/28 £000's	Beyond 2028/29 £000's	Total £000's
Revenue	RCCO - From Revenue EMR's - Other	-	67	-	-	-	-	-	-	**67**	67	-	-	-	-	-	**67**
Revenue	RCCO - From Revenue EMR's - Econ Development	10	60	-	-	-	-	-	-	**70**	10	60	-	-	-	-	**70**
Revenue	RCCO - From Revenue EMR's - ICT	110	-	435	-	25	-	30	**490**	**600**	545	-	25	-	30	-	**600**
Revenue	RCCO - From Revenue EMR's - Capital	40	50	30	30	-	-	-	**60**	**150**	72	78	-	-	-	-	**150**
Revenue	RCCO - From Revenue EMR's - Waste Infrastructure EMR	-	250	-	1,000	-	-	-	**1,000**	**1,250**	-	1,250	-	-	-	-	**1,250**
Revenue	New Homes Bonus	211	782	-	-	-	-	-	-	**993**	338	655	-	-	-	-	**993**
Capital Grants	Capital Grants Unapplied - DCC	20	-	-	215	-	-	-	**215**	**235**	20	215	-	-	-	-	**235**
Capital Grants	Govt Grant (DCLG passported from DCC)	-	-	525	550	575	600	625	**2,875**	**2,875**	525	550	575	600	625	-	**2,875**
Capital Grants	DCC Funding - HIF Project	-	153	1,347	-	-	-	-	**1,347**	**1,500**	153	-	1,347	-	-	-	**1,500**
Capital Grants	Salix Round 3b Funding	-	-	265	-	-	-	-	**265**	**265**	265	-	-	-	-	-	**265**
Capital Grants	HIF Funding	1,712	-	5,144	-	-	-	-	**5,144**	**6,856**	3,201	3,655	-	-	-	-	**6,856**
Capital Grants	Govt Grants - Levelling - up Funding	1,896	4,540	11,539	-	-	-	-	**11,539**	**17,975**	6,436	11,386	153	-	-	-	**17,975**
Capital Grants	Salix Funding or Equivalent	-	-	-	815	260	640	-	**1,715**	**1,715**	-	815	260	640	-	-	**1,715**
Capital Grants	DLUHC - Changing Places Fund bid	-	-	153	-	-	-	-	**153**	**153**	153	-	-	-	-	-	**153**
Capital Receipts	Usable Capital Receipts	108	83	229	150	-	72	-	**451**	**642**	407	163	-	72	-	-	**642**
Borrowing	Borrowing 3 Yrs	1,116	12,796	12,221	11,462	14,298	9,464	8,463	**55,908**	**69,820**	26,133	11,462	14,298	9,464	8,463	-	**69,820**
Borrowing	Borrowing 5 Yrs	-	-	103	-	150	-	-	**253**	**253**	103	-	150	-	-	-	**253**
Borrowing	Borrowing 10 Yrs	-	3,315	371	895	-	128	-	**1,394**	**4,709**	3,686	895	-	128	-	-	**4,709**
Borrowing	Borrowing 25 Yrs	-	1,448	-	-	-	-	-	-	**1,448**	78	1,370	-	-	-	-	**1,448**
Borrowing	Borrowing 50 Yrs	-	1,000	-	2,785	-	-	-	**2,785**	**3,785**	1,000	2,600	185	-	-	-	**3,785**
General Fund Subtotals		**5,223**	**24,544**	**32,362**	**17,902**	**15,308**	**10,904**	**9,118**	**85,594**	**115,361**	**43,192**	**35,154**	**16,993**	**10,904**	**9,118**	**-**	**115,361**
Revenue	S106 (Revenue) Contributions	-	-	1,000	-	-	-	-	**1,000**	**1,000**	200	800	-	-	-	-	**1,000**
Revenue	MRA Reserve	175	-	2,435	2,475	2,295	2,315	2,195	**11,715**	**11,890**	2,610	2,475	2,295	2,315	2,195	-	**11,890**
Revenue	RCCO - From HRA Revenue EMR's - Other	25	-	-	-	-	-	-	-	**25**	25	-	-	-	-	-	**25**
Revenue	RCCO - From HRA Revenue EMR's - Renewable Energy	-	-	250	250	250	250	250	**1,250**	**1,250**	250	250	250	250	250	-	**1,250**
Revenue	RCCO - From HRA Revenue EMR's - Afford Rents Surplus	148	-	225	225	225	224	-	**899**	**1,047**	373	93	357	24	200	-	**1,047**
Revenue	RCCO - From HRA Revenue EMR's - HMF	384	60	-	-	-	-	-	-	**444**	444	-	-	-	-	-	**444**
Capital Grants	Capital Grants Unapplied - S106 Afford Housing	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	**-**
Capital Grants	Government Grants - Homes England Funding	52	1,818	22,720	1,080	4,815	-	-	**28,615**	**30,485**	4,030	9,986	8,501	7,968	-	-	**30,485**
Capital Receipts	Usable Capital Receipts	43	-	1,004	1,009	1,015	320	325	**3,673**	**3,716**	550	1,024	891	926	325	-	**3,716**
Capital Receipts	UCR 1:4:1 Replacement Homes	14	156	1,619	680	1,000	160	-	**3,459**	**3,629**	618	1,239	696	916	160	-	**3,629**
Capital Grants	One Public Estate Funding	-	-	3,285	180	1,140	-	-	**4,605**	**4,605**	240	3,045	180	1,140	-	-	**4,605**
Borrowing	Borrowing 25 Yrs	50	-	-	-	-	-	-	-	**50**	50	-	-	-	-	-	**50**
Borrowing	Borrowing 50 Yrs	87	6,653	33,475	3,236	5,320	16	-	**42,047**	**48,787**	12,244	13,662	13,535	9,346	-	-	**48,787**
HRA Subtotals		**978**	**8,687**	**66,013**	**9,135**	**16,060**	**3,285**	**2,770**	**97,263**	**106,928**	**21,634**	**32,574**	**26,705**	**22,885**	**3,130**	**-**	**106,928**
Grand Totals		**6,201**	**33,231**	**98,375**	**27,037**	**31,368**	**14,189**	**11,888**	**182,857**	**222,289**	**64,826**	**67,728**	**43,698**	**33,789**	**12,248**	**-**	**222,289**

Appendix 2

Area	Sub Area	Project Title	To be rolled f/wd from 22/23		Total Project Costs for Approval							Spend Profile						
			Forecast Slippage from 22/23 to be C/fwd to 2023/24 £000's	Forecast Budget from 22/23 to be spent over life of MTFP £000's	2023/24 £000's	2024/25 £000's	2025/26 £000's	2026/27 £000's	2027/28 £000's	Total £000's	Grand Total £000's	2023/24 £000's	2024/25 £000's	2025/26 £000's	2026/27 £000's	2027/28 £000's	Beyond 2028/29 £000's	Total £000's
General Fund																		
Leisure	Lords Meadow Leisure Centre	Reception infrastructure	40	80	40	-	-	-	-	**40**	**160**	160	-	-	-	-	-	**160**
Leisure	Culm Valley Sports Centre	CVSC - Remodelling of Ground Floor	-	174	-	-	-	-	-	**-**	**174**	-	174	-	-	-	-	**174**
Leisure	Culm Valley Sports Centre	CVSC - Sports Hall Ceiling asset review	-	230	-	-	-	-	-	**-**	**230**	-	230	-	-	-	-	**230**
Other MDDC Buildings	Other - Climate Change/Net Zero	Hydromills Electricity generation Project - Tiverton Weir	10	1,200	-	-	-	-	-	**-**	**1,210**	10	1,200	-	-	-	-	**1,210**
Other MDDC Buildings	Phoenix House	Etarmis - Security Swipe - (linked to security project)	20	30	30	-	-	-	-	**30**	**80**	80	-	-	-	-	-	**80**
Other MDDC Buildings	MDDC Depots	Land acquisition for operational needs	-	1,000	-	-	-	-	-	**-**	**1,000**	1,000	-	-	-	-	-	**1,000**
Other MDDC Buildings	MDDC Depots	Depot Design & Build - Waste & Recycling	-	250	-	-	-	-	-	**-**	**250**	-	250	-	-	-	-	**250**
Other MDDC Buildings	MDDC Shops/Industrial Units	Market Walk Unit 17 - remodelling options	60	430	-	-	-	-	-	**-**	**490**	60	430	-	-	-	-	**490**
Other MDDC Buildings	MDDC Shops/Industrial Units	36 & 38 Fore Street including Flat above structure & cosmetic works	90	107	-	-	-	-	-	**-**	**197**	197	-	-	-	-	-	**197**
HIF	HIF Schemes	CA719 Cullompton Town Centre Relief Road (HIF)	3,608	8,008	18,030	-	-	-	-	**18,030**	**29,646**	13,105	15,041	1,500	-	-	-	**29,646**
Other	General Car Parks	West Exe South - Remodelling - additional parking spaces	20	60	-	-	-	-	-	**-**	**80**	80	-	-	-	-	-	**80**
Other	Parks & Play Areas	Open Space Infrastructure (incl Play Areas)	35	-	-	-	-	-	-	**-**	**35**	35	-	-	-	-	-	**35**
Other	ICT Projects	Server farm expansion/upgrades	74	-	-	-	-	-	-	**-**	**74**	74	-	-	-	-	-	**74**
Other	ICT Projects	Secure WIFI Replacement	60	-	-	-	-	-	-	**-**	**60**	60	-	-	-	-	-	**60**
Other	ICT Projects	Network Switch/Firewall Refresh (all sites except P/House)	50	-	-	-	-	-	-	**-**	**50**	50	-	-	-	-	-	**50**
Other	Other Projects	Fire Dampeners - Corporate sites	20	-	-	-	-	-	-	**-**	**20**	20	-	-	-	-	-	**20**
Other	Other Projects	Land drainage flood defence schemes - St Marys Hemyock	-	50	-	-	-	-	-	**-**	**50**	-	50	-	-	-	-	**50**
Other	Other Projects	Land drainage flood defence schemes - Ashleigh Park Bampton	20	67	-	-	-	-	-	**-**	**87**	87	-	-	-	-	-	**87**
Other	Other Projects	Cemetery Lodge - Structural solution for damp	-	62	-	-	-	-	-	**-**	**62**	-	62	-	-	-	-	**62**
Other GF Development P	Other General Fund Development Projects	3 Rivers Schemes - Funding envelope	1,116	12,796	12,196	11,162	14,138	9,304	7,953	**54,753**	**68,665**	26,108	11,162	14,138	9,304	7,953	-	**68,665**
Leisure	Exe Valley Leisure Centre	Spin bikes	-	-	32	-	-	-	-	**32**	**32**	32	-	-	-	-	-	**32**
Leisure	Exe Valley Leisure Centre	Leisure - Improved Disabled Toilet facilities	-	-	51	-	-	-	-	**51**	**51**	51	-	-	-	-	-	**51**
Leisure	Lords Meadow Leisure Centre	Fitness Studio renewal of equipment	-	-	125	-	-	-	-	**125**	**125**	125	-	-	-	-	-	**125**
Leisure	Lords Meadow Leisure Centre	Spin bikes including environment improvements	-	-	32	-	-	-	-	**32**	**32**	32	-	-	-	-	-	**32**
Leisure	Lords Meadow Leisure Centre	Leisure - Improved Disabled Toilet facilities	-	-	46	-	-	-	-	**46**	**46**	46	-	-	-	-	-	**46**
Leisure	Culm Valley Sports Centre	Spin Bikes	-	-	40	-	-	-	-	**40**	**40**	40	-	-	-	-	-	**40**
Leisure	Culm Valley Sports Centre	Leisure - Improved Disabled Toilet facilities	-	-	56	-	-	-	-	**56**	**56**	56	-	-	-	-	-	**56**
Leisure	Leisure - Other	All leisure sites replacement management/site access system (Hardware Element)	-	-	200	-	-	-	-	**200**	**200**	200	-	-	-	-	-	**200**
Leisure	Leisure - Climate Change/Net Zero	CVSC -Phase 3B Salix funding energy saving	-	-	396	-	-	-	-	**396**	**396**	396	-	-	-	-	-	**396**
Other MDDC Buildings	Phoenix House	Building Mgmt System for Heating Control	-	-	103	-	-	-	-	**103**	**103**	103	-	-	-	-	-	**103**
Private Sector Housing	Private Sector Housing	DFG and other private sector grants	-	-	525	550	575	600	625	**2,875**	**2,875**	525	550	575	600	625	-	**2,875**
Other	ICT Projects	Server hardware/software Citrix Replacement	-	-	50	-	-	-	60	**110**	**110**	50	-	-	-	60	-	**110**
Other	ICT Projects	VM/Storage Area Network	-	-	120	-	-	-	140	**260**	**260**	120	-	-	-	140	-	**260**
Other	ICT Projects	UPS Replacements	-	-	20	-	25	-	30	**75**	**75**	20	-	25	-	30	-	**75**
Other	ICT Projects	Laptop/Desktop Refresh	-	-	150	150	160	160	170	**790**	**790**	150	150	160	160	170	-	**790**
Other	ICT Projects	Audio/Video replacement for Phoenix House	-	-	120	-	-	-	140	**260**	**260**	120	-	-	-	140	-	**260**
Leisure	Exe Valley Leisure Centre	ATP replacement (50% share with DCC)	-	-	-	220	-	-	-	**220**	**220**	-	220	-	-	-	-	**220**
Leisure	Exe Valley Leisure Centre	CHP -Replacement future energy saving project	-	-	-	30	-	-	-	**30**	**30**	-	30	-	-	-	-	**30**
Leisure	Culm Valley Sports Centre	ATP replacement (50% share with DCC)	-	-	-	210	-	-	-	**210**	**210**	-	210	-	-	-	-	**210**
Leisure	Culm Valley Sports Centre	Fitness Studio renewal of equipment	-	-	-	150	-	-	-	**150**	**150**	-	150	-	-	-	-	**150**
Other MDDC Buildings	Other - Climate Change/Net Zero	All Fleet - Vehicle live monitoring for CO2 emissions	-	-	-	115	-	-	-	**115**	**115**	-	115	-	-	-	-	**115**
Other MDDC Buildings	Other - Climate Change/Net Zero	Phoenix House - Air Source Heat pumps & ducting	-	-	-	450	-	-	-	**450**	**450**	-	450	-	-	-	-	**450**
Other MDDC Buildings	Other - Climate Change/Net Zero	MSCP -Solar carport and additional security	-	-	-	170	-	-	-	**170**	**170**	-	170	-	-	-	-	**170**
Other MDDC Buildings	Other - Climate Change/Net Zero	MSCP Additional electric car charging points	-	-	-	80	-	-	-	**80**	**80**	-	80	-	-	-	-	**80**
Other MDDC Buildings	MDDC Depots	Depot Build - Waste & Recycling	-	-	-	3,500	-	-	-	**3,500**	**3,500**	-	3,500	-	-	-	-	**3,500**
Other MDDC Buildings	Public Conveniences	Phoenix Lane Toilets - new construction in fresh position - funding options to be pursued	-	-	-	125	-	-	-	**125**	**125**	-	50	75	-	-	-	**125**
Other MDDC Buildings	Public Conveniences	Westexe Rec Toilets - Replacement	-	-	-	160	-	-	-	**160**	**160**	-	50	110	-	-	-	**160**
Other	Other Projects	Tiverton Market Paving - Permanent Solution	-	-	-	200	-	-	-	**200**	**200**	-	200	-	-	-	-	**200**
Other	Other Projects	Baler	-	-	-	480	-	-	-	**480**	**480**	-	480	-	-	-	-	**480**
Other	Other Projects	PDA's for cabs	-	-	-	150	-	-	-	**150**	**150**	-	150	-	-	-	-	**150**
Leisure	Leisure - Climate Change/Net Zero	EVLC - Building Fabric - Insulation improvements	-	-	-	-	260	-	-	**260**	**260**	-	-	260	-	-	-	**260**
Other MDDC Buildings	Phoenix House	Cooling options Air Handing Unit	-	-	-	-	150	-	-	**150**	**150**	-	-	150	-	-	-	**150**
Leisure	Lords Meadow Leisure Centre	ATP replacement (no dual use)	-	-	-	-	-	200	-	**200**	**200**	-	-	-	200	-	-	**200**
Leisure	Leisure - Climate Change/Net Zero	LMLC -Building Fabric -Insulation improvements	-	-	-	-	-	200	-	**200**	**200**	-	-	-	200	-	-	**200**
Leisure	Leisure - Climate Change/Net Zero	CVSC-Building Fabric -Insulation improvements	-	-	-	-	-	200	-	**200**	**200**	-	-	-	200	-	-	**200**
Other MDDC Buildings	Other - Climate Change/Net Zero	MDDC commercial property building fabric improvements	-	-	-	-	-	240	-	**240**	**240**	-	-	-	240	-	-	**240**
General Fund Subtotals			**5,223**	**24,544**	**32,362**	**17,902**	**15,308**	**10,904**	**9,118**	**85,594**	**115,361**	**43,192**	**35,154**	**16,993**	**10,904**	**9,118**	**-**	**115,361**

Area	Sub Area	Project Title	To be rolled f/wd from 22/23		Total Project Costs for Approval							Spend Profile						
			Forecast Slippage from 22/23 to be C/fwd to 2023/24 £000's	Forecast Budget from 22/23 to be spent over life of MTFP £000's	2023/24 £000's	2024/25 £000's	2025/26 £000's	2026/27 £000's	2027/28 £000's	Total £000's	Grand Total £000's	2023/24 £000's	2024/25 £000's	2025/26 £000's	2026/27 £000's	2027/28 £000's	Beyond 2028/29 £000's	Total £000's
HRA			-	-														
HRA Projects	Existing Housing Stock	Decent Homes	175	-	860	905	730	755	780	**4,030**	**4,205**	1,035	905	730	755	780	-	**4,205**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 4	-	16	189	-	-	-	-	**189**	**205**	205	-	-	-	-	-	**205**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 1	35	-	10	-	-	-	-	**10**	**45**	45	-	-	-	-	-	**45**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 3	-	105	1,387	-	-	-	-	**1,387**	**1,492**	1,492	-	-	-	-	-	**1,492**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 29	-	150	950	-	-	-	-	**950**	**1,100**	110	990	-	-	-	-	**1,100**
HRA Projects	Housing Development Schemes (HE)	Project 15	16	515	4,210	-	-	-	-	**4,210**	**4,741**	4,741	-	-	-	-	-	**4,741**
HRA Projects	Housing Development Schemes (HE)	Project 18	4	851	200	-	-	-	-	**200**	**1,055**	1,055	-	-	-	-	-	**1,055**
HRA Projects	Housing Development Schemes (HE)	Project 10	10	118	1,505	-	-	-	-	**1,505**	**1,633**	1,633	-	-	-	-	-	**1,633**
HRA Projects	Housing Development Schemes (HE)	Project 14	9	751	200	-	-	-	-	**200**	**960**	960	-	-	-	-	-	**960**
HRA Projects	Housing Development Schemes (HE)	Project 9	6	122	1,105	-	-	-	-	**1,105**	**1,233**	1,233	-	-	-	-	-	**1,233**
HRA Projects	Housing Development Schemes (HE)	Project 11	10	1,416	400	-	-	-	-	**400**	**1,826**	1,826	-	-	-	-	-	**1,826**
HRA Projects	Housing Development Schemes (HE)	Project 8	60	300	2,240	-	-	-	-	**2,240**	**2,600**	60	2,540	-	-	-	-	**2,600**
HRA Projects	Housing Development Schemes (HE)	Modular Housing - Shapland Place, Tiverton	278	-	-	-	-	-	-	**-**	**278**	278	-	-	-	-	-	**278**
HRA Projects	Other HRA Projects	Post Hill, Tiverton	-	4,243	15,757	-	-	-	-	**15,757**	**20,000**	2,339	8,706	8,955	-	-	-	**20,000**
HRA Projects	Other HRA Projects	Garages Block - Redevelopment	300	-	-	-	-	-	-	**-**	**300**	300	-	-	-	-	-	**300**
HRA Projects	Other HRA Projects	Old Road Depot remodelling options - forecast expenditure to maintain operations	50	-	-	-	-	-	-	**-**	**50**	50	-	-	-	-	-	**50**
HRA Projects	Other HRA Projects	Queensway (Beech Road) Tiverton (3 units)	-	100	-	-	-	-	-	**-**	**100**	100	-	-	-	-	-	**100**
HRA Projects	Other HRA Projects	Sewerage Treatment Works - Washfield	25	-	-	-	-	-	-	**-**	**25**	25	-	-	-	-	-	**25**
HRA Projects	Existing Housing Stock	Garage Mods	-	-	150	150	150	150	-	**600**	**600**	150	150	150	150	-	-	**600**
HRA Projects	Existing Housing Stock	Roofing	-	-	600	600	600	600	600	**3,000**	**3,000**	600	600	600	600	600	-	**3,000**
HRA Projects	Existing Housing Stock	Fire Safety	-	-	50	40	30	20	20	**160**	**160**	50	40	30	20	20	-	**160**
HRA Projects	Existing Housing Stock	Window/Doors	-	-	400	400	400	400	400	**2,000**	**2,000**	400	400	400	400	400	-	**2,000**
HRA Projects	Existing Housing Stock	Heating	-	-	375	380	385	390	395	**1,925**	**1,925**	375	380	385	390	395	-	**1,925**
HRA Projects	Existing Housing Stock	Renewables	-	-	250	250	250	250	250	**1,250**	**1,250**	250	250	250	250	250	-	**1,250**
HRA Projects	Existing Housing Stock	Adaptations	-	-	305	310	315	320	325	**1,575**	**1,575**	305	310	315	320	325	-	**1,575**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 7	-	-	220	-	-	-	-	**220**	**220**	220	-	-	-	-	-	**220**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 41	-	-	140	-	-	-	-	**140**	**140**	140	-	-	-	-	-	**140**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 28	-	-	1,100	-	-	-	-	**1,100**	**1,100**	110	990	-	-	-	-	**1,100**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 51	-	-	400	-	-	-	-	**400**	**400**	40	360	-	-	-	-	**400**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 52	-	-	220	-	-	-	-	**220**	**220**	22	198	-	-	-	-	**220**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 53	-	-	230	-	-	-	-	**230**	**230**	23	207	-	-	-	-	**230**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 5	-	-	220	-	-	-	-	**220**	**220**	22	198	-	-	-	-	**220**
HRA Projects	Housing Development Schemes (HE)	Project 25	-	-	2,600	-	-	-	-	**2,600**	**2,600**	260	2,340	-	-	-	-	**2,600**
HRA Projects	Housing Development Schemes (HE)	Project 37	-	-	1,800	-	-	-	-	**1,800**	**1,800**	180	1,620	-	-	-	-	**1,800**
HRA Projects	Housing Development Schemes (HE)	Project 33	-	-	1,300	-	-	-	-	**1,300**	**1,300**	130	1,170	-	-	-	-	**1,300**
HRA Projects	Housing Development Schemes (HE)	Project 36	-	-	1,700	-	-	-	-	**1,700**	**1,700**	170	1,530	-	-	-	-	**1,700**
HRA Projects	Housing Development Schemes (HE)	Project 20	-	-	24,940	-	-	-	-	**24,940**	**24,940**	700	8,080	8,080	8,080	-	-	**24,940**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 27	-	-	-	1,700	-	-	-	**1,700**	**1,700**	-	170	1,530	-	-	-	**1,700**
HRA Projects	Housing Development Schemes (HE)	Project 26	-	-	-	1,200	-	-	-	**1,200**	**1,200**	-	120	1,080	-	-	-	**1,200**
HRA Projects	Housing Development Schemes (HE)	Project 22	-	-	-	2,800	-	-	-	**2,800**	**2,800**	-	280	2,520	-	-	-	**2,800**
HRA Projects	Housing Development Schemes (HE)	Project 54	-	-	-	200	-	-	-	**200**	**200**	-	20	180	-	-	-	**200**
HRA Projects	Housing Development Schemes (HE)	Project 55	-	-	-	200	-	-	-	**200**	**200**	-	20	180	-	-	-	**200**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 16	-	-	-	-	1,000	-	-	**1,000**	**1,000**	-	-	100	900	-	-	**1,000**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 56	-	-	-	-	200	-	-	**200**	**200**	-	-	20	180	-	-	**200**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 57	-	-	-	-	200	-	-	**200**	**200**	-	-	20	180	-	-	**200**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 30	-	-	-	-	1,100	-	-	**1,100**	**1,100**	-	-	110	990	-	-	**1,100**
HRA Projects	Housing Development Schemes (HE)	Project 23	-	-	-	-	4,100	-	-	**4,100**	**4,100**	-	-	410	3,690	-	-	**4,100**
HRA Projects	Housing Development Schemes (HE)	Project 24	-	-	-	-	1,100	-	-	**1,100**	**1,100**	-	-	110	990	-	-	**1,100**
HRA Projects	Housing Development Schemes (HE)	Project 12	-	-	-	-	1,600	-	-	**1,600**	**1,600**	-	-	160	1,440	-	-	**1,600**
HRA Projects	Housing Development Schemes (HE)	Project 35	-	-	-	-	1,700	-	-	**1,700**	**1,700**	-	-	170	1,530	-	-	**1,700**
HRA Projects	Housing Development Schemes (HE)	Project 31	-	-	-	-	1,100	-	-	**1,100**	**1,100**	-	-	110	990	-	-	**1,100**
HRA Projects	Housing Development Schemes (HE)	Project 13	-	-	-	-	1,100	-	-	**1,100**	**1,100**	-	-	110	990	-	-	**1,100**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 58	-	-	-	-	-	200	-	**200**	**200**	-	-	-	20	180	-	**200**
HRA Projects	Housing Schemes (1:4:1 Projects)	Project 59	-	-	-	-	-	200	-	**200**	**200**	-	-	-	20	180	-	**200**
HRA Subtotals			**978**	**8,687**	**66,013**	**9,135**	**16,060**	**3,285**	**2,770**	**97,263**	**106,928**	**21,634**	**32,574**	**26,705**	**22,885**	**3,130**	**-**	**106,928**
Grand Totals			**6,201**	**33,231**	**98,375**	**27,037**	**31,368**	**14,189**	**11,888**	**182,857**	**222,289**	**64,826**	**67,728**	**43,698**	**33,789**	**12,248**	**-**	**222,289**

Cabinet
07 February 2023

Treasury Management Strategy Statement
Minimum Revenue Provision Policy Statement and Annual Investment Strategy 2023/24

Cabinet Member: Cllr Bob Deed, Leader and Cabinet Member for Finance
Responsible Officer: Andrew Jarrett, S151 (Deputy Chief Executive)

Reason for Report: To agree the proposed Treasury Management Strategy and Annual Investment Strategy for 2023/24.

RECOMMENDATION(S):

That Cabinet recommends to Full Council that the proposed Treasury Management Strategy and Annual Investment Strategy for 2023/24, including the prudential indicators for the next 3 years and the Minimum Revenue Provision Statement (Appendix 1), be approved.

Relationship to the Corporate Plan: Maximising our return from all associated treasury activities enables the Council to support current levels of spending in accordance with our Corporate Plan.

Financial Implications: Good financial management and administration underpins the entire strategy.

Legal Implications: Authorities are required by regulation to have regard to the Prudential Code when carrying out their duties under Part 1 of the Local Government Act 2003.

Risk Assessment: The S151 Officer is responsible for the administration of the financial affairs of the Council. Implementing this strategy and the CIPFA Code of Practice on Treasury Management helps manage the risk associated with the Council's treasury management activity.

Equality Impact Assessment: There are no Equalities Impact implications relating to the content of this report.

Impact on Climate Change: There are no Climate Change implications relating to the content of this report.

1.0 Background

1.1 The Council is required to operate a balanced budget, which broadly means that the cash raised during the year will meet cash expenditure. Part of the treasury management operation is to ensure that this cash flow is adequately planned, with cash being available when it is needed. Surplus monies are invested in low risk counterparties or instruments commensurate with the Council's low risk appetite, providing adequate liquidity initially before considering investment return.

1.2 The second main function of the treasury management service is the funding of the Council's capital plans. These capital plans provide a guide to the borrowing need of the Council, essentially the longer-term cash flow planning, to ensure that the Council can meet its capital spending obligations. This management of longer-term cash may involve arranging long or short-term loans, or using longer-term cash flow surpluses. On occasion, when it is prudent and economic, any debt previously drawn may be restructured to meet Council risk or cost objectives.

1.3 The contribution the treasury management function makes to the authority is critical, as the balance of debt and investment operations ensure liquidity or the ability to meet spending commitments as they fall due, either on day-to-day revenue or for larger capital projects. The treasury operations will see a balance of the interest costs of debt and the investment income arising from cash deposits affecting the available budget. Since cash balances generally result from reserves and balances, it is paramount to ensure adequate security of the sums invested, as a loss of principal will in effect result in a loss to the General Fund Balance.

1.4 Whilst any commercial initiatives or loans to third parties will impact on the treasury function, these activities are generally classed as non-treasury activities (arising usually from capital expenditure), and are separate from the day to day treasury management activities.

1.5 CIPFA defines treasury management as:

"The management of the local authority's borrowing, investments and cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks."

1.6 In the recent Devon Audit Partnership audit (December 2022), a Substantial Assurance opinion was given, meaning the Council has "a sound system of governance, risk management and control exists, with internal controls operating effectively and being consistently applied to support the achievement of objectives in the area audited".

2.0 Reporting requirements

2.1 Treasury Strategy

2.1.1 The CIPFA 2021 Prudential and Treasury Management Codes require all local authorities to prepare a capital strategy report which will provide the following:

- a high-level long term overview of how capital expenditure, capital financing and treasury management activity contribute to the provision of services;
- an overview of how the associated risk is managed; and
- the implications for future financial sustainability.

2.1.2 The aim of this treasury strategy is to ensure that all elected members of the Council fully understand the overall long-term policy objectives and resulting treasury strategy requirements, governance procedures and risk appetite.

2.2 Treasury Management reporting

2.2.1 The Council is currently required to receive and approve, as a minimum, three main treasury reports each year, which incorporate a variety of policies, estimates and actuals.

a. Prudential and treasury indicators and treasury strategy (this report) - The first, and most important report is forward looking and covers:

- the capital plans (including prudential indicators);
- a minimum revenue provision (MRP) policy (how residual capital expenditure is charged to revenue over time);
- the treasury management strategy (how the investments and borrowings are to be organised), including treasury indicators; and
- an investment strategy (the parameters on how investments are to be managed).

b. A mid-year treasury management report – This is primarily a progress report and will update members on the capital position, amending prudential indicators as necessary, and whether any policies require revision. In addition, members will receive quarterly treasury updates as part of the financial monitoring.

c. An annual treasury report – This is a backward looking review document and provides details of a selection of actual prudential and treasury indicators and actual treasury operations compared to the estimates within the strategy.

2.2.2 **Scrutiny.** The above reports are required to be adequately scrutinised before being recommended to the Council. The Cabinet undertakes this role.

2.3 Treasury Management Strategy for 2023/24

2.3.1 The strategy for 2023/24 covers two main areas:

2.3.2 **Capital issues**

- The capital expenditure plans and the associated prudential indicators; and
- The minimum revenue provision (MRP) policy.

2.3.3 **Treasury management issues**

- The current treasury position;
- Treasury indicators which limit the treasury risk and activities of the Council;
- Prospects for interest rates;
- The borrowing strategy;
- Policy on borrowing in advance of need;
- Debt rescheduling;
- The investment strategy;
- Creditworthiness policy; and
- The policy on the use of external service providers.

2.3.4 These elements cover the requirements of the Local Government Act 2003, the Chartered Institute of Public Finance and Accountancy (CIPFA) Prudential Code, Department for Levelling Up, Housing and Communities (DLUHC – this was formerly the Ministry of Housing, Communities and Local Government [MHCLG]) MRP Guidance, the CIPFA Treasury Management Code and DLUHC Investment Guidance.

2.4 Training

2.4.1 The CIPFA Treasury Management Code requires the responsible officer to ensure that members with responsibility for treasury management receive adequate training in treasury management. This especially applies to members responsible for Scrutiny.

2.4.2 Furthermore, the Code states that all organisations are expected to have a formal and comprehensive knowledge and skills or training policy for the effective acquisition and retention of treasury management knowledge and skills for those responsible for management, delivery, governance and decision making.

2.4.3 The scale and nature of this will depend on the size and complexity of the organisation's treasury management needs. Organisations should consider how to assess whether treasury management staff and council members have the required knowledge and skills to undertake their roles and whether they have been able to maintain those skills and keep them up to date.

2.4.4 As a minimum, authorities should carry out the following to monitor and review knowledge and skills:

- Record attendance at training and ensure action is taken where poor attendance is identified;
- Prepare tailored learning plans for treasury management officers and board/council members;
- Require treasury management officers and board/council members to undertake self-assessment against the required competencies (as set out in the schedule that may be adopted by the organisation); and
- Have regular communication with officers and board/council members, encouraging them to highlight training needs on an ongoing basis.

2.4.5 In further support of the revised training requirements, CIPFA's Better Governance Forum and Treasury Management Network have produced a 'self-assessment by members responsible for the scrutiny of treasury management', which is available from the CIPFA website to download.

2.4.6 Training requirements of members will be reviewed in 2023/24 following the district election in May and training will be arranged as required.

2.4.7 The training needs of treasury management officers are periodically reviewed.

2.4.8 A formal record of the training received by officers central to the Treasury function will be maintained by the S151 (Deputy Chief Executive). Similarly, a formal record of the treasury management/capital finance training received by members will be maintained by the Member Services Manager.

2.5 Treasury management consultants

2.5.1 The Council uses Link Group as its external treasury management advisors. The Council recognises that responsibility for treasury management decisions remains with the organisation at all times and will ensure that undue reliance is not placed upon the services of our external service providers.

2.5.2 It also recognises that there is value in employing external providers of treasury management services in order to acquire access to specialist skills and resources. The Council will ensure that the terms of their appointment and the methods by which their value will be assessed are properly agreed and documented, and subjected to regular review.

3.0 The Capital Prudential Indicators 2023/24 – 2025/26

3.1.1 The Council's capital expenditure plans are the key driver of treasury management activity. The output of the capital expenditure plans is reflected in the Prudential Indicators, which are designed to assist members' overview and confirm capital expenditure plans.

3.2 Capital expenditure and financing

3.2.1 This Prudential Indicator is a summary of the Council's capital expenditure plans, both those agreed previously, and those forming part of this budget cycle. The below table shows planned expenditure in the 2023/24 Capital Programme of £64,826k, (£58,625k new projects plus the projected slippage from prior years £6,201k).

Prudential Indicator: Estimates of Capital Expenditure

Capital Expenditure £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
General Fund	3,836	5,224	17,084	23,992	2,855
HRA	4,196	7,446	21,634	32,574	26,705
Loans to Subsidiary Company *	3,591	9,282	26,108	11,162	14,138
Total	**11,623**	**21,952**	**64,826**	**67,728**	**43,698**

** Loans to Subsidiary Company are non-treasury investments and so not covered in detail in this report. Refer to the Capital Strategy for further information.*

For Members clarity, the NHS Hub loan is treated as General Fund.

3.2.2 Other long-term liabilities – The above financing need excludes other long-term liabilities, such as PFI and leasing arrangements that already include borrowing instruments.

3.2.3 The table below summarises the above capital expenditure plans and how these plans are being financed by capital or revenue resources. Any shortfall of resources results in a funding borrowing need.

Financing of capital expenditure £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
Capital Receipts	1,484	1,190	1,575	2,426	1,587
Capital Grants	1,367	4,934	15,023	29,652	11,016
Capital Reserves	0	0	0	0	0
Revenue	2,889	4,733	4,934	5,661	2,927
Net financing need for the year	**5,883**	**11,095**	**43,294**	**29,989**	**28,168**

3.2.4 The net financing need for Loans to Subsidiary Company included in the above table against expenditure is shown below:

Loans to Subsidiary Company £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
Capital Expenditure	3,591	9,282	26,108	11,162	14,138
Financing Costs	0	0	0	0	0
Net financing need for the year	**3,591**	**9,282**	**26,108**	**11,162**	**14,138**
Percentage of total net financing need %	61.0%	83.7%	60.3%	37.2%	50.2%

The financing costs are zero as, to date, all lending has been funded through internal borrowing. This is forecast to be possible in the years 2023/24 – 2025/26.

3.3 The Council's borrowing need (the Capital Financing Requirement)

3.3.1 The second Prudential Indicator is the Council's Capital Financing Requirement (CFR). The CFR is simply the total historic outstanding capital expenditure which has not yet been paid for from either revenue or capital resources. It is essentially a measure of the Council's indebtedness and so its underlying borrowing need. Any capital expenditure above, which has not immediately been paid for through a revenue or capital resource, will increase the CFR.

3.3.2 The CFR does not increase indefinitely, as the Minimum Revenue Provision (MRP) is a statutory annual revenue charge which broadly reduces the indebtedness in line with each asset's life, and so charges the economic consumption of capital assets as they are used.

3.3.3 The CFR includes any other long-term liabilities (e.g. PFI schemes, finance leases). Whilst these increase the CFR, and therefore the Council's borrowing requirement, these types of scheme include a borrowing facility by the PFI, PPP lease provider and so the Council is not required to separately borrow for these schemes. The Council currently has £2.314m of such schemes within the CFR.

3.3.4 **The Council is asked to approve the CFR projections below:**

Prudential Indicator: Estimates of Capital Financing Requirement

Capital Financing Requirement £000	**2021/22 Actual**	**2022/23 Estimate**	**2023/24 Estimate**	**2024/25 Estimate**	**2025/26 Estimate**
CFR – General Fund	10,162	9,877	14,223	19,411	18,856
CFR – Housing	39,603	40,580	51,934	64,400	76,626
CFR – Loans to Subsidiary Company	11,363	20,522	30,636	15,622	14,138
Total CFR	**61,128**	**70,979**	**96,793**	**99,433**	**109,620**
Movement in CFR*	**3,282**	**9,851**	**25,814**	**2,640**	**10,187**

**The movement in CFR will not directly match the Net Financing Need (see 3.2.3) due to the annual MRP charge reducing the balance in line with each asset's expected life. The CFR is cumulative, so increases and decreases for scheduled loans to, and repayments from, 3 Rivers Developments Ltd.*

3.4 Liability Benchmark

3.4.1 A third and new Prudential Indicator for 2023/24 is the Liability Benchmark (LB). The Authority is required to estimate and measure the LB for the forthcoming financial year and the following two financial years, as a minimum.

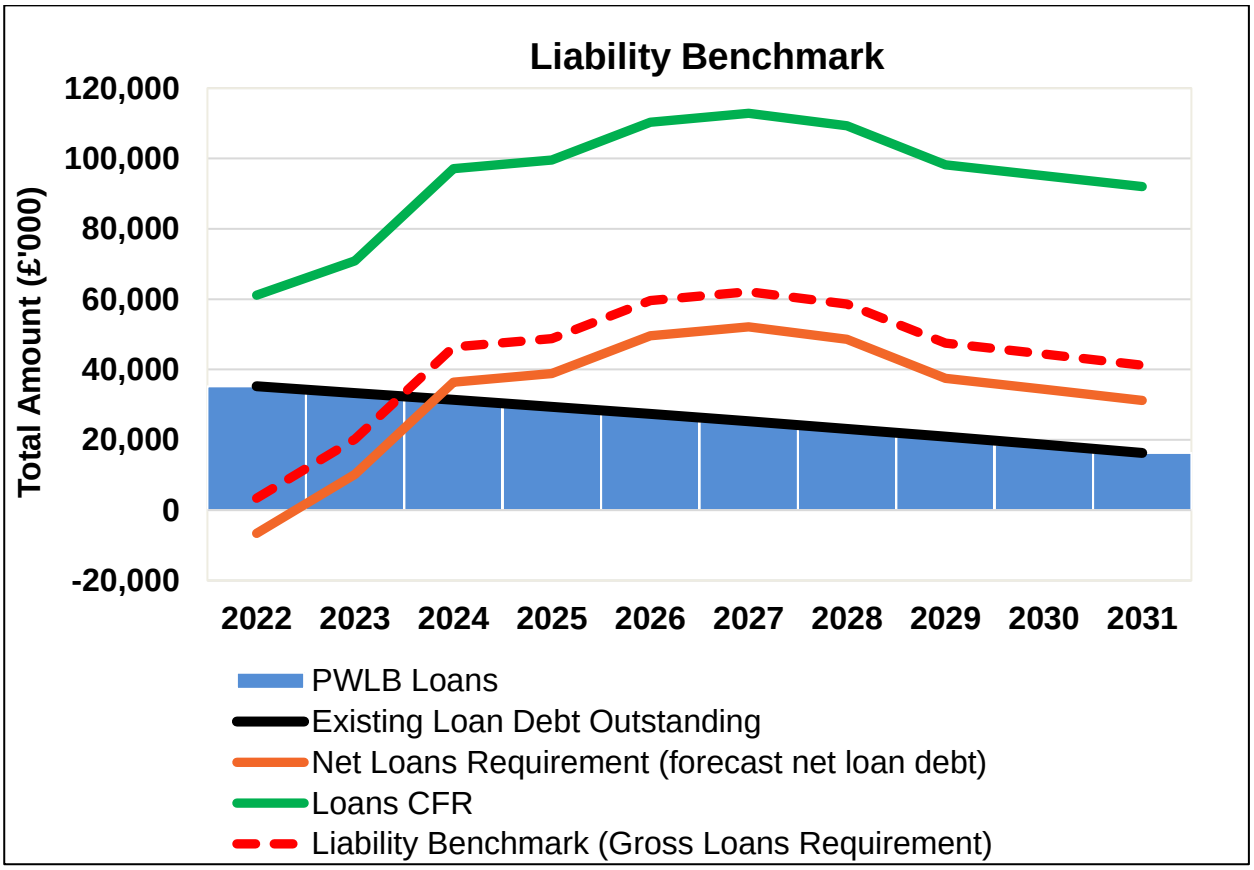
3.4.2 There are four compenents to the LB:

1. **Existing loan debt outstanding**: the Council's existing loans that are still outstanding in future years.
2. **Loans CFR**: this is calculated in accordance with the loans CFR definition in the Prudential Code and projected into the future based on approved prudential borrowing and planned MRP.

3 **Net loans requirement**: this will show the Council's gross loan debt less treasury management investments at the last financial year-end, projected into the future and based on its approved prudential borrowing, planned MRP and any other major cash flows forecast.

4 **Liability benchmark** (or gross loans requirement): this equals net loans requirement plus a short-term liquidity allowance.

3.4.3 The Council's Liability Benchmark for years ending March 2022 to March 2031 is shown below:



3.4.4 The chart can be interpreted as follows:

- The liability benchmark (red dashed line) is the Council's need for external borrowing.
- Where the liability benchmark exceeds the existing loans (black line) then there is a need for new borrowing. Where the liability benchmark is below the existing loans then the Council is holding surplus cash that will be put into short-term investments.
- The area between the liability benchmark and net loans requirement (orange line) shows the cash required to manage the Council's day-to-day cash flow need, which is estimated to be £10m.
- The area between the loans CFR (green line) and liability benchmark shows the potential for internal borrowing, which currently stands at circa £50m.

4.0 Borrowing

4.1 The capital expenditure plans set out in Section 3 provide details of the service activity of the Council. The treasury management function ensures that the Council's cash is organised in accordance with the relevant professional codes, so that sufficient cash is available to meet this service activity and the Council's capital strategy. This will involve both the organisation of the cash flow and, where capital plans require, the organisation of appropriate borrowing facilities. This strategy covers the relevant treasury / prudential indicators, the current and projected debt positions and the annual investment strategy.

4.2 Current portfolio position

4.2.1 The overall treasury management portfolio as at 31 March 2022 and the position as at 31 December 2022 are shown below for both borrowing and investments.

TREASURY PORTFOLIO				
	Actual	Actual	Current	Current
	31/03/2022	31/03/2022	31/12/2022	31/12/2022
Treasury Investments	**£000**	**%**	**£000**	**%**
Banks	17,832	43%	17,479	45%
Building Societies	4,000	10%	0	0%
Local Authorities	15,000	36%	11,000	28%
DMADF (H.M.Treasury)	0	0%	5,500	14%
Other Public Bodies	0	0%	0	0%
Total Managed In-House	**36,832**	**88%**	**33,979**	**87%**
Property Funds	5,000	12%	5,000	13%
Total Managed Externally	**5,000**	**12%**	**5,000**	**13%**
Total Treasury Investments	**41,832**	**100%**	**38,979**	**100%**
Treasury External Borrowing				
Local Authorities	0	0%	0	0%
PWLB	35,234	100%	34,279	100%
Total External Borrowing	**35,234**	**100%**	**34,279**	**100%**
Net Treasury Investments / (Borrowing)	**6,598**		**4,700**	

4.2.2 The Council's forward projections for borrowing are summarised below. The table shows the actual external debt (the treasury management operations) against the underlying capital borrowing need (the Capital Financing Requirement – CFR), highlighting any over or under borrowing.

External Debt £000	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
Debt at 1 April	37,104	35,234	33,310	43,873	47,898
Expected Change in Debt	-1,870	-1,924	10,563	4,025	9,967
Other Long-Term Liabilities (OLTL)	2,436	2,190	2,314	2,037	2,323
Expected Change in OLTL	-247	125	-277	287	-532
Actual Gross Debt at 31 March	**37,423**	**35,625**	**45,910**	**50,222**	**59,656**
Capital Financing Requirement	**61,128**	**70,979**	**96,793**	**99,433**	**109,620**
Under / (Over) Borrowing	**23,705**	**35,354**	**50,883**	**49,211**	**49,964**

4.2.3 Within the range of Prudential Indicators there are a number of key indicators to ensure that the Council operates its activities within well-defined limits. One of these is that the Council needs to ensure that its gross debt does not, except in the short term, exceed the total of the CFR in the preceding year plus the estimates of any additional CFR for 2023/24 and the following two financial years. This allows some flexibility for limited early borrowing for future years, but ensures that borrowing is not undertaken for revenue or speculative purposes.

4.2.4 The S151 (Deputy Chief Executive) reports that the Council complied with this Prudential Indicator in the current year and does not envisage difficulties for the future. This view takes into account current commitments, existing plans, and the proposals in this budget report.

4.3 Treasury Indicators: limits to borrowing activity

4.3.1 **The operational boundary.** This is the limit which external debt is not normally expected to exceed. This is the CFR, split between debt and other long term liabilities (leases) and rounded up to the nearest million.

Prudential Indicator: Operational Boundary

Operational boundary £000	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
Debt	69,000	95,000	98,000	108,000
Other long term liabilities	3,000	3,000	3,000	2,000
Total	**72,000**	**98,000**	**101,000**	**110,000**

4.3.2 **The Authorised Limit for external debt.** This is a key prudential indicator and represents a control on the maximum level of borrowing. This represents a legal limit beyond which external debt is prohibited, and this limit needs to be set or revised by the Full Council. It reflects the level of external debt, which, while not desired, could be afforded in the short term, but is not sustainable in the longer term.

4.3.3 This is the statutory limit determined under section 3 (1) of the Local Government Act 2003. The Government retains an option to control either the total of all councils' plans, or those of a specific council, although this power has not yet been exercised. The authorised limit is set at the CFR plus £5m for debt and £4m for other long term

liabilities, to cover exceptional circumstances and borrowing ahead of need to secure interest rates.

4.3.4 **The Council is asked to approve the following authorised limit:**

Prudential Indicator: Authorised Limit

Authorised Limit £000	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
Debt	74,000	100,000	103,000	113,000
Other long term liabilities	7,000	7,000	7,000	6,000
Total	**81,000**	**107,000**	**110,000**	**119,000**

4.4 Prospects for interest rates

4.4.1 The Council has appointed Link Group as its treasury advisor and part of their service is to assist the Council to formulate a view on future interest rates. The following table gives their view as at 19 December 2022.

Interest Rates	Dec 22	Mar 23	Jun 23	Sep 23	Dec 23	Mar 24	Jun 24	Sep 24	Dec 24	Mar 25	Jun 25	Sep 25	Dec 25
Bank Rate View	3.50%	4.25%	4.50%	4.50%	4.50%	4.00%	3.75%	3.50%	3.25%	3.00%	2.75%	2.50%	2.50%
5yr PWLB Rate	4.20%	4.20%	4.20%	4.10%	4.00%	3.90%	3.80%	3.60%	3.50%	3.40%	3.30%	3.20%	3.10%
10yr PWLB Rate	4.30%	4.40%	4.40%	4.30%	4.10%	4.00%	3.90%	3.80%	3.60%	3.50%	3.40%	3.30%	3.30%
25yr PWLB Rate	4.60%	4.60%	4.60%	4.50%	4.40%	4.20%	4.10%	4.00%	3.90%	3.70%	3.60%	3.50%	3.50%
50yr PWLB Rate	4.30%	4.30%	4.30%	4.20%	4.10%	3.90%	3.80%	3.70%	3.60%	3.50%	3.30%	3.20%	3.20%

4.4.2 Over the last 12 months, the Bank of England has made a series of increases to Bank Rate in an attempt to tame inflation. CPI looks to have peaked at 11.1% in Q4 2022 and currently sits at 10.5%, yet further increases to Bank Rate are expected in the coming months to help bring this down further. The current Bank Rate is 3.5% and most forecasts, including that of Link Group, expect this to reach a peak of 4.5% around May of this year before falling again once inflationary pressures reach an acceptable level, perhaps as early as Q1 2024.

4.4.3 A more thorough economic outlook provided by our Treasury Advisors is detailed in **Appendices 2 and 3.**

4.5 Borrowing strategy

4.5.1 The Council is currently maintaining an under-borrowed position. This means that the capital borrowing need (the Capital Financing Requirement), has not been fully funded with loan debt as cash supporting the Council's reserves, balances and cash flow has been used as a temporary measure. With significant levels of capital expenditure expected during 2023/24, it is recommended that the Council maximises its use of internal borrowing rather than seeking to fund projects through new external borrowing. This strategy is prudent as investment returns are lower than the cost of borrowing and counterparty risk is still an issue that needs to be considered.

4.5.2 Against this background and the risks within the economic forecast, caution will be adopted with the 2023/24 treasury operations. The S151 (Deputy Chief Executive) will monitor interest rates in financial markets and adopt a pragmatic approach to changing circumstances:

- If it was felt that there was a significant risk of a sharp FALL in borrowing rates, then borrowing will be postponed;
- If it was felt that there was a significant risk of a much sharper RISE in borrowing rates than that currently forecast, then the portfolio position will be re-appraised. Most likely, fixed rate funding will be drawn whilst interest rates are lower than they are projected to be in the next few years.
- The Council will consider all external loan options available in the market including Public Works Loans Board, Banks, Other Local Authorities and the Municipal Bond Agency. The term and repayment profile of any loans will be determined by the periods financing is required. The level of borrowing will stay within the above limits.

4.5.3 Any decisions will be reported to the Cabinet at the next available opportunity.

4.6 Policy on borrowing in advance of need

4.6.1 The Council can not borrow more than or in advance of its needs purely in order to profit from the investment of the extra sums borrowed. Any decision to borrow in advance will be within forward approved Capital Financing Requirement estimates, and will be considered carefully to ensure that value for money can be demonstrated and that the Council can ensure the security of such funds.

4.6.2 Risks associated with any borrowing in advance activity will be subject to prior appraisal and subsequently reported through the mid-year or annual reporting mechanism.

4.7 Debt rescheduling

4.7.1 Rescheduling of current borrowing in our debt portfolio is unlikely to occur as the penalties currently being applied to premature repayments are prohibitive. If rescheduling is done, it will be reported to the Cabinet at the earliest meeting following its action.

4.8 New financial institutions as a source of borrowing and / or types of borrowing

4.8.1 Currently the PWLB Certainty Rate is set at gilts + 80 basis points for both HRA and non-HRA borrowing. However, consideration may still need to be given to sourcing funding from the following sources for the following reasons:

- Local authorities (primarily shorter dated maturities out to 3 years or so – still cheaper than the Certainty Rate)
- Financial institutions (primarily insurance companies and pension funds but also some banks, out of forward dates where the objective is to avoid a “cost of carry”)

- Municipal Bonds Agency (possibly still a viable alternative depending on market circumstances prevailing at the time)

4.8.2 The degree to which any of these options proves cheaper than PWLB Certainty Rate is constantly evolving but our advisors will keep us informed.

4.9 Approved Sources of Long and Short Term Borrowing

On Balance Sheet	Fixed	Variable
PWLB	●	●
Municipal Bond Agency	●	●
Local Authorities	●	
Banks	●	●
Finance Leases	●	●

5.0 Annual Investment Strategy

5.1 Investment policy – management of risk

5.1.1 The DLUHC and CIPFA have extended the meaning of 'investments' to include both financial and non-financial investments. This report deals solely with financial investments (as managed by the treasury management team). Non-financial investments, essentially the purchase of income yielding assets, are covered in the Capital Strategy (a separate report).

5.1.2 The Council's investment policy has regard to the following:

- DLUHC's Guidance on Local Government Investments ("the Guidance");
- CIPFA Treasury Management in Public Services Code of Practice and Cross Sectoral Guidance Notes 2021 ("the Code"); and
- CIPFA Treasury Management Guidance Notes 2021

5.1.3 The Council's investment priorities will be Security first, portfolio Liquidity second and then Yield (return) – known as the SLY Principle.

5.1.4 The above guidance from the DLUHC and CIPFA place a high priority on the management of risk. This authority has adopted a prudent approach to managing risk and defines its risk appetite by the following means:

5.1.4.1 Minimum acceptable credit criteria are applied in order to generate a list of highly creditworthy counterparties. This also enables diversification and thus avoidance of concentration risk. The key ratings used to monitor counterparties are the short term and long-term ratings.

5.1.4.2 **Other information:** ratings will not be the sole determinant of the quality of an institution; it is important to continually assess and monitor the financial sector on both a micro and macro basis and in relation to the economic and political environments in which institutions operate. The assessment will also take account of information that reflects the opinion of the markets, which the Council will achieve through engaging with its advisors to maintain a monitor on market pricing.

5.1.4.3 **Other information sources** used will include the financial press, share price and other such information pertaining to the financial sector in order to establish the most robust scrutiny process on the suitability of potential investment counterparties.

5.1.4.4 The Council has defined the list of **types of investment instruments** that the treasury management team are authorised to use. See **Appendix 4** for a list.

5.1.4.5 **Lending and transaction limits** (amounts and maturity) for each counterparty will be set through applying the matrix table in paragraph 5.2.6.

5.1.4.6 The Council will set a limit for the amount of its investments which are invested for **longer than 365 days** (see paragraph 5.4.9).

5.1.4.7 Investments will only be placed with counterparties from countries with a specified minimum **sovereign rating** (see paragraph 5.3.2).

5.1.5 The Council has engaged external consultants (see paragraph 2.5.1), to provide expert advice on how to optimise an appropriate balance of Security, Liquidity and Yield, given the risk appetite of the Council in the context of the expected level of cash balances and need for liquidity throughout the year.

5.1.6 All investments will be denominated in sterling.

5.1.7 As a result of the change in accounting standards for 2019/20 under IFRS 9, the Council will consider the implications of investment instruments which could result in an adverse movement in the value of the amount invested and resultant charges at the end of the year to the General Fund. (In November 2018, the then MHCLG concluded a consultation for a temporary override to allow English local authorities time to adjust their portfolio of all pooled investments by announcing a statutory override to delay implementation of IFRS 9 for five years ending 31 March 2023.) It has not yet been determined whether a further extension to the override will be agreed by Government.

5.1.8 However, the Council will also pursue **value for money** in treasury management and will monitor the yield from investment income against appropriate benchmarks for investment performance (see section 5.5). Regular monitoring of investment performance will be carried out during the year.

5.1.9 The above criteria are unchanged from last year.

5.2 Creditworthiness policy

5.2.1 The primary principle governing the Council's investment criteria is the security of its investments, although the yield or return on the investment is also a key consideration. After this main principle, the Council will ensure that:

- It maintains a policy covering both the categories of investment types it will invest in, criteria for choosing investment counterparties with adequate

security, and monitoring their security. This is set out in the specified and non-specified investment sections below; and

- It has sufficient liquidity in its investments. For this purpose, it will set out procedures for determining the maximum periods for which funds may prudently be committed. These procedures also apply to the Council's prudential indicators covering the maximum principal sums invested.

5.2.2 The S151 (Deputy Chief Executive) will maintain a counterparty list in compliance with the following criteria and will revise the criteria and submit them to Council for approval as necessary. These criteria are separate to that which determines which types of investment instrument are either specified or non-specified as it provides an overall pool of counterparties considered high quality which the Council may use, rather than defining what types of investment instruments are to be used.

5.2.3 Credit rating information is supplied by Link Group, our treasury advisors, on all active counterparties that comply with the criteria below. Any counterparty failing to meet the criteria would be omitted from the counterparty (dealing) list. Any rating changes, rating Watches (notification of a likely change), rating Outlooks (notification of the longer-term bias outside the central rating view) are provided to officers almost immediately after they occur and this information is considered before dealing. For instance, a negative rating Watch applying to a counterparty with the minimum Council criteria will be suspended from use, with all others being reviewed in light of market conditions.

5.2.4 The criteria for providing a pool of high quality investment counterparties (both specified and non-specified investments) is:

- Banks 1 - good credit quality – the Council will only use banks which:
    i. are UK banks; and/or
    ii. are non-UK and domiciled in a country which has a minimum sovereign Long Term Fitch rating of AAA; and
    iii. have, as a minimum, a credit rating of F1 (Fitch), with regard for Moody's and Standard & Poor's credit ratings (where rated).
- Banks 2 – The Council's own banker for transactional purposes if the bank falls below the above criteria, although in this case balances will be minimised in both monetary size and time invested.
- Building Societies – The Council will use all societies which:
    i. Meet the Fitch rating for banks outlined above; and
    ii. Have assets in excess of £1bn;
- Money Market Funds Fitch CNAV AAAmmf/AAA
- Money Market Funds LNVAV AAAmmf/AAA
- Money Market Funds VNAV AAAmmf/AAA
- UK Government (including gilts, Treasury Bills and the DMADF)
- Local authorities, Police, Fire, parish councils and other public bodies

5.2.5 **Use of additional information other than credit ratings.** Additional requirements under the Code require the Council to supplement credit rating information. Whilst the above criteria relies primarily on the application of credit ratings to provide a pool of appropriate counterparties for officers to use, additional operational market information will be applied before making any specific investment decision from the agreed pool

of counterparties. This additional market information will be applied to compare the relative security of differing investment opportunities.

5.2.6 **Time and monetary limits applying to investments.** The time and monetary limits for institutions on the Council's counterparty list are as follows (these will cover both specified and non-specified investments):

Details	Fitch Short term Rating	Money and/or % Limit	Transaction Limit	Time Limit
The Council's bank* (currently NatWest)	F1	£5m + balance of grant funds	n/a	n/a
Banks 1 (good credit quality)	F1	£5m	£5m	2yr
Banks 2 (Council's banker if not meeting Banks 1)	F2/F3	£5m (call account)	£5m (call account)	1 day
DMADF	UK sovereign rating	unlimited	unlimited	unlimited
Local authorities & other public bodies	N/A	unlimited	unlimited	unlimited
Building Societies	F1	£5m	£5m	2yr
Money Market Funds - CNAV	AAAmmf/AAA	£2m	£2m	liquid
Money Market Funds - LVNAV	AAAmmf/AAA	£2m	£2m	liquid
Money Market Funds - VNAV	AAAmmf/AAA	£2m	£2m	liquid

**This limit was approved in the TMSS for 2021/22 to allow the continued administration of business grant funds.*

The above table relates to financial investments only – non-financial investments, such as commercial loans or purchases of income yielding assets are covered in the Capital Strategy.

5.2.7 The proposed criteria for specified and non-specified investments are shown in **Appendix 4** for approval.

5.2.8 **Creditworthiness**

5.2.9 Significant levels of downgrades to short- and long-term credit ratings have not materialised since the crisis in March 2020. In the main, where they did change, any alterations were limited to Outlooks. However, more recently the UK sovereign debt rating has been placed on Negative Outlook by the three major rating agencies in the wake of the Truss/Kwarteng unfunded tax-cuts policy. Although the Sunak/Hunt government has calmed markets, the outcome of the rating agency reviews is unknown at present, but it is possible the UK sovereign debt

rating will be downgraded. Accordingly, when setting minimum sovereign debt ratings, this Authority will not set a minimum rating for the UK.

5.3 Other limits

5.3.1 Due care will be taken to consider the country, group and sector exposure of the Council's investments.

5.3.2 **Country limit.** The Council has determined that it will only use approved counterparties from the UK and from countries with a minimum sovereign credit rating of AAA. The list of countries that qualify using this credit criteria as at the date of this report are shown in **Appendix 5**. This list will be added to, or deducted from, by officers should ratings change in accordance with this policy.

5.3.3 **Other limits.** In addition:

- no more than 30% of overall investment balances will be placed with any non-UK country at any time;
- limits in place above will apply to a group of companies; and
- the Council will not hold more than £5m with any banking group.

5.4 Investment strategy

5.4.1 **In-house funds**

5.4.2 Over recent years, the Council has typically held upwards of £20m in short term investments with the objective of managing cash flows whilst earning a return at the same time. These returns remained historically low for two years after interest rates plummeted at the start of the Covid-19 pandemic in Q4 2019/20, however increases to interest rates over the last 12 months have seen returns on short term investments rebound from £54k in 2021/22 to a forecast £534k in 2022/23.

5.4.3 Retaining cash balances (short term investments + current account [excluding Covid-19 grant funds]) of £10m would be enough to ensure a regular turnover in short term investments to manage the fluctuations in cash flows. Therefore, internal borrowing will be used to finance capital expenditure where cash balances remain above £10m, with external borrowing only sought to keep balances above this limit where necessary. Interest rates currently available from PWLB are around 50 basis points (0.50%) higher than rates available for short term investments, and so maximising internal borrowing could result in net savings of around £50k per annum versus maintaining cash balances at current levels.

5.4.4 As cash balances reduce through 2023/24, there will be a need to reduce the average maturity on investments to ensure a regular turnover of maturities, which will be matched with the Council's large cash outflows. This will mean the primary consideration for investments will be the core balance and cash flow requirements, with the outlook for short-term interest rates only considered where significant changes are expected. Greater returns are usually obtainable by investing for longer periods, however this needs to be balanced with the Council's cash requirements.

- If it is thought that Bank Rate is likely to rise significantly within the time horizon being considered, then consideration will be given to keeping most investments as being short term or variable.
- Conversely, if it is thought that Bank Rate is likely to fall within that time period, consideration will be given to locking in higher rates currently obtainable, for longer periods.

5.4.5 **Investment returns expectations**

5.4.6 The current forecast shown in paragraph 4.4.1, includes a forecast for Bank Rate to reach 4.5% in Q2 2023.

5.4.7 The suggested budgeted investment earnings rates for returns on investments placed for periods up to about three months during each financial year are as follows:

Year	%
2023/24	4.40%
2024/25	3.30%
2025/26	2.60%
2026/27	2.50%
Later years	2.80%

5.4.8 **Investment treasury indicator and limit -** total principal funds invested for greater than 365 days. These limits are set with regard to the Council's liquidity requirements and to reduce the need for early sale of an investment, and are based on the availability of funds after each year-end.

5.4.9 **The Council is asked to approve the following treasury indicator and limit:**

Upper limit for principal sums invested for longer than 365 days	2023/24 (£m)	2024/25 (£m)	2025/26 (£m)
Principal sum invested for longer than 365 days but not exceeding 2 years.	5	5	5

5.4.10 For its cash flow generated balances, the Council will seek to utilise money market funds and short-dated deposits (overnight to 365 days) in order to benefit from the compounding of interest.

5.5 Investment performance / risk benchmarking

5.5.1 The Council will use an investment benchmark to assess the performance of its investment portfolio of 7 day SONIA (Sterling Overnight Index Average).

5.6 End of year investment report

5.6.1 At the end of the financial year, the Council will report on its investment activity as part of its Annual Treasury Report.

5.7 Commercial and Non-Financial Investments

5.7.1 **Property Investments.** A limit of £5m will be applied to the use of non-specified investments. This principally relates to property funds, which is within the Local Authorities' Property Fund via CCLA.

5.7.2 **Non-Financial Investments.** On the 30th March 2017, Cabinet approved the establishment of a Special Purpose Vehicle – 3 Rivers Developments Limited and that the Council could lend to 3 Rivers Developments Ltd. This company is a subsidiary of Mid Devon District Council and has the sole purpose of property development.

5.7.3 There is no cap on the amount of money that can be loaned to 3 Rivers Developments Ltd. However, for each new project the company takes on, there is an individual loan agreement signed by the S151 Officer prior to any lending. All project spending / borrowing requirements are approved annually by Cabinet as part of the company's Annual Report/Business Plan, with individual Business Cases reviewed and approved by Cabinet on any development over £1m.

5.7.4 Please refer to the Capital Strategy for a more detailed programme and borrowing streams.

6.0 Conclusion

6.1 Treasury management is a highly complex and specialist subject. It is tightly controlled by regulation and procedures that the Council must abide by. In addition to the skilled staff in house, the Council has access to advice from its Treasury Advisors (Link Group) where we need it to ensure that we comply with these rules.

6.2 Cabinet will consider the Treasury Management Strategy before recommending Full Council approve it at its budget meeting on 22 February.

APPENDICES

1. Prudential and treasury indicators and MRP statement
2. Interest rate forecasts
3. Economic background
4. Treasury management practice 1 – credit and counterparty risk management
5. Approved countries for investments
6. Treasury management scheme of delegation
7. The treasury management role of the Section 151 Officer

Contact for more information:

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APPENDIX 1

1.0 THE CAPITAL PRUDENTIAL AND TREASURY INDICATORS 2023/24 – 2025/26

The Council's capital expenditure plans are the key driver of treasury management activity. The output of the capital expenditure plans is reflected in the prudential indicators, which are designed to assist members' overview and confirm capital expenditure plans.

1.1 Capital expenditure

See section 3.2 for the breakdown of capital expenditure.

1.2 Affordability prudential indicators

The previous sections cover the overall capital and control of borrowing prudential indicators, but within this framework prudential indicators are required to assess the affordability of the capital investment plans. These provide an indication of the impact of the capital investment plans on the Council's overall finances. **The Council is asked to approve the following indicators:**

Ratio of financing costs to net revenue stream

This indicator identifies the trend in the cost of capital, (borrowing and other long-term obligation costs net of investment income), against the net revenue stream.

%	2021/22 Actual	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
General Fund	0.95%	-3.55%	-4.89%	-3.14%	-3.45%
HRA	15.06%	12.56%	12.59%	15.63%	17.16%

The estimates of financing costs include current commitments and the proposals in this budget report.

1.3 Minimum Revenue Provision (MRP) Policy Statement

Where the Council finances capital expenditure by debt, it must put aside resources to repay that debt in later years. The amount charged to the revenue budget for the repayment of debt is known as Minimum Revenue Provision (MRP), although there has been no statutory minimum since 2008. The Local Government Act 2003 requires the Council to have regard to the Department of Levelling Up, Housing & Communities' *Statutory Guidance on Minimum Revenue Provision* (the DLUHC Guidance).

The broad aim of the DLUHC Guidance is to ensure that debt is repaid over a period that is either reasonably commensurate with that over which the capital expenditure provides benefits, or, in the case of borrowing supported by Government Revenue Support Grant, reasonably commensurate with the period implicit in the determination of that grant.

The DLUHC Guidance requires the Council to approve an Annual MRP Statement each year, and recommends a number of options for calculating a prudent amount of MRP.

The Council is recommended to approve the following MRP Statement*:*

For capital expenditure incurred before 1 April 2008 or which in the future will be Supported Capital Expenditure, the MRP policy will be:

- **Based on CFR** – MRP will be based on the CFR.

This option provides for an approximate 4% reduction in the borrowing need (CFR) each year.

From 1 April 2008 for all unsupported borrowing (including PFI and finance leases) the MRP policy will be*:*

- **Asset life method** – MRP will be based on the estimated life of the assets, in accordance with the regulations (this option must be applied for any expenditure capitalised under a Capitalisation Direction)

This option provides for a reduction in the borrowing need over approximately the asset's life.

Finance leases will have their capital financing applied on a straight-line basis over the life of the lease contract.

There is no requirement on the HRA to make a Minimum Revenue Provision but there is a requirement for a charge for depreciation to be made.

The MRP requirement for a finance lease or PFI contract is deemed to be equal to the element of the charge/rent that goes to write down the balance sheet liability.

For capital expenditure loans to third parties that are expected to be repaid in full, the Council will make nil MRP, but will instead apply the capital receipts arising from principal repayments to reduce the capital financing requirement. Where it becomes probable that a loan will not be repaid in full, MRP will be charged in accordance with the Expected Credit Loss (ECL) model outlined in IFRS 9.

MRP will not be charged against capital expenditure in the year it is incurred, but will instead commence the following year. Capital expenditure incurred during 2022/23 will not be subject to a MRP charge until 2023/24.

1.4 MRP Overpayments

A change introduced by the revised DLUHC MRP Guidance was the allowance that any charges made over the statutory Minimum Revenue Provision (MRP), Voluntary Revenue Provision (VRP) or overpayments, can, if needed, be reclaimed in later years if deemed necessary or prudent. In order for these sums to be reclaimed for use in the budget, this policy must disclose the cumulative overpayment made each year. Up until the 31 March 2022, the total VRP overpayments were £0m.

APPENDIX 2 – Provided by Link Group (MDDC's Treasury Advisor)

2.0 INTEREST RATE FORECASTS 2023-2025

Link Group Interest Rate View

Interest Rates	Dec 22	Mar 23	Jun 23	Sep 23	Dec 23	Mar 24	Jun 24	Sep 24	Dec 24	Mar 25	Jun 25	Sep 25	Dec 25
Bank Rate View	3.50%	4.25%	4.50%	4.50%	4.50%	4.00%	3.75%	3.50%	3.25%	3.00%	2.75%	2.50%	2.50%
5yr PWLB Rate	4.20%	4.20%	4.20%	4.10%	4.00%	3.90%	3.80%	3.60%	3.50%	3.40%	3.30%	3.20%	3.10%
10yr PWLB Rate	4.30%	4.40%	4.40%	4.30%	4.10%	4.00%	3.90%	3.80%	3.60%	3.50%	3.40%	3.30%	3.30%
25yr PWLB Rate	4.60%	4.60%	4.60%	4.50%	4.40%	4.20%	4.10%	4.00%	3.90%	3.70%	3.60%	3.50%	3.50%
50yr PWLB Rate	4.30%	4.30%	4.30%	4.20%	4.10%	3.90%	3.80%	3.70%	3.60%	3.50%	3.30%	3.20%	3.20%

The central forecast for interest rates was updated on 19 December and reflected a view that the MPC would be keen to further demonstrate its anti-inflation credentials by delivering a succession of rate increases. Bank Rate stands at 3.5% currently but is expected to reach a peak of 4.5% in H1 2023.

Further down the road, it is anticipated that the Bank of England will be keen to loosen monetary policy when the worst of the inflationary pressures are behind us – but that timing will be one of fine judgment: cut too soon, and inflationary pressures may well build up further; cut too late and any downturn or recession may be prolonged.

The CPI measure of inflation looks to have peaked at 11.1% in Q4 2022 (currently 10.7%). Despite the cost-of-living squeeze that is still taking shape, the Bank will want to see evidence that wages are not spiralling upwards in what is evidently a very tight labour market.

Regarding the plan to sell £10bn of gilts back into the market each quarter (Quantitative Tightening), this has started and will focus on the short, medium and longer end of the curve in equal measure, now that the short-lived effects of the Truss/Kwarteng unfunded dash for growth policy are firmly in the rear-view mirror.

In the upcoming months, forecasts will be guided not only by economic data releases and clarifications from the MPC over its monetary policies and the Government over its fiscal policies, but the on-going conflict between Russia and Ukraine. More recently, the heightened tensions between China/Taiwan/US also have the potential to have a wider and negative economic impact.

On the positive side, consumers are still estimated to be sitting on over £160bn of excess savings left over from the pandemic so that will cushion some of the impact of the above challenges. However, most of those are held by more affluent people whereas lower income families already spend nearly all their income on essentials such as food, energy and rent/mortgage payments.

PWLB RATES

- The yield curve movements have become less volatile of late and PWLB 5 to 50 years Certainty Rates are, generally, in the range of 4.10% to 4.80%.
- The markets are seen as having built in, already, nearly all the effects on gilt yields of the likely increases in Bank Rate and the elevated inflation outlook.

The balance of risks to the UK economy: -

- The overall balance of risks to economic growth in the UK is to the downside.

Downside risks to current forecasts for UK gilt yields and PWLB rates include: -

- **Labour and supply shortages** prove more enduring and disruptive and depress economic activity (accepting that in the near-term this is also an upside risk to inflation and, thus, rising gilt yields).

- **The Bank of England** acts too quickly, or too far, over the next year to raise Bank Rate and causes UK economic growth, and increases in inflation, to be weaker than we currently anticipate.

- **UK / EU trade arrangements** – if there was a major impact on trade flows and financial services due to complications or lack of co-operation in sorting out significant remaining issues.

- **Geopolitical risks,** for example in Ukraine/Russia, China/Taiwan/US, Iran, North Korea and Middle Eastern countries, which could lead to increasing safe-haven flows.

Upside risks to current forecasts for UK gilt yields and PWLB rates: -

- The **Bank of England is too slow** in its pace and strength of increases in Bank Rate and, therefore, allows inflationary pressures to build up too strongly and for a longer period within the UK economy, which then necessitates Bank Rate staying higher for longer than we currently project or even necessitates a further series of increases in Bank Rate.

- **The Government** acts too quickly to cut taxes and/or increases expenditure in light of the cost-of-living squeeze.

- **The pound weakens** because of a lack of confidence in the UK Government's fiscal policies, resulting in investors pricing in a risk premium for holding UK sovereign debt.

- Longer term **US treasury yields** rise strongly and pull gilt yields up higher than currently forecast.

- Projected **gilt issuance, inclusive of natural maturities and QT,** could be too much for the markets to comfortably digest without higher yields consequently.

Borrowing advice: The long-term (beyond 10 years) forecast for Bank Rate stands at 2.5%. As all PWLB certainty rates are currently above this level, borrowing strategies will need to be reviewed in that context. Better value can generally be obtained at the shorter end of the curve and short-dated fixed LA to LA monies should be considered. Temporary borrowing rates are likely, however, to remain near Bank Rate and may also prove attractive whilst the market waits for inflation, and therein gilt yields, to drop back later in 2023.

APPENDIX 3 – Provided by Link Group (MDDC's Treasury Advisor)

3.0 ECONOMIC BACKGROUND

Against a backdrop of stubborn inflationary pressures, the easing of Covid restrictions in most developed economies, the Russian invasion of Ukraine, and a range of different UK Government policies, it is no surprise that UK interest rates have been volatile right across the curve, from Bank Rate through to 50-year gilt yields, for all of 2022.

Market commentators' misplaced optimism around inflation has been the root cause of the rout in the bond markets with, for example, UK, EZ and US 10-year yields all rising by over 200bps since the turn of the year. The table below provides a snapshot of the conundrum facing central banks: inflation is elevated but labour markets are extra-ordinarily tight, making it an issue of fine judgment as to how far monetary policy needs to tighten.

	UK	Eurozone	US
Bank Rate	3.5%	2.0%	4.25%-4.50%
GDP	-0.2%q/q Q3 (2.4%y/y)	+0.2%q/q Q3 (2.1%y/y)	2.6% Q3 Annualised
Inflation	10.7%y/y (Nov)	10.1%y/y (Nov)	7.1%y/y (Nov)
Unemployment Rate	3.7% (Oct)	6.5% (Oct)	3.7% (Nov)

Q2 of 2022 saw UK GDP revised upwards to +0.2% q/q, but this was quickly reversed in the third quarter, albeit some of the fall in GDP can be placed at the foot of the extra Bank Holiday in the wake of the Queen's passing. Nevertheless, CPI inflation has picked up to what should be a peak reading of 11.1% in October, although with further increases in the gas and electricity price caps pencilled in for April 2023, and the cap potentially rising from an average of £2,500 to £3,000 per household, there is still a possibility that inflation will spike higher again before dropping back slowly through 2023.

The UK unemployment rate fell to a 48-year low of 3.6%, and this despite a net migration increase of c500k. The fact is that with many economic participants registered as long-term sick, the UK labour force actually shrunk by c500k in the year to June. Without an increase in the labour force participation rate, it is hard to see how the UK economy will be able to grow its way to prosperity, and with average wage increases running at over 6% the MPC will be concerned that wage inflation will prove just as sticky as major supply-side shocks to food and energy that have endured since Russia's invasion of Ukraine on 22nd February 2022.

Throughout Q3 Bank Rate increased, finishing the quarter at 2.25% (an increase of 1%). Q4 has seen rates rise to 3.5% in December and the market expects Bank Rate to hit 4.5% by May 2023.

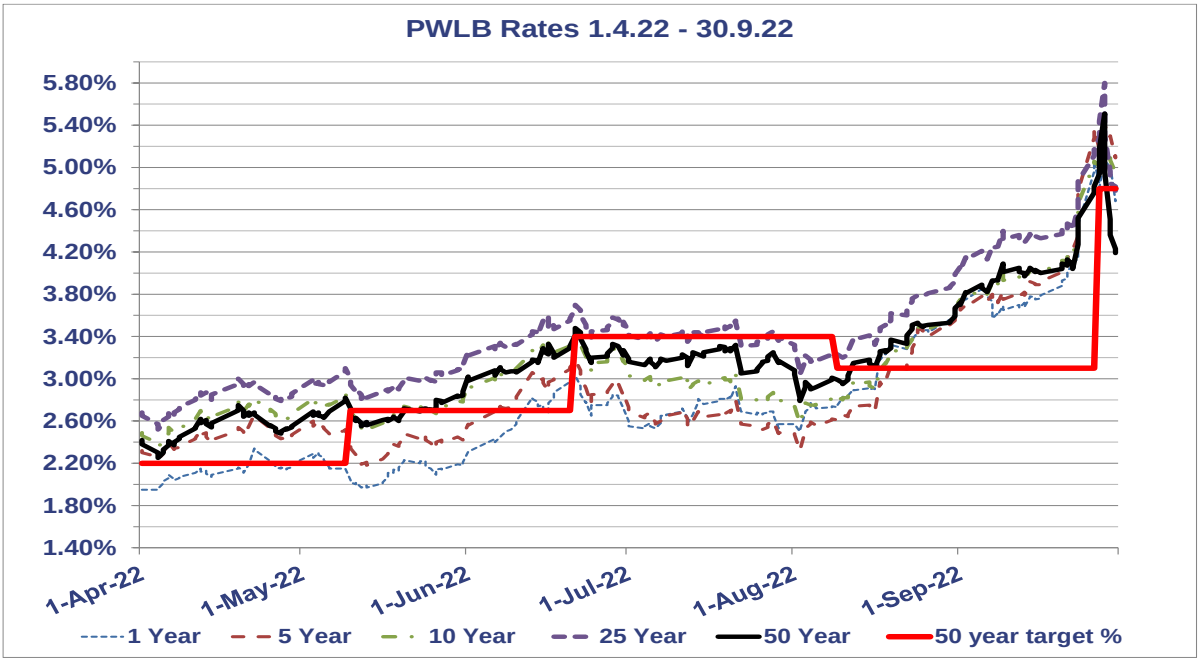
Following a Conservative Party leadership contest, Liz Truss became Prime Minister for a tumultuous seven weeks that ran through September and October. Put simply, the markets did not like the unfunded tax-cutting and heavy spending policies put forward by her Chancellor, Kwasi Kwarteng, and their reign lasted barely seven weeks before being

replaced by Prime Minister Rishi Sunak and Chancellor Jeremy Hunt. Their Autumn Statement of 17th November gave rise to a net £55bn fiscal tightening, although much of the "heavy lifting" has been left for the next Parliament to deliver. However, the markets liked what they heard, and UK gilt yields have almost completely reversed the increases seen under the previous tenants of No10/11 Downing Street.

Globally, though, all the major economies are expected to struggle in the near term. The fall below 50 in the composite Purchasing Manager Indices for the UK, US, EZ and China all point to at least one, if not more, quarters of GDP contraction. In November, the MPC projected eight quarters of negative growth for the UK lasting throughout 2023 and 2024, but with Bank Rate set to peak at lower levels than previously priced in by the markets and the fiscal tightening deferred to some extent, it is not clear that things will be as bad as first anticipated by the Bank.

The £ has strengthened of late, recovering from a record low of $1.035, on the Monday following the Truss government's "fiscal event", to $1.22. Notwithstanding the £'s better run of late, 2023 is likely to see a housing correction of some magnitude as fixed-rate mortgages have moved above 5% and affordability has been squeezed despite proposed Stamp Duty cuts remaining in place.

In the table below, the rise in gilt yields, and therein PWLB rates, through the first half of 2022/23 is clear to see.



However, the peak in rates on 28th September as illustrated in the table covering April to September 2022 below, has been followed by the whole curve shifting lower. PWLB rates at the front end of the curve are generally over 1% lower now whilst the 50 years is over 1.75% lower.

	1 Year	5 Year	10 Year	25 Year	50 Year
Low	1.95%	2.18%	2.36%	2.52%	2.25%
Date	01/04/2022	13/05/2022	04/04/2022	04/04/2022	04/04/2022
High	5.11%	5.44%	5.35%	5.80%	5.51%
Date	28/09/2022	28/09/2022	28/09/2022	28/09/2022	28/09/2022
Average	2.81%	2.92%	3.13%	3.44%	3.17%
Spread	3.16%	3.26%	2.99%	3.28%	3.26%

After a shaky start to the year, the S&P 500 and FTSE 100 have climbed in recent weeks, albeit the former is still 17% down and the FTSE 2% up. The German DAX is 9% down for the year.

CENTRAL BANK CONCERNS – DECEMBER 2022

In December, the Fed decided to push up US rates by 0.5% to a range of 4.25% to 4.5%, whilst the MPC followed by raising Bank Rate from 3% to 3.5%, in line with market expectations. EZ rates have also increased to 2% with further tightening in the pipeline.

Having said that, the sentiment expressed in the press conferences in the US and the UK were very different. In the US, Fed Chair, Jerome Powell, stated that rates will be elevated and stay higher for longer than markets had expected. Governor Bailey, here in the UK, said the opposite and explained that the two economies are positioned very differently so you should not, therefore, expect the same policy or messaging.

Regarding UK market expectations, although they now expect Bank Rate to peak within a lower range of 4.5% - 4.75%, caution is advised as the Bank of England Quarterly Monetary Policy Reports have carried a dovish message over the course of the last year, only for the Bank to have to play catch-up as the inflationary data has proven stronger than expected.

In addition, the Bank's central message that GDP will fall for eight quarters starting with Q3 2022 may prove to be a little pessimistic. Will the £160bn excess savings accumulated by households through the Covid lockdowns provide a spending buffer for the economy – at least to a degree? Ultimately, however, it will not only be inflation data but also employment data that will mostly impact the decision-making process, although any softening in the interest rate outlook in the US may also have an effect (just as, conversely, greater tightening may also).

APPENDIX 4

4.0 TREASURY MANAGEMENT PRACTICE (TMP1) – CREDIT AND COUNTERPARTY RISK MANAGEMENT

Specified Investments: All investments with a high level of credit quality subject to a maturity limit of one year.

Non-Specified Investments: Any investments that do not meet the specified investment criteria. These may be of a lower credit quality, for periods in excess of one year, or are more complex instruments which require a greater consideration by members and officers before being authorised for use. A maximum of £5m will be held in aggregate in non-specified investment.

A variety of investment instruments will be used, subject to the credit quality of the institution, and depending on the type of investment made, it will fall into one of the above categories.

The criteria, time limits and monetary limits applying to institutions or investment vehicles are:

	Minimum credit criteria	Max % of total investments / £ limit per institution	Max. maturity period
DMADF – UK Government	N/A	100%	Any
UK Government gilts	UK sovereign rating	100%	Any
UK Government Treasury bills	UK sovereign rating	100%	Any
Money Market Funds CNAV	AAAmmf/AAA	£2m	Liquid
Money Market Funds LNVAV	AAAmmf/AAA	£2m	Liquid
Money Market Funds VNAV	AAAmmf/AAA	£2m	Liquid
Local authorities	N/A	100%	Any
Term deposits with banks and building societies	F1 (Fitch) / £1bn asset base for building societies	£5m	2 Years
Term deposits with Non-UK banks and building societies	Sovereign Fitch rating of AAA	£3m	1 Year
Gilt funds	UK sovereign rating	100%	Any
Property funds	LA Property Fund	£5m	Ongoing

In addition to the minimum credit criteria outlined in the above table, all term deposits with banks and building societies will be subject to the maximum recommended duration set out by Link Group.

Accounting treatment of investments. The accounting treatment may differ from the underlying cash transactions arising from investment decisions made by the Council. To ensure that the Council is protected from any adverse revenue impact, which may arise from these differences, we will review the accounting implications of new transactions before they are undertaken.

Environmental, Social and Governance (ESG) factors. Following changes to the CIPFA Treasury Management Code 2021, the Council is required to consider ESG factors as part of its investment policy. This is a new and evolving area within the short-term financial markets, so the impact on investment decisions will be limited for the coming year.

Governance is by far the most important part of ESG when considering treasury investments, as this is most likely to impact on the financial performance of an entity and its ability to repay deposits. Governance issues already play a role in the selection of acceptable investment counterparties, as any banks or building societies with significant governance concerns are unlikely to achieve the high credit ratings required for the Council to deposit funds.

Environmental and Social factors have less of an impact when considering short-term investments. This is because investments specifically for environmental or social gain are typically longer term and inherently more risky, which isn't aligned with the Security, Liquidity and Yield (SLY) principle the Council currently follows. Only the larger banks and building societies are able to achieve the credit ratings required by the Council, all of which are likely to have environmental and social aims broadly aligned with that of the Council, so further consideration of these factors are currently unlikely to influence the Council's investment decisions.

Further work on ESG is required by the financial markets before the Council can incorporate this into its investment policy. Trying to do this too early could result in artificially limiting potential counterparty options, thus decreasing diversification and increasing financial risk. This could then lead to the need to widen credit criteria to find more counterparties, again increasing financial risk beyond what is considered prudent and acceptable. Members will be updated on any significant advances by the financial markets that could allow the formulation of ESG criteria to include in the Council's investment policy.

APPENDIX 5

5.0 APPROVED COUNTRIES FOR INVESTMENTS

AAA

- Australia
- Denmark
- Germany
- Netherlands
- Norway
- Singapore
- Sweden
- Switzerland

The sovereign ratings shown above are at 19 December 2022 from Link Group.

APPENDIX 6

6.0 TREASURY MANAGEMENT SCHEME OF DELEGATION

(i) Full Council

- receiving and reviewing reports on treasury management policies, practices and activities;
- approval of annual strategy.

(ii) Cabinet

- approval of/amendments to the organisation's adopted clauses, treasury management policy statement and treasury management practices;
- budget consideration and approval;
- approval of the division of responsibilities;
- receiving and reviewing regular monitoring reports and acting on recommendations;
- approving the selection of external service providers and agreeing terms of appointment.

(iii) Cabinet

- reviewing the treasury management policy and procedures and making recommendations to the responsible body.

(iv) Delegation from the S151 (Deputy Chief Executive) to the nominated post(s) for the taking of the investment decisions:

- Corporate Manager for Finance and Procurement (Deputy S151)

APPENDIX 7

7.0 THE TREASURY MANAGEMENT ROLE OF THE SECTION 151 OFFICER

The S151 (responsible) officer

- recommending clauses, treasury management policy/practices for approval, reviewing the same regularly, and monitoring compliance;
- submitting regular treasury management policy reports;
- submitting budgets and budget variations;
- receiving and reviewing management information reports;
- reviewing the performance of the treasury management function;
- ensuring the adequacy of treasury management resources and skills, and the effective division of responsibilities within the treasury management function;
- ensuring the adequacy of internal audit, and liaising with external audit;
- recommending the appointment of external service providers;
- preparation of a capital strategy to include capital expenditure, capital financing, non-financial investments and treasury management, with a long term timeframe for example 25+ years;
- ensuring that the capital strategy is prudent, sustainable, affordable and prudent in the long term and provides value for money;
- ensuring that due diligence has been carried out on all treasury and non-financial investments and is in accordance with the risk appetite of the authority;
- ensure that the authority has appropriate legal powers to undertake expenditure on non-financial assets and their financing;
- ensuring the proportionality of all investments so that the authority does not undertake a level of investing which exposes the authority to an excessive level of risk compared to its financial resources;
- ensuring that an adequate governance process is in place for the approval, monitoring and ongoing risk management of all non-financial investments and long term liabilities;
- provision to members of a schedule of all non-treasury investments including material investments in subsidiaries, joint ventures, loans and financial guarantees;
- ensuring that members are adequately informed and understand the risk exposures taken on by an authority;
- ensuring that the authority has adequate expertise, either in house or externally provided, to carry out the above;
- creation of Treasury Management Practices which specifically deal with how non treasury investments will be carried out and managed, to include the following
    - *Risk management (TMP1 and schedules), including investment and risk management criteria for any material non-treasury investment portfolios;*
    - *Performance measurement and management (TMP2 and schedules), including methodology and criteria for assessing the performance and success of non-treasury investments;*

- *Decision making, governance and organisation (TMP5 and schedules), including a statement of the governance requirements for decision making in relation to non-treasury investments; and arrangements to ensure that appropriate professional due diligence is carried out to support decision making;*

- *Reporting and management information (TMP6 and schedules), including where and how often monitoring reports are taken;*

- *Training and qualifications (TMP10 and schedules), including how the relevant knowledge and skills in relation to non-treasury investments will be arranged.*

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CABINET **AGENGA ITEM:**
7 FEBRUARY 2023

2023/24 /- 2027/28 PROCUREMENT STRATEGY

Cabinet Member(s): Cllr Bob Deed – Leader and Cabinet Member for Finance
Responsible Officer: Andrew Jarrett – Deputy Chief Executive (S151)

Reason for Report: To introduce the draft new Procurement Strategy covering the period 2023/24 to 2027/28.

Recommendation: Cabinet are recommended to approach the attach Procurement Strategy.

Financial Implications: Procurement is a critical element of service delivery, with strict regulations in place to ensure Value for Money is delivered. The Council spends multiple millions per year on goods, services and works.

Budget and Policy Framework: Procurement has a critical role to play in delivering strategic objectives, innovation and improving the overall quality of services delivered to the public.

Legal Implications: The Council must adhere to the EU Public Procurement Regulations for above threshold spend. Below threshold procurements will adhere to Public Procurement Notices and the Council's own financial regulations.

Risk Assessment: The EU Public Procurement Regulations are due to be replaced during this calendar year. There is a risk that this could outline different requirements which would necessitate an update to this Strategy.

Equality Impact Assessment: No implications arising from this report.

Relationship to Corporate Plan: Procurement has a critical role to play in delivering strategic objectives, innovation and improving the overall quality of services delivered to the public.

Impact on Climate Change: No direct implications arising from this report. However with the investment required, Procurement will be a key element in the delivery of climate change.

1.0 **Introduction/Background**

1.1 The current Procurement Strategy covered the period 2019 to 2022 and was a joint strategy adopted by the District Council's across Devon. Following MDDC joining in partnership with Devon County Council (DCC) it is more appropriate to align with Devon's strategy. Therefore this closely follows DCC's recently adopted strategy and sets out the procurement priorities for 2023 to 2027. The aim is to ensure that our procurement function is best able to support the Council and be compliant with all applicable legislative requirements.

2.0 **2023/24 – 2027/28 Procurement Strategy**

2.1 The proposed strategy is attached in Appendix 1.

2.2 MDDC's procurement approach is informed by the National Procurement Strategy and local influences such as the Council's Corporate Plan, Service Business Plans, local economy considerations and reinvestment, the wider supply market, the national procurement strategy and legislative framework.

2.3 The draft strategy covers a number of strategic themes. They interrelate as a balance of considerations, are not in order of priority nor are they exhaustive. These themes will be promoted across services through the procurement approach and performance will be monitored for continuous improvement.

2.4 In partnership with Devon Procurement Services this strategy will support the council to deliver high quality procurement that delivers value for money and is compliant with legislation.

3.0 **Conclusion**

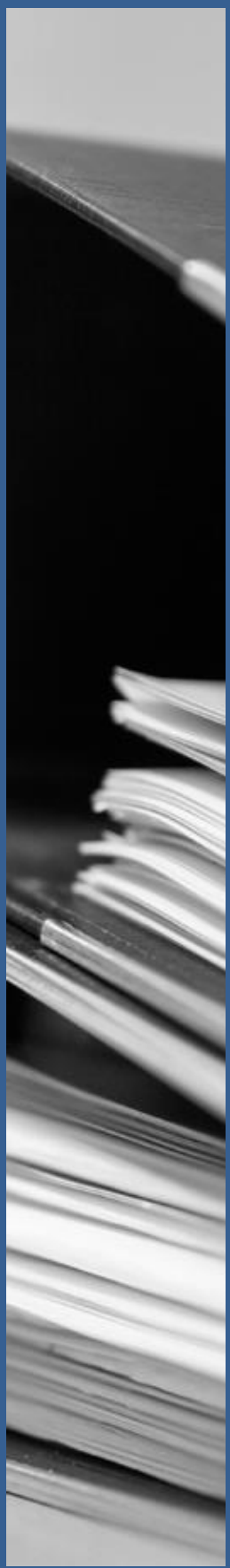
3.1 It is recommended that Cabinet approve the attached Strategy.

Contact for more information:

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Corporate Manager for Financial Services
pdeal@middevon.gov.uk

Circulation of the Report: Cllr Bob Deeb, Cabinet, Leadership Team



Procurement Strategy 2023/24 – 2027/28

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Telephone: 01884 255255
E-mail: procurementoffice@middevon.gov.uk
Website: Information on all of our services is available at: www.middevon.gov.uk

Foreword

Our Vision for Mid Devon
Through innovative and effective procurement and effective selection and management of third-party relationships, we will obtain best value on all goods and services required by the Council, which in turn makes a difference to our services and locality and helps make lives better.

At Mid Devon District Council, we recognise that our spend on the procurement of goods, works and services has a major impact on many aspects of life in the district. This includes the environment, social factors and local economic development. This can be particularly important to those local businesses and the voluntary and community sector which form part of our supply chain. Wherever it supports achieving the best value for money, we wish to encourage our local economy and work with our public, private and voluntary sector partners to deliver services.

In a post Brexit and Covid-19 world, we aim to stimulate our local economy and help local businesses work with the Authority through tender opportunities, and promote training/engagement opportunities to ensure our supply chain is ready to bid for work with the Authority and wider region.

This strategy covers all areas of Council third party expenditure, including capital expenditure and major projects such as the investment in high quality affordable housing and our commitment to become carbon neutral by 2030. It draws from the National Procurement strategy for Local Government in England and provides a local interpretation of key themes from a procurement perspective.

The Council's services are advised and supported by a procurement partnership with Devon County Council, and therefore this strategy and related policies align closely. We have access to a large, well-established and respected Procurement Team comprising of experienced, highly skilled and committed people across six relevant categories of service/expenditure.

Delivery of this strategy will be challenging for the Council, with fewer resources available and likely significant change to regulations following Brexit. However we are committed to delivering our objectives, providing high quality and sustainable services and creating an environment where communities and businesses can flourish and grow together.

Cllr Bob Deed
Cabinet Member for Financial Services

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Introduction

Welcome to Mid Devon District Council's procurement strategy for 2023 and beyond. The strategy complements the Local Government Association National Procurement Strategy, highlights a range of priorities for the Authority's procurement approach, and utilises the skills of the Devon Procurement Services to enable the Council's services to deliver high quality, mitigate risks and comply with public sector procurement legislation.

Procurement concerns the acquisition of all goods, works and services. The aim of this Procurement Strategy is to set a clear framework for procurement throughout the Council which reflects the Council's Corporate Plan and provides a framework for securing value for money within the regulations.

Procurement is a facilitator through which diverse considerations and objectives are drawn together to form a practical approach. This programme has been developed to support all areas of the Authority's activity in a joined-up way, bringing significant added value to our aim of providing the best possible service for Mid Devon's residents and communities.

Our procurement approach supports the organisation's core purpose and contributes to continual evolution. The procurement function is about far more than just competition and compliance; it is an expansive, value adding system which supports alignment of purpose and overall public value.

This procurement strategy links with the LGA National Procurement Strategy and brings together key considerations. This links into the Authority's wider objectives, many of which are highlighted within. Naturally as our landscape continually changes, the strategy will be updated periodically to reflect today's evolving environment.

The Authority Context

Mid Devon District Council serves a rural location covering an area of 353 square miles (914 km2) in the agricultural heartland of Devon, between Dartmoor, Exmoor and the Blackdown Hills. More than half the population of some 82,000 people is scattered in villages in the rural hinterland, with the balance divided between the three main towns of Tiverton, Cullompton and Crediton.

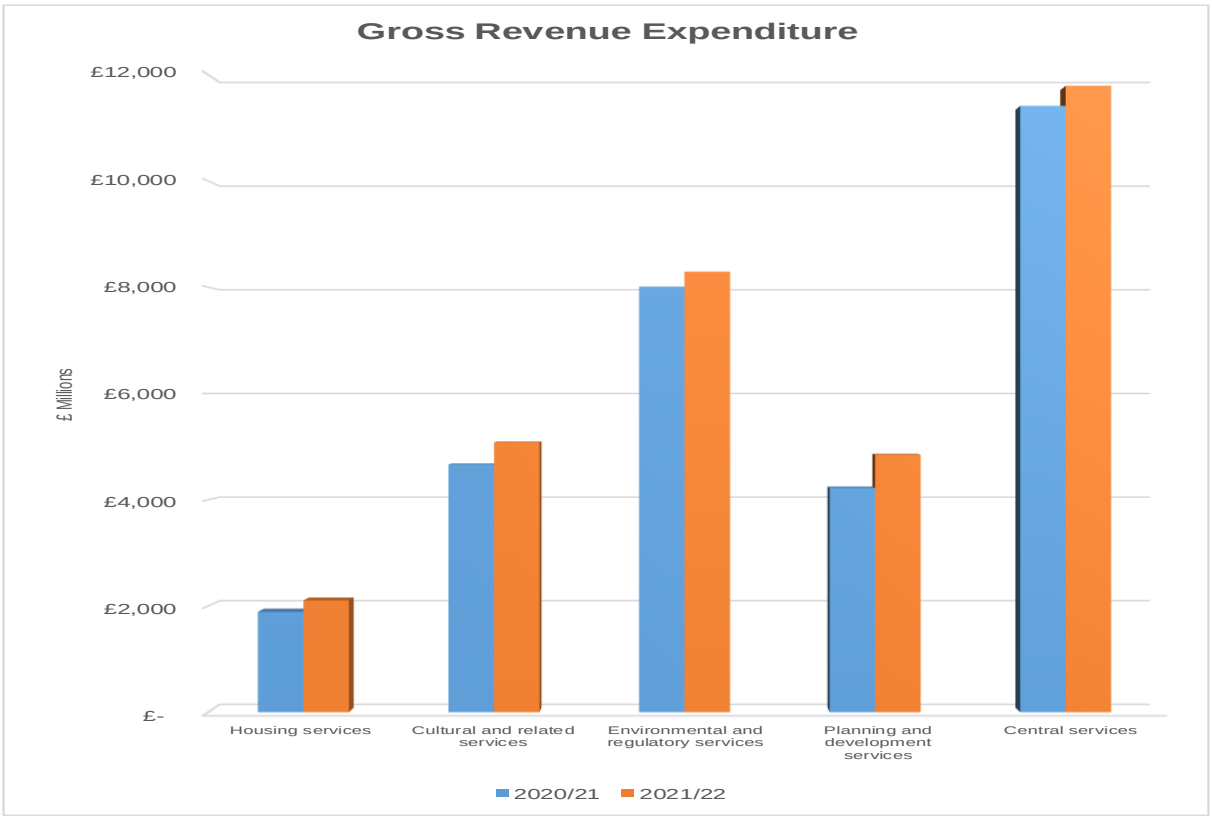
While it is the 23rd-largest district council in England by area, it is also the 34th-smallest by population. Our main offices lie to the north of the city of Exeter, one of the most rapidly expanding economies in the country, and as a district council Mid Devon has sought to maximise this opportunity by delivering quality growth in a high-quality environment.

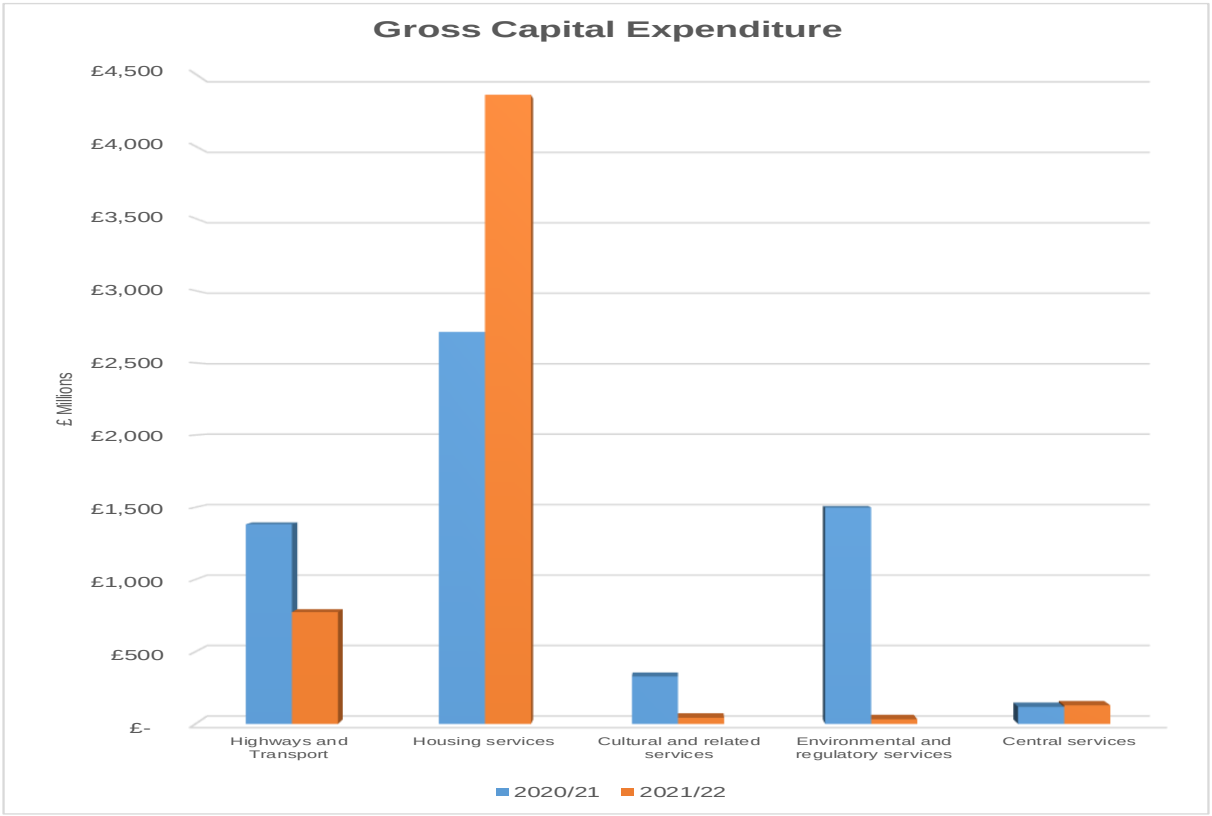
As a district council, we are responsible for providing services such as Housing, Leisure and Cultural services, Environmental and Regulatory services, Waste Collection and Planning Services. Also as a billing authority, we are also responsible for the collection and administration of Council Tax and Business Rates income on behalf of those that levy it.

The Council applies a variety of different service delivery models across its operations including an increasing number of Joint Ventures and partnership operations. This utilises single / multiple provider frameworks and contracts, use of small Lots, local, and sometimes regional frameworks.

Mid Devon District Council is a progressive council committed to providing high quality and sustainable services, creating an environment where communities and businesses can flourish and grow together.

The Council spends significant sums on delivering services for its communities and residents across its capital and revenue workstreams. The charts below illustrate the value of spend across various categories. Over the timeframe of this strategy, the Council will be investing in further quality social and affordable housing and in reducing our carbon footprint.


Gross Revenue Expenditure
£12,000
£10,000
£8,000
£6,000
£4,000
£2,000
£-
£ Millions
Housing services
Cultural and related services
Environmental and regulatory services
Planning and development services
Central services
2020/21
2021/22


Gross Capital Expenditure
£4,500
£4,000
£3,500
£3,000
£2,500
£2,000
£1,500
£1,000
£500
£-
£ Millions
Highways and Transport
Housing services
Cultural and related services
Environmental and regulatory services
Central services
2020/21
2021/22

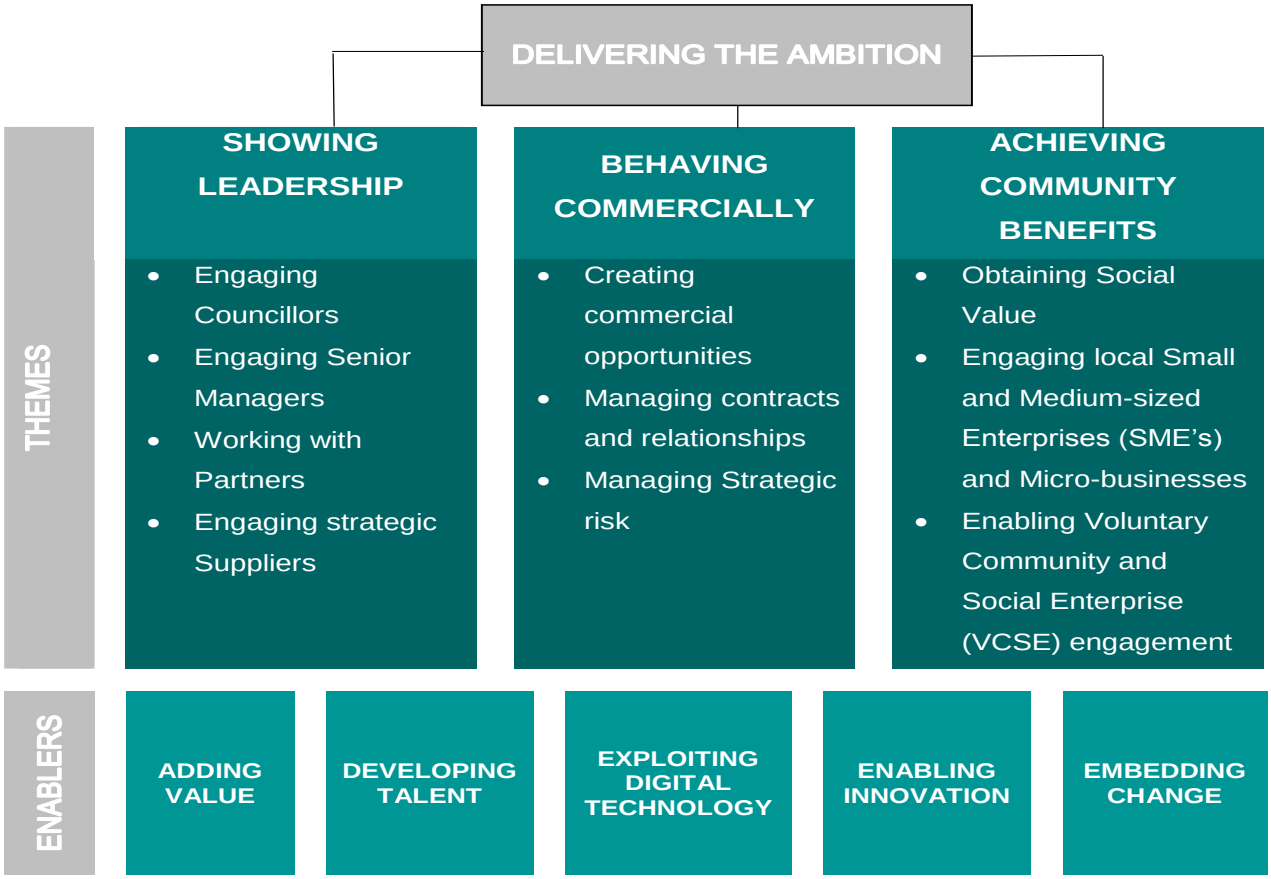
National Procurement Strategy for Local Government in England

The Local Government Association (LGA) has published the National Procurement Strategy for Local Government in England. The strategy outlines three Priority Themes and five 'Enablers' for Local Government procurement in coming years. [1]

The LGA national strategy highlights these themes and invites Authority's to develop their own approach linked to them. The strategy themes are illustrated below and are available via:

https://www.local.gov.uk/publications/national-procurement-strategy-local-government-england-2022

Mid Devon District Council's procurement strategy links these themes with local priorities, forming our procurement approach.



[1] Source: National Procurement Strategy for Local Government in England

Procurement Strategy

Below are the key procurement themes. The Authority's procurement strategy closely links these themes with local priorities, to form our overall procurement approach. The approach works in line with organisational objectives and the National Procurement Strategy, and will develop over time. These themes will be promoted across services through the procurement approach and performance will be monitored for continuous improvement.



Support Strategic Objectives



Procurement is an enabler which supports the Authority's objectives.

Our priorities include:

Procurement awareness

- Understand how procurement can help in the delivery of the Council's aims and objectives.
- Maintain excellent procurement links with the Authority's Senior Managers and Budget Holders.

Support future service design

- Early procurement involvement in service planning.
- Promote stakeholder input to support efficient and effective service design.
- Consult service providers to build supply market skills into service design.
- Support Service delivery and decision making.

Support daily activities

- Support daily operations across the Authority's business.
- Promote procurement support for public sector partnerships and income generation / cost recovery to support partners as appropriate.

Continuous learning

- Identify continuous learning opportunities and share knowledge widely.
- Undertake support and challenge to enable effective decisions.

Promote equality and diversity objectives

- Work with services to ensure equality and diversity considerations are central to the procurement approach, helping build a society where everybody can thrive.

KEY MESSAGE

Attuned to organisational strategy with an enabling procurement environment.

01 Promote procurement as an enabler to support the organisation's strategic objectives and daily operations.

02 Lead the Authority in a fair and proportionate procurement approach and enable monitoring through contract duration.

Global Climate Change



Mid Devon's climate declaration

Mid Devon's Climate Declaration is in place along with a Devon Climate Emergency Response Group. Relevant Procurement considerations are part of the Authority's Net Zero Action Group's (NZAG) responsibility which is working in response to the climate emergency.

This includes working with service providers to reduce the Authority's carbon footprint in line with developing commitments, as part of Mid Devon's Net Zero ambition. It will carefully consider specifications and standards alongside a total lifecycle approach to consider the long-term impact.

Procurement activity will underpin the Authority's climate emergency activities by supporting the sourcing of low carbon alternatives, renewable energy, waste management strategies and climate enhancement initiatives. We will work with services, communities, external partners and supply markets to show leadership, improve standards and enable investments which support environmental sustainability priorities and play our part in tackling the global climate emergency.

We will promote local service delivery, reduce road miles, help de-carbonise the supply chain and support opportunities for local supply in our procurement approach.

KEY MESSAGE

Our procurement approach will underpin the Authority's Climate Change Action Plan

01 We will proactively support procurement for climate emergency activity.

02 Work with services across the Authority to reduce the carbon footprint including supply chain carbon reductions.

Social Value



“Social Value drives everything”

Unlocking social value promotes the improvement of economic, social, and environmental wellbeing, and our work must prioritise the things that bring value. Our approach includes:

- Creating opportunities in line with the Social Value Act 2012.
- Implementing a social value matrix to maximise Social Value opportunities when planning procurement activity.
- Ensuring social value considerations are proportionate with the size, scope and nature of procurement activity.
- Working in line with good practice approaches such as the national social value framework.
- Ensuring Social Value is considered upfront in all procurement approaches as appropriate (e.g. quality criteria, specifications, design of route to market and contract evolution through its lifecycle).
- Social Value Championing ensuring wide engagement.
- Supporting local social value creation events.
- Promoting Social Value across all our collaborative procurement forums and contributing towards further development of shared social value frameworks with other local authorities.

KEY MESSAGE

Social value drives everything.

01 Our approach will prioritise the overall value ahead of the cost.

02 We will ensure Social Value considerations are built centrally into the planning of all procurement activity.

Prioritise Local Economic Development & SMEs



Mid Devon's organisational strategy emphasises local economic wellbeing. The Authority's Procurement Strategy aims to prioritise opportunities for local suppliers, Small and Medium-sized Enterprises (SMEs) and Voluntary Community and Social Enterprise (VCSE) when planning the procurement approach and that applying to do business with the Authority is as streamlined as possible.

We recognise that engaging local SME's and VCSE's is a powerful means to support the local economy. This brings a multiplier effect through which local service providers can upscale, create and sustain local jobs, invest in personnel, generate local economic growth, social stability, be agile and support innovation.

Service providers working within their localities bring an unrivalled appreciation of local considerations. Their contribution is tireless, and they are able to direct their operations in line with fast changing local priorities. We are mutually reliant on their success.

We recognise VCSE's can play a critical role in local communities and look to build suitable opportunities into our approach when planning procurements.

The Authority's approach includes:

- Applying an SME / VCSE engagement strategy for specific contracts, designing services at an appropriate scale to support engagement and attending local 'Meet the Buyer' events.
- Approaching the competitive process in a practical way, with procedures and templates proportionate to each procurement – with early market engagement, appropriate routes to market and small Lots.
- Promoting the 'Multiplier effect', whereby £1 spent locally is multiplied many times over through the local economy. As organisations gain turnover, they can upscale and invest, gain resilience and support sustainable services and communities.
- SME / VCSE use of e-procurement systems including a common system across local procurers.

- Using Dynamic Purchasing Systems to support SME engagement.
- Utilising VCSE sector for insights into local community requirements and support service design, with community engagement in service development.
- Building Social Value when planning all our procurements: consider breaking down opportunities into smaller lots, ensuring SME's and VCSE's have good opportunity to bid.
- Ensuring fair payment and other positive practices flow through the supply chain.
- Improve the monitoring of spend with local SME's/VCSE's.
- Considering how 'Tail spend' is managed and ensure it is not just the high profile spend areas which attract due attention.
- Recognise how local supply chains contribute to the Local Economic Multiplier effect.

KEY MESSAGE

Local supply is key for sustainable services and economic wellbeing. We will promote opportunities for local community and partnership engagement.

01 Ensure wherever possible we create opportunities for small to medium-sized enterprises and the voluntary/ community sector.

02 Promote and prioritise local economic development across our procurement engagement and delivery.

03 Ensure we are easy to do business with and always take a proportionate approach.



Client of Choice,

Service providers have choices around which clients to prioritise, and to secure the best outcomes for the people of Mid Devon our approach must enable us to be client of choice.

This includes being practical and consistent in our approach, transparent and diligent and communicating well. This requires early planning, market communications, risk allocation, meeting our commitments and holding to our principles.

We plan procurements to accommodate SME's and VCSE's, use small Lots as appropriate and build contracts of sensible scale. Supporting measures include prompt payment, avoiding onerous contract terms, meeting our timescales, good implementation planning and quality relationship management.



Ease of Doing Business

Procurement can sometimes feel complex due to many competing priorities. Therefore, we take a proportionate approach and work transparently.

Working with the SW Regional Procurement Board we support the uptake of e-tendering. This ensures our suppliers have a common system to embrace opportunities from SW public bodies, as a joined up supply side experience which promotes ease of doing business.



Transparency

Mid Devon District Council works transparently. We ensure our operations are well structured, logical and predictable, and that our procurement procedures are transparent, practical and easy to engage with.

The Authority supports the transparency regime and publishes details of all spending over £500 via this link:

Payments to suppliers - MIDDEVON.GOV.UK

The team supports information enquiries from the public, many of which link to MDDC's contractual arrangements, a link to the Authority's published Access to information responses can be found here:

Access to information - MIDDEVON.GOV.UK

Our contract register and opportunities to work with us can be found here:

Current contract opportunities - MIDDEVON.GOV.UK

KEY MESSAGE	
We will be a client of choice. In meeting our obligations, we prioritise purpose over process.	01 Openness, transparency, fairness, sustainability, resilience, equality and democracy

Contract Management and Performance Regime

Contract management is vital to service performance. It supports overall service quality, value for money, promotes continual innovation, agility and flexibility, supports early intervention and encourages collaborative service development.

As the Authority's financial resources are stretched ever further, the importance of contract management grows. This requires clear objectives and measurement of what's important to people. We take a proportionate approach to contract management ensuring considerations of strategic, political and citizen importance are within the performance regime.

Contract management focuses service delivery on quality performance, making efficiencies and achieving cost reductions, increasing social value opportunities, decreasing environmental footprint, mitigating risks, increasing resilience and harnessing continuous innovation and change.

Our priorities for contract management include:

01 Working with strategic suppliers via supplier relationship management.

02 Collaborative framework management and focus sessions.

03 Promoting supply chain opportunities through 'Meet the Buyer' events.



04 Performance monitoring of suppliers. Measures include financial resilience, service quality and continuity, modern slavery, carbon footprint and early problem resolution. Ensuring all parties are held mutually to account.

05 Sharing supply side intelligence with partners to support joined up public service.

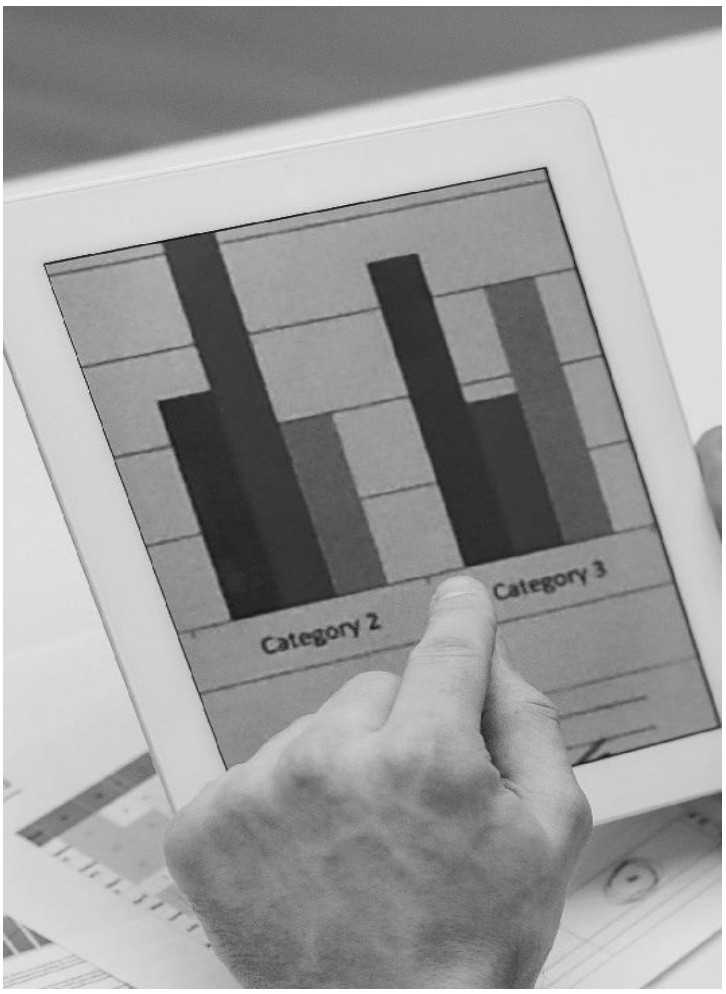
06 Enabling services to fulfil governance and control over provider performance through good measurement and reporting. Ongoing performance reviews and meetings.

07 Promoting visibility of potential risks and ability to mitigate these to avoid underperformance / disaster with early intervention (e.g. inclusion of "Termination on Insolvency, Change of Control, and Breach of Warranties" clause)

08 Understanding market development opportunities, innovation and value creation; ensure contract agility and continual development

09 Post contract review meetings and lessons learned sessions including exit strategy

10 Maintaining the contracts register and supporting services in identifying procurement risks and opportunities.



KEY MESSAGE	
We need to understand what's important to people.	01 Support services to develop contractual arrangements that facilitate effective contractual relations.

Value for Money and Benefits Realisation

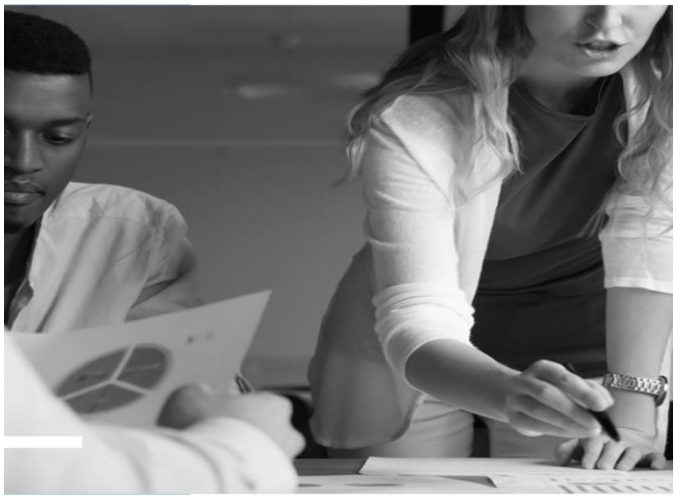
Our services prioritise value for money and our supply competitions include specific criteria which identify the critical success factors for each opportunity. We optimise the performance of our contracts and prioritise value for the people of Mid Devon. We promote service quality and lifecycle value with performance, sustainability and longevity in mind.

Procurement activity requires the highest standards of probity, transparency and fair competition. This includes adherence to the Authority's Code of Business Conduct and strategic procurement good practice and operating procedures.

Further details can be found in the procurement documents we publish for each competitive process and the wider considerations outlined in this strategy.



Commercialisation and Working Efficiently



As government funding changes, we increasingly rely on sustainable models which promote service outcomes in the best possible way. This includes the following approaches:

- Income generating / cost recovery through procurement services for other public bodies.
- Developing ideas for further cost reductions and revenue generation opportunities.
- Maximising commercial attractiveness by aggregating requirements if appropriate.
- Bringing innovative ideas for service delivery (e.g. creation of trading services).
- Utilising frameworks and dynamic purchasing systems for operational efficiency.
- Engaging and researching the market for up-to-date intelligence.
- Developing documentation for each competition to ensure opportunities are attractive for the market and include innovation and value creation.

KEY MESSAGE

Value is at the centre of everything we do.

01 We will consider income generation / cost recovery opportunities with a good organisational fit, which enable us to support partners and promote joined up public services.

02 Investing in our team will enable us to support our own financial sustainability, continuously develop our skills base and maintain our strategic procurement offer.

Risk Appetite and Risk Management



The Authority has complex services for which innovation and transformation comes as standard, which requires risk appetite to pursue our objectives. This demands balance between the benefits of innovation and the risks this can carry.

Risk management is important to our activities and is part of good governance. Risks are identified and made transparent, with mitigations considered and implemented within the contract management approach. This also requires that risks are appropriately apportioned through our contracts and sit with whichever risk owners are best placed to manage them.

This ensures service providers do not take on inappropriate risk and then build risk allocations into their proposals; we can then provide better assurance and reduce costs in the system.

Our approach includes the following:

- Procurement and Services collaboratively designing contract specifications to include risk identification and mitigation – for example supplier resilience and business continuity.
- Identifying risk ownership and mitigation assurance.
- Reporting and monitoring of suppliers' input and responsibilities.
- Developing and applying suitable terms and conditions for contracts.
- An appetite for innovation.
- External environment monitoring and identifying risk implication and mitigation in relation to strategic contracts.

KEY MESSAGE

We need a proportionate approach to risk and will maintain a responsible risk appraisal process.

01 Procurement will support risk appraisal areas and help identify appropriate ownership and mitigation of risk amongst stakeholders.

02 We will create an environment of opportunity and promote innovation.

Workforce Skills Development



We rely on the skills of our people and all those we work with to run our activities with professionalism, diligence, knowledge, open mindedness, and leadership. We are committed to continual professional development. Through collaboration we have access to procurement professionals who bring unique skillsets, expertise, technical knowledge and offer peer challenge and support.

We aim for high quality procurement support at all times. This requires continuous development of skills, and competencies, diversity, broad exposure to experience and learning, and cross functional working with services and market areas for knowledge development. This brings exposure to diverse experiences, formal professional development and links to industry forums, partnerships and learning events.

We invest in skills development to evolve our service, improve resilience and link back to our purpose of supporting Mid Devon's communities by providing high quality public service.

We value and embrace diversity at the heart of what we do.

This includes:

- Linking with HR strategy to encourage workforce development and diverse experiences.
- Identifying leadership / career development opportunities.
- Promoting a management and mentoring approach.
- Cross-matrix working.
- Utilising the apprenticeship programme and opportunities for wider staff development.

KEY MESSAGE	
We invest in our team for continual learning, embrace autonomy and shared purpose.	01 Apply a workforce strategy which supports and enables professionals to continually develop their knowledge and make ever greater contributions. Ensure personal accountability and continual learning help. 02 We will continuously review opportunities to help our services be more efficient, effective and smart.

Working with Partners



Our procurement philosophy is a "one team" approach working with networks to ensure resources are applied efficiently, needs are understood, knowledge is shared, and innovative solutions are implemented.

We encourage early stakeholder involvement and recognise the value in service co-design, consultation, and working together. We promote early engagement, collaboration, collective intellect and partnership, and recognise that competition can in some cases risk driving out co-operation in service design.

We engage with other local public bodies to uncover benefits which can be derived through collaboration. We also look to community groups, service providers and reference groups to build intelligence and local service knowledge into the planned approach.

We see advantages of a collaborative approach being:

- The avoidance of duplication of effort/resources and working in silos, fostering cooperation across services and with external partners.
- Joined up planning and budgeting processes.
- Strong cross-organisational governance structures
- A cross service project management approach and shared support/resources.
- Greater economies of scale and cost savings

KEY MESSAGE

We promote collaborations and partnerships which are greater than the sum of the parts.

01 We will look to the big picture in supporting relationships, and consider whether competition or collaboration is the best approach.

Digital Transformation



The Authority's strategic procurement system is closely aligned with the digital agenda, working across all our markets to seek opportunities through digital access, using innovation to facilitate change.

Procurement is a facilitator of change. It supports the Authority's digital ambitions in identifying opportunities for digital change, harnessing opportunities from specialist and innovative service providers.

We will support digital transformation and modernisation opportunities across the Authority, partners, stakeholders and service users to improve quality outcomes, promote wellbeing and efficiency. We will improve citizen experiences, support fitness for the future and transformational change.

Digital opportunities through the procurement approach include:

- Supporting service re-design;
- Enabling agile working and flexibility; and
- Increasing efficiency through use of better devices, hardware and software systems.

Cloud commissioning / remote hosting approach:

- Supporting better IT infrastructure;
- Using Data & Business Intelligence;
- Maximising benefit created through technology;
- Innovating; and
- Working to modern e-Government standards including Cyber Security and Information Governance.

KEY MESSAGE

We will support digital transformation throughout services, reduce waste, automate, digitalise, innovate, transform, simplify and streamline. Ensuring the local community and efficiency is at the heart of what we do.

01 We will seek opportunities for digital transformation across all service areas to improve all areas of our overall public service.

Utilise the Legal Framework to Best Effect

We apply the legal framework in an enabling manner which allows us to work fairly, transparently and consistently. Considerations include:

- Common appreciation of legal considerations Authority wide.
- Staying continuously up to date with the developing public sector legal framework.
- Modern Slavery measures and compliance checks.
- Innovation and consistent approach.
- Information Governance and GDPR measures and compliance checks – collaboration with the Information Governance team.
- Assisting internal stakeholders and external partners in procurement compliance.
- Ensuring ethical trading standards are supported by the supply chain.
- Working within the Authority's Equality and Diversity Policy.
- Considering opportunities available through legislative change such as BREXIT.
- Counter fraud measures and awareness of procurement fraud risk.

United Against Modern Slavery

We are united against Modern Slavery and Mid Devon's Modern Slavery statement is available here:

Modern Slavery and Human Trafficking Statement 2021-2022 - MIDDEVON.GOV.UK

As part of the SW Procurement Board we have a joint approach in which all its members stand united in our commitment to positively contribute to both influencing and supporting the National Procurement agenda across the public sector. We aim to do this by providing a strategic voice with links into national policy, best practice and emerging changes to commissioning, procurement and supplier relationship management.

We can all make a difference.



KEY MESSAGE

We apply the legal framework in an enabling manner and maximise opportunities from legislative change.

We are united against all aspects of Modern Slavery and will take a unified approach with regional partners.

01 We will apply the legal framework to ensure our operations are consistent, practical, innovative and legally compliant.
02 Ensure our procurement practises are compliant with all relevant legislation and reflect the latest best practises resulting from case law.
03 Work across the Authority and the SW Procurement Board to raise the profile and bring attention to this area.
04 Undertake supplier assessments and focus reviews to uncover and eliminate slavery from our supply chains and all areas of activity.

Website: www.middevon.gov.uk

Email: Procurementoffice@middevon.gov.uk



COMMUNITY
24 JANUARY 2023

COUNCIL TAX REDUCTION – BANDED SCHEME

Cabinet Member(s): Cllr Bob Deed
Responsible Officer: Andrew Jarrett – Deputy CEO & S151

Reason for Report: Section 13A (2) of the Local Government Finance Act 1992 requires the Council as the billing authority to make a localised Council Tax Reduction Scheme in accordance with Section 1A of the act.

The Council is looking to amend the current scheme in order to expand the assistance for our customers.

Introduction

In April 2020 Mid Devon District Council introduced an Income Banded Scheme to support people on low incomes by reducing the amount of Council Tax they had to pay and to improve the administrative process for assessment.

The Council Tax Reduction scheme is determined locally by District Councils rather than the Department of Work and Pensions. We have had no funding from Central Government since 2020 though a separate Central Government scheme is retained for people of pension age so proposed changes will only affect working age residents

Mid Devon District Council is proposing the following revisions to the current Income Banded scheme from 1 April 2023

RECOMMENDATION:
1) TO INCREASE THE MAXIMUM REDUCTION FROM 85% TO 100%
2) DISREGARD THE HOUSING ELEMENT OF UNIVERSAL CREDIT IN THE CALCUATION
3) INCREASE THE INCOME BANDS BY INFLATION each year
4) ANY INCOME FROM WELFARE PROVSION TO BE DISREGARDED
3) TO RECOMMEND THIS POLICY IS ADOPTED BY MID DEVON DISTRICT COUNCIL CABINET

Financial Implications: The cost of the current scheme is increasing, expanding the reduction to 100% will reduce the ongoing arrears of our residents least able to pay. Increasing the income bands will give reduced bills where the propensity to pay will increase. Reduced production of Reminder notices and associated costs with enforcement action through the courts. An Exceptional hardship scheme will allow those under the banded scheme to apply for additional assistance if needed.

Legal Implications: The Welfare Reform Act 2012 provided for the abolition of Council Tax Benefit and brought in instead, localisation of Council Tax Support under the Local Government & Finance Act 2012 from 1 April 2013. This Act made councils responsible for administering their own Council Tax Support Schemes. Councils are required to review their schemes annually and Full Council must make a decision as to whether to revise or replace the scheme.

Risk Assessment: Should the proposed scheme not be agreed there is a risk of reduced collection rates and an increase in overall arrears. The current scheme has not been fully reviewed since its introduction in April 2020 and needs uprating to reflect the financial concerns being experienced by many people.

Equality Impact Assessment: The Revenues and Benefits service constantly monitors the issues affecting claimants on Council Tax Reduction. The banded scheme has been developed to support our most vulnerable customers in the ever changing landscape of welfare reform.

Universal Credit changes in circumstances issued by the Department of Work and Pensions (DWP) have increased as the migration continues, the inclusion of the housing element of Universal Credit in the assessment for rebate has had a direct impact on Council Tax Reduction scheme and the amount customers receive.

The impact has been reviewed for the 2023/24 financial year. It is apparent that unless changes are made to the scheme our customers in receipt of Universal Credit will receive bills that are disproportionately higher than those claimants in receipt of housing benefit which is disregarded under the current scheme.

Having reviewed our scheme and taken into consideration funding, Council Tax arrears, cost of living crisis Universal Credit and the impact of wider welfare reform Mid Devon Council recommends that the revised Banded Scheme starts from 01/04/2023

Further detail can be seen on the Equality Impact Assessment attached to this report.

Relationship to Corporate Plan: Making sure that the “public purse” is used in an economic way.

Impact on Climate Change: This policy has no known detrimental effect on climate change. The administration will be almost paperless and administered electronically where possible. As such it’s considered to have a positive effect and will reduce the amount of paper currently used.

1.0 Introduction/Background

1.1 Council Tax Reduction (CTR) Banded Scheme was introduced in April 2020. The CTR scheme for working-age customers is a local scheme, however the scheme that exists for pension age recipients is a national scheme prescribed by regulations and cannot be varied locally.

1.2 Councils are required to consult fully on any changes they would like to bring into place within the scheme.

1.3 It is proposed to adopt the revised scheme from 1 April 2023.

1.4 All Devon Billing Authorities (with the exception of Torridge District Council) operate similar Banded Schemes, this is also the case nationally.

2.0 CTR – Drivers for Revision

2.1 Universal Credit Migration.

2.2 Loss of joint Housing Benefit/Council Tax Reduction Claims.

2.3 Greater support for households in the lowest income band.

2.4 Inflation increase to the current banding levels.

2.5 Digital and Self – Service Transformation – Citizen Access.

2.6 Potential for full automation saving complex processing work – Officers can focus on other tasks/areas.

2.7 Financial crisis

3.0 Options

Option 1 - Retain Current scheme

3.1 No additional help for those in the lowest band

3.2 UC claimants will continue to have housing element counted as income.

3.3 Inflation ignored

3.4 Increased administration to accommodate welfare provision disregards

Option 2 - Move to Revised Banded Scheme

3.5 Administration savings due to the expansion of bands.

3.6 Reduced enforcement action

3.7 1265, 69% customers will have full entitlement.

3.8 Scheme is simplified.

3.9 Customers should be able to work out their entitlement before applying.

3.10 Potential for customers to ‘self-serve’.

3.11 Consistent with other Councils in Devon and Country wide.

4.0 Summary of Impact as at 13/12/2022

Customers can apply for help via the Hardship Policy if their entitlement is causing them financial concern. Customers will be notified of changes due to the new scheme, they will be advised on what help can be applied for understanding that 'vulnerability' must and will be recognised by Mid Devon Council

Scheme	Total Annual award for working age claims	Number of working age claims	Number of Gainers	Numbers of Losers	No Change	Lost Claims
Current	£3,998,789.27	2015	0	0	0	0
Revised	£4,512,261.93	1825	1265	0	0	0

.

5.0 Banded Scheme

Current scheme

CTR discount	Passported	Single	Couple	Family with 1	Family with 2+
85%	Yes	0 – 75	0 – 120	0 – 200	0 – 260
65%	N/A	75.01 – 120	120.01 – 160	200.01 – 250	260.01 – 310
45%	N/A	120.01 – 170	160.01 – 210	250.01 – 300	310.01 – 360
25%	N/A	170.01 - 220	210.01 - 260	300.01 - 350	360.01 - 410

Details of scheme for 100% + removal of UC HE + inflation.

CTR discount	Passported	Single	Couple	Family with 1	Family with 2 +
100%	Yes	0 - 85	0 - 130	0 - 210	0 - 270
65%	N/A	85.01 - 130	130.01 - 170	210.01 - 260	270.01 - 320
45%	N/A	130.01 - 180	170.01 - 220	260.01 - 310	320.01 - 370
25%	N/A	180.01 - 230	220.01 - 270	310.01 - 360	370.01 - 420

Customers can see at a glance what % reduction they would get in accordance with their net income off their Council Tax. Increases and decreases in income should mainly stay with the bands,

6.0 What is Changing

6.1 Increases maximum award from 85% to 100% to all passported claims and those in the lowest income band.

6.2 Ignores housing element of UC.

6.3 Inflation increase to bands.

6.4 Streamlines billing and enforcement, reduced bills, reminders and prosecution.

7.0 Key Impacts

7.1 Customers on lowest income will no longer have to pay a charge.

7.2 Officers will have more time to pursue collectable debt.

7.3 Customers more likely to pay due to having reduced bills.

7.4 Hardship policy to allow those who require additional assistance to access it.

8.0 Rationale for Change

8.1 Over 29% of CTR cases have Council Tax Arrears.

8.2 Fewer referrals to our Welfare Officer

8.3 Revisions better align with our neighbouring districts

8.4 Recognises vulnerable groups.

8.5 Inflation increase to bands will provide additional assistance.

8.6 Helps stakeholders such as CHAT and CAB to advise customers on reductions that could be claimed.

9 Consultation with the public and Preceptors 1127 issued

Survey Question	Surveys Received 1127	Survey Results
Do you agree with revising the income-based banded discount scheme?		
	Yes	No & skipped
	80%	20%

Mid Devon had a very good response by receiving 1124, however it must be noted that not all questions were answered by everyone.

	Agreed/disagreed	comments
Devon & Somerset Fire & Rescue Service	Agreed	
Devon County Council	Disagreed	Adverse impact on income for County
Police & Crime Commissioner	Agreed	

Contact for more Information: Fiona Keyes Operations Manager Revenues and Benefits – 01884 234329 / fkeyes@middevon.gov.uk

Circulation of the Report: Leadership Team, Cllr Bod Deed, Community PDG and Cabinet

List of Background Papers: Hardship Policy, Equality Impact Assessment, CTR Policy

Equality Impact Assessment

"I shall try to explain what "due regard" means and how the courts interpret it. The courts have made it clear that having due regard is **more than having a cursory glance** at a document before arriving at a preconceived conclusion. Due regard requires public authorities, in formulating a policy, to give equality considerations the weight which is **proportionate in the circumstances**, given the potential impact of the policy on equality. It is not a question of box-ticking; it requires the equality impact to be **considered rigorously and with an open mind**."

Baroness Thornton, March 2010

What are you completing the Impact Assessment on (which policy, service, MTFP reference etc)?	Revisions to the Council Tax Reduction Scheme from April 2023		
Version	1	**Date**	16.12.2022

Section 1 – **Description** of what is being impact assessed

Section 13A (2) of the Local Government Finance Act 1992 requires the Council as the billing authority to make a localised Council Tax Reduction Scheme in accordance with Section 1A of the act.

In April 2013 Council Tax Benefit was replaced by a new Council Tax Reduction scheme.

Council Tax Benefit had been funded by the Department for Work and Pensions and supported people on low incomes by reducing the amount of Council Tax they have to pay.

The Council Tax Reduction scheme is determined locally by District Councils rather than the Department of Work and Pensions. Although the Government initially provided funding for the scheme, the funding has reduced each year in line with the reduction in Revenue Support Grant provided to councils. From 2020 no funding will be provided for the scheme.

Universal Credit is replacing legacy benefits such as Income Support, Tax Credits and Housing Benefit. Universal Credit has increased the workload for local authorities, revenues and benefits departments. Nationally local authorities have developed a new income banded scheme to make administering Council Tax Support easier for themselves and the customer.

A separate Central Government scheme is retained for people of pension age so the new changes will only affect working age residents.

Mid Devon District Council along with other Devon Billing Authorities introduced a scheme using Income Bands from 01 April 2020.

The following changes are being recommended effective 1st April 2023;
An increase to the maximum reduction from 85 to 100%
Disregard the housing element of Universal Credit
Increase the income bands by inflation (each year)
Any income from welfare provision be disregarded

Section 2A – People or communities that are **targeted or could be affected** (taking particular note of the Protected Characteristic listed in action table)

The scheme works across the community, however it does look at working age people who are on a low income with those most in need having a rebate of 100% of their Council Tax liability.

Pension age customers will not be affected by the change other than that increased pension payments will take some out of scope. This is a Government scheme as opposed to local.

Section 2B – People who are **delivering** the policy or service

The scheme will be delivered by the Revenues and Benefits Service.

Section 3 – **Evidence and data** used for the assessment (Attach documents where appropriate)

Proposal 1 – To increase the maximum reduction from 85% to 100% for applicants of working agein the lowest inome band

At present there are 1265 working age Council Tax Reduction claims which will be affected by the change to the income bands from 85 10 100%
The proposal will also affect any new working age applications from April 2023 onwards.

Proposal 2 – to disregard the housing element of Universal Credit
We currently disregard housing benefit from the the rebate calculation; disregarding the housing element of Universal Credit will ensure equality for our claimants.

Proposal 3 – to increase income bands by inflation each year

To ensure that rebate matches inflation year on year

Proposal 4 – any income from welfare provision to be disregarded

Will proof us against Central Government schemes for example the test and trace payments administered during the COVID pandemic and the cost of living payments currently being paid.

Section 4 – Conclusions drawn about the equalities impact (positive or negative) of the proposed change or new service/policy

The Revenues and Benefits Service constantly monitors the issues affecting customers in receipt of Council Tax Reduction (CTR). The proposed revisions to the banded scheme though increasing our costs to administer by approximately £56,000 (11% of the actual cost ths majority of the cost will be borne by County) will have the following positive impact on the community;

Those least able to pay will now no longer have to from April 2023; unless they have historic arrears.

Expanded income bands will benefit every claimaint in receipt of Council Tax Rebate

Disregarding the housing element of Universal Credit will align these claimants income disregard with those currently in receipt of housing benefit.

Streamlining enforcement with reduced Bill, Reminders Enforcement and prosecution.

Reduced bills for all those who qualifiy for Council Tax Rebate will increase propensity to pay as bill will be more manageable

Staff able to focus of collection of debt from those who are more able to pay.

681 pensioner claimants will lose Council Tax Rebate however this is a result of the Government run scheme rather than a local decision.

Changes will aligin us with our neighbouring Districts.

Identified issue drawn from your conclusions	Actions needed – can you mitigate the impacts? If you can how will you mitigate the impacts?	Who is responsible for the actions? When will the action be completed?	How will it be monitored? What is the expected outcome from the action?
Age			
Working age customers suffer disproportionately due to the requirement to protect pensioners from financial loss. This could drive working age people out of the area because of the increased burden arising from Devon having a higher number of pensioners than other parts of the UK. Working age customers in Devon are already disadvantaged by low wages and seasonal work, rurality and poor ICT connectivity.	The revised scheme is supplemented by a hardship relief policy. Those adversely affected by the changes can apply for additional help.	The revised scheme will be monitored and treated as work in progress. Managers will have regular discussions to make sure any issues are flagged and worked through.	The level of rebate paid, will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when required.
Disability			
Schemes must have regard to their statutory duties under The Disabled Persons (Services, Consultation and Representation) Act 1986, and Chronically Sick and Disabled Persons Act 1970, which include a range of duties relating to the welfare needs of disabled people. The revised CTR scheme as part of our ongoing commitment to support disabled people will disregard Carer's Allowance and the support element of Employment Support Allowance as well as continuing to disregard Disability Living Allowance,			

Personal Independence Payments and War Disablement Payments.	The revised Banded Scheme is supplemented by a Hardship Relief policy.	The revised banding Scheme will be monitored and treated as work in progress. Managers will discuss on a regular basis to make sure all issues are flagged and worked through	Issues and resolutions will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when or if required.
Gender Reassignment			
The Banded Scheme works on the basis of "working age" people not gender. There are no known equality issues within this group	The revised Banded Scheme is supplemented by a Hardship Relief policy. Should some see an adverse effect that cannot be managed they can apply for additional help.	The revised Band Scheme will be monitored and treated as work in progress. Managers will discuss on a regular basis to make sure all issues are flagged and worked through.	Issues and resolutions will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when or if required.
Marriage and Civil Partnership			
No issues identified	The revised Banded Scheme is supplemented by a Hardship Relief policy. Should some see an adverse effect that cannot be managed they can apply for additional help.	The revised Band Scheme will be monitored and treated as work in progress. Managers will discuss on a regular basis to make sure all issues are flagged and worked through.	Issues and resolutions will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when or if required.

Pregnancy and Maternity			
No issued identified.	The revised Banded Scheme is supplemented by a Hardship Relief policy. Should some see an adverse effect that cannot be managed they can apply for additional help.	The revised Band Scheme will be monitored and treated as work in progress. Managers will discuss on a regular basis to make sure all issues are flagged and worked through.	Issues and resolutions will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when or if required.
Race			
Whilst information is held on 'race' the scheme looks at income only. No isssues identified	The revised scheme will be monitored id concerns are raised the policy will be corrected as required.	The revised Band Scheme will be monitored and treated as work in progress. Managers will discuss on a regular basis to make sure all issues are flagged and worked through	Issues and resolutions will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when or if required.
Religion and Belief			
We do not hold details of religion or belief. The scheme is an income/household based reduction and so will not treat people of different religion or belief differently.	The revised Banded Scheme is supplemented by a Hardship Relief policy. Should some see an adverse effect that cannot be managed they can apply for additional help.	The revised Band Scheme will be monitored and treated as work in progress. Managers will discuss on a regular basis to make sure all issues are flagged and worked through.	Issues and resolutions will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when or if required.
Sex			

Same as race question?			
Sexual Orientation			
We do not hold details of sexual orientation. The scheme is an income/household based reduction.	The revised Banded Scheme is supplemented by a Hardship Relief policy. Should some see an adverse effect that cannot be managed they can apply for additional help.	The revised Band Scheme will be monitored and treated as work in progress. Managers will discuss on a regular basis to make sure all issues are flagged and worked through.	Issues and resolutions will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when

Other (including caring responsibilities, rurality, low income, Military Status etc)			
Rurality The proposed changes will not have any impact on those customers living in rural areas in comparison with those living in towns.	The revised Banded Scheme is supplemented by a Hardship Relief policy. Should some see an adverse effect that cannot be managed they can apply for additional help. Issues with regards connectivity can be overcome by a home visit. Customers can also call Customer Services or Revenues and Benefits	The revised Band Scheme will be monitored and treated as work in progress. Managers will discuss on a regular basis to make sure all issues are flagged and worked through. Any issues raised will be reviewed and a way forward discussed on a case by case basis.	Issues and resolutions will be tracked and closely monitored by all officers and managers. Reactive corrections will take place as and when or if required.

Section 6 - How will the assessment, consultation and outcomes be published and communicated? E.g. reflected in final strategy, published. What steps are in place to review the Impact Assessment?
General publicity via the website, social media channels, individual letters to those existing customers affected and face-to-face with customers on a case by case basis. We are also engaging with local agencies such as CHAT and Citizen's Advice.

Completed by:	Revenues & Benefits Leadership
Date	16/12/2022
Signed off by:	Fiona Keyes
Date	16/12/2022
Compliance sign off Date	
To be reviewed by: (officer name)	
Review date:	

Mid Devon District Council
Council Tax Reduction Scheme
S13A and Schedule 1a of the Local Government Finance Act 1992

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1.0 Introduction to the Council Tax Reduction Scheme

1.1 The following has been adopted by the Council and details the Council Tax Reduction scheme for the period from 1st April 2023.

1.2 This document details how the scheme will operate for both pension credit age and working age applicants and in accordance with Section 13A of the Local Government Finance Act 1992 specifies the classes of person who are to be entitled to a reduction under the scheme and is effective from 1st April 2023 for a period of one financial year.

1.3 1.3 The scheme in respect of pension age applicants is defined by Central Government within the following:

- Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012;
- Council Tax Reduction Schemes (Prescribed Requirements and Default Scheme) (England) (Amendment) Regulations 2012;
- Council Tax Reduction Schemes (Transitional Provision) (England) Regulations 2013;
- Council Tax Reduction Schemes (Detection of Fraud and Enforcement) (England) Regulations 2013;
- Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2013;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) (No. 2) Regulations 2014
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2015:
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2016;
- The Council Tax Reduction Schemes (Amendment) (England) Regulations 2017;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2018;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2020:
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2021;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2022;
- The Council Tax (Demand Notices and Reduction Schemes) (England) (amendment) Regulations 2022;
- The Council Tax (Demand Notices and Reduction Schemes) (England) (amendment) Regulations 2023; and
- Local Government Finance Act 1992 (as amended by the Local Government Finance Act 2012).

The scheme for pension age applicants – Central Government's scheme as defined by the Council Tax Reduction Scheme (Prescribed Requirements) (England) Regulations 2012

1.4 There are three main classes under the prescribed pension credit age scheme, for each of which there are a number of qualifying criteria. In all cases individuals must not be of a prescribed class exempted from reduction, such as a person subject to immigration control with limited leave to remain. The definition of a pension credit age person is a person who;

a. has attained the qualifying age for state pension credit; and
b. is not, or, if he has a partner, his partner is not;
    i. a person on income support, on an income-based jobseeker's allowance or on an income-related employment and support allowance; or
    ii. a person with an award of universal credit

The three prescribed classes are as follows;

Class A: pensioners whose income is less than the applicable amount.

On any day Class A consists of any person who is a pensioner:

a. who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
b. who, subject to paragraph 5 of Schedule 1 of the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012, is not absent from the dwelling throughout the day; in respect of whom a maximum Council Tax Reduction amount can be calculated;
c. who does not fall within a class of persons prescribed for the purposes of paragraph 2(9) of Schedule 1A to the Local Government Finance Act 1992 and excluded from the authority's scheme;
d. whose income (if any) for the relevant week does not exceed his applicable amount calculated in accordance with paragraph 9 and Schedule 2 of the Local Government Finance Act 1992;
e. not have capital savings above £16,000; and
f. who has made an application for a reduction under the authority's scheme.

Class B: pensioners whose income is greater than the applicable amount.

On any day class B consists of any person who is a pensioner:

a. who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
b. who, subject to paragraph 5 of Schedule 1 of the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012, is not absent from the dwelling throughout the day; in respect of whom a maximum Council Tax Reduction amount can be calculated;
c. who does not fall within a class of person prescribed for the purposes of paragraph 2(9) of Schedule 1A to the Local Government Finance Act 1992 and excluded from the authority's scheme;
d. whose income for the relevant week is greater than his applicable amount calculated in accordance with paragraph 9 and Schedule 2 to the Local Government Finance Act 1992;
e. in respect of whom amount A exceeds amount B where;
    (i) amount A is the maximum Council Tax Reduction in respect of the day in the applicant's case; and
    (ii) amount B is 2 6/7 per cent of the difference between his income for the relevant week and his applicable amount;
g. not have capital savings above £16,000; and
h. who has made an application for a reduction under the authority's scheme.

Class C: alternative maximum Council Tax Reduction

On any day class C consists of any person who is a pensioner:

a. who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
b. who, subject to paragraph 5 of Schedule 1 of the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012, is not absent from the dwelling throughout the day;
c. in respect of whom a maximum Council Tax Reduction amount can be calculated;
d. who does not fall within a class of person prescribed for the purposes of paragraph 2(9) of Schedule 1A to the 1992 Act and excluded from the authority's scheme;
e. who has made an application for a reduction under the authority's scheme; and
f. in relation to whom the condition below is met.

The condition referred to in sub-paragraph f. is that no other resident of the dwelling is liable to pay rent to the applicant in respect of the dwelling and there is an alternative maximum Council Tax Reduction in respect of the day in the case of that person which is derived from the income, or aggregate income, of one or more residents to whom this sub-paragraph applies.

The above applies to any other resident of the dwelling who:

a. is not a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for

the purposes of discount;

b. is not a person who is liable for council tax solely in consequence of the provisions of section 9 of the 1992 Act (spouse's or civil partner's joint and several liability for tax);
c. is not a person who is residing with a couple or with the members of a polygamous marriage where the applicant is a member of that couple or of that marriage and—
    (i) in the case of a couple, neither member of that couple is a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for the purposes of discount; or
    (ii) in the case of a polygamous marriage, two or more members of that marriage are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount;
d. is not a person who, jointly with the applicant, falls within the same paragraph of section 6(2)(a) to (e) of the 1992 Act (persons liable to pay council tax) as applies in the case of the applicant; or
e. is not a person who is residing with two or more persons both or all of whom fall within the same paragraph of section 6(2)(a) to (e) of the 1992 Act where two or more of those persons are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount.

Disregard of certain incomes

1.5 For those who have reached the qualifying age for state pension credit, the Council has resolved to enhance the government scheme (as defined by the Council Tax Reduction Scheme (Prescribed Requirements) (England) Regulations 2012 to disregard in full the following:
    a. a war disablement pension;
    b. a war widow's pension or war widower's pension;
    c. a pension payable to a person as a widow, widower or surviving civil partner under any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;
    d. a guaranteed income payment;
    e. a payment made to compensate for the non-payment of such a pension or payment as is mentioned in any of the preceding sub-paragraphs;
    f. a pension paid by the government of a country outside Great Britain which is analogous to any of the pensions or payments mentioned in sub-paragraphs (a) to (d) above;
    g. pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria.

    The provisions outlined above, enhance the Central Government's scheme.

THE SCHEME FOR WORKING AGE APPLICANTS – THE COUNCIL'S LOCAL SCHEME

1.6 The adopted scheme for working age applicants is an income banded / grid scheme means test, which compares income against a range of discounts available. Full details of the working age scheme of the authority are contained within this document from section 2 onwards. The authority is required to specify a scheme for working age and therefore this scheme only applies to a person who;
    a. has not attained the qualifying age for state pension credit; or
    b. has attained the qualifying age for state pension credit if he, and his partner, is a person on income support, on an income-based jobseeker's allowance, on an income-related employment and support allowance or on universal credit.

1.7 The Council has resolved that there will be ***one*** class of persons who will receive a reduction in line with adopted scheme. The scheme has qualifying criteria. In all cases individuals must not be of a prescribed class exempted from reduction as specified within section 7 of this scheme.

Class D

To obtain reduction the individual (or partner) must:

a. have not attained the qualifying age for state pension credit; or
b. he has attained the qualifying age for state pension credit and he, or if he has a partner, his partner, is a person on income support, on income-based jobseeker's allowance or an income-related employment and support allowance; or a person with an award of universal credit.
c. be liable to pay council tax in respect of a dwelling in which he is solely or mainly resident;
d. is not deemed to be absent from the dwelling;
e. not fall within a class of person prescribed for the purposes of paragraph 2(9) of Schedule 1A to the Local Government Finance Act 1992 and excluded from the authority's scheme;
f. be somebody in respect of whom a maximum Council Tax Reduction amount can be calculated;
g. not have capital savings above £6,000;
h. not have income above the levels specified within the scheme;
i. be a person in respect of whom a day in which s/he is liable to pay council tax falls within a week in respect of which the person's *income* is within a range of incomes specified within Schedule 1; and
j. has made a valid application for reduction.

Council Tax Reduction Scheme

Details of support to be given for **working age applicants** for the financial year 2023/24

Sections 2- 8

Definitions and interpretation

2.0 Interpretation – an explanation of the terms used within this scheme

2.1 In this scheme–

'the Act' means the Social Security Contributions and Benefits Act 1992;

'the Administration Act' means the Social Security Administration Act 1992;

'**the 1973 Act'** means the Employment and Training Act 1973;

'the 1992 Act' means the Local Government Finance Act 1992;

'the 2000 Act' means the Electronic Communications Act 2000;

'Abbeyfield Home' means an establishment run by the Abbeyfield Society including all bodies corporate or incorporate which are affiliated to that Society;

'adoption leave' means a period of absence from work on ordinary or additional adoption leave by virtue of section 75A or 75B of the Employment Rights Act 1996;

'an AFIP' means an armed forces independence payment payable in accordance with an armed and reserve forces compensation scheme established under section 1(2) of the Armed Forces (Pensions and Compensation) Act 2004

'applicant' means a person who the authority designates as able to claim Council tax reduction – for the purposes of this scheme all references are in the masculine gender but apply equally to male and female;

'application' means an application for a reduction under this scheme:

'appropriate DWP office' means an office of the Department for Work and Pensions dealing with state pension credit or office which is normally open to the public for the receipt of claims for income support, a jobseeker's allowance or an employment and support allowance;

'assessment period' means such period as is prescribed in sections 19 to 21 over which income falls to be calculated;

'attendance allowance' means–

(a) an attendance allowance under Part 3 of the Act;

(b) an increase of disablement pension under section 104 or 105 of the Act;

(c) a payment under regulations made in exercise of the power conferred by paragraph 7(2)(b) of Part 2 of Schedule 8 to the Act;

(d) an increase of an allowance which is payable in respect of constant attendance under paragraph 4 of Part 1 of Schedule 8 to the Act;

(e) a payment by virtue of article 14, 15, 16, 43 or 44 of the Personal Injuries (Civilians) Scheme 1983or any analogous payment; or

(f) any payment based on need for attendance which is paid as part of a war disablement pension;

'the authority' means a billing authority in relation to whose area this scheme has effect by virtue of paragraph 4(6) of Schedule 1A to the 1992 Act;

'Back to Work scheme(s)' means any scheme defined within the Jobseekers (Back to Work Schemes) Act 2013 or Jobseeker's Allowance (Schemes for Assisting Persons to Obtain Employment) Regulations 2013;

'basic rate', where it relates to the rate of tax, has the same meaning as in the Income Tax Act 2007 (see section 989 of that Act).

'the benefit Acts' means the Act (SSBA) and the Jobseekers Act 1995 and the Welfare Reform Act 2007;

'board and lodging accommodation' means accommodation provided to a family, for a charge which is inclusive of the provision of that accommodation and at least some cooked or prepared meals which both are cooked or prepared (by a person other than the person to whom the accommodation is provided or a member of his family) and are consumed in that accommodation or associated premises;

'care home' has the meaning given by section 3 of the Care Standards Act 2000 and in Scotland means a care home service within the meaning given by section 2(3) of the Regulation of Care (Scotland) Act 2001 and in Northern Ireland means a nursing home within the meaning of Article 11 of the Health and Personal Social Services (Quality, Improvement and Regulation) (Northern Ireland) Order 2003 or a residential care home within the meaning of Article 10 of that Order;

'the Caxton Foundation' means the charitable trust of that name established on 28th March 2011 out of funds provided by the Secretary of State for the benefit of certain persons suffering

from hepatitis C and other persons eligible for payment in accordance with its provisions;

'child' means a person under the age of 16;

'child benefit' has the meaning given by section 141 of the SSCBA as amended by The Child Benefit (General), Child Tax Credit (Amendment) Regulations 2014 and The Child Benefit (General) (Amendment) Regulations 2015;

'the Children Order' means the Children (Northern Ireland) Order 1995;

'child tax credit' means a child tax credit under section 8 of the Tax Credits Act 2002;

'claim' means a claim for council tax reduction;

'close relative' means a parent, parent-in-law, son, son-in-law, daughter, daughter- in-law, step-parent, step-son, step-daughter, brother, sister, or if any of the preceding persons is one member of a couple, the other member of that couple;

'concessionary payment' means a payment made under arrangements made by the Secretary of State with the consent of the Treasury which is charged either to the National Insurance Fund or to a Departmental Expenditure Vote to which payments of benefit or tax credits under the benefit Acts or the Tax Credits Act are charged;

'the Consequential Provisions Regulations' means the Housing Benefit and Council tax reduction (Consequential Provisions) Regulations 2006;

'contributory employment and support allowance" means an allowance under Part 1 of the Welfare Reform Act 2007 as amended by the provisions of Schedule 3, and Part 1 of Schedule 14, to the Welfare Reform Act 2012 that remove references to an income-related allowance and a contributory allowance under Part 1 of the Welfare Reform Act 2007 as that Part has effect apart from those provisions;

'council tax benefit' means council tax benefit under Part 7 of the SSCBA;

'council tax reduction scheme' has the same meaning as **'council tax reduction or reduction'**

'council tax support (or reduction) ' means council tax reduction as defined by S13a Local Government Finance Act 1992 (as amended);

'couple' means;

(a) a man and a woman who are married to each other and are members of the same household;
(b) a man and a woman who are not married to each other but are living together as if they were a married couple or civil partners;
(c) two people of the same sex who are civil partners of each other and are members of the same household; or
(d) two people of the same sex who are not civil partners of each other but are living together as if they were civil partners,

Two people of the same sex are to be treated as living together as if they were civil partners if, and only if, they would be treated as living together as husband and wife were they of opposite sexes. The above includes the Marriage (Same Sex Couples) Act 2013 and The Marriage (Same Sex Couples) Act 2013 (Commencement No. 3) Order 2014;

'date of claim' means the date on which the application or claim is made, or treated as made, for the purposes of this scheme

'**designated authority**' means any of the following;

the local authority; or a person providing services to, or authorised to exercise any function of, any such authority;

'**designated office**' means the office designated by the authority for the receipt of claims for council tax reduction;

(a) by notice upon or with a form approved by it for the purpose of claiming council tax reduction; or
(b) by reference upon or with such a form to some other document available from it and sent by electronic means or otherwise on application; or
(c) by any combination of the provisions set out in sub-paragraphs (a) and (b) above;

'disability living allowance' means a disability living allowance under section 71 of the Act;

'dwelling' has the same meaning in section 3 or 72 of the 1992 Act;

'earnings' has the meaning prescribed in section 25 or, as the case may be, 27;

'the Eileen Trust' means the charitable trust of that name established on 29th March 1993 out of funds provided by the Secretary of State for the benefit of persons eligible for payment in accordance with its provisions;

'electronic communication' has the same meaning as in section 15(1) of the Electronic Communications Act 2000 ;

'employed earner' is to be construed in accordance with section 2(1)(a) of the Act and also includes a person who is in receipt of a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay or statutory maternity pay;

'Employment and Support Allowance Regulations' means the Employment and Support Allowance Regulations 2008 and the Employment and Support Regulations 2013 as appropriate;

'Employment and Support Allowance (Existing Awards) Regulations' means the Employment and Support Allowance (Transitional Provisions, Housing Benefit and Council Tax Benefit) (Existing Awards) Regulations 2010;

'the Employment, Skills and Enterprise Scheme' means a scheme under section 17A (schemes for assisting persons to obtain employment; 'work for your benefit' schemes etc.) of the Jobseekers Act 1995 known by that name and provided pursuant to arrangements made by the Secretary of State that is designed to assist applicants to obtain employment, including self-employment, and which may include for any individual work-related activity (including work experience or job search). This also includes schemes covered by The Jobseekers Allowance (Employment, Skills and Enterprise Scheme) Regulations 2011 as amended by the Jobseekers (Back to Work Schemes) Act 2013 – see **'Back to Work Schemes'**;

'enactment' includes an enactment comprised in, or in an instrument made under, an Act of the Scottish Parliament;

'extended reduction)' means a payment of council tax reduction payable pursuant to section 60;

'extended reduction period' means the period for which an extended reduction is payable in accordance with section 60A or 61A of this scheme;

'extended reduction (qualifying contributory benefits)' means a payment of council tax reduction payable pursuant to section 61;

'family' has the meaning assigned to it by section 137(1) of the Act and Section 9 of this scheme;

'the Fund' means moneys made available from time to time by the Secretary of State for the benefit of persons eligible for payment in accordance with the provisions of a scheme established by him on 24th April 1992 or, in Scotland, on 10th April 1992;

'a guaranteed income payment' means a payment made under article 15(1)(c) (injury benefits) or 29(1)(a) (death benefits) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2011;

'he, him, his' also refers to the feminine within this scheme

'housing benefit' means housing benefit under Part 7 of the Act; 'the Housing Benefit Regulations' means the Housing Benefit Regulations 2006;

'Immigration and Asylum Act' means the Immigration and Asylum Act 1999;

'an income-based jobseeker's allowance' and **'a joint-claim jobseeker's allowance'** have the meanings given by section 1(4) of the Jobseekers Act 1995;

'income-related employment and support allowance' means an income-related allowance under Part 1 of the Welfare Reform Act 2007;

'Income Support Regulations' means the Income Support (General) Regulations 1987**(a)**;

'independent hospital'–

(a) in England, means a hospital as defined by section 275 of the National Health Service Act 2006 that is not a health service hospital as defined by that section;

(b) in Wales, has the meaning assigned to it by section 2 of the Care Standards Act 2000; and

(c) in Scotland means an independent health care service as defined by section 10F of the National Health Service (Scotland) Act 1978;

'the Independent Living Fund (2006)' means the Trust of that name established by a deed dated 10th April 2006 and made between the Secretary of State for Work and Pensions of the one part and Margaret Rosemary Cooper, Michael Beresford Boyall and Marie Theresa Martin of the other part;

'invalid carriage or other vehicle' means a vehicle propelled by a petrol engine or by electric power supplied for use on the road and to be controlled by the occupant;

'Jobseekers Act' means the Jobseekers Act 1995; 'Jobseeker's Allowance Regulations' means

the Jobseeker's Allowance Regulations 1996 and Jobseeker's Allowance Regulations 2013 as appropriate;

'limited capability for work' has the meaning given in section 1(4) of the Welfare Reform Act;

'limited capability for work-related activity' has the meaning given in section 2(5) of the Welfare Reform Act 2007;

'the London Bombing Relief Charitable Fund' means the company limited by guarantee (number 5505072), and registered charity of that name established on 11th July 2005 for the purpose of (amongst other things) relieving sickness, disability or financial need of victims (including families or dependants of victims) of the terrorist attacks carried out in London on 7th July 2005;

'lone parent' means a person who has no partner and who is responsible for and a member of the same household as a child or young person;

'the Macfarlane (Special Payments) Trust' means the trust of that name, established on 29th January 1990 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia;

'the Macfarlane (Special Payments) (No.2) Trust' means the trust of that name, established on 3rd May 1991 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia and other beneficiaries;

'the Macfarlane Trust' means the charitable trust, established partly out of funds provided by the Secretary of State to the Haemophilia Society, for the relief of poverty or distress among those suffering from haemophilia;

'main phase employment and support allowance' means an employment and support allowance where the calculation of the amount payable in respect of the applicant includes a component under section 2(1)(b) or 4(2)(b) of the Welfare Reform Act 2007 except in Part 1 of Schedule 1;

'the Mandatory Work Activity Scheme' means a scheme within section 17A (schemes for assisting persons to obtain employment; 'work for your benefit' schemes etc.) of the Jobseekers Act 1995 known by that name and provided pursuant to arrangements made by the Secretary of State that is designed to provide work or work related activity for up to 30 hours per week over a period of four consecutive weeks with a view to assisting applicants to improve their prospect of obtaining employment;

'maternity leave' means a period during which a woman is absent from work because she is pregnant or has given birth to a child, and at the end of which she has a right to return to work either under the terms of her contract of employment or under Part 8 of the Employment Rights Act 1996;

'member of a couple' means a member of a married or unmarried couple;

'MFET Limited' means the company limited by guarantee (number 7121661) of that name, established for the purpose in particular of making payments in accordance with arrangements made with the Secretary of State to persons who have acquired HIV as a result of treatment by the NHS with blood or blood products;

'mobility supplement' means a supplement to which paragraph 9 of Schedule 4 refers;

'mover' means an applicant who changes the dwelling in which the applicant is resident and in respect of which the applicant liable to pay council tax from a dwelling in the area of the appropriate authority to a dwelling in the area of the second authority;

'net earnings' means such earnings as are calculated in accordance with section 26;

'net profit' means such profit as is calculated in accordance with section 28;

'the New Deal options' means the employment programmes specified in regulation 75(1)(a)(ii) of the Jobseeker's Allowance Regulations 1996 and the training scheme specified in regulation 75(1)(b)(ii) of those Regulations;

'new dwelling' means, for the purposes of the definition of 'second authority' and sections 60C, and 61C the dwelling to which a applicant has moved, or is about to move, in which the applicant is or will be resident;

'non-dependant' has the meaning prescribed in section 3;

'non-dependant deduction' means a deduction that is to be made under section 58;

'occasional assistance' means any payment or provision made by a local authority, the Welsh Ministers or the Scottish Ministers for the purposes of:

(a) meeting, or helping to meet an immediate short-term need;

(i) arising out of an exceptional event or exceptional circumstances, or
(ii) that needs to be met to avoid a risk to the well-being of an individual, and
(b) enabling qualifying individuals to establish or maintain a settled home, and—
(i) 'local authority' has the meaning given by section 270(1) of the Local Government Act 1972; and
(ii) 'qualifying individuals' means individuals who have been, or without the assistance might otherwise be:
(aa) in prison, hospital, an establishment providing residential care or other institution, or
(bb) homeless or otherwise living an unsettled way of life; and 'local authority' means a local authority in England within the meaning of the Local Government Act 1972;

'occupational pension' means any pension or other periodical payment under an occupational pension scheme but does not include any discretionary payment out of a fund established for relieving hardship in particular cases;

'occupational pension scheme' has the same meaning as in section 1 of the Pension Schemes Act 1993

'ordinary clothing or footwear' means clothing or footwear for normal daily use, but does not include school uniforms, or clothing or footwear used solely for sporting activities;

'partner' in relation to a person, means
(a) where that person is a member of a couple, the other member of that couple;
(b) subject to paragraph (c), where that person is polygamously married to two or more members of his household, any such member to whom he is married; or
(c) where that person is polygamously married and has an award of universal credit with the other party to the earliest marriage that still subsists, that other party to the earliest marriage;

'paternity leave' means a period of absence from work on leave by virtue of section 80A or 80B of the Employment Rights Act 1996;

'payment' includes part of a payment;

'pensionable age' has the meaning given by the rules in paragraph 1 of Schedule 4 to the Pensions Act 1995 as amended by the Public Services Pension Act 2013 and Pensions Act 2014;

'pension fund holder' means with respect to a personal pension scheme or an occupational pension scheme, the trustees, managers or scheme administrators, as the case may be, of the scheme concerned;

'pensioner' a person who has attained the age at which pension credit can be claimed;

'person affected' shall be construed as a person to whom the authority decides is affected by any decision made by the council;

"person from abroad" means, subject to the following provisions of this regulation, a person who is not habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland

'person on income support' means a person in receipt of income support;

personal independence payment' has the meaning given by Part 4 of the Welfare Reform Act 2012 and the Social Security (Personal Independence Payments) 2013;

'person treated as not being in Great Britain' has the meaning given by section 7;

'personal pension scheme' means–

a. a personal pension scheme as defined by section 1 of the Pension Schemes Act 1993 as amended by the Public Service Pension Act 2013;
b. an annuity contractor trust scheme approved under section 620 or 621of the Income and Corporation Taxes Act 1988 or a substituted contract within the meaning of section 622(3) or that Act which is treated as having become a registered pension scheme by virtue of paragraph 1(1)(f) of Schedule 36 of the Finance Act 2004;
c. a personal pension scheme approved under Chapter 4 of Part 14 of the Income and Corporation Taxes Act 1988 which is treated as having become a registered pension scheme by virtue of paragraph 1(1)(g) of Schedule 36 to the Finance Act 2004;

'policy of life insurance' means any instrument by which the payment of money is assured on death (except death by accident only) or the happening of any contingency dependent on human life, or any instrument evidencing a contract which is subject to payment of premiums

for a term dependent on human life;

'polygamous marriage' means a marriage to which section 133(1) of the Act refers namely;

(a) a person is a husband or wife by virtue of a marriage entered into under a law which permits polygamy; and

(b) either party to the marriage has for the time being any spouse additional to the other party.

'public authority' includes any person certain of whose functions are functions of a public nature;

'qualifying age for state pension credit' means (in accordance with section 1(2)(b) and (6) of the State Pension Credit Act 2002)–

(a) in the case of a woman, pensionable age; or

(b) in the case of a man, the age which is pensionable age in the case of a woman born on the same day as the man;

'qualifying contributory benefit' means;

(a) severe disablement allowance;

(b) incapacity benefit;

(c) contributory employment and support allowance;

'qualifying course' means a qualifying course as defined for the purposes of Parts 2 and 4 of the Job Seeker's Allowance Regulations 1996

'qualifying income-related benefit' means

(a) income support;

(b) income-based jobseeker's allowance;

(c) income-related employment and support allowance;

'qualifying person' means a person in respect of whom payment has been made from the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the London Bombings Relief Charitable Fund;

'reduction week' means a period of seven consecutive days beginning with a Monday and ending with a Sunday;

'relative' means a close relative, grandparent, grandchild, uncle, aunt, nephew or niece;

'relevant authority' means an authority administering council tax reduction;

'relevant week' In relation to any particular day, means the week within which the day in question falls;

'remunerative work' has the meaning prescribed in section 6;

'rent' means 'eligible rent' to which regulation 12 of the Housing Benefit Regulations refers less any deductions in respect of non-dependants which fall to be made under regulation 74 (non-dependant deductions) of those Regulations;

'resident' has the meaning it has in Part 1 or 2 of the 1992 Act;

'Scottish basic rate' means the rate of income tax of that name calculated in accordance with section 6A of the Income Tax Act 2007;

'Scottish taxpayer' has the same meaning as in Chapter 2 of Part 4A of the Scotland Act 1998

'second adult' has the meaning given to it in Schedule 2;

'second authority' means the authority to which a mover is liable to make payments for the new dwelling;

'self-employed earner' is to be construed in accordance with section 2(1)(b) of the Act;

'self-employment route' means assistance in pursuing self-employed earner's employment whilst participating in–

(a) an employment zone programme;

(b) a programme provided or other arrangements made pursuant to section 2 of the 1973 Act (functions of the Secretary of State) or section 2 of the Enterprise and New Towns (Scotland) Act 1990 (functions in relation to training for employment, etc.);

(c) the Employment, Skills and Enterprise Scheme;

(d) a scheme prescribed in regulation 3 of the Jobseeker's Allowance (Schemes for Assisting Persons to Obtain Employment) Regulations 2013;

(e) Back to Work scheme.

'Service User' references in this scheme to an applicant participating as a service user are to

a. a person who is being consulted by or on behalf of—
(i) the Secretary of State in relation to any of the Secretary of State's functions in the field of social security or child support or under section 2 of the Employment and Training Act 1973; or
(ii) a body which conducts research or undertakes monitoring for the purpose of planning or improving such functions in their capacity as a person affected or potentially affected by the exercise of those functions or the carer of such a person; or

b. the carer of a person consulted as described in sub-paragraph (a) where the carer is not being consulted as described in that sub-paragraph.".

'service user group' means a group of individuals that is consulted by or on behalf of;

(a) a Health Board, Special Health Board or the Agency in consequence of a function under section 2B of the National Health Service (Scotland) Act 1978,
(b) a landlord authority in consequence of a function under section 105 of the Housing Act 1985,
(c) a public authority in Northern Ireland in consequence of a function under section 49A of the Disability Discrimination Act 1995,
(d) a public authority in consequence of a function relating to disability under section 149 of the Equality Act 2010;
(e) a best value authority in consequence of a function under section 3 of the Local Government Act 1999,
(f) a local authority landlord or registered social landlord in consequence of a function under section 53 of the Housing (Scotland) Act 2001,
(g) a relevant English body or a relevant Welsh body in consequence of a function under section 242 of the National Health Service Act 2006,
(h) a Local Health Board in consequence of a function under section 183 of the National Health Service (Wales) Act 2006,
(i) the Care Quality Commission in consequence of a function under section 4 or 5 of the Health and Social Care Act 2008,
(j) the regulator or a private registered provider of social housing in consequence of a function under section 98, 193 or 196 of the Housing and Regeneration Act 2008, or
(k) a public or local authority in Great Britain in consequence of a function conferred under any other enactment,

for the purposes of monitoring and advising on a policy of that body or authority which affects or may affect persons in the group, or of monitoring or advising on services provided by that body or authority which are used (or may potentially be used) by those persons;

'**single applicant'** means an applicant who neither has a partner nor is a lone parent;

'the Skipton Fund' means the ex-gratia payment scheme administered by the Skipton Fund Limited, incorporated on 25th March 2004, for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with the scheme's provisions.

'special account' means an account as defined for the purposes of Chapter 4A of Part 8 of the Jobseeker's Allowance Regulations or Chapter 5 of Part 10 of the Employment and Support Allowance Regulations;

'sports award' means an award made by one of the Sports Councils named in section 23(2) of the National Lottery etc Act 1993 out of sums allocated to it for distribution under that section;

'the SSCBA' means the Social Security Contributions and Benefits Act 1992

'State Pension Credit Act' means the State Pension Credit Act 2002;

'student' has the meaning prescribed in section 43;

'subsistence allowance' means an allowance which an employment zone contractor has agreed to pay to a person who is participating in an employment zone programme;

'the Tax Credits Act' means the Tax Credits Act 2002;

'tax year' means a period beginning with 6th April in one year and ending with 5th April in the next;

'training allowance' means an allowance (whether by way of periodical grants or otherwise) payable–

(a) out of public funds by a Government department or by or on behalf of the Secretary of State, Skills Development Scotland, Scottish Enterprise or Highlands and Islands Enterprise, the Young People's Learning Agency for England, the Chief Executive of Skills Funding or

Welsh Ministers;

(b) to a person for his maintenance or in respect of a member of his family; and

(c) for the period, or part of the period, during which he is following a course of training or instruction provided by, or in pursuance of arrangements made with, the department or approved by the department in relation to him or so provided or approved by or on behalf of the Secretary of State, Skills Development Scotland Scottish Enterprise or Highlands and Islands Enterprise or the Welsh Ministers.

It does not include an allowance paid by any Government department to or in respect of a person by reason of the fact that he is following a course of full-time education, other than under arrangements made under section 2 of the 1973 Actor is training as a teacher;

'the Trusts' means the Macfarlane Trust, the Macfarlane (Special Payments) Trust and the Macfarlane (Special Payments) (No. 2) Trust;

'Universal Credit' means any payment of Universal Credit payable under the Welfare Reform Act 2012, the Universal Credit Regulations 2013, The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013, Universal Credit (Miscellaneous Amendments) Regulations 2013 and the Universal Credit (Transitional Provisions) Regulations 2014;

'Uprating Act' means the Welfare Benefit Up-rating Act 2013, the Welfare Benefits Up-rating Order 2014 and the Welfare Benefits Up-rating Order 2015;

'voluntary organisation' means a body, other than a public or local authority, the activities of which are carried on otherwise than for profit;

'war disablement pension' means any retired pay or pension or allowance payable in respect of disablement under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003;

'**war pension'** means a war disablement pension, a war widow's pension or a war widower's pension;

'war widow's pension' means any pension or allowance payable to a woman as a widow under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003 in respect of the death or disablement of any person;

'war widower's pension' means any pension or allowance payable to a man as a widower or to a surviving civil partner under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003 in respect of the death or disablement of any person;

'water charges' means;

(a) as respects England and Wales, any water and sewerage charges under Chapter 1 of Part 5 of the Water Industry Act 1991,

(b) as respects Scotland, any water and sewerage charges established by Scottish Water under a charges scheme made under section 29A of the Water Industry (Scotland) Act 2002, in so far as such charges are in respect of the dwelling which a person occupies as his home;

'week' means a period of seven days beginning with a Monday;

'Working Tax Credit Regulations' means the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002 as amended[1]; and

'young person' has the meaning prescribed in section 9(1) and in section 142 of the SSCBA.

2.2 In this scheme, references to an applicant occupying a dwelling or premises as his home shall be construed in accordance with regulation 7 of the Housing Benefit Regulations 2006.

2.3 In this scheme, where an amount is to be rounded to the nearest penny, a fraction of a penny shall be disregarded if it is less than half a penny and shall otherwise be treated as a whole penny.

2.4 For the purpose of this scheme, a person is on an income-based jobseeker's allowance on any day in respect of which an income-based jobseeker's allowance is payable to him and on any day;

[1] The Working Tax Credit (Entitlement and Maximum Rate) (Amendment) Regulations 2013; The Working Tax Credit (Entitlement and Maximum Rate) (Amendment) Regulations 2015

(a) in respect of which he satisfies the conditions for entitlement to an income- based jobseeker's allowance but where the allowance is not paid in accordance with regulation 27A of the Jobseeker's Allowance Regulations or section 19 or 20A or regulations made under section 17A of the Jobseekers Act (circumstances in which a jobseeker's allowance is not payable); or

(b) which is a waiting day for the purposes of paragraph 4 of Schedule 1 to that Act and which falls immediately before a day in respect of which an income- based jobseeker's allowance is payable to him or would be payable to him but for regulation 27A of the Jobseeker's Allowance Regulations or section 19 or 20A or regulations made under section 17A of that Act;

(c) in respect of which he is a member of a joint-claim couple for the purposes of the Jobseekers Act and no joint-claim jobseeker's allowance is payable in respect of that couple as a consequence of either member of that couple being subject to sanctions for the purposes of section 20A of that Act;

(d) in respect of which an income-based jobseeker's allowance or a joint-claim jobseeker's allowance would be payable but for a restriction imposed pursuant to section 6B, 7, 8 or 9 of the Social Security Fraud Act 2001 (loss of benefit provisions).

2.4A For the purposes of this scheme, a person is on an income-related employment and support allowance on any day in respect of which an income-related employment and support allowance is payable to him and on any day;

(a) in respect of which he satisfies the conditions for entitlement to an income- related employment and support allowance but where the allowance is not paid in accordance with section 18 of the Welfare Reform Act disqualification; or

(b) which is a waiting day for the purposes of paragraph 2 of Schedule 2 to that Act and which falls immediately before a day in respect of which an income- related employment and support allowance is payable to him or would be payable to him but for section 18 of that Act.

2.5 For the purposes of this scheme, two persons shall be taken to be estranged only if their estrangement constitutes a breakdown of the relationship between them.

2.6 In this scheme, references to any person in receipt of state pension credit includes a person who would be in receipt of state pension credit but for regulation 13 of the State Pension Credit Regulations 2002 (small amounts of state pension credit).

3.0 Definition of non-dependant

3.1 In this scheme, 'non-dependant' means any person, except someone to whom paragraph 3.2 applies, who normally resides with an applicant or with whom an applicant normally resides.

3.2 This paragraph applies to;

a. any member of the applicant's family;

b. if the applicant is polygamously married, any partner of his and any child or young person who is a member of his household and for whom he or one of his partners is responsible;

c. a child or young person who is living with the applicant but who is not a member of his household by virtue of section 11(membership of the same household);

d. subject to paragraph 3.3, any person who, with the applicant, is jointly and severally liable to pay council tax in respect of a dwelling for any day under sections 6, 7 or 75 of the 1992 Act (persons liable to pay council tax);

e. subject to paragraph 3.3, any person who is liable to make payments on a commercial basis to the applicant or the applicant's partner in respect of the occupation of the dwelling;

f. a person who lives with the applicant in order to care for him or a partner of his and who is engaged by a charitable or voluntary organisation which makes a charge to the applicant or his partner for the services provided by that person.

3.3 Excepting persons to whom paragraph 3.2 a) to c) and f) refer, a person to whom any of the following sub-paragraphs applies shall be a non-dependant–

a. a person who resides with the person to whom he is liable to make payments in respect of the dwelling and either;
   i. that person is a close relative of his or her partner; or
   ii. the tenancy or other agreement between them is other than on a commercial basis;

b. a person whose liability to make payments in respect of the dwelling appears to the authority to have been created to take advantage of the council tax reduction scheme except someone who was, for any period within the eight weeks prior to the creation of the agreement giving rise to the liability to make such payments, otherwise liable to make payments of rent in respect of the same dwelling;

c. a person who becomes jointly and severally liable with the applicant for council tax in respect of a dwelling and who was, at any time during the period of eight weeks prior to his becoming so liable, a non-dependant of one or more of the other residents in that dwelling who are so liable for the tax, unless the authority is satisfied that the change giving rise to the new liability was not made to take advantage of the support scheme.

4.0 Requirement to provide a National Insurance Number[2]

4.1 No person shall be entitled to support unless the criteria below in 4.2 is satisfied in relation both to the person making the claim and to any other person in respect of whom he is claiming support.

4.2 This subsection is satisfied in relation to a person if–

a. the claim for support is accompanied by;
   i. a statement of the person's national insurance number and information or evidence establishing that that number has been allocated to the person; or
   ii. information or evidence enabling the national insurance number that has been allocated to the person to be ascertained; or

b. the person makes an application for a national insurance number to be allocated to him which is accompanied by information or evidence enabling such a number to be so allocated and the application for reduction is accompanied by evidence of the application and information to enable it to be allocated.

4.3 Paragraph 4.2 shall not apply–

a. in the case of a child or young person in respect of whom council tax reduction is claimed;
b. to a person who;
   i. is a person in respect of whom a claim for council tax reduction is made;
   ii. is subject to immigration control within the meaning of section 115(9)(a) of the Immigration and Asylum Act; and
   iii. has not previously been allocated a national insurance number.

5.0 Persons who have attained the qualifying age for state pension credit

5.1 This scheme applies to a person if:

(i) he has not attained the qualifying age for state pension credit; or

(ii) he has attained the qualifying age for state pension credit and he, or if he has a partner, his partner, is;
   (a) a person on income support, on income-based jobseeker's allowance or an income-related employment and support allowance; or
   (b) a person with an award of universal credit.

[2] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

6.0 Remunerative work

6.1 This provision applies where the applicant or their partner wish to have child care costs considered in the calculation of their reduction. Subject to the following provisions of this section, a person shall be treated for the purposes of this scheme as engaged in remunerative work if he is engaged, or, where his hours of work fluctuate, he is engaged on average, for not less than 16 hours a week, in work for which payment is made or which is done in expectation of payment.

6.2 Subject to paragraph 6.3, in determining the number of hours for which a person is engaged in work where his hours of work fluctuate, regard shall be had to the average of hours worked over;

a. if there is a recognisable cycle of work, the period of one complete cycle (including, where the cycle involves periods in which the person does no work, those periods but disregarding any other absences);
b. in any other case, the period of 5 weeks immediately prior to that date of claim, or such other length of time as may, in the particular case, enable the person's weekly average hours of work to be determined more accurately,

6.3 Where, for the purposes of paragraph 6.2 a), a person's recognisable cycle of work at a school, other educational establishment or other place of employment is one year and includes periods of school holidays or similar vacations during which he does not work, those periods and any other periods not forming part of such holidays or vacations during which he is not required to work shall be disregarded in establishing the average hours for which he is engaged in work.

6.4 Where no recognisable cycle has been established in respect of a person's work, regard shall be had to the number of hours or, where those hours will fluctuate, the average of the hours, which he is expected to work in a week.

6.5 A person shall be treated as engaged in remunerative work during any period for which he is absent from work referred to in paragraph 6.1 if the absence is either without good cause or by reason of a recognised customary or other holiday.

6.6 A person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance for more than 3 days in any reduction week shall be treated as not being in remunerative work in that week.

6.7 A person shall not be treated as engaged in remunerative work on any day on which the person is on maternity leave, paternity leave or adoption leave, or is absent from work because he is ill.

6.8 A person shall not be treated as engaged in remunerative work on any day on which he is engaged in an activity in respect of which;

a. a sports award has been made, or is to be made, to him; and
b. no other payment is made or is expected to be made to him.

7.0 Persons treated as not being in Great Britain and Persons Subject to Immigration Control

Persons treated as not being in Great Britain

7.1 Persons treated as not being in Great Britain are a class of person prescribed for the purposes of paragraph 2(9)(b) of Schedule 1A to the 1992 Act and which must not be included in an authority's scheme.

7.2 Except where a person falls within paragraph (5) or (6), a person is to be treated as not being in Great Britain if the person is not habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland.

7.3 A person must not be treated as habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland unless the person has a right to reside in one of those places.

7.4 For the purposes of paragraph (3), a right to reside does not include a right, which exists by virtue of, or in accordance with—

(a) regulation 13 of the EEA Regulations;

(aa) regulation 14 of the EEA Regulations, but only in a case where the right exists under that regulation because the person is—

(i) a jobseeker for the purpose of the definition of "qualified person" in regulation 6(1) of those Regulations, or

(ii) a family member (within the meaning of regulation 7 of those Regulations) of such a jobseeker;

(b) regulation 15A(1) of the EEA Regulations, but only in a case where the right exists under that regulation because the applicant satisfies the criteria in paragraph (5) of that regulation of the Treaty on the Functioning of the European Union (in a case where the right to reside arises because a British citizen would otherwise be deprived of the genuine enjoyment of their rights as a European Union citizen).

7.4A For the purposes of paragraph (3), a right to reside does not include a right which exists by virtue of a person having been granted limited leave to enter, or remain in, the United Kingdom under the Immigration Act 1971 by virtue of—

(a) (Removed by the Council Tax Reductions Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2021

(b) Appendix EU to the immigration rules made under section 3(2) of that Act;

(c) being a person with a Zambrano right to reside as defined in Annex 1 of Appendix EU to the immigration rules made under section 3(2) of that Act; or

(d) having arrived in the United Kingdom with an entry clearance that was granted under Appendix EU (Family Permit) to the immigration rules made under section 3(2) of that Act.

7.4B Paragraph (4A)(b) does not apply to a person who—

(a) has a right to reside granted by virtue of being a family member of a relevant person of Northern Ireland; and

(b) would have a right to reside under the EEA Regulations if the relevant person of Northern Ireland were an EEA national, provided that the right to reside does not fall within paragraph (4)(a) or (b)

7.5 A person falls within this paragraph if the person is—

(za) a person granted leave in accordance with the immigration rules made under section 3(2) of the Immigration Act 1971, where such leave is granted by virtue of—

(i)the Afghan Relocations and Assistance Policy; or

(ii)the previous scheme for locally employed staff in Afghanistan (sometimes referred to as the ex-gratia scheme);

(zb) a person in Great Britain not coming within sub-paragraph (za) or (e)(iv) who left Afghanistan in connection with the collapse of the Afghan government that took place on 15th August 2021

(a) a qualified person for the purposes of regulation 6 of the EEA Regulations as a worker or a self-employed person;

(b) a family member of a person referred to in sub-paragraph (a);

(c) a person who has a right to reside permanently in the United Kingdom by virtue of regulation 15(1)(c), (d) or (e) of the EEA Regulations;

(ca) a family member of a relevant person of Northern Ireland, with a right to reside which falls within paragraph (4A)(b), provided that the relevant person of Northern Ireland falls within paragraph (5)(a), or would do so but for the fact that they are not an EEA national;

(cb) a frontier worker within the meaning of regulation 3 of the Citizens' Rights (Frontier Workers) (EU Exit) Regulations 2020;

(cc) a family member of a person referred to in sub-paragraph (cb), who has been granted limited leave to enter, or remain in, the United Kingdom by virtue of Appendix EU to the immigration rules made under section 3(2) of the Immigration Act 1971

(d) a person recorded by the Secretary of State as a refugee within the definition in Article 1 of the Convention relating to the Status of Refugees done at Geneva on 28th July 1951, as extended by Article 1(2) of the Protocol relating to the Status of Refugees done at New York on 31st January 1967;

(e) a person who has been granted, or who is deemed to have been granted, leave outside the rules made under section 3(2) of the Immigration Act 1971[3] where that leave is—

(i) discretionary leave to enter or remain in the United Kingdom,

(ii) leave to remain under the Destitution Domestic Violence concession which came into effect on 1st April 2012;

(iii) leave deemed to have been granted by virtue of regulation 3 of the Displaced Persons (Temporary Protection) Regulations 2005; or

(iv) granted under the Afghan Citizens Resettlement Scheme.

(f) a person who has humanitarian protection granted under those rules;

(g) a person who is not a person subject to immigration control within the meaning of section 115(9) of the Immigration and Asylum Act 1999 and who is in the United Kingdom as a result of his deportation, expulsion or other removal by compulsion of law from another country to the United Kingdom;

(h) in receipt of income support or on an income-related employment and support allowance; or

(ha) in receipt of an income-based jobseeker's allowance and has a right to reside other than a right to reside falling within paragraph (4).

7.6 A person falls within this paragraph if the person is a Crown servant or member of Her Majesty's forces posted overseas.

7.7 A person mentioned in sub-paragraph (6) is posted overseas if the person is performing overseas the duties of a Crown servant or member of Her Majesty's forces and was, immediately before the posting or the first of consecutive postings, habitually resident in the United Kingdom.

7.8 In this regulation—

"claim for asylum" has the same meaning as in section 94(1) of the Immigration and Asylum Act 1999;

"Crown servant" means a person holding an office or employment under the Crown;

"EEA Regulations" means the Immigration (European Economic Area) Regulations 2006; and the Immigration (European Economic Area) (Amendment) (No. 2) Regulations 2014 and references to the EEA Regulations are to be read with Schedule 4 to the Immigration and Social Security Co-ordination (EU Withdrawal) Act 2020 (Consequential, Saving, Transitional and Transitory Provisions) Regulations 2020

"EEA national" has the meaning given in regulation 2(1) of the EEA Regulations;

[3] As amended by the Immigration Act 2014 and the Immigration Act 2014 (Commencement No. 2) Order 2014

"family member" has the meaning given in regulation 7(1)(a), (b) or (c) of the EEA Regulations, except that regulation 7(4) of the EEA Regulations does not apply for the purposes of paragraphs (4B) and (5)(ca);
"relevant person of Northern Ireland" has the meaning given in Annex 1 of Appendix EU to the immigration rules made under section 3(2) of the Immigration Act 1971; and
"Her Majesty's forces" has the same meaning as in the Armed Forces Act 2006.

Persons subject to immigration control

7.9 Persons subject to immigration control are a class of person prescribed for the purposes of paragraph 2(9)(b) of Schedule 1A to the 1992 Act and which must not be included in an authority's scheme.

7.10 A person who is a national of a state which has ratified the European Convention on Social and Medical Assistance (done in Paris on 11th December 1953) or a state which has ratified the Council of Europe Social Charter (signed in Turin on 18th October 1961) and who is lawfully present in the United Kingdom is not a person subject to immigration control for the purpose of paragraph 7.9

7.11 "Person subject to immigration control" has the same meaning as in section 115(9) of the Immigration and Asylum Act 1999.

7A.0 Transitional provision

7A.1 The above does not apply to a person who, on 31st March 2015—

(a) is liable to pay council tax at a reduced rate by virtue of a council tax reduction under an authority's scheme established under section 13A(2) of the Act; and

(b) is entitled to an income-based jobseeker's allowance, until the first of the events in paragraph 7A.2 occurs.

7A.2 The events are—

(a) the person makes a new application for a reduction under an authority's scheme established under section 13A(2) of the Act; or

(b) the person ceases to be entitled to an income-based jobseeker's allowance.

7A.3 In this section "the Act" means the Local Government Finance Act 1992.

8.0 Temporary Absence (period of absence)

8.1 Where a person is absent from the dwelling throughout any day then no support shall be payable

8.2 A person shall not, in relation to any day, which falls within a period of temporary absence from that dwelling, be a prescribed person under paragraph 8.1.

8.3 In paragraph 8.2, a 'period of temporary absence' means–

a. a period of absence not exceeding 13 weeks, beginning with the first whole day on which a person resides in residential accommodation where and for so long as;
   i. the person resides in that accommodation;
   ii. the part of the dwelling in which he usually resided is not let or sub-let; and
   iii. that period of absence does not form part of a longer period of absence from the dwelling of more than 52 weeks,

where he has entered the accommodation for the purpose of ascertaining whether it suits his needs and with the intention of returning to the dwelling if it proves not to suit his needs;

b. a period of absence not exceeding 13 weeks, beginning with the first whole day of absence

from the dwelling, where and for so long as;

i. the person intends to return to the dwelling;
ii. the part of the dwelling in which he usually resided is not let or sub-let; and
iii. that period is unlikely to exceed 13 weeks; and

c. a period of absence not exceeding 52 weeks, beginning with the first whole day of absence, where and for so long as

i. the person intends to return to the dwelling;
ii. the part of the dwelling in which he usually resided is not let or sub-let;
iii. the person is a person to whom paragraph 8.4 applies; and
iv. the period of absence is unlikely to exceed 52 weeks or, in exceptional circumstances, is unlikely substantially to exceed that period.

8.4 This paragraph applies to a person who is;

a. detained in custody on remand pending trial or required, as a condition of bail, to reside;
i. in a dwelling, other than the dwelling referred to in paragraph 8.1, or
ii. in premises approved under section 13 of the Offender Management Act 2007 as amended by the Offender Rehabilitation Act 2014, or, detained in custody pending sentence upon conviction;

b. resident in a hospital or similar institution as a patient;

c. undergoing, or his partner or his dependent child is undergoing, in the United Kingdom or elsewhere, medical treatment, or medically approved convalescence, in accommodation other than residential accommodation;

d. following, in the United Kingdom or elsewhere, a training course;

e. undertaking medically approved care of a person residing in the United Kingdom or elsewhere;

f. undertaking the care of a child whose parent or guardian is temporarily absent from the dwelling normally occupied by that parent or guardian for the purpose of receiving medically approved care of medical treatment;

g. in the United Kingdom or elsewhere, receiving medically approved care provided in accommodation other than residential accommodation;

h. a student;

i. receiving care provided in residential accommodation other than a person to whom paragraph 8.3a) applies; or

j. has left the dwelling he resides in through fear of violence, in that dwelling, or by a person who was formerly a member of the family of the person first mentioned.

8.5 This paragraph applies to a person who is;

a. detained in custody pending sentence upon conviction or under a sentence imposed by a court (other than a person who is detained in hospital under the provisions of the Mental Health Act 1983 (as amended by the Mental Health (Discrimination) Act 2013), or, in Scotland, under the provisions of the Mental Health (Care and Treatment) (Scotland) Act 2003 or the Criminal Procedure (Scotland) Act 1995) or the Mental Health (Scotland) Act 2015; and

b. on temporary release from detention in accordance with Rules made under the provisions of the Prison Act 1952 or the Prisons (Scotland) Act 1989

8.6 Where paragraph 8.5 applies to a person, then, for any day when he is on temporary release–

a. if such temporary release was immediately preceded by a period of temporary absence under paragraph 8.3 b) or c), he shall be treated, for the purposes of paragraph 8.1, as if he continues to be absent from the dwelling, despite any return to the dwelling;

b. for the purposes of paragraph 8.4 a), he shall be treated as if he remains in detention;

c. If he does not fall within sub-paragraph a), he is not considered to be a person who is liable to pay Council Tax in respect of a dwelling of which he is resident

8.7 In this section;

- ‘medically approved’ means certified by a medical practitioner;
- ‘patient’ means a person who is undergoing medical or other treatment as an in- patient

in any hospital or similar institution; 'residential accommodation' means accommodation which is provided;

a. in a care home;
b. in an independent hospital;
c. in an Abbeyfield Home; or
d. in an establishment managed or provided by a body incorporated by Royal Charter or constituted by Act of Parliament other than a local social services authority;

- 'training course' means a course of training or instruction provided wholly or partly by or on behalf of or in pursuance of arrangements made with, or approved by or on behalf of, Skills Development Scotland, Scottish Enterprise, Highlands and Islands Enterprise, a government department or the Secretary of State.

Sections 9 - 11

The family for Council tax reduction purposes

9.0 Membership of a family

9.1 Within the support scheme adopted by the Council 'family' means;

a. a married or unmarried couple;
b. married or unmarried couple and a member of the same household for whom one of them is or both are responsible and who is a child or a young person;
c. two people of the same sex who are civil partners of each other and are members of the same household (with or without children);
d. two people of the same sex who are not civil partners of each other but are living together as if they were civil partners (with or without children),
e. and for the purposes of sub-paragraph (d) two people of the same sex are to be regarded as living together as if they were civil partners if, but only if, they would be regarded as living together as husband and wife were they instead two people of the opposite sex;
f. except in prescribed circumstances, a person who is not a member of a married or unmarried couple and a member of the same household for whom that person is responsible and who is a child or a young person;

For the purposes of the scheme a child is further defined as a 'child or young person'
A 'child' means a person under the age of 16 and a 'Young Person' is someone aged 16 or over but under 20 and who satisfies other conditions. These conditions are:

- they are aged 16, have left 'relevant education' or training, and 31 August following the sixteenth birthday has not yet been passed;
- they are aged 16 or 17, have left education or training, are registered for work, education or training, are not in remunerative work and are still within their 'extension period';
- they are on a course of full-time non-advanced education, or are doing 'approved training', and they began that education or training before reaching the age of 19;
- they have finished a course of full-time non-advanced education, but are enrolled on another such course (other than one provided as a result of their employment);
- they have left 'relevant education' or 'approved training' but have not yet passed their 'terminal date'.

9.2 Paragraph 9.1 the definition of child or young person shall not apply to a person who is;

a. on income support ;
b. an income-based jobseeker's allowance or an income-related employment and support allowance; or has an award of Universal Credit; or
c. a person to whom section 6 of the Children (Leaving Care) Act 2000 (exclusion from benefits) applies.

9.3 The definition also includes a child or young person in respect of whom there is an entitlement to child benefit but only for the period that Child Benefit is payable

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10.0 Circumstances in which a person is to be treated as responsible (or not responsible) for a child or young person.

10.1 Subject to the following paragraphs a person shall be treated as responsible for a child or young person who is normally living with him and this includes a child or young person to whom paragraph 9.3 applies

10.2 Where a child or young person spends equal amounts of time in different households, or where there is a question as to which household he is living in, the child or young person shall be treated for the purposes of paragraph 9.1 as normally living with;

a. the person who is receiving child benefit in respect of him; or
b. if there is no such person;
    i. where only one claim for child benefit has been made in respect of him, the

person who made that claim; or

ii. in any other case the person who has the primary responsibility for him.

10.3 For the purposes of this scheme a child or young person shall be the responsibility of only one person and any person other than the one treated as responsible for the child or young person under this section shall be treated as not so responsible.

10.4 In accordance with Schedule 1 of this scheme, the number of dependants determined to be within the household shall be limited to two.

11.0 Circumstances in which a child or young person is to be treated as being or not being a member of the household

11.1 Subject to paragraphs 11.2 and 11.3, the applicant and any partner and, where the applicant or his partner is treated as responsible by virtue of section 10 (circumstances in which a person is to be treated as responsible or not responsible for a child or young person) for a child or young person, that child or young person and any child of that child or young person, shall be treated as members of the same household notwithstanding that any of them is temporarily absent from that household.

11.2 A child or young person shall not be treated as a member of the applicant's household where he is;

a. placed with the applicant or his partner by a local authority under section 23(2)(a) of the Children Act 1989 or by a voluntary organisation under section 59(1)(a) of that Act, or in Scotland boarded out with the applicant or his partner under a relevant enactment; or
b. placed, or in Scotland boarded out, with the applicant or his partner prior to adoption; or
c. placed for adoption with the applicant or his partner in accordance with the Adoption and Children Act 2002 or the Adoption Agencies (Scotland) Regulations 2009.

11.3 Subject to paragraph 11.4, paragraph 11.1 shall not apply to a child or young person who is not living with the applicant and he–

a. is being looked after by, or in Scotland is in the care of, a local authority under a relevant enactment; or
b. has been placed, or in Scotland boarded out, with a person other than the applicant prior to adoption; or
c. has been placed for adoption in accordance with the Adoption and Children Act 2002 or the Adoption Agencies (Scotland) Regulations 2009; or in accordance with an adoption allowance scheme made under section 71 of the Adoption and Children (Scotland) Act 2007 (adoption allowances schemes).

11.4 The authority shall treat a child or young person to whom paragraph 11.3 a) applies as being a member of the applicant's household where;

a. that child or young person lives with the applicant for part or all of that reduction week; and
b. the authority considers that it is responsible to do so taking into account the nature and frequency of that child's or young person's visits.

11.5 In this paragraph 'relevant enactment' means the Army Act 1955, the Air Force Act 1955**,** the Naval Discipline Act 1957, the Matrimonial Proceedings (Children) Act 1958, the Social Work (Scotland) Act 1968, the Family Law Reform Act 1969, the Children and Young Persons Act 1969, the Matrimonial Causes Act 1973, the Children Act 1975, the Domestic Proceedings and Magistrates' Courts Act 1978, the Adoption and Children (Scotland) Act 1978, the Family Law Act 1986, the Children Act 1989**,** the Children (Scotland) Act 1995 and the Legal Aid, Sentencing and Punishment of Offenders Act 2012.

12.0 – 14.0 Not Used

Sections 15 – 32 & Schedules 3 & 4

Definition and the treatment of income for Council tax reduction purposes

15.0 Calculation of income and capital of members of applicant's family and of a polygamous marriage

15.1 The income and capital of:
(a) an applicant; and
(b) any partner of that applicant,

is to be calculated in accordance with the provisions of this Part.

15.2 The income and capital of any partner of the applicant is to be treated as income and capital of the applicant, and in this Part any reference to the applicant applies equally to any partner of that applicant.

15.3 Where an applicant or the partner of an applicant is married polygamously to two or more members of his household:
(a) the applicant must be treated as possessing capital and income belonging to each such member; and
(b) the income and capital of that member is to be calculated in accordance with the following provisions of this Part in like manner as for the applicant.

15A.0 Calculation of income and capital: persons who have an award of universal credit

15A.1 In determining the income of an applicant
a. who has, or
b. who (jointly with his partner) has,
an award of universal credit the authority must, subject to the following provisions of this paragraph use the calculation or estimate of the income of the applicant, or the applicant and his partner jointly (as the case may be), made by the Secretary of State for the purpose of determining the award of universal credit.

15A.2 The authority may adjust the amount referred to in sub-paragraph (1) to take account of
(a) income consisting of the award of universal credit, determined in accordance with subparagraph (3) and housing costs;
(b) any sum to be disregarded under paragraphs of Schedule 3 to this scheme (sums to be disregarded in the calculation of earnings);
(c) any sum to be disregarded under paragraphs of Schedule 4 to this scheme (sums to be disregarded in the calculation of income other than earnings);
(d) section 16 (circumstances in which income and capital of non-dependant is to be treated as applicant's), if the authority determines that the provision applies in the applicant's case;
(e) such further reduction (if any) as the authority thinks fit under section 13A(1)(c) of the 1992 Act (power of billing authority to reduce amount of council tax payable)

15A.3 The amount for the award of universal credit is to be determined by multiplying the amount of the award by 12 and dividing the product by 52.

15A.4 Sections 16 (income and capital of non-dependant to be treated as applicant's) and 52 and 53 (disregards from income) apply (so far as relevant) for the purpose of determining any adjustments, which fall to be made to the figure for income under sub-paragraph (2)

15A.5 In determining the capital of an applicant;
(a) who has, or
(b) who (jointly with his partner) has,
an award of universal credit, the authority must use the calculation or estimate of the capital of the applicant, or the applicant and his partner jointly (as the case may be), made by the Secretary of State for the purpose of determining that award

16.0 Circumstances in which capital and income of non-dependant is to be treated as applicant's

16.1 Where it appears to the authority that a non-dependant and the applicant have entered into arrangements in order to take advantage of the council tax reduction scheme and the non-dependant has more capital and income than the applicant, that authority shall, except were the applicant is on income support, an income- based jobseeker's allowance or an income-related employment and support allowance, treat the applicant as possessing capital and income belonging to that non-dependant, and, in such a case, shall disregard any capital and income which the applicant does possess.`

16.2 Where an applicant is treated as possessing capital and income belonging to a non-dependant under paragraph 16.1 the capital and income of that non-dependant shall be calculated in accordance with the following provisions in like manner as for the applicant and any reference to the ' applicant' shall, except where the context otherwise requires, be construed for the purposes of this scheme as if it were a reference to that non-dependant.

17.0 Calculation of income on a weekly basis

17.1For the purposes of this policy, the income of an applicant shall be calculated on a weekly basis;

a. by estimating the amount which is likely to be his average weekly income in accordance with this Section and in line with Sections 2, 3, 4 and 5 of the Housing Benefit Regulations 2006; and
b. by then deducting any relevant child care charges to which section 18 (treatment of child care charges) applies from any earnings which form part of the average weekly income.

18.0 Treatment of child care charges

18.1 This section applies where an applicant is incurring relevant child-care charges and;

a. is a lone parent and is engaged in remunerative work;
b. is a member of a couple both of whom are engaged in remunerative work; or
c. is a member of a couple where one member is engaged in remunerative work and the other;
   i. is incapacitated;
   ii. is an in-patient in hospital; or
   iii. is in prison (whether serving a custodial sentence or remanded in custody awaiting trial or sentence).

18.2 For the purposes of paragraph 18.1 and subject to paragraph 18.4, a person to whom paragraph 18.3 applies shall be treated as engaged in remunerative work for a period not exceeding 28 weeks during which he–

a. is paid statutory sick pay;
b. is paid short-term incapacity benefit at the lower rate under sections 30A to 30E of the Act;
c. is paid an employment and support allowance;
d. is paid income support on the grounds of incapacity for work under regulation 4ZA of, and paragraph 7 or 14 of Schedule 1B to, the Income Support Regulations; or
e. is credited with earnings on the grounds of incapacity for work or limited capability for work under regulation 8B of the Social Security (Credits) Regulations**.**

18.3 This paragraph applies to a person who was engaged in remunerative work immediately before

a. the first day of the period in respect of which he was first paid statutory sick pay, short-term incapacity benefit, an employment and support allowance or income support on the grounds of incapacity for work; or
b. the first day of the period in respect of which earnings are credited, as the case may be.

18.4 In a case to which paragraph 18.2 d) or e) applies, the period of 28 weeks begins on the day on which the person is first paid income support or on the first day of the period in respect of which earnings are credited, as the case may be.

18.5 Relevant child care charges are those charges for care to which paragraphs 18.6 and 18.7 apply, and shall be calculated on a weekly basis in accordance with paragraph 18.10.

18.6 The charges are paid by the applicant for care, which is provided

a. in the case of any child of the applicant's family who is not disabled, in respect of the period beginning on that child's date of birth and ending on the day preceding the first Monday in September following that child's fifteenth birthday; or

b. in the case of any child of the applicant's family who is disabled, in respect of the period beginning on that person's date of birth and ending on the day preceding the first Monday in September following that person's sixteenth birthday.

18.7 The charges are paid for care, which is provided by one, or more of the care providers listed in paragraph 18.8 and are not paid–

a. in respect of the child's compulsory education;

b. by an applicant to a partner or by a partner to an applicant in respect of any child for whom either or any of them is responsible in accordance with section 10 (circumstances in which a person is treated as responsible or not responsible for another); or

c. in respect of care provided by a relative of the child wholly or mainly in the child's home.

18.8 The care to which paragraph 18.7 refers may be provided;

a. out of school hours, by a school on school premises or by a local authority;

i. for children who are disabled in respect of the period beginning on their eight birthday and ending on the day preceding the first Monday in September following their fifteenth birthday; or

ii. for children who are disabled in respect of the period beginning on their eight birthday and ending on the day preceding the first Monday in September following their sixteenth birthday; or

b. by a child care provider approved in accordance with by the Tax Credit (New Category of Child Care Provider) Regulations 1999;

c. by persons registered under Part 2 of the Children and Families (Wales) Measure 2010; or

d. by a person who is excepted from registration under Part 2 of the Children and Families (Wales) Measure 2010 because the child care that person provides is in a school or establishment referred to in article 11, 12 or 14 of the Child Minding and Day Care Exceptions (Wales) order 2010; or

e. by;

i. persons registered under section 59(1) of the Public Services Reform Act 2010; Act 2001, or

ii. local authorities registered under section 8(1) of that Act, where the care provided is child minding or daycare within the meaning of that Act; or

f. by a person prescribed in regulations made pursuant to section 12(4) of the Tax Credits Act 2002 or

g. by a person who is registered under Chapter 2 or 3 of Part 3 of the Childcare Act 2006; or

h. by any of the schools mentioned in section 34(2) of the Childcare Act 2006 in circumstances where the requirement to register under Chapter 2 of Part 3 of that Act does not apply by virtue of section 34(2) of that Act; or

i. by any of the schools mentioned in section 53(2) of the Childcare Act 2006 in circumstances where the requirement to register under Chapter 3 of Part 3 of that Act does not apply by virtue of section 53(2) of that Act; or

j. by any of the establishments mentioned in section 18(5) of the Childcare Act 2006 in circumstances where the care is not included in the meaning of 'childcare' for the purposes of Part 1 and Part 3 of that Act by virtue of that subsection; or

k. by a foster parent or kinship carer under the Fostering Services Regulations 2002, the Fostering Services (Wales) Regulations 2003 or the Looked After Children (Scotland) Regulations 2009 in relation to a child other than one whom the foster parent is fostering

or kinship carer is looking after; or

l. by a domiciliary care worker under the Domiciliary Care Agencies Regulations 2002 or the Domiciliary Care Agencies (Wales) Regulations 2004; or

m. by a person who is not a relative of the child wholly or mainly in the child's home.

18.9 In paragraphs 18.6 and 18.8 a), 'the first Monday in September' means the Monday which first occurs in the month of September in any year.

18.10 Relevant child care charges shall be estimated over such period, not exceeding a year, as is appropriate in order that the average weekly charge may be estimated accurately having regard to information as to the amount of that charge provided by the child minder or person providing the care.

18.11 For the purposes of paragraph 18.1 c) the other member of a couple is incapacitated where

a. the applicant's applicable amount includes a disability premium on account of the other member's incapacity or the support component or the work- related activity component on account of his having limited capability for work

b. the applicant's applicable amount would include a disability premium on account of the other member's incapacity but for that other member being treated as capable of work by virtue of a determination made in accordance with regulation made under section 171E of the Act;

c. the applicant's applicable amount would include the support component or the work-related activity component on account of the other member having limited capability for work but for that other member being treated as not having limited capability for work by virtue of a determination made in accordance with the Employment and Support Allowance Regulations 2008 or Employment and Support Regulations 2013;

d. the applicant (within the meaning of this scheme) is, or is treated as, incapable of work and has been so incapable, or has been so treated as incapable, of work in accordance with the provisions of, and regulations made under, Part 12A of the Act (incapacity for work) for a continuous period of not less than 196 days; and for this purpose any two or more separate periods separated by a break of not more than 56 days shall be treated as one continuous period;

e. the applicant (within the meaning of this scheme) has, or is treated as having, limited capability for work and has had, or been treated as having, limited capability for work in accordance with the Employment and Support Allowance Regulations 20018 or Employment and Support Regulations 2013 for a continuous period of not less than 196 days and for this purpose any two or more separate periods separated by a break of not more than 84 days must be treated as one continuous period;

f. there is payable in respect of him one or more of the following pensions or allowances–

   i. long-term incapacity benefit or short-term incapacity benefit at the higher rate under Schedule 4 to the Act;
   ii. attendance allowance under section 64 of the Act;
   iii. severe disablement allowance under section 68 of the Act;
   iv. disability living allowance under section 71 of the Act;
   v. personal independence payment under the Welfare Reform Act 2012;
   vi. an AFIP;
   vii. increase of disablement pension under section 104 of the Act;
   viii. a pension increase paid as part of a war disablement pension or under an industrial injuries scheme which is analogous to an allowance or increase of disablement pension under head (ii), (iv) or (vii) above;
   ix. main phase employment and support allowance;

g. a pension or allowance to which head (ii), (iv). (vi) or (viii) of sub-paragraph (f) above refers was payable on account of his incapacity but has ceased to be payable in consequence of his becoming a patient, which in this section shall mean a person (other than a person who is serving a sentence of imprisonment or detention in a youth custody

institution) who is regarded as receiving free in-patient treatment within the meaning of social security (Hospital In-Patients) Regulations 2005.

h. an AFIP would be payable to that person but for any suspension of payment in accordance with any terms of the armed and reserve forces compensation scheme which allow for a suspension because a person is undergoing medical treatment in a hospital or similar institution;

i. paragraphs (f) or (g) would apply to him if the legislative provisions referred to in those sub-paragraphs were provisions under any corresponding enactment having effect in Northern Ireland; or

j. he has an invalid carriage or other vehicle provided to him by the Secretary of State under section 5(2)(a) of and Schedule 2 to the National Health Service Act 1977 or under section 46 of the National Health Service (Scotland) Act 1978 or provided by the Department of Health, Social Services and Public Safety in Northern Ireland under Article 30(1) of the Health and Personal Social Services (Northern Ireland) Order 1972.

18.12 For the purposes of paragraph 18.11 once paragraph 18.11d) applies to the applicant, if he then ceases, for a period of 56 days or less, to be incapable, or to be treated as incapable, of work, that paragraph shall, on his again becoming so incapable, or so treated as incapable, of work at the end of that period, immediately thereafter apply to him for so long as he remains incapable, or is treated as remaining incapable, of work.

18.12AFor the purposes of paragraph 18.11, once paragraph 18.11e) applies to the applicant, if he then ceases, for a period of 84 days or less, to have, or to be treated as having, limited capability for work, that paragraph is, on his again having, or being treated as having, limited capability for work at the end of that period, immediately thereafter apply to him for so long as he has, or is treated as having, limited capability for work.

18.13 For the purposes of paragraphs 18.6 and 18.8 a), a person is disabled if he is a person–

a. in respect of whom disability living allowance or personal independence payment is payable, or has ceased to be payable solely because he is a patient;

b. who is registered as blind in a register compiled under section 29 of the National Assistance Act 1948 welfare services) or, in Scotland, has been certified as blind and in consequence he is registered as blind in a register maintained by or on behalf of a council constituted under section 2 of the Local Government (Scotland) Act 1994; or

c. who ceased to be registered as blind in such a register within the period beginning 28 weeks before the first Monday in September following that person's fifteenth birthday and ending on the day preceding that person's sixteenth birthday.

18.14 For the purposes of paragraph 18.1 a person on maternity leave, paternity leave or adoption leave shall be treated as if they are engaged in remunerative work for the period specified in paragraph 18.15 ('the relevant period') provided that–

a. in the week before the period of maternity leave, paternity leave, shared parental leave (effective from 5/4/2015) or adoption leave began, they were in remunerative work;

b. the applicant is incurring relevant child care charges within the meaning of paragraph 18.5; and

c. the person is entitled to either statutory maternity pay under section 164 of the Act, statutory paternity pay by virtue of section 171ZA or 171ZB of the Act statutory adoption pay by of section 171ZL of the Act, maternity allowance under section 35 of the Act or qualifying support.

18.15 For the purposes of paragraph 18.14 the relevant period shall begin on the day on which the person's maternity, paternity leave or adoption leave commences and shall end on–

a. the date that leave ends;

b. if no child care element of working tax credit is in payment on the date that entitlement to maternity allowance, qualifying support, statutory maternity pay, statutory paternity pay or statutory adoption pay ends, the date that entitlement ends; or

c. if a child care element of working tax credit is in payment on the date that entitlement

to maternity allowance or qualifying support, statutory maternity pay or statutory adoption pay ends, the date that entitlement to that award of the child care element of the working tax credits ends.

whichever shall occur first.

18.16 In paragraphs 18.14 and 18.15

a. 'qualifying support' means income support to which that person is entitled by virtue of paragraph 14B of Schedule 1B to the Income Support Regulations 1987**;** and
b. 'child care element' of working tax credit means the element of working tax credit prescribed under section 12 of the Tax Credits Act (child care element) 2002.

18.17 In this section 'applicant' does not include an applicant:

a. who has, or
b. who (jointly with his partner) has,

an award of universal credit

19.0 Average weekly earnings of employed earners

19.1 Where an applicant's income consists of earnings from employment as an employed earner his average weekly earnings shall be estimated by reference to his earnings from that employment–

a. over a period immediately preceding the reduction week in which the claim is made or treated as made and being a period of
    i. 5 weeks, if he is paid weekly; or
    ii. 2 months, if he is paid monthly; or
b. whether or not sub-paragraph 19.1a i) or ii) applies, where an applicant's earnings fluctuate, over such other period preceding the reduction week in which the claim is made or treated as made as may, in any particular case, enable his average weekly earnings to be estimated more accurately.

19.2 Where the applicant has been in his employment for less than the period specified in paragraph 19.1 a)(i) or (ii)

a. if he has received any earnings for the period that he has been in that employment and those earnings are likely to represent his average weekly earnings from that employment his average weekly earnings shall be estimated by reference to those earnings;
b. in any other case, the authority shall require the applicant's employer to furnish an estimate of the applicant's likely weekly earnings over such period as the authority may require and the applicant's average weekly earnings shall be estimated by reference to that estimate.

19.3 Where the amount of an applicant's earnings changes during an award the authority shall estimate his average weekly earnings by reference to his likely earnings from the employment over such period as is appropriate in order that his average weekly earnings may be estimated accurately but the length of the period shall not in any case exceed 52 weeks.

19.4 For the purposes of this section the applicant's earnings shall be calculated in accordance with sections 25 and 26

20.0 Average weekly earnings of self-employed earners

20.1 Where an applicant's income consists of earnings from employment as a self-employed earner his average weekly earnings shall be estimated by reference to his earnings from that employment over such period as is appropriate in order that his average weekly earnings may be estimated accurately but the length of the period shall not in any case exceed a year.

20.2 For the purposes of this section the applicant's earnings shall be calculated in accordance with section 27 to 29A of this scheme

21.0 Average weekly income other than earnings

21.1 An applicant's income which does not consist of earnings shall, except where paragraph 18.2 applies, be estimated over such period as is appropriate in order that his average weekly income may be estimated accurately but the length of the period shall not in any case exceed 52 weeks; and nothing in this paragraph shall authorise the authority to disregard any such income other than that specified in Schedule 4 of this scheme

21.2 The period over which any benefit under the benefit Acts is to be taken into account shall be the period in respect of which that support is payable.

21.3 For the purposes of this section income other than earnings shall be calculated in accordance with paragraphs 30 to 32 of this scheme

22.0 Calculation of average weekly income from tax credits

22.1 This section applies where an applicant receives a tax credit.

22.2 Where this section applies, the period over which a tax credit is to be taken into account shall be the period set out in paragraph 22.3

22.3 Where the instalment in respect of which payment of a tax credit is made is;

a. a daily instalment, the period is 1 day, being the day in respect of which the instalment is paid;
b. a weekly instalment, the period is 7 days, ending on the day on which the instalment is due to be paid;
c. a two-weekly instalment, the period is 14 days, commencing 6 days before the day on which the instalment is due to be paid;
d. a four-weekly instalment, the period is 28 days, ending on the day on which the instalment is due to be paid.

22.4 For the purposes of this section 'tax credit' means child tax credit or working tax credit.

23.0 Calculation of weekly income

23.1 For the purposes of sections 19 (average weekly earnings of employed earners), 21 (average weekly income other than earnings) and 22 (calculation of average weekly income from tax credits), where the period in respect of which a payment is made;

a. does not exceed a week, the weekly amount shall be the amount of that payment;
b. exceeds a week, the weekly amount shall be determined–
    i. in a case where that period is a month, by multiplying the amount of the payment by 12 and dividing the product by 52;
    ii. in any other case, by dividing the amount of the payment by the number equal to the number of days in the period to which it relates and multiplying the product by 7.

23.2 For the purpose of section 20 (average weekly earnings of self-employed earners) the weekly amount of earnings of an applicant shall be determined by dividing his earnings over the assessment period by the number equal to the number of days in that period and multiplying the product by 7.

24.0 Disregard of changes in tax, contributions etc.

24.1 In calculating the applicant's income the appropriate authority may disregard any legislative change

a. in the basic or other rates of income tax;

b. in the amount of any personal tax relief;

c. in the rates of national insurance contributions payable under the Act or in the lower earnings limit or upper earnings limit for Class 1 contributions under the Act, the lower or upper limits applicable to Class 4 contributions under the Act or the amount specified in section11(4) of the Act (small profits threshold in relation to Class 2 contributions);

d. in the amount of tax payable as a result of an increase in the weekly rate of Category A, B, C or D retirement pension or any addition thereto or any graduated pension payable under the Act;

in the maximum rate of child tax credit or working tax credit,

25.0 Earnings of employed earners

25.1 Subject to paragraph 25.2, 'earnings' means in the case of employment as an employed earner, any remuneration or profit derived from that employment and includes–

a. any bonus or commission;

b. any payment in lieu of remuneration except any periodic sum paid to an applicant on account of the termination of his employment by reason of redundancy;

c. any payment in lieu of notice or any lump sum payment intended as compensation for the loss of employment but only in so far as it represents loss of income;

d. any holiday pay except any payable more than 4 weeks after termination or interruption of the employment;

e. any payment by way of a retainer;

f. any payment made by the applicant's employer in respect of expenses not wholly, exclusively and necessarily incurred in the performance of the duties of the employment, including any payment made by the applicant's employer in respect of–

g. (i) travelling expenses incurred by the applicant between his home and his place of employment;

(ii) expenses incurred by the applicant under arrangements made for the care of a member of his family owing to the applicant's absence from home;

h. any award of compensation made under section 112(4) or 117(3)(a) of the Employment Rights Act 1996 (remedies and compensation for unfair dismissal);

i. any payment or remuneration made under section 28, 34, 64, 68 or 70 of the Employment Rights Act 1996 (right to guarantee payments, remuneration on suspension on medical or maternity grounds, complaints to employment tribunals);

j. any such sum as is referred to in section 112 of the Act (certain sums to be earnings for social security purposes);

k. any statutory sick pay, statutory maternity pay, statutory paternity pay, shared parental pay or statutory adoption pay, or a corresponding payment under any enactment having effect in Northern Ireland;

l. any remuneration paid by or on behalf of an employer to the applicant who for the time being is on maternity leave, paternity leave, shared parental pay or adoption leave or is absent from work because he is ill;

m. the amount of any payment by way of a non-cash voucher which has been taken into account in the computation of a person's earnings in accordance with Part 5 of Schedule 3 to the Social Security (Contributions) Regulations 2001 as amended [4].

25.2 Earnings shall not include–

a. subject to paragraph 25.3, any payment in kind;

b. any payment in respect of expenses wholly, exclusively and necessarily incurred in the performance of the duties of employment;

c. any occupational pension

d. any payment in respect of expenses arising out of the applicant's participation in a service user group or an applicant participating as a service user

25.3 Paragraph 25.2 a) shall not apply in respect of any non-cash voucher referred to in paragraph

[4] Social Security (Contributions)(Amendment) Regulations 2013, Social Security (Contributions)(Amendment No.2) Regulations 2013 and Social Security (Contributions)(Amendment No.2) Regulations 2013

25.1 l)

26.0 Calculation of net earnings of employed earners

26.1 For the purposes of section 19 (average weekly earnings of employed earners), the earnings of an applicant derived or likely to be derived from employment as an employed earner to be taken into account shall, subject to paragraph 26.2, be his net earnings.

26.2 There shall be disregarded from an applicant's net earnings, any sum, where applicable, specified in paragraphs 1 to 14 of Schedule 3.

26.3 For the purposes of paragraph 26.1 net earnings shall, except where paragraph 26.6 applies, be calculated by taking into account the gross earnings of the applicant from that employment over the assessment period, less;

a. any amount deducted from those earnings by way of
   i) income tax;
   ii) primary Class 1 contributions under the Act;
b. any sum paid by the applicant by way of a contribution towards an occupational pension scheme;
c. the amount calculated in accordance with paragraph 26.5 in respect of any qualifying contribution payable by the applicant; and
d. where those earnings include a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay, statutory maternity pay, statutory paternity pay or statutory adoption pay, any amount deducted for those earnings by way of any contributions which are payable under any enactment having effect in Northern Ireland and which correspond to primary Class 1 contributions under the Act.

26.4 In this section 'qualifying contribution' means any sum which is payable periodically as a contribution towards a personal pension scheme.

26.5 The amount in respect of any qualifying contribution shall be calculated by multiplying the daily amount of the qualifying contribution by the number equal to the number of days in the assessment period; and for the purposes of this section the daily amount of the qualifying contribution shall be determined–

a. where the qualifying contribution is payable monthly, by multiplying the amount of the qualifying contribution by 12 and dividing the product by 365;
b. in any other case, by dividing the amount of the qualifying contribution by the number equal to the number of days in the period to which the qualifying contribution relates.

26.6 Where the earnings of an applicant are estimated under sub-paragraph (b) of paragraph 2) of the section 19 (average weekly earnings of employment earners), his net earnings shall be calculated by taking into account those earnings over the assessment period, less–

a. an amount in respect of income tax equivalent to an amount calculated by applying to those earnings the basic rate or in the case of a Scottish taxpayer, the Scottish basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 257(1) of the Income and Corporation Taxes Act 1988(personal allowances) as is appropriate to his circumstances but, if the assessment period is less than a year, the earnings to which the basic rate or in the case of a Scottish taxpayer, the Scottish basic rate of tax is to be applied and the amount of the personal relief deductible under this sub-paragraph shall be calculated on a pro rata basis;
b. an amount equivalent to the amount of the primary Class 1 contributions that would be payable by him under the Act in respect of those earnings if such contributions were payable; and
c. any sum which would be payable by the applicant by way of a contribution towards an occupational or personal pension scheme, if the earnings so estimated were actual

earnings.

27.0 Earnings of self-employed earners

27.1 Subject to paragraph 27.2, 'earnings', in the case of employment as a self- employed earner, means the gross income of the employment plus any allowance paid under section 2 of the 1973 Act or section 2 of the Enterprise and New Towns (Scotland) Act 1990 to the applicant for the purpose of assisting him in carrying on his business unless at the date of claim the allowance has been terminated.

27.2 'Earnings' shall not include any payment to which paragraph 27 or 28 of Schedule 4 refers (payments in respect of a person accommodated with the applicant under arrangements made by a local authority or voluntary organisation and payments made to the applicant by a health authority, local authority or voluntary organisation in respect of persons temporarily in the applicant's care) nor shall it include any sports award.

27.3 This paragraph applies to–

a. royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent or trade mark; or

b. any payment in respect of any–

(i) book registered under the Public Lending Right Scheme 1982; or

(ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982, where the applicant is the first owner of the copyright, design, patent or trade mark, or an original contributor to the book of work concerned.

27.4 Where the applicant's earnings consist of any items to which paragraph 27.3 applies, those earnings shall be taken into account over a period equal to such number of weeks as is equal to the number obtained (and any fraction is to be treated as a corresponding fraction of a week) by dividing the earnings by

(a) the amount of the reduction under this scheme which would be payable had the payment not been made, plus

(b) an amount equal to the total of the sums which would fall to be disregarded from the payment under Schedule 3 (sums to be disregarded in the calculation of earnings) as appropriate in the applicant's case.

28.0 Calculation of net profit of self-employed earners

28.1 For the purposes of section 20 (average weekly earnings of self- employed earners) the earnings of an applicant to be taken into account shall be

a. in the case of a self-employed earner who is engaged in employment on his own account, the net profit derived from that employment;

b. in the case of a self-employed earner whose employment is carried on in partnership or is that of a share fisherman within the meaning of the Social Security (Mariners' Benefits) Regulations 1975, his share of the net profit derived from that employment, less–

i. an amount in respect of income tax and of national insurance contributions payable under the Act calculated in accordance with section 29 (deduction of tax and contributions for self-employed earners); and

ii. the amount calculated in accordance with paragraph (11) in respect of any qualifying premium.

28.2 There shall be disregarded from an applicant's net profit, any sum, where applicable, specified in paragraph 1 to 14 of Schedule 3.

28.3 For the purposes of paragraph 28.1 a) the net profit of the employment must, except where paragraph 28.9 applies, be calculated by taking into account the earnings for the employment

over the assessment period less

a. subject to paragraphs 28.5 to 28.7, any expenses wholly and exclusively incurred in that period for the purposes of that employment;
b. an amount in respect of;
   (i) income tax, and
   (ii) national insurance contributions payable under the Act, calculated in accordance with section 29 (deduction of tax and contributions for self-employed earners); and
c. the amount calculated in accordance with paragraph (28.11) in respect of any qualifying premium.

28.4 For the purposes of paragraph 28.1b) the net profit of the employment shall be calculated by taking into account the earnings of the employment over the assessment period less, subject to paragraphs 28.5 to 28.8, any expenses wholly and exclusively incurred in that period for the purposes of the employment.

28.5 Subject to paragraph 28.6 no deduction shall be made under paragraph 28.3 a) or 28.4, in respect of–

a. any capital expenditure;
b. the depreciation of any capital asset;
c. any sum employed or intended to be employed in the setting up or expansion of the employment;
d. any loss incurred before the beginning of the assessment period;
e. the repayment of capital on any loan taken out for the purposes of the employment;
f. any expenses incurred in providing business entertainment, and
g. any debts, except bad debts proved to be such, but this sub-paragraph shall not apply to any expenses incurred in the recovery of a debt.

28.6 A deduction shall be made under paragraph 28.3 a) or 28.4 in respect of the repayment of capital on any loan used for–

a. the replacement in the course of business of equipment or machinery; and
b. the repair of an existing business asset except to the extent that any sum is payable under an insurance policy for its repair.

28.7 The authority shall refuse to make deductions in respect of any expenses under paragraph 28.3 a. or 28.4 where it is not satisfied given the nature and the amount of the expense that it has been reasonably incurred.

28.8 For the avoidance of doubt–

a. deductions shall not be made under paragraph 28.3 a) or 28.4 in respect of any sum unless it has been expended for the purposes of the business;
b. a deduction shall be made thereunder in respect of–
   i. the excess of any value added tax paid over value added tax received in the assessment period;
   ii. any income expended in the repair of an existing business asset except to the extent that any sum is payable under an insurance policy for its repair;
   iii. any payment of interest on a loan taken out for the purposes of the employment

28.9 Where an applicant is engaged in employment, as a child minder the net profit of the employment shall be one-third of the earnings of that employment, less an amount in respect of

a. income tax; and
b. national insurance contributions payable under the Act, calculated in accordance with section 29 (deduction of tax and contributions for self-employed earners); and
c. the amount calculated in accordance with paragraph 28.1 in respect of any qualifying contribution.

28.10 For the avoidance of doubt where an applicant is engaged in employment as a self-employed

earner and he is also engaged in one or more other employments as a self-employed or employed earner any loss incurred in any one of his employments shall not be offset against his earnings in any other of his employments.

28.11 The amount in respect of any qualifying premium shall be calculated by multiplying the daily amount of the qualifying premium by the number equal to the number of days in the assessment period; and for the purposes of this section the daily amount of the qualifying premium shall be determined

a. where the qualifying premium is payable monthly, by multiplying the amount of the qualifying premium by 12 and divided the product by 365;
b. in any other case, by dividing the amount of the qualifying premium by the number equal to the number of days in the period to which the qualifying premium relates.

28.12 In this section, 'qualifying premium' means any premium which is payable periodically in respect of a personal pension scheme and is so payable on or after the date of claim.

29.0 Deduction of tax and contributions of self-employed earners

29.1 The amount to be deducted in respect of income tax under section 28.1b) i), 28.3 b) i) or 28.9 a) i) (calculation of net profit of self-employed earners) shall be calculated on the basis of the amount of chargeable income and as if that income were assessable to income tax at the basic rate or in the case of a Scottish taxpayer, the Scottish basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under section 257(1) of the Income and Corporation Taxes Act 1988(personal allowances) as is appropriate to his circumstances; but, if the assessment period is less than a year, the earnings to which the basic rate or in the case of a Scottish taxpayer, the Scottish basic rate of tax is to be applied and the amount of the personal reliefs deductible under this paragraph shall be calculated on a pro rata basis.

29.2 The amount to be deducted in respect of national insurance contributions under paragraphs 28.1 1 b)(i); 28.3 b) ii) or 28.9 a shall be the total of–

a. the amount of Class 2 contributions payable under section 11(1) or, as the case may be, 11(3) of the Act at the rate applicable to the assessment period except where the applicant's chargeable income is less than the amount specified in section 11(4) of the Act (small profits threshold) for the tax year applicable to the assessment period; but if the assessment period is less than a year, the amount specified for that tax year shall be reduced pro rata; and
b. the amount of Class 4 contributions (if any) which would be payable under section 15 of the Act (Class 4 contributions recoverable under the Income Tax Acts) at the percentage rate applicable to the assessment period on so much of the chargeable income as exceeds the lower limit but does not exceed the upper limit of profits and gains applicable for the tax year applicable to the assessment period; but if the assessment period is less than a year, those limits shall be reduced pro rata.

29.3 In this section 'chargeable income' means–

a. except where sub-paragraph (b) applies, the earnings derived from the employment less any expenses deducted under paragraph 28.3(a) or, as the case may be, 28.4 of section 28;
b. in the case of employment as a child minder, one-third of the earnings of that employment.

29A.0 Minimum Income Floor

29 A.1 Where no start up period (as defined within 29A.2) applies to the applicant or partner, the income used by the Council in the calculation of their award will be the gross amount declared by the applicant or a substituted amount whichever is the higher. This substituted amount

shall not be less than 35 hours multiplied by the national living wage(or national minimum wage as appropriate) From that, the Council will deduct only an estimate for tax, national insurance and any pension contribution (where a pension contribution is being made).

29 A.2 The Council shall determine an appropriate start up period for the employment activity being conducted by the applicant or partner. This will normally be one year from the date of commencement of the employment activity. During this period, no Minimum Income Floor shall be applied. The start-up period ends where the person is no longer in gainful self-employment.

29 A.3 Where an applicant or partner holds a position in a company that is analogous to that of a sole owner or partner in the business of that company, he shall be treated as if he were such sole owner or partner and in such a case be subject to the substituted amount where appropriate.

29 A.4 No start-up period may be applied in relation to an applicant where a start-up period has previously been applied, whether in relation to a current or previous award of a Council Tax Reduction.

29 A.5 In order to establish whether to award a start up period, the applicant must satisfy the Council that the employment is

- Genuine and effective. The Council must be satisfied that the employment activity is being conducted; and
- Being conducted with the intention of increasing the income received to the level that would be conducive with that form of employment.

29 A.6 For the purposes of determining whether an applicant is in gainful self-employment or meets the conditions for a start up-period, the Council will require the applicant to provide such evidence or information that it reasonably requires to make that decision, the Council may also require the self employed person to attend an interview for the purpose of establishing whether the employment is gainful or whether the conditions for a start up period are met

30.0 Calculation of income other than earnings

30.1 For the purposes of section 21 (average weekly income other than earnings), the income of an applicant which does not consist of earnings to be taken into account shall, subject to paragraphs 30.2 to 30.4, be his gross income and any capital treated as income under section 31 (capital treated as income).

30.2 There is to be disregarded from the calculation of an applicant's gross income under paragraph 30.1, any sum, where applicable, specified in Schedule 4.

30.3 Where the payment of any benefit under the benefit Acts is subject to any deduction by way of recovery the amount to be taken into account under paragraph 30.1 shall be the gross amount payable.

30.4 Where the applicant or, where he is a member of a couple, his partner is receiving a contributory employment and support allowance and that benefit has been reduced under regulation 63 of the Employment and Support Allowance Regulations 2008 or 2013 as appropriate, the amount of that benefit to be taken into account is the amount as if it had not been reduced.

30.5 Where an award of any working tax credit or child tax credit under the Tax Credits Act 2002 is subject to a deduction by way of recovery of an overpayment of working tax credit or child tax credit which arose in a previous tax year the amount to be taken into account under paragraph 30.1 shall be the amount of working tax credit or child tax credit awarded less the amount of that deduction.

30.6 In paragraph 30.5 'tax year' means a period beginning with 6th April in one year and ending with 5th April in the next.

30.7 Paragraph 30.8 and 30.9 apply where a relevant payment has been made to a person in an academic year; and that person abandons, or is dismissed from, his course of study before the payment to him of the final instalment of the relevant payment.

30.8 Where a relevant payment is made quarterly, the amount of a relevant payment to be taken into account for the assessment period for the purposes of paragraph 30.1 in respect of a person to whom paragraph 30.7 applies, shall be calculated by applying the formula–

$$\frac{A - (BxC)}{D}$$

Where

A = the total amount of the relevant payment which that person would have received had he remained a student until he last day of the academic term in which he abandoned, or was dismissed from, his course, less any deduction under paragraph 51.5

B = the number of reduction weeks from the reduction week immediately following that which includes the first day of that academic year to the reduction week which includes the day on which the person abandoned, or was dismissed from, his course;

C = the weekly amount of the relevant payment, before the application of the £10 disregard, which would have been taken into account as income under paragraph 51.2 had the person not abandoned or been dismissed from, his course and, in the case of a person who was not entitled to council tax reduction immediately before he abandoned or was dismissed from his course, had that person, at that time, been entitled to housing benefit;

D = the number of reduction weeks in the assessment period.

30.9 Where a relevant payment is made by two or more instalments in a quarter, the amount of a relevant payment to be taken into account for the assessment period for the purposes of paragraph 30.1 in respect of a person to whom paragraph (30.8) applies, shall be calculated by applying the formula in paragraph 30.8 but as if–

A = the total amount of relevant payments which that person received, or would have received, from the first day of the academic year to the day the person abandoned the course, or was dismissed from it, less any deduction under paragraph 51.5

30.10 In this section– 'academic year' and 'student loan' shall have the same meanings as for the purposes of sections 43 to 45, 'assessment period' means–

a. in a case where a relevant payment is made quarterly, the period beginning with the reduction week which includes the day on which the person abandoned, or was dismissed from, his course and ending with the reduction week which includes the last day of the last quarter for which an instalment of the relevant payment was payable to that person;
b. in a case where the relevant payment is made by two or more instalments in a quarter, the period beginning with the reduction week which includes the day on which the person abandoned, or was dismissed from, his course and ending with the reduction week which includes–
    i. the day immediately before the day on which the next instalment of the relevant payment would have been due had the payments continued; or
    ii. the last day of the last quarter for which an instalment of the relevant payment was payable to that person.

whichever of these dates is earlier

'quarter' in relation to an assessment period means a period in that year beginning on;

a. 1st January and ending on 31st March;
b. 1st April and ending on 30th June;
c. 1st July and ending on 31st August; or
d. 1st September and ending on 31st December;

'relevant payment' means either a student loan or an amount intended for the maintenance of dependants referred to in paragraph 46.7 or both.

30.11 For the avoidance of doubt there shall be included as income to be taken into account under paragraph 30.1

a. any payment to which paragraph 25.2 (payments not earnings) applies; or

b. in the case of an applicant who is receiving support under section 95 or 98 of the Immigration and Asylum Act 1999 including support provided by virtue of regulations made under Schedule 9 to that Act, the amount of such support provided in respect of essential living needs of the applicant and his dependants (if any) as is specified in regulations made under paragraph 3 of Schedule 8 to the Immigration and Asylum Act 1999.

31.0 Capital treated as income

31.1 Any capital payable by instalments which are outstanding at the date on which the claim is made or treated as made, or, at the date of any subsequent revision or supersession, shall, if the aggregate of the instalments outstanding and the amount of the applicant's capital otherwise calculated in accordance with sections 33 to 42 of this scheme exceeds £6,000, be treated as income.

31.2 Any payment received under an annuity shall be treated as income.

31.3 Any earnings to the extent that they are not a payment of income shall be treated as income.

31.4 Any Career Development Loan paid pursuant to section 2 of the Employment and Training Act 1973 Act shall be treated as income

31.5 Where an agreement or court order provides that payments shall be made to the applicant in consequence of any personal injury to the applicant and that such payments are to be made, wholly or partly, by way of periodic payments, any such periodic payments received by the applicant (but not a payment which is treated as capital), shall be treated as income.

32.0 Notional income

32.1 An applicant shall be treated as possessing income of which he has deprived himself for the purpose of securing entitlement of support or increasing the amount of that support.

32.2 Except in the case of–

a. a discretionary trust;
b. a trust derived from a payment made in consequence of a personal injury;
c. a personal pension scheme, occupational pension scheme or a payment made by the Board of the Pension Protection Fund where the applicant has not attained the qualifying age for state pension credit;
d. any sum to which paragraph 47(2)(a) of Schedule 5 (capital to be disregarded) applies which is administered in the way referred to in paragraph 47(1)(a);
e. any sum to which paragraph 48(a) of Schedule 5 refers;
f. rehabilitation allowance made under section 2 of the 1973 Act;
g. child tax credit; or
h. working tax credit,
i. any sum to which paragraph 32.13 applies;

any income which would become available to the applicant upon application being made, but which has not been acquired by him, shall be treated as possessed by the applicant but only from the date on which it could be expected to be acquired were an application made.

32.3 – 32.5 Not used

32.6 Any payment of income, other than a payment of income specified in paragraph 32.7 made–

a. to a third party in respect of a single applicant or a member of the family (but not a member of the third party's family) shall, where that payment is a payment of an occupational pension, a pension or other periodical payment made under or by a personal pension scheme or a payment made by the Board of the Pension Protection Fund, be treated as possessed by that single applicant or, as the case may be, by that member;

b. to a third party in respect of a single applicant or in respect of a member of the family (but not a member of the third party's family) shall, where it is not a payment referred to in sub-paragraph a), be treated as possessed by that single applicant or by that member to the extent that it is used for the food, ordinary clothing or footwear, household fuel or rent of that single applicant or, as the case may be, of any member of that family or is used for any council tax or water charges for which that applicant or member is liable;

c. to a single applicant or a member of the family in respect of a third party (but not in respect of another member of that family) shall be treated as possessed by that single applicant or, as the case may be, that member of the family to the extent that it is kept or used by him or used by or on behalf of any member of the family.

32.7 Paragraph 32.6 shall not apply in respect of a payment of income made–

a. under the Macfarlane Trust, the Macfarlane (Special Payments) Trust, the Macfarlane (Special Payments) (No. 2) Trust, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006);

b. pursuant to section 19(1)(a) of the Coal Industry Act 1994 (concessionary coal);

c. pursuant to section 2 of the 1973 Act in respect of a person's participation–
(i) in an employment programme specified in regulation 75(1)(a)(ii) of the Jobseeker's Allowance Regulations;
(ii) in a training scheme specified in regulation 75(1)(b)(ii) of those Regulations;
(iii) in the Intense Activity Period specified in regulation75(1)(a)(iv)of those Regulations;
(iv) in a qualifying course within the meaning specified in regulation 17A(7) of those Regulations or;
(v) in the Flexible New Deal specified in regulation 75(1)(a)(v) of those Regulations;

d. in respect of a person's participation in the Work for Your Benefit Pilot Scheme

e. in respect of a previous participation in the Mandatory Work Activity Scheme;

f. in respect of an applicant's participation in the Employment, Skills and Enterprise Scheme;

g. under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where–
(i) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person's estate under section 41 of the Solicitors (Scotland) Act 1980;
(ii) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
(iii) the person referred to in (i) and any member of his family does not possess, or is not treated as possessing, any other income apart from that payment.

32.8 Where an applicant is in receipt of any benefit (other than council tax reduction) under the benefit Acts and the rate of that benefit is altered with effect from a date on or after 1st April in any year but not more than 14 days thereafter, the authority shall treat the applicant as possessing such benefit at the altered rate from either 1st April or the first Monday in April in that year, whichever date the authority shall select to apply in its area, to the date on which the altered rate is to take effect.

32.9 Subject to paragraph 32.10, where–

a. applicant performs a service for another person; and

b. that person makes no payment of earnings or pays less than that paid for a comparable

employment in the area, the authority shall treat the applicant as possessing such earnings (if any) as is reasonable for that employment unless the applicant satisfies the authority that the means of that person are insufficient for him to pay or to pay more for the service.

32.10 Paragraph 32.9 shall not apply–

a. to an applicant who is engaged by a charitable or voluntary organisation or who is a volunteer if the authority is satisfied in any of those cases that it is reasonable for him to provide those services free of charge; or
b. in a case where the service is performed in connection with–
(i) the applicant's participation in an employment or training programme in accordance with regulation 19(1)(q) of the Jobseeker's Allowance Regulations, other than where the service is performed in connection with the applicant's participation in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations or
(ii) the applicant's or the applicant's partner's participation in an employment or training programme as defined in regulation 19(3) of those Regulations for which a training allowance is not payable or, where such an allowance is payable, it is payable for the sole purpose of reimbursement of travelling or meal expenses to the person participating in that programme ; or
c. to an applicant who is participating in a work placement approved by the Secretary of State (or a person providing services to the Secretary of State) before the placement starts.

32.10A In paragraph 32.10 (c) 'work placement' means practical work experience which is not undertaken in expectation of payment.

32.11 Where an applicant is treated as possessing any income under any of paragraph 32.1 to (32.8), the foregoing provisions of this scheme shall apply for the purposes of calculating the amount of that income as if a payment has actually been made and as if it were actual income which he does possess.

32.12 Where an applicant is treated a possessing any earnings under paragraph 32.9 the foregoing provisions of this scheme shall apply for the purposes of calculating the amount of those earnings as if a payment had actually been made and as if they were actual earnings which he does possess except that paragraph (3) of section 26 (calculation of net earnings of employed earners) shall not apply and his net earnings shall be calculated by taking into account those earnings which he is treated as possessing, less;

a. an amount in respect of income tax equivalent to an amount calculated by applying to those earnings the starting rate or, as the case may be, the starting rate and the basic rate or in the case of a Scottish taxpayer, the Scottish basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 257(1) of the Income and Corporation Taxes Act 1988 (personal allowances) as is appropriate to his circumstances; but, if the assessment period is less than a year, the earnings to which the starting rate of tax is to be applied and the amount of the personal relief deductible under this sub-paragraph shall be calculated on a pro rate basis;
b. an amount equivalent to the amount of the primary Class 1 contributions that would be payable by him under the Act in respect of those earnings if such contributions were payable; and
c. any sum payable by the applicant by way of a contribution towards an occupational or personal pension scheme.

32.13 Paragraphs (32.1), (32.2), (32.6) and (32.9) shall not apply in respect of any amount of income other than earnings, or earnings of an employed earner, arising out of the applicant's participation in a service user group or an applicant participating as a service user

Sections 33 – 42 & Schedule 5

Definition and the treatment of capital for Council tax reduction purposes

33.0 Capital limit

33.1 For the purposes of this scheme, the prescribed amount is £6,000 and no reduction shall be granted when the applicant has an amount greater than this level.

34.0 Calculation of capital

34.1 For the purposes of this scheme, the capital of an applicant to be taken into account shall, subject to paragraph (34.2), be the whole of his capital calculated in accordance with this scheme and any income treated as capital under section 36 (income treated as capital).

34.2 There shall be disregarded from the calculation of an applicant's capital under paragraph (34.1), any capital, where applicable, specified in Schedule 5.

35.0 Disregard of capital of child and young person

35.1 The capital of a child or young person who is a member of the applicant's family shall not be treated as capital of the applicant.

36.0 Income treated as capital

36.1 Any bounty derived from employment to which paragraph 8 of Schedule 3 applies and paid at intervals of at least one year shall be treated as capital.

36.2 Any amount by way of a refund of income tax deducted from profits or emoluments chargeable to income tax under Schedule D or E shall be treated as capital.

36.3 Any holiday pay which is not earnings under section 25(1)(d) (earnings of employed earners) shall be treated as capital.

36.4 Except any income derived from capital disregarded under paragraphs 1, 2, 4, 8, 14 or 25 to 28, 47 or 48 of Schedule 5, any income derived from capital shall be treated as capital but only from the date it is normally due to be credited to the applicant's account.

36.5 In the case of employment as an employed earner, any advance of earnings or any loan made by the applicant's employer shall be treated as capital.

36.6 Any charitable or voluntary payment which is not made or due to be made at regular intervals, other than a payment which is made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, the Independent Living Fund (2006) or the London Bombings Charitable Relief Fund, shall be treated as capital.

36.7 There shall be treated as capital the gross receipts of any commercial activity carried on by a person in respect of which assistance is received under the self- employment route, but only in so far as those receipts were payable into a special account during the period in which that person was receiving such assistance.

36.8 Any arrears of subsistence allowance which are paid to an applicant as a lump sum shall be treated as capital.

36.9 Any arrears of working tax credit or child tax credit shall be treated as capital.

37.0 Calculation of capital in the United Kingdom

37.1 Capital which an applicant possesses in the United Kingdom shall be calculated at its current market or surrender value less–

a. where there would be expenses attributable to the sale, 10 per cent.; and
b. the amount of any encumbrance secured on it;

38.0 Calculation of capital outside the United Kingdom

38.1 Capital which an applicant possesses in a country outside the United Kingdom shall be calculated

a. in a case where there is no prohibition in that country against the transfer to the United Kingdom of an amount equal to its current market or surrender value in that country, at that value.

b. in a case where there is such a prohibition, at the price which it would realise if sold in the United Kingdom to a willing buyer,

less, where there would be expenses attributable to sale, 10 per cent. and the amount of any encumbrances secured on it.

39.0 Notional capital

39.1 An applicant shall be treated as possessing capital of which he has deprived himself for the purpose of securing entitlement to council tax reduction or increasing the amount of that support except to the extent that that capital is reduced in accordance with section 40 (diminishing notional capital rule).

39.2 Except in the case of

(a) a discretionary trust; or
(b) a trust derived from a payment made in consequence of a personal injury; or
(c) any loan which would be obtained only if secured against capital disregarded under Schedule 5; or
(d) a personal pension scheme, occupational pension scheme or a payment made by the Board of the Pension Protection Fund; or
(e) any sum to which paragraph 47(2)(a) of Schedule 5 (capital to be disregarded) applies which is administered in the way referred to in paragraph 47(1)(a); or
(f) any sum to which paragraph 48(a) of Schedule 5 refers; or
(g) child tax credit; or
(h) working tax credit,

any capital which would become available to the applicant upon application being made, but which has not been acquired by him, shall be treated as possessed by him but only from the date on which it could be expected to be acquired were an application made.

39.3 Any payment of capital, other than a payment of capital specified in paragraph (39.4), made

(a) to a third party in respect of a single applicant or a member of the family (but not a member of the third party's family) shall, where that payment is a payment of an occupational pension, a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund, be treated as possessed by that single applicant or, as the case may be, by that member;
(b) to a third party in respect of a single applicant or in respect of a member of the family (but not a member of the third party's family) shall, where it is not a payment referred to in sub-paragraph (a), be treated as possessed by that single applicant or by that member to the extent that it is used for the food, ordinary clothing or footwear, household fuel or rent of that single applicant or, as the case may be, of any member of that family or is used for any council tax or water charges for which that applicant or member is liable;
(c) to a single applicant or a member of the family in respect of a third party (but not in respect of another member of that family) shall be treated as possessed by that single applicant or, as the case may be, that member of the family to the extent that it is kept or used by him or used by or on behalf of any member of the family.

39.4 Paragraph 39.3 shall not apply in respect of a payment of capital made

(a) under or by any of the Trusts, the Fund, the Eileen Trust, MFET Limited, the Independent Living Fund (2006), the Skipton Fund, the Caxton Foundation or the London Bombings Relief Charitable Fund;
(b) pursuant to section 2 of the 1973 Act in respect of a person's participation
    (i) in an employment programme specified in regulation 75(1)(a)(ii) of the

Jobseeker's Allowance Regulations;

(ii) in a training scheme specified in regulation 75(1)(b)(ii) of those Regulations;

(iii) in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations;

(iv) in a qualifying course within the meaning specified in regulation17A(7) of those Regulations; or

(v) in the Flexible New Deal specified in regulation 75(1)(a)(v) of those Regulations;

(bb) in respect of a person's participation in the Mandatory Work Activity Scheme; Enterprise Scheme;

(bc) in respect of an applicant's participation in the Employment, Skills and Enterprise Scheme;

(c) under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where–

(i) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person's estate under section 41 of the Solicitors (Scotland) Act 1980;

(ii) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and

(iii) the person referred to in (i) and any member of his family does not possess, or is not treated as possessing, any other income apart from that payment.

39.5 Where an applicant stands in relation to a company in a position analogous to that of a sole owner or partner in the business of that company, he may be treated as if he were such sole owner or partner and in such a case

a. the value of his holding in that company shall, notwithstanding section 34 (calculation of capital) be disregarded; and

b. he shall, subject to paragraph 39.6, be treated as possessing an amount of capital equal to the value or, as the case may be, his share of the value of the capital of that company and the foregoing provisions of this Section shall apply for the purposes of calculating that amount as if it were actual capital which he does possess.

39.6 For so long as the applicant undertakes activities in the course of the business of the company, the amount which, he is treated as possessing under paragraph 39.5 shall be disregarded.

39.7 Where an applicant is treated as possessing capital under any of paragraphs 39.1 to 39.2 the foregoing provisions of this Section shall apply for the purposes of calculating its amount as if it were actual capital, which he does possess.

40.0 Diminishing notional capital rule

40.1 Where an applicant is treated as possessing capital under section 39.1 (notional capital), the amount which he is treated as possessing;

a. in the case of a week that is subsequent to

(i) the relevant week in respect of which the conditions set out in paragraph 40.2 are satisfied; or

(ii) a week which follows that relevant week and which satisfies those conditions, shall be reduced by an amount determined under paragraph 40.3;

b. in the case of a week in respect of which paragraph 40.1(a) does not apply but where

(i) that week is a week subsequent to the relevant week; and

(ii) that relevant week is a week in which the condition in paragraph 40.4 is satisfied, shall be reduced by the amount determined under paragraph 40.4.

40.2 This paragraph applies to a reduction week or part-week where the applicant satisfies the conditions that

a. he is in receipt of council tax reduction; and

b. but for paragraph 39.1, he would have received an additional amount of council tax reduction in that week.

40.3 In a case to which paragraph 40.2 applies, the amount of the reduction for the purposes of paragraph 40.1(a) shall be equal to the aggregate of

a. the additional amount to which sub-paragraph 40.2 (b) refers;
b. where the applicant has also claimed housing benefit, the amount of any housing benefit or any additional amount of that benefit to which he would have been entitled in respect of the whole or part of the reduction week to which paragraph 40.2 refers but for the application of regulation 49(1) of the Housing Benefit Regulations 2006 (notional capital);
c. where the applicant has also claimed income support, the amount of income support to which he would have been entitled in respect of the whole or part of the reduction week to which paragraph 40.2 refers but for the application of regulation 51(1) of the Income Support Regulations (notional capital);
d. where the applicant has also claimed a jobseeker's allowance, the amount of an income-based jobseeker's allowance to which he would have been entitled in respect of the whole or part of the reduction week to which paragraph 40.2 refers but for the application of regulation 113 of the Jobseeker's Allowance Regulations 1996 (notional capital) and
e. where the applicant has also claimed an employment and support allowance, the amount of an income-related employment and support allowance to which he would have been entitled in respect of the whole or part of reduction week to which paragraph 40.2 refers but for the application of regulation 115 of the Employment and Support Allowance Regulations 2008 (notional capital).

40.4 Subject to paragraph 40.5, for the purposes of paragraph 40.1(b) the condition is that the applicant would have been entitled to council tax reduction in the relevant week but for paragraph 39.1, and in such a case the amount of the reduction shall be equal to the aggregate of

a. the amount of council tax reduction to which the applicant would have been entitled in the relevant week but for paragraph 39.1; and for the purposes of this sub-paragraph is the amount is in respect of a part-week, that amount shall be determined by dividing the amount of council tax reduction to which he would have been so entitled by the number equal to the number of days in the part-week and multiplying the quotient so obtained by 7;
b. if the applicant would, but for regulation 49(1) of the Housing Benefit Regulations, have been entitled to housing benefit or to an additional amount of housing benefit in respect of the reduction week which includes the last day of the relevant week, the amount which is equal to–
   (i) in a case where no housing benefit is payable, the amount to which he would have been entitled; or
   (ii) in any other case, the amount equal to the additional amount of housing benefit to which he would have been entitled,

   and, for the purposes of this sub-paragraph, if the amount is in respect of a part-week, that amount shall be determined by dividing the amount of housing benefit to which he would have been so entitled by the number equal to that number of days in the part-week and multiplying the quotient so obtained by 7;
c. if the applicant would, but for regulation 51(1) of the Income Support Regulations, have been entitled to income support in respect of the reduction week, within the meaning of regulation 2(1) of those Regulations, which includes the last day of the relevant week, the amount to which he would have been entitled and, for the purposes of this sub-paragraph, if the amount is in respect of a part-week, that amount shall be determined by dividing the amount of the income support to which he would have been so entitled by the number equal to the number of days in the part- week and multiplying the quotient so obtained by 7
d. if the applicant would, but for regulation 113 of the Jobseeker's Allowance Regulations 1996, have been entitled to an income-based jobseeker's allowance in respect of the reduction week, within the meaning of this scheme, which includes the last day of the relevant week, the amount to which he would have been entitled and, for the purposes

of this sub-paragraph, if the amount is in respect of a part-week, that amount shall be determined by dividing the amount of the income-based jobseeker's allowance to which he would have been so entitled by the number equal to the number of days in the part-week and multiplying the quotient so obtained by 7; and

e. if the applicant would, but for regulation 115 of the Employment and Support Allowance Regulations 2008, have been entitled to an income-related employment and support allowance in respect of the reduction week, within the meaning of regulation 2(1) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled and, for the purposes of this sub-paragraph, if the amount is in respect of a part-week, that amount must be determined by dividing the amount of the income-related employment and support allowance to which he would have been so entitled by the number equal to the number of days in that part-week and multiplying the quotient so obtained by 7.

40.5 The amount determined under paragraph 40.4 shall be re-determined under that paragraph if the applicant makes a further claim for council tax reduction and the conditions in paragraph 40.6 are satisfied, and in such a case–

a. sub-paragraphs (a) to (d) of paragraph 40.4 shall apply as if for the words 'relevant week' there were substituted the words 'relevant subsequent week'; and

b. subject to paragraph 40.7, the amount as re-determined shall have effect from the first week following the relevant subsequent week in question.

40.6 The conditions are that

a. a further claim is made 26 or more weeks after

(i) the date on which the applicant made a claim for council tax reduction in respect of which he was first treated as possessing the capital in question under paragraph 39.1;

(ii) in a case where there has been at least one re-determination in accordance with paragraph 40.5, the date on which he last made a claim for council tax reduction which resulted in the weekly amount being re-determined, or

(iii) the date on which he last ceased to be entitled to council tax reduction, whichever last occurred; and

b. the applicant would have been entitled to council tax reduction but for paragraph 39.1.

40.7 The amount as re-determined pursuant to paragraph 40.5 shall not have effect if it is less than the amount which applied in that case immediately before the re-determination and in such a case the higher amount shall continue to have effect.

40.8 For the purposes of this section

a. 'part-week'

(i) in paragraph40.4(a)means a period of less than a week for which council tax reduction is allowed;

(ii) in paragraph 40.4(b)means a period of less than a week for which housing benefit is payable;

(iii) in paragraph 40.4 (c),(d)and(e)means–

aa. a period of less than a week which is the whole period for which income support , an income-related employment and support allowance or, as the case may be, an income-based jobseeker's allowance is payable; and

bb. any other period of less than a week for which it is payable;

b. 'relevant week' means the reduction week or part-week in which the capital in question of which the applicant has deprived himself within the meaning of section 39.1

(i) was first taken into account for the purpose of determining his entitlement to council tax reduction; or

(ii) was taken into account on a subsequent occasion for the purpose of determining or re-determining his entitlement to council tax reduction on that subsequent occasion and that determination or re-determination resulted in his beginning to receive, or ceasing to receive, council tax reduction;

and where more than one reduction week is identified by reference to heads (i) and (ii)

of this sub-paragraph the later or latest such reduction week or, as the case may be, the later or latest such part-week;

c. 'relevant subsequent week' means the reduction week or part-week which includes the day on which the further claim or, if more than one further claim has been made, the last such claim was made.

41.0 Capital jointly held

41.1 Except where an applicant possesses capital which is disregarded under paragraph 39(5) (notional capital) where an applicant and one or more persons are beneficially entitled in possession to any capital asset they shall be treated, in the absence of evidence to the contrary, as if each of them were entitled in possession to the whole beneficial interest therein in an equal share and the foregoing provisions of this Section shall apply for the purposes of calculating the amount of capital which the applicant is treated as possessing as if it were actual capital which the applicant does possess.

42.0 Not used

Sections 43 - 56

Definition and the treatment of students for Council tax reduction purposes[5]

[5] Amounts shown in sections 43 to 56 will be uprated in line with the Housing Benefit Regulations 2006 (as amended)

43.0 Student related definitions

43.1 In this scheme the following definitions apply;

'academic year' means the period of twelve months beginning on 1st January, 1st April, 1st July or 1st September according to whether the course in question begins in the winter, the spring, the summer or the autumn respectively but if students are required to begin attending the course during August or September and to continue attending through the autumn, the academic year of the course shall be considered to begin in the autumn rather than the summer;

'access funds' means;

a. grants made under section 68 of the Further and Higher Education Act 1992 for the purpose of providing funds on a discretionary basis to be paid to students;

b. grants made under section 73(a) and (c) and 74(1) of the Education (Scotland) Act 1980;

c. grants made under Article 30 of the Education and Libraries (Northern Ireland) Order 1993 or grants, loans or other payments made under Article 5 of the Further Education (Northern Ireland) Order 1997in each case being grants, or grants, loans or other payments as the case may be, for the purpose of assisting students in financial difficulties;

d. discretionary payments, known as "learner support funds", which are made available to students in further education by institutions out of funds provided by the Secretary of State under section 14 of the Education Act 2002 or the Chief Executive of Skills Funding under sections 100 and 101 of the Apprenticeships, Skills, Children and Learning Act 2009; or

e Financial Contingency Funds made available by the Welsh Ministers;

'college of further education' means a college of further education within the meaning of Part 1 of the Further and Higher Education (Scotland) Act 1992;

'contribution' means;

a. any contribution in respect of the income of a student or any person which the Secretary of State, the Scottish Ministers or an education authority takes into account in ascertaining the amount of a student's grant or student loan; or

b. any sums, which in determining the amount of a student's allowance or bursary in Scotland under the Education (Scotland) Act 1980, the Scottish Ministers or education authority takes into account being sums which the Scottish Ministers or education authority consider that it is reasonable for the following person to contribute towards the holder's expenses;

(i) the holder of the allowance or bursary;

(ii) the holder's parents;

(iii) the holder's parent's spouse, civil partner or a person ordinarily living with the holder's parent as if he or she were the spouse or civil partner of that parent; or

(iv) the holder's spouse or civil partner;

'course of study' means any course of study, whether or not it is a sandwich course and whether or not a grant is made for attending or undertaking it;

'covenant income' means the gross income payable to a full-time student under a Deed of Covenant by his parent;

'education authority' means a government department, a local authority as defined in section 579 of the Education Act 1996 (interpretation), a local education authority as defined in section 123 of the Local Government (Scotland) Act 1973, an education and library board established under Article 3 of the Education and Libraries (Northern Ireland) Order 1986, any body which is a research council for the purposes of the Science and Technology Act 1965 or any analogous government department, authority, board or body, of the Channel Islands, Isle of Man or any other country outside Great Britain;

'full-time course of study' means a full time course of study which;

a. is not funded in whole or in part by the Secretary of State under section 14 of the Education Act 2002, the Chief Executive of Skills Funding or by the Welsh Ministers or a full-time course of study which is not funded in whole or in part by the Scottish Ministers at a college of further education or a full-time course of study which is a course of higher education and is funded in whole or in part by the Scottish Ministers;;

b. is funded in whole or in part by the Secretary of State under section 14 of the Education Act 2002, the Chief Executive of Skills Funding or by the Welsh Ministers if it involves more than 16 guided learning hours per week for the student in question, according to the number of guided learning hours per week for that student set out—

(i) in the case of a course funded by the Secretary of State under section 14 of the Education Act 2002 or the Chief Executive of Skills Funding, in the student's learning agreement signed on behalf of the establishment which is funded by either of those persons for the delivery of that course; or

(ii) in the case of a course funded by the Welsh Ministers, in a document signed on behalf of the establishment which is funded by that Council for the delivery of that course; or

c. is not higher education and is funded in whole or in part by the Scottish Ministers at a college of further education and involves—

(i) more than 16 hours per week of classroom-based or workshop-based programmed learning under the direct guidance of teaching staff according to the number of hours set out in a document signed on behalf of the college; or

(ii) 16 hours or less per week of classroom-based or workshop-based programmed learning under the direct guidance of teaching staff and additional hours using structured learning packages supported by the teaching staff where the combined total of hours exceeds 21 hours per week, according to the number of hours set out in a document signed on behalf of the college;

'full-time student' means a person attending or undertaking a full-time course of study and includes a student on a sandwich course;

'grant' (except in the definition of 'access funds') means any kind of educational grant or award and includes any scholarship, studentship, exhibition allowance or bursary but does not include a payment from access funds or any payment to which paragraph 12 of Schedule 4 or paragraph 53 of Schedule 5 applies;

'grant income' means

(a) any income by way of a grant;

(b) any contribution whether or not it is paid;

'higher education' means higher education within the meaning of Part 2 of the Further and Higher Education (Scotland) Act 1992;

'last day of the course' means;

a. in the case of a qualifying course, the date on which the last day of that course falls or the date on which the final examination relating to that course is completed, whichever is the later;

b. in any other case, the date on which the last day of the final academic term falls in respect of the course in which the student is enrolled;

'period of study' means–

a. in the case of a course of study for one year or less, the period beginning with the start of the course and ending with the last day of the course;

b. in the case of a course of study for more than one year, in the first or, as the case may be, any subsequent year of the course, other than the final year of the course, the period beginning with the start of the course or, as the case may be, the year's start and ending with either–

(i) the day before the start of the next year of the course in a case where the student's grant or loan is assessed at a rate appropriate to his studying throughout the year, or, if he does not have a grant or loan, where a loan would have been assessed at such a rate had he had one; or

(ii) in any other case, the day before the start of the normal summer vacation appropriate to his course;

c. in the final year of a course of study of more than one year, the period beginning with that year's start and ending with the last day of the course;

'periods of experience' means periods of work experience which form part of a sandwich course;

'qualifying course' means a qualifying course as defined for the purposes of Parts 2 and 4 of the Jobseeker's Allowance Regulations;

'modular course' means a course of study which consists of two or more modules, the successful completion of a specified number of which is required before a person is considered by the educational establishment to have completed the course.

'sandwich course' has the meaning prescribed in regulation 2(9) of the Education (Student Support) Regulations 2008, regulation 4(2) of the Education (Student Loans), (Scotland), Regulations 2007 or regulation 2(8) of the Education (Student Support) Regulations (Northern Ireland) 2007, as the case may be;

'standard maintenance grant' means–

a. except where paragraph (b) or (c) applies, in the case of a student attending or undertaking a course of study at the University of London or an establishment within the area comprising the City of London and the Metropolitan Police District, the amount specified for the time being in paragraph 2(2)(a) of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 ('the 2003 Regulations') for such a student;
b. except where paragraph (c) applies, in the case of a student residing at his parent's home, the amount specified in paragraph 3 thereof;
c. in the case of a student receiving an allowance or bursary under the Education (Scotland) Act 1980**,** the amount of money specified as 'standard maintenance allowance' for the relevant year appropriate for the student set out in the Student Support in Scotland Guide issued by the student Awards Agency for Scotland, or its nearest equivalent in the case of a bursary provided by a college of further education or a local education authority;
d. in any other case, the amount specified in paragraph 2(2) of Schedule 2 to the 2003 Regulations other than in sub-paragraph (a) or (b) thereof;

'student' means a person, other than a person in receipt of a training allowance, who is attending or undertaking–

a. a course of study at an educational establishment; or
b. a qualifying course;

'student' loan' means a loan towards a student's maintenance pursuant to any regulations made under section 22 of the Teaching and Higher Education Act 1998, section 73 of the Education (Scotland) Act 1980 or Article 3 of the Education (Student Support) (Northern Ireland) Order 1998 and shall include, in Scotland, a young student's bursary paid under regulation 4(1)(c) of the Student's Allowances (Scotland) Regulations 2007

43.2 For the purposes of the definition of 'full-time student', a person shall be regarded as attending or, as the case may be, undertaking a full-time course of study or as being on a sandwich course

a. in the case of a person attending or undertaking a part of a modular course which would be a full-time course of study for the purposes of this Part, for the period beginning on the day on which that part of the course starts and ending;
   (i) on the last day on which he is registered with the educational establishment as attending or undertaking that part as a full-time course of study; or
   (ii) on such earlier date (if any) as he finally abandons the course or is dismissed from it;
b. in any other case, throughout the period beginning on the date on which he starts attending or undertaking the course and ending on the last day of the course or on such earlier date (if any) as he finally abandons it or is dismissed from it.

43.3 For the purposes of sub-paragraph (a) of paragraph 43.2, the period referred to in that sub-paragraph shall include;

a. where a person has failed examinations or has failed to successfully complete a module relating to a period when he was attending or undertaking a part of the course as a full-time course of study, any period in respect of which he attends or undertakes the course for the purpose of retaking those examinations or that module;
b. any period of vacation within the period specified in that paragraph or immediately following that period except where the person has registered with the educational establishment to attend or undertake the final module in the course and the vacation immediately follows the last day on which he is required to attend or undertake the course.

44.0 Treatment of students

44.1 The following sections relate to students who claim Council tax reduction

45.0 Students who are excluded from entitlement to council tax reduction

45.1 Students (except those specified in paragraph 45.3) are not able to claim Council tax reduction under Classes D and E of the Council's reduction scheme.

45.2 To be eligible for support, the student must be liable for Council Tax under Section 6 of the Local Government Finance Act 1992 and they must not be deemed to be a full time student or a persons from abroad within the meaning of section 7 of this scheme (persons from aboard).

45.3 Paragraph 45.2 shall not apply to a student

(a) who is a person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance;

(b) who is a lone parent;

(c) **but for the implementation of this scheme** , whose applicable amount would, but for this section, include the disability premium or severe disability premium;

(d) **but for the implementation of this scheme**, whose applicable amount would include the disability premium but for his being treated as capable of work by virtue of a determination made in accordance with regulations made under section 171E of the Act;

(e)who is, or is treated as, incapable of work and has been so incapable, or has been so treated as incapable, of work in accordance with the provisions of, and regulations made under, Part 12A of the Act (incapacity for work) for a continuous period of not less than 196 days; and for this purpose any two or more separate periods separated by a break of not more than 56 days shall be treated as one continuous period;

(f) who has, or is treated as having, limited capability for work and has had, or been treated as having, limited capability for work in accordance with the Employment and Support Allowance Regulations for a continuous period of not less than 196 days, and for this purpose any two or more separate periods separated by a break of not more than 84 days must be treated as one continuous period.

(g) who has a partner who is also a full-time student, if he or that partner is treated as responsible for a child or young person;

(h)who is a single applicant with whom a child is placed by a local authority or voluntary organisation within the meaning of the Children Act 1989, or, in Scotland, boarded out within the meaning of the Social Work (Scotland) Act 1968;

(i) who is;

i) aged under 21 and whose course of study is not a course of higher education

ii) aged 21 and attained that age during a course of study which is not a course of higher education – this condition needs adding

iii) a qualifying young person or child within the meaning of section 142 of the Act (child and qualifying young person)

(j) in respect of whom

i) a supplementary requirement has been determined under paragraph 9 of Part 2 of Schedule 2 to the Education (Mandatory Awards) Regulations 2003;

(ii) an allowance, or as the case may be, bursary has been granted which includes a sum under paragraph (1)(d) or regulation 4 of the Students' Allowances (Scotland) Regulations 1999 or, as the case may be, under paragraph (1)(d) of regulation 4 of the Education Authority (Bursaries) (Scotland) Regulations 1995, in respect of expenses incurred;

(iii) a payment has been made under section 2 of the Education Act 1962 or under or by virtue of regulations made under the Teaching and Higher Education Act 1998;

(iv) a grant has been made under regulation 13 of the Education (Student Support) Regulations 2005 or under regulation 13 of the Education (Student Support)

Regulations (Northern Ireland) 2000; or
(v) a supplementary requirement has been determined under paragraph 9 of Schedule 6 to the Students Awards Regulations (Northern Ireland) 1999 or a payment has been made under Article 50(3) of the Education and Libraries (Northern Ireland) Order 1986,

on account of his disability by reason of deafness.

45.3A Paragraph 45.3(i)(ii) only applies to a claimant until the end of the course during which the claimant attained the age of 21

45.4 For the purposes of paragraph 45.3, once paragraph 45.3(e) applies to a full-time student, if he then ceases, for a period of 56 days or less, to be incapable, or to be treated as incapable, of work, that paragraph shall, on his again becoming so incapable, or so treated as incapable, of work at the end of that period, immediately thereafter apply to him for so long as he remains incapable or is treated as remaining incapable, of work.

45.5 In paragraph 45.3(h) the reference to a course of higher education is a reference to a course of any description mentioned in Schedule 6 to the Education Reform Act 1988.

45.6 A full-time student to whom sub-paragraph (i) of paragraph 45.3 applies, shall be treated as satisfying that sub-paragraph from the date on which he made a request for the supplementary requirement, allowance, bursary or payment as the case may be.

45.7 Paragraph 45.2 shall not apply to a full-time student for the period specified in paragraph 45.8 if;

(a) at any time during an academic year, with the consent of the relevant educational establishment, he ceases to attend or undertake a course because he is;
(i) engaged in caring for another person; or
(ii) ill;

(b) he has subsequently ceased to be engaged in engaging in caring for that person or, as the case may be, he has subsequently recovered from that illness; and
(c) he is not eligible for a grant or a student loan in respect of the period specified in paragraph 45.8.

45.8 The period specified for the purposes of paragraph 45.7 is the period, not exceeding one year, beginning on the day on which he ceased to be engaged in caring for that person or, as the case may be, the day on which he recovered from that illness and ending on the day before;

(a) the day on which he resumes attending or undertaking the course; or
(b) the day from which the relevant educational establishment has agreed that he may resume attending or undertaking the course,

which shall first occur.

46.0 Calculation of grant income

46.1 The amount of a student's grant income to be taken into account shall, subject to paragraphs 46.2 and 46.3, be the whole of his grant income.

46.2 There shall be excluded from a student's grant income any payment;

(a) intended to meet tuition fees or examination fees;
(b) in respect of the student's disability;
(c) intended to meet additional expenditure connected with term time residential study away from the student's educational establishment;
(d) on account of the student maintaining a home at a place other than that at which he resides during his course;

(e) on account of any other person but only if that person is residing outside of the United Kingdom and ,**but for the implementation of this scheme,** there is no applicable amount in respect of him;

(f) intended to meet the cost of books and equipment;

(g) intended to meet travel expenses incurred as a result of his attendance on the course;

(h) intended for the child care costs of a child dependant.

(i) of higher education bursary for care leavers made under Part III of the Children Act 1989.

46.3 Where a student does not have a student loan and is not treated as possessing such a loan, there shall be excluded from the student's grant income;

(a) the sum of £303 per academic year in respect of travel costs; and

(b)the sum of £390 per academic year towards the costs of books and equipment, whether or not any such costs are incurred.

The above figures will be increased annually in line with the Housing Benefit Regulations 2006 (as amended).

46.4 There shall also be excluded from a student's grant income the grant for dependants known as the parents' learning allowance paid pursuant to regulations made under Article 3 of the Education (Student Support) (Northern Ireland) Order 1998 or section 22 of the Teaching and Higher Education Act 1998.

46.5 Subject to paragraphs 46.6 and 46.7, a student's grant income shall be apportioned;

(a) subject to paragraph 46.8, in a case where it is attributable to the period of study, equally between the weeks in that period beginning with the reduction week, the first day of which coincides with, or immediately follows the first day of the period of study and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period of study;

(b) in any other case, equally between the weeks in the period beginning with the reduction week, the first day of which coincides with, or immediately follows, the first day of the period for which it is payable and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period for which it is payable.

46.6 Any grant in respect of dependants paid under section 63(6) of the Health Services and Public Health Act 1968 (grants in respect of the provision of instruction to officers of hospital authorities) and any amount intended for the maintenance of dependants under Part 3 of Schedule 2 to the Education (Mandatory Awards) Regulations 2004 shall be apportioned equally over the period of 52 weeks or, if there are 53 reduction weeks (including part-weeks) in the year, 53.

46.7 In a case where a student is in receipt of a student loan or where he could have acquired a student loan by taking reasonable steps but had not done so, any amount intended for the maintenance of dependants to which neither paragraph 46.6 nor section 50 (other amounts to be disregarded) apply, shall be apportioned over the same period as the student's loan is apportioned or, as the case may be, would have been apportioned.

46.8 In the case if a student on a sandwich course, any periods of experience within the period of study shall be excluded and the student's grant income shall be apportioned equally between the weeks in the period beginning with the reduction week, the first day of which immediately follows the last day of the period of experience and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period of study.

47.0 Calculation of covenant income where a contribution is assessed

47.1 Where a student is in receipt of income by way of a grant during a period of study and a contribution has been assessed, the amount of his covenant income to be taken into account for that period and any summer vacation immediately following shall be the whole amount of the covenant income less, subject to paragraph 47.3, the amount of the contribution.

47.2 The weekly amount of the student's covenant shall be determined–

(a) by dividing the amount of income which falls to be taken into account under paragraph 47.1 by 52 or 53, whichever is reasonable in the circumstances; and

(b) by disregarding from the resulting amount, £5.

47.3 For the purposes of paragraph 47.1, the contribution shall be treated as increased by the amount (if any) by which the amount excluded under paragraph 46.2(g) (calculation of grant income) falls short of the amount specified in paragraph 7(2) of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 (travel expenditure).

48.0 Covenant income where no grant income or no contribution is assessed

48.1 Where a student is not in receipt of income by way of a grant the amount of his covenant income shall be calculated as follows;

(a) any sums intended for any expenditure specified in paragraph 46.2 (a) to (e) (calculation of grant income) necessary as a result of his attendance on the course shall be disregarded;

(b) any covenant income, up to the amount of the standard maintenance grant, which is not so disregarded, shall be apportioned equally between the weeks of the period of study;

(c) there shall be disregarded from the amount so apportioned the amount which would have been disregarded under paragraph 46.2(f) and 46.3 (calculation of grant income) had the student been in receipt of the standard maintenance grant; and

(d) the balance, if any, shall be divided by 52 or 53 whichever is reasonable in the circumstances and treated as weekly income of which £5 shall be disregarded.

48.2 Where a student is in receipt of income by way of a grant and no contribution has been assessed, the amount of his covenanted income shall be calculated in accordance with sub-paragraphs (a) to (d) of paragraph 48.1, except that;

(a) the value of the standard maintenance grant shall be abated by the amount of such grant income less an amount equal to the amount of any sums disregarded under paragraph 46.2 (a) to (e); and

(b) the amount to be disregarded under paragraph 48.1(c) shall be abated by an amount equal to the amount of any sums disregarded under paragraph 46.2(f) and (g) and 46.3.

49.0 Student Covenant Income and Grant income – non disregard

49.1 No part of a student's covenant income or grant income shall be disregarded under paragraph 15 of Schedule 4 to this scheme

50.0 Other amounts to be disregarded

50.1 For the purposes of ascertaining income other than grant income, covenant income and loans treated as income in accordance with section 51, any amounts intended for any expenditure specified in paragraph 46.2 (calculation of grant income), necessary as a result of his attendance on the course shall be disregarded but only if, and to the extent that, the necessary expenditure exceeds or is likely to exceed the amount of the sums disregarded under paragraphs 46.2 or 46.3, 47.3, 48.1(a) or (c) or 51.5 (calculation of grant income, covenant income and treatment of student loans) on like expenditure.

51.0 Treatment of student loans

51.1 A student loan shall be treated as income.

51.2 In calculating the weekly amount of the loan to be taken into account as income

(a) in respect of a course that is of a single academic year's duration or less, a loan which is payable in respect of that period shall be apportioned equally between the weeks in the

period beginning with;

(i) except in a case where (ii) applies, the reduction week ,the first day of which coincides with, or immediately follows, the first day of the single academic year;

(ii) where the student is required to start attending the course in August or where the course is less than an academic year's duration, the reduction week, the first day of which coincides with, or immediately follows, the first day of the course, and ending with the reduction week, the last day of which coincides with, or immediately precedes with last day of the course,

(b) in respect of an academic year of a course which starts other than on 1st September, a loan which is payable in respect of that academic year shall be apportioned equally between the weeks in the period beginning with the reduction week, the first day of which coincides with or immediately follows, the first day of that academic year and ending with the reduction week, the last day of which coincides with or immediately precedes, the last day of that academic year but excluding any reduction weeks falling entirely within the quarter during which, in the opinion of the Secretary of State, the longest of any vacation is taken and for the purposes of this sub-paragraph, 'quarter' shall have the same meaning as for the purposes of the Education (Student Support) Regulations 2005;

(c) in respect of the final academic year of a course (not being a course of a single year's duration), a loan which is payable in respect of that final academic year shall be apportioned equally between the weeks in the period beginning with;

(i) except in a case where (ii) applies, the reduction week, the first day of which coincides with or immediately follows, the first day of that academic year;

(ii) where the final academic year starts on 1st September, the reduction week, the first day of which coincide with, or immediately follows, the earlier of 1st September or the first day of the autumn term,

and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the course;

(d) in any other case, the loan shall be apportioned equally between the weeks in the period beginning with the earlier of;

(i) the first day of the first reduction week in September; or

(ii) the reduction week, the first day of which coincides with, or immediately follows the first day of the autumn term,

and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of June,

and, in all cases, from the weekly amount so apportioned there shall be disregarded £10.

51.3 A student shall be treated as possessing a student loan in respect of an academic year where;

(a) a student loan has been made to him in respect of that year; or

(b) he could acquire such a loan in respect of that year by taking reasonable steps to do so.

51.4 Where a student is treated as possessing a student loan under paragraph 51.3, the amount of the student loan to be taken into account as income shall be, subject to paragraph 51.5

(a) in the case of a student to whom a student loan is made in respect of an academic year, a sum equal to

(i) the maximum student loan he is able to acquire in respect of that year by taking reasonable steps to do so; and

(ii) any contribution whether or not it has been paid to him;

(b) in the case of a student to whom a student loan is not made in respect of an academic year, the maximum student loan that would be made to the student if;

(i) he took all reasonable steps to obtain the maximum student loan he is able to acquire in respect of that year; and

(ii) no deduction in that loan was made by virtue of the application of a means test.

51.5 There shall be deducted from the amount of income taken into account under paragraph 51.4
(a) the sum of £303 per academic year in respect of travel costs; and
(b) the sum of £390 per academic year towards the cost of books and equipment, whether or not any such costs are incurred.
The above figures will be increased annually in line with the Housing Benefit Regulations 2006 (as amended).

51A.0 Treatment of fee loans

51A. 1A loan for fees, known as a fee loan or a fee contribution loan, made pursuant to regulations made under Article 3 of the Education (Student Support) (Northern Ireland) Order 1998, section 22 of the Teaching and Higher Education Act 1998 or section 73(f) of the Education (Scotland) Act 1980, shall be disregarded as income.

52.0 Treatment of payments from access funds

52.1 This paragraph applies to payments from access funds that are not payments to which paragraph 55.2 or 55.3 (income treated as capital) applies.

52.2 A payment from access funds, other than a payment to which paragraph 52.3 applies, shall be disregarded as income.

52.3 Subject to paragraph 52.4 of this section and paragraph 35 of Schedule 4,
a) any payments from access funds which are intended and used for an item of food, ordinary clothing or footwear, household fuel, or rent of a single applicant or, as the case may be, of the applicant or any other member of his family and
b) any payments from access funds which are used for any council tax or water charges for which that applicant or member is liable, shall be disregarded as income to the extent of £20 per week.

52.4 Where a payment from access funds is made–
(a) on or after 1st September or the first day of the course, whichever first occurs, but before receipt of any student loan in respect of that year and that payment is intended for the purpose of bridging the period until receipt of the student loan; or
(b) before the first day of the course to a person in anticipation of that person becoming a student,
that payment shall be disregarded as income.

53.0 Disregard of contribution

53.1 Where the applicant or his partner is a student and for the purposes of assessing a contribution to the student's grant or student loan, the other partner's income has been taken into account, an amount equal to that contribution shall be disregarded for the purposes of assessing that other partner's income.

54.0 Further disregard of student's income

54.1 Where any part of a student's income has already been taken into account for the purpose of assessing his entitlement to a grant or student loan, the amount taken into account shall be disregarded in assessing that student's income.

55.0 Income treated as capital

55.1 Any amount by way of a refund of tax deducted from a student's covenant income shall be treated as capital.

55.2 Any amount paid from access funds as a single lump sum shall be treated as capital.

55.3 An amount paid from access fund as a single lump sum which is intended and used for an item other than food, ordinary clothing or footwear, household fuel or rent, or which is used for an item other than any council tax or water charges for which that applicant or member is liable, shall be disregarded as capital but only for a period of 52 weeks from the date of the payment.

56.0 Disregard of changes occurring during summer vacation

56.1 In calculating a student's income the authority shall disregard any change in the standard maintenance grant, occurring in the recognised summer vacation appropriate to the student's course, if that vacation does not form part of his period of study from the date on which the change occurred to the end of that vacation.

Sections 57 – 63

The calculation and amount of Council tax reduction

57.0 Maximum council tax reduction

57.1 Subject to paragraphs 57.2 to 57.4, the amount of a person's maximum council tax support in respect of a day for which he is liable to pay council tax, shall be 100 per cent, of the amount A/B where;

(a) A is the **lower** of either;

i. the amount set by the appropriate authority as the council tax for the relevant financial year in respect of the dwelling in which he is a resident and for which he is liable, subject to any discount which may be appropriate to that dwelling under the 1992 Act; or

ii. the amount set by the appropriate authority as the council tax for the relevant financial year in respect of a dwelling within Band D subject to any discount which may be appropriate to the person's circumstances; and

(b) B is the number of days in that financial year,

In this paragraph "relevant financial year" means, in relation to any particular day, financial year within which the day in question falls.

57.2 In calculating a person's maximum council tax reduction any reduction in the amount that person is liable to pay in respect of council tax, which is made in consequence of any enactment in, or made under, the 1992 Act, shall be taken into account.

57.3 Subject to paragraph 57.4, where an applicant is jointly and severally liable for council tax in respect of a dwelling in which he is resident with one or more other persons but excepting any person so residing with the applicant who is a student to whom paragraph 45.2 (students who are excluded from entitlement to council tax reduction) applies, in determining the maximum council tax reduction in his case in accordance with paragraph 57.1, the amount A shall be divided by the number of persons who are jointly and severally liable for that tax.

57.4 Where an applicant is jointly and severally liable for council tax in respect of a dwelling with only his partner, paragraph 57.3 shall not apply in his case.

58.0 Non-dependant deductions

58.1 There shall be no non-dependant deductions.

59.0 Extended reductions: movers into the authority's area [6]

59.1 Where;

a. an application is made to the authority for a reduction under its scheme, and

b. the applicant or the partner of the applicant, is in receipt of an extended reduction from;

(i) another billing authority in England; or

(ii) a billing authority in Wales,

the current authority must reduce any reduction to which the applicant is entitled under its Council Tax Reduction scheme by the amount of that extended reduction.

60.0 - 63.0 Not Used

[6] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

Sections 64 – 67

Dates on which entitlement and changes of circumstances are to take effect

64.0 Date on which entitlement is to begin

64.1 Subject to paragraph 64.2, any person to whom or in respect of whom a claim for council tax reduction is made and who is otherwise entitled to that support shall be so entitled from the date on which that claim is made or is treated as made.

65.0 - 66.0 Not Used

67.0 Date on which change of circumstances is to take effect

67.1 Except in cases where section 24 (disregard of changes in tax, contributions, etc.**)** applies and subject to the following provisions of this paragraph, a change of circumstances which affects entitlement to, or the amount of, a reduction under the authority's scheme ("change of circumstances"), takes effect from the first day of the reduction week following the date on which the change actually occurs, and where that change is cessation of entitlement to any benefit under the benefit Acts, the date on which the change actually occurs shall be the day immediately following the last day of entitlement to that benefit.

67.2 Subject to paragraph (3), where the change of circumstances is a change in the amount of council tax payable, it takes effect from the day on which it actually occurs.

67.3 Where the change of circumstances is a change in the amount a person is liable to pay in respect of council tax in consequence of regulations under section 13 of the 1992 Act (reduced amounts of council tax) or changes in the discount to which a dwelling may be subject under sections 11 or 12 of that Act, it shall take effect from the day on which the change in amount has effect.

67.4 Where the change of circumstances is the applicant's acquisition of a partner, the change takes effect on the day on which the acquisition takes place.

67.5 Where the change of circumstances is the death of an applicant's partner or their separation, it takes effect on the day the death or separation occurs.

67.6 If two or more changes of circumstances occurring in the same reduction week would, but for this paragraph, take effect in different reduction weeks in accordance with paragraphs (1) to (5) they take effect from the day to which the appropriate paragraph from (2) to (5) above refers, or, where more than one day is concerned, from the earlier day.

67.7 Where the change of circumstances is that income, or an increase in the amount of income, other than a benefit or an increase in the amount of a benefit under the Act, is paid in respect of a past period and there was no entitlement to income of that amount during that period, the change of circumstances shall take effect from the first day on which such income, had it been paid in that period at intervals appropriate to that income, would have fallen to be taken into account for the purposes of this scheme.

67.8 Without prejudice to paragraph (7), where the change of circumstances is the payment of income, or arrears of income, in respect of a past period, the change of circumstances takes effect from the first day on which such income, had it been timeously paid in that period at intervals appropriate to that income, would have fallen to be taken into account for the purposes of this scheme.

Sections 68– 74A

Claiming and the treatment of claims for Council tax reduction purposes

68.0 Making an application[7]

68.1 In the case of a couple or members of a polygamous marriage an application is to be made by whichever one of them they agree should so apply or, in default of agreement, by such one of them as the authority determines.

68.2 Where a person who is liable to pay council tax in respect of a dwelling is unable for the time being to act, and;

(a) a deputy has been appointed by the Court of Protection with power to claim, or as the case may be, receive benefit on his behalf; or

(b) in Scotland, his estate is being administered by a judicial factor or any guardian acting or appointed under the Adults with Incapacity (Scotland) Act 2000 who has power to apply or, as the case may be, receive benefit on his behalf; or

(c) an attorney with a general power or a power to apply or, as the case may be, receive benefit, has been appointed by that person under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985 or the Mental Capacity Act 2005 or otherwise,

that deputy, judicial factor, guardian or attorney, as the case may be, may make an application on behalf of that person.

68.3 Where a person who is liable to pay council tax in respect of a dwelling is unable for the time being to act and sub-paragraph (2) does not apply to him, the authority may, upon written application made to them by a person who, if a natural person, is over the age of 18, appoint that person to exercise on behalf of the person who is unable to act, any right to which that person might be entitled under the authority's scheme and to receive and deal on his behalf with any sums payable to him.

68.4 Where a person who is liable to pay council tax in respect of a dwelling is for the time being unable to act and the Secretary of State has appointed a person to act on his behalf under regulation 33 of the Social Security (Claims and Payments) Regulations 1987 (persons unable to act), the authority may if that person agrees, treat him as if he had been appointed by them under sub-paragraph (3).

68.5 Where the authority has made an appointment under sub-paragraph (3) or treated a person as an appointee under sub-paragraph (4);

(a) it may at any time revoke the appointment;

(b) the person appointed may resign his office after having given 4 weeks notice in writing to the authority of his intention to do so;

(c) any such appointment terminates when the authority is notified of the appointment of a person mentioned in sub-paragraph (2).

68.6 Anything required by the authority's scheme to be done by or to any person who is for the time being unable to act may be done by or to the persons mentioned in sub-paragraph (2) above or by or to the person appointed or treated as appointed under this paragraph and the receipt of any such person so appointed shall be a good discharge to the authority for any sum paid.

68.7 The authority must;

(a) inform any person making an application of the duty imposed by paragraph 9(1)(a) of the Council Tax Reduction Scheme (Prescribed Requirements) Regulations 2012;

(b) explain the possible consequences (including prosecution) of failing to comply with that duty; and

(c) set out the circumstances a change in which might affect entitlement to the reduction or its amount.

[7] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

69.0 Procedure by which a person may apply for a reduction under the authority's scheme[8]

69.1. Paragraphs 2 to 7 apply to an application made under the authority's scheme. Notwithstanding other paragraphs within this section, the authority will determine the method by which claims are to be made as well as where claims should be sent or delivered. For the purposes of this scheme any Universal Credit claim, a Local Authority Information Document (LAID) or Local Authority Customer Information document (LACI) issued by the Department for Work and Pensions shall be treated as a valid claim

69.2. An application may be made;

(a) in writing,
(b) by means of an electronic communication in accordance with sections 101 – 106A of this scheme, or by means of an electronic communication from either the DWP or HMRC; or
(c) where the authority has published a telephone number for the purpose of receiving such applications, by telephone.

69.3 (1) An application which is made in writing must be made to the designated office on a properly completed form.
(2) The form must be provided free of charge by the authority for the purpose.

69.4 (1) Where an application made in writing is defective because—
(a) it was made on the form supplied for the purpose but that form is not accepted by the authority as being properly completed; or
(b) it was made in writing but not on the form approved for the purpose and the authority does not accept the application as being in a written form which is sufficient in the circumstances of the case having regard to the sufficiency of the written information and evidence,

the authority may, in a case to which sub-paragraph (a) applies, request the applicant to complete the defective application or, in the case to which sub-paragraph (b) applies, supply the applicant with the approved form or request further information and evidence.

(2) An application made on a form provided by the authority is properly completed if it is completed in accordance with the instructions on the form, including any instructions to provide information and evidence in connection with the application.

69.5. (1) If an application made by electronic communication is defective the authority must provide the person making the application with an opportunity to correct the defect.

(2) An application made by electronic communication is defective if the applicant does not provide all the information the authority requires.

69.6. In a particular case the authority may determine that an application made by telephone is only valid if the person making the application approves a written statement of his circumstances provided by the authority.

69.7 (1) If an application made by telephone is defective the authority must provide the person making the application with an opportunity to correct the defect.
(2) An application made by telephone is defective if the applicant does not provide all the information the authority requests during the telephone call.

69.8 Notwithstanding other paragraphs within this section, the authority will determine the method by which claims are to be made as well as where claims should be sent or delivered.

[8] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

(1) Where an applicant requests that the application is backdated to an earlier date, the authority shall determine, at its discretion, the date from which the application shall be deemed to take effect.

69A.0 Date on which an application is made

69A.1 Subject to sub-paragraph (7), the date on which an application is made is;
(a) in a case where;
(i) an award of income support, an income-based jobseeker's allowance or an income- related employment and support allowance or an award of universal credit has been made to the applicant or his partner, and
(ii) the application is made within one calendar month of the date on which the claim for that income support, jobseeker's allowance, employment and support allowance or universal credit was received,
the first day of entitlement to income support, an income-based jobseeker's allowance, an income-related employment and support allowance or universal credit arising from that claim;
(b) in a case where;
(i) an applicant or his partner is a person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance or has an award of universal credit,
(ii) the applicant becomes liable for the first time to pay council tax in respect of the dwelling which he occupies as his home, and
(iii) the application is received at the designated office within one calendar month of the date of the change,
the date on which the change takes place;
(c) in a case where;
(i) an applicant is the former partner of a person who was, at the date of his death or their separation, entitled to a reduction under the authority's scheme, and
(ii) the applicant makes an application for a reduction under that scheme within one calendar month of the date of the death or the separation,
the date of the death or separation;
(d) except where paragraph (a), (b) or (e) is satisfied, in a case where a properly completed application is received within one calendar month (or such longer period as the authority considers reasonable) of the date on which an application form was issued to an applicant following the applicant first notifying, by whatever means, the authority of an intention to make an application, the date of first notification;
(e) in any other case, the date on which an application is received at the designated office.

69A.2 For the purposes only of sub-paragraph (1)(a) a person who has been awarded an income-based jobseeker's allowance or an income-related employment and support allowance is to be treated as entitled to that allowance for any days which immediately precede the first day in that award and on which he would, but for regulations made under;
(a) in the case of income-based jobseeker's allowance, paragraph 4 of Schedule 1 to the Jobseekers Act 1995 (waiting days); or
(b) in the case of income-related employment and support allowance, paragraph 2 of Schedule 2 to the Welfare Reform Act 2007 (waiting days),
have been entitled to that allowance.

69A.3 Where there is a defect in an application by telephone;
(a) is corrected within one calendar month (or such longer period as the authority considers reasonable) of the date the authority last drew attention to it, the authority must treat the application as if it had been duly made in the first instance;
(b) is not corrected within one calendar month (or such longer period as the authority considers reasonable) of the date the authority last drew attention to it, the authority must treat the application as if it had been duly made in the first instance where it considers it has

sufficient information to decide the application.

69A.4 The authority is to treat a defective application as if it had been validly made in the first instance if, in any particular case, the conditions specified in sub-paragraph (5)(a), (b) or (c) are satisfied.

69A.5 The conditions are that—

(a) where the authority receives the properly completed application or the information requested to complete it or the evidence within one calendar month of the request, or such longer period as the authority may consider reasonable; or

(b) where an application is not on approved form or further information requested by authority applies;

(i) the approved form sent to the applicant is received at the offices of the authority properly completed within one calendar month of it having been sent to him; or, as the case may be;

(ii) the applicant supplies whatever information or evidence was requested within one calendar month of the request; or,

in either case, within such longer period as the authority may consider reasonable; or

(c) where the authority has requested further information, the authority receives at its offices the properly completed application or the information requested to complete it within one calendar month of the request or within such longer period as the authority considers reasonable.

69A.6 Except in the case of an application made by a person treated as not being in Great Britain, where a person has not become liable for council tax to the authority but it is anticipated that he will become so liable within the period of 8 weeks (the relevant period), he may apply for a reduction under that authority's scheme at any time in that period in respect of that tax and, provided that liability arises within the relevant period, the authority must treat the application as having been made on the day on which the liability for the tax arises.

69A.7 Except in the case of an application made by a person treated as not being in Great Britain, where the applicant is not entitled to a reduction under the authority's scheme in the reduction week immediately following the date of his application but the authority is of the opinion that unless there is a change of circumstances he will be entitled to a reduction under its scheme for a period beginning not later than;

(a) in the case of an application made by;

(i) a pensioner, or

(ii) a person who has attained, or whose partner has attained, the age which is 17 weeks younger than the qualifying age for state pension credit,

the seventeenth reduction week following the date on which the application is made, or

(b) in the case of an application made by a person who is not a pensioner, the thirteenth reduction week following the date on which the application is made,

the authority may treat the application as made on a date in the reduction week immediately preceding the first reduction week of that period of entitlement and award a reduction accordingly.

70.0 Submission of evidence electronically

70.1 The authority may accept such evidence, documents and certificates to support the claim electronically where it feels that this would be acceptable given the nature of the claim

71. 0 Use of telephone provided evidence

71.1 The authority may accept such evidence to support the claim by telephone where it feels that this would be acceptable given the nature of the claim

72.0 Information and evidence[9]

72.1 Subject to sub-paragraph (3), a person who makes an application for a reduction under an authority's scheme must satisfy sub-paragraph (2) in relation both to himself and to any other person in respect of whom he is making the application.

72.2 This sub-paragraph is satisfied in relation to a person if—
(a) the application is accompanied by;
(i) a statement of the person's national insurance number and information or evidence establishing that that number has been allocated to the person; or
(ii) information or evidence enabling the authority to ascertain the national insurance number that has been allocated to the person; or
(b) the person has made an application for a national insurance number to be allocated to him and the application for the reduction is accompanied by;
(i) evidence of the application for a national insurance number to be so allocated; and
(ii) the information or evidence enabling it to be so allocated.

72.3 Sub-paragraph (2) does not apply;
(a) in the case of a child or young person in respect of whom an application for a reduction is made;
(b) to a person who;
(i) is a person treated as not being in Great Britain for the purposes of this scheme;
(ii) is subject to immigration control within the meaning of section 115(9)(a) of the Immigration and Asylum Act 1999; and
(iii) has not previously been allocated a national insurance number.

72.4 Subject to sub-paragraph (5), a person who makes an application, or a person to whom a reduction under the authority's scheme has been awarded, must furnish such certificates, documents, information and evidence in connection with the application or the award, or any question arising out of the application or the award, as may reasonably be required by that authority in order to determine that person's entitlement to, or continuing entitlement to a reduction under its scheme and must do so within one calendar month of the authority requiring him to do so or such longer period as the authority may consider reasonable.

72.5 Nothing in this paragraph requires a person who is a pensioner to furnish any certificates, documents, information or evidence relating to a payment to which sub-paragraph (7) applies.

72.6 Where the authority makes a request under sub-paragraph (4), it must;
(a) inform the applicant or the person to whom a reduction under its scheme has been awarded of his duty under paragraph 9 of Schedule 8 the Council Tax Reduction Scheme (Prescribed Requirements) Regulations 2012 (duty to notify change of circumstances) to notify the authority of any change of circumstances; and
(b) without prejudice to the extent of the duty owed under paragraph 9, indicate to him either orally or by notice or by reference to some other document available to him on application and without charge, the kind of change of circumstances which must be notified.

72.7 This sub-paragraph applies to any of the following payments;
(a) a payment which is made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, the London Emergencies Trust, the We Love Manchester Emergency Fund, or the London Bombings Relief Charitable Fund;
(b) a payment which is disregarded under paragraph 24 of Schedule 5, other than a payment under the Independent Living Fund (2006);
(c) a payment which is disregarded under paragraph 58.9.

[9] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

72.8 Where an applicant or a person to whom a reduction under the authority's scheme has been awarded or any partner has attained the qualifying age for state pension credit and is a member of, or a person deriving entitlement to a pension under, a personal pension scheme, he must where the authority so requires furnish the following information;
(a) the name and address of the pension fund holder;
(b) such other information including any reference or policy number as is needed to enable the personal pension scheme to be identified.

73.0 Amendment and withdrawal of application[10]

73.1 A person who has made an application may amend it at any time before a decision has been made on it by a notice in writing delivered or sent to the designated office.

73.2 Where the application was made by telephone the amendment may also be made by telephone.

73.3 Any application amended is to be treated as if it had been amended in the first instance.

73.4 A person who has made an application may withdraw it by notice to the designated office at any time before a decision has been made on it.

73.5 Where the application was made by telephone, the withdrawal may also be made by telephone.

73.6 Any notice of withdrawal given in accordance with sub-paragraph (4) or (5) has effect when it is received.

73.7 Where a person, by telephone, amends or withdraws an application the person must (if required to do so by the authority) confirm the amendment or withdrawal by a notice in writing delivered or sent to the designated office.

74.0 Duty to notify changes of circumstances[11]

74.1 Subject to sub-paragraphs (3), (6) and (7), an applicant (or any person acting on his behalf) must comply with sub-paragraph (2) if there is a relevant change of circumstances at any time;
(a) between the making of an application and a decision being made on it, or
(b) after the decision is made (where the decision is that the applicant is entitled to a reduction under the authority's scheme) including at any time while the applicant is in receipt of such a reduction.

74.2 The applicant (or any person acting on his behalf) must notify any change of circumstances which the applicant (or that person) might reasonably be expected to know might affect his entitlement to, or the amount of, a reduction under the authority's scheme (a "relevant change of circumstances") by giving notice to the authority;
(a) in writing; or
(b) by telephone—
(i) where the authority has published a telephone number for that purpose unless the authority determines that in any particular case or class of case notification may not be given by telephone; or
(ii) in any case or class of case where the authority determines that notice may be given by telephone; or
(c) by any other means which the authority agrees to accept in any particular case,

[10] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012
[11] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

within a period of 21 days beginning with the day on which the change occurs, or as soon as reasonably practicable after the change occurs, whichever is later.

74.3 The duty imposed on a person by sub-paragraph (1) does not extend to notifying
(a) changes in the amount of council tax payable to the authority;
(b) changes in the age of the applicant or that of any member of his family;
(c) in the case of an applicant in receipt of a relevant benefit, changes in circumstances which affect the amount of the benefit but not the amount of the reduction under the authority's scheme to which he is entitled, other than the cessation of that entitlement to the benefit.

74.4 For the purposes of sub-paragraph (3)(c) "relevant benefit" means income support, an income-based jobseeker's allowance or an income-related employment and support allowance or universal credit.

74.5 Notwithstanding sub-paragraph (3)(b) or (c) an applicant is required by sub-paragraph (1) to notify the authority of any change in the composition of his family arising from the fact that a person who was a member of his family is now no longer such a person because he has ceased to be a child or young person.

Sections 75- 90

Decisions, decision notices and awards of Council tax reduction

75.0 Decisions by the authority[12]

75.1 An authority must make a decision on an application under its scheme within 14 days of paragraphs 4 and 7 and Part 1 of Schedule 7 of the Council Tax Reduction Scheme (Prescribed Requirements) Regulations 2012 being satisfied, or as soon as reasonably practicable thereafter.

76.0 Notification of decision[13]

76.1 The authority must notify in writing any person affected by a decision made by it under its scheme;
(a) in the case of a decision on an application, forthwith or as soon as reasonably practicable thereafter;
(b) in any other case, within 14 days of that decision or as soon as reasonably practicable thereafter.

76.2 Where the decision is to award a reduction, the notification under sub-paragraph (1) must include a statement;
(a) informing the person affected of the duty imposed by paragraph 9 of Schedule 8 the Council Tax Reduction Scheme (Prescribed Requirements) Regulations 2012 (duty to notify change of circumstances) to notify the authority of any change of circumstances;
(b) explaining the possible consequences (including prosecution) of failing to comply with that duty; and
(c) setting out the circumstances a change in which might affect entitlement to the reduction or its amount.

76.3 Where the decision is to award a reduction, the notification under sub-paragraph (1) must include a statement as to how that entitlement is to be discharged.

76.4 In any case, the notification under sub-paragraph (1) must inform the person affected of the procedure by which an appeal may be made and must refer the person to the provisions in the authority's scheme relating to the procedure for making an appeal.

76.5 A person affected to whom the authority sends or delivers a notification of decision may, within one calendar month of the date of the notification of that decision request in writing the authority to provide a written statement setting out the reasons for its decision on any matter set out in the notice.

76.6 The written statement referred to in sub-paragraph (5) must be sent to the person requesting it within 14 days or as soon as reasonably practicable thereafter.

76.7 For the purposes of this paragraph a person is to be treated as a person affected by a decision of the authority under its scheme where the rights, duties or obligations of that person are affected by that decision and the person falls within sub-paragraph (8).

76.8 This sub-paragraph applies to—
(a) the applicant;
(b) in the case of a person who is liable to pay council tax in respect of a dwelling and is unable for the time being to act;
(i) a deputy appointed by the Court of Protection with power to claim, or as the case may be, receive benefit on his behalf; or
(ii) in Scotland, a judicial factor or any guardian acting or appointed under the Adults with Incapacity (Scotland) Act 2000(**3**) who has power to apply or, as the case may be, receive benefit on the person's behalf; or

[12] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012
[13] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

(iii) an attorney with a general power or a power to apply or, as the case may be, receive benefit, has been appointed by that person under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985 or the Mental Capacity Act 2005 or otherwise,

(c) a person appointed by the authority to act for a person unable to act.

77.0 Time and manner of granting council tax reduction[14]

77.1 Where a person is entitled to a reduction under this authority's scheme in respect of his liability for the authority's council tax as it has effect in respect of a chargeable financial year ("the chargeable year"), the authority must discharge his entitlement;

(a) by reducing, so far as possible, the amount of his liability to which regulation 20(2) of the Council Tax (Administration and Enforcement) Regulations 1992 refers; or

(b) where;

(i) such a reduction is not possible; or

(ii) such a reduction would be insufficient to discharge the entitlement to a reduction under the authority's scheme; or

(iii) the person entitled to the reduction is jointly and severally liable for the council tax and the authority determines that such a reduction would be inappropriate, by making payment to him of the amount of reduction to which he is entitled, rounded where necessary to the nearest penny.

77.2 The authority must notify the person entitled to a reduction under this scheme of the amount of that reduction and how his entitlement is to be discharged in pursuance of paragraph (1).

77.3 In a case to which paragraph (1)(b) refers;

(a) if the amount of the council tax for which he remains liable in respect of the chargeable year, after any reduction to which sub-paragraph (1)(a) refers has been made, is insufficient to enable his entitlement to a reduction under the authority's scheme in respect thereof to be discharged, upon the final instalment of that tax becoming due any outstanding reduction;

(i) must be paid to that person if he so requires; or

(ii) in any other case must (as the authority determines) either be repaid or credited against any subsequent liability of the person to make a payment in respect of the authority's council tax as it has effect for any subsequent year;

(b) if that person has ceased to be liable for the authority's council tax and has discharged the liability for that tax, the outstanding balance (if any) of the reduction under the authority's scheme in respect thereof must be paid within 14 days or, if that is not reasonably practicable, as soon as practicable thereafter

(c) in any other case, the reduction under the authority's scheme must be paid within 14 days of the receipt of the application at the offices of the authority or, if that is not reasonably practicable, as soon as practicable thereafter.

77.4 For the purposes of this paragraph "instalment" means any instalment of the authority's council tax to which regulation 19 of the Council Tax (Administration and Enforcement) Regulations 1992 refers (council tax payments).

78.0 Persons to whom reduction is to be paid [15]

78.1 Subject to section 80 (payment on death) and paragraph (2), any payment of the amount

[14] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

[15] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

of a reduction must be made to that person.

78.2 Where a person other than a person who is entitled to a reduction under this authority's scheme made the application for the reduction and that first person is a person acting pursuant to an appointment or is treated as having been so appointed, the amount of the reduction may be paid to that person.

79.0 Shortfall in reduction[16]

79.1 Where, on the revision of a decision allowing a reduction under the authority's scheme to a person, it is determined that the amount allowed was less than the amount to which that person was entitled, the authority must either;

(a) make good any shortfall in reduction which is due to that person, by reducing so far as possible the next and any subsequent payments he is liable to make in respect of the council tax of the authority as it has effect for the chargeable financial year until that shortfall is made good; or

(b) where this is not possible or the person concerned so requests, pay the amount of any shortfall in reduction due to that person within 14 days of the revision of the decision being made or if that is not reasonably practicable, as soon as possible afterwards.

80.0 Payment on the death of the person entitled[17]

80.1 Where the person entitled to any reduction under this scheme has died and it is not possible to award the reduction which is due in the form of a reduction of the council tax for which he was liable, the authority must make payment of the amount of the reduction to his executor or administrator in accordance with regulation 58(4) of the Council Tax (Administration and Enforcement) Regulations 1992.

81.0 Offsetting

81.1 Where a person has been allowed or paid a sum of council tax reduction under a decision which is subsequently revised or further revised, any sum allowed or paid in respect of a period covered by the subsequent decision shall be offset against arrears of entitlement under the subsequent decision except to the extent that the sum exceeds the arrears and shall be treated as properly awarded or paid on account of them.

82 .0 Payment where there is joint and several liability[18]

82.1 Where;

(a) a person is entitled to a reduction under the authority's scheme in respect of his liability for the authority's council tax as it has effect in respect of a chargeable financial year;

(b) the person entitled to the reduction is jointly and severally liable for the council tax; and

(c) the authority determines that discharging his entitlement by reducing the amount of his liability to which regulation 20(2) of the Council Tax (Administration and Enforcement) Regulations 1992(7) refers would be inappropriate,

it may make a payment to him of the amount of the reduction to which he is entitled, rounded where necessary to the nearest penny.

82.2 Subject to sub-paragraph (3) any payment made under sub-paragraph (1) must be made to the person who is entitled to the reduction.

[16] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012
[17] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012
[18] Inserted by Schedule 8 of the Council Tax Reductions Scheme (Prescribed Requirements) (England) Regulations 2012

82.3 Where a person other than a person who is entitled to a reduction under the authority's scheme made the application and that first person is a person acting pursuant to an appointment or is treated as having been so appointed, the amount of the reduction may be paid to that person.

83.0 - 90.0 Not used

Sections 91 – 94

Collection, holding and forwarding of information for Council tax reduction purposes

91.0 Use of information from and to the Department of Work and Pensions (DWP) and Her Majesty's Revenues and Customs (HMRC)

91.1 The authority will use information provided by the DWP and HMRC for the purposes of Council Tax Reduction, council tax liability, billing, administration and enforcement as outlined within Schedule 2 of the Local Government Finance Act 1992 as amended by the Local Government Finance Act 2012 and the Social Security (Information-sharing in relation to Welfare Services etc.) (Amendment) Regulations 2013

91.2 Where required by the relevant department and where required by law, the authority will share information obtained for Council Tax Reduction with the DWP or HMRC as appropriate and in accordance with Data Protections requirements[19].

92.0 Collection of information

92.1 The authority may receive and obtain information and evidence relating to claims for council tax reduction, the council may receive or obtain the information or evidence from–

(a) persons making claims for council tax reduction;
(b) other persons in connection with such claims;
(c) other local authorities; or
(d) central government departments including the DWP and HMRC

92.2 The authority may verify relevant information supplied to, or obtained.

93.0 Recording and holding information

93.1 The authority may

(a) may make a record of such information; and
(b) may hold that information, whether as supplied or obtained or recorded, for the purpose of forwarding it to the person or authority for the time being administering council tax reduction.

94.0 Forwarding of information

94.1 The authority may forward it to the person or authority for the time being administering claims to or awards of council tax reduction to which the relevant information relates, being

(i) a local authority;
(ii) a person providing services to a local authority; or
(iii) a person authorised to exercise any function of a local authority relating to council tax reduction.

[19] Data Retention and Investigatory Powers Act 2014,Data Retention Regulations 2014 and The Regulation of Investigatory Powers (Acquisition and Disclosure of Communications Data: Code of Practice) Order 2015

Sections 95 – 98

Revisions, Written Statements, Termination of Council tax reduction

95.0 Persons affected by Decisions

95.1 A person is to be treated as a person affected by a relevant decision of the authority where that person is;

a. an applicant;

b. in the case of a person who is liable to make payments in respect of a dwelling and is unable for the time being to act

(i) a Deputy appointed by the Court of Protection with power to claim, or as the case may be, receive benefit or support on his behalf,

(ii) in Scotland, a tutor, curator, judicial factor or other guardian acting or appointed in terms of law administering that person's estate, or

(iii) an attorney with a general power or a power to receive benefit or support appointed by the person liable to make those payments under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985 or the Mental Capacity Act 2005 or otherwise;

c. a person appointed by the authority under this scheme;

96.0 Revisions of Decisions

96.1 Subject to the provisions in this scheme, a relevant decision ('the original decision) may be revised or further revised by the authority, which made the decision where the person affected makes an application for a revision within;

(i) one calendar month of the date of notification of the original decision; or

(ii) such extended time as the authority may allow.

96.2 The authority may revise or further revise that original decision at any time. Where further information is required from the person affected, the authority shall request such information and evidence as it feels is reasonable. Such information must be supplied within;

i) one calendar month of the date of notification of the additional information; or

(ii) such extended time as the authority may allow

97.0 Written Statements

97.1 Subject to the provisions in the scheme, the authority may upon a written request issue a written statement to a person affected to further explain the decision of the authority in relation to Council tax reduction. The request must be received within one calendar month of the date of the notification being issued by the authority.

98.0 Terminations

98.1 The authority may terminate support in whole or in part the Council tax reduction where it appears to the authority that an issue arises whether;

a. the conditions for entitlement to Council tax reduction are or were fulfilled; or

b. a decision as to an award of such a support should be revised or superseded.

98.2 The authority may terminate, in whole or in part the Council tax reduction where it appears to the authority that an issue arises whether;

a. the conditions for entitlement to Council tax reduction are or were fulfilled; or

b. a decision as to an award of such a support should be revised or superseded.

Where the person fails to provide information to the authority as requested in relation to any matter relating to their liability for Council Tax

Section 99

Appeals against the authority's decisions

99.0 Procedure by which a person may make an appeal against certain decisions of the authority[20]

99.1 A person who is aggrieved by a decision of the authority, which affects;
(a) the person's entitlement to a reduction under its scheme, or
(b) the amount of any reduction to which that person is entitled,
may serve a written notice on the authority stating the matter by which, and the grounds on which, he is aggrieved.

99.2 The authority must
(a) consider the matter to which the notice relates;
(b) notify the aggrieved person in writing;
(i) that the grievance is not well founded, giving reasons for that belief; or
(ii) that steps have been taken to deal with the grievance, stating the steps taken.

99.3 Where, following notification under sub-paragraph (2)(b)(i) or (ii), the person is still aggrieved, or if the authority fails to notify the person aggrieved in accordance with sub-paragraph (2)(b) within two months of the service of his notice, he may appeal to the valuation tribunal under section 16 of the 1992 Act[21].

[20] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012
[21] As amended by the Tribunal Procedure (Amendment No 3) Rules 2014, The First-tier Tribunal and Upper Tribunal (Chambers) (Amendment) Order 2015 and The Tribunal Procedure (Amendment) Rules 2015

Section 100

Procedure for applying for a discretionary reduction

100.0 Procedure for an application to the authority for a reduction under section 13A(1)(c) of the 1992 Act[22]

100.1 An application to the authority for a reduction under section 13A(1)(c) of the 1992 Act may be made;

(a) in writing,

(b) by means of an electronic communication in accordance this scheme or

(c) where the authority has published a telephone number for the purpose of receiving such applications, by telephone.

100.2 Where;

(a) the authority has made a determination under section 13A(1)(c) in relation to a class of case in which liability is to be reduced; and

(b) a person in that class would otherwise be entitled to a reduction under its scheme, that person's application for a reduction under the authority's scheme may also be treated as an application for a reduction under section 13A(1)(c).

[22] Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

Section 101 – 106A[23]

Electronic Communication

[23] Inserted by Council Tax Reductions Schemes (Prescribed Requirements) (England) Regulations 2012

101.0 Interpretation

101.1 In this Part;
"information" includes an application, a certificate, notice or other evidence; and
"official computer system" means a computer system maintained by or on behalf of an authority for sending, receiving, processing or storing of any information.

102.0 Conditions for the use of electronic communication

102.1 The authority may use an electronic communication in connection with applications for, and awards of, reductions under its scheme including any or all information received via DWP or HMRC.

102.2 A person other than the authority may use an electronic communication in connection with the matters referred to in paragraph (1) if the conditions specified in paragraphs (3) to (6) are satisfied.

102.3 The first condition is that the person is for the time being permitted to use an electronic communication by an authorisation given by means of a direction of the Chief Executive of the authority.

102.4 The second condition is that the person uses an approved method of;
(a) authenticating the identity of the sender of the communication;
(b) electronic communication;
(c) authenticating any application or notice delivered by means of an electronic communication; and
(d) subject to sub-paragraph (7), submitting to the authority any information.

102.5 The third condition is that any information sent by means of an electronic communication is in a form approved for the purposes.

102.6 The fourth condition is that the person maintains such records in written or electronic form as may be specified in a direction given by the Chief Executive of the authority.

102.7 Where the person uses any method other than the method approved of submitting any information, that information is to be treated as not having been submitted.

102.8 In this paragraph "approved" means approved by means of a direction given by the Chief Executive of the authority for the purposes of this section.

103.0 Use of intermediaries

103.1 The authority may use intermediaries in connection with;
(a) the delivery of any information by means of an electronic communication; and
(b) the authentication or security of anything transmitted by such means,
and may require other persons to use intermediaries in connection with those matters.

104.0 Effect of delivering information by means of electronic communication

104.1 Any information which is delivered by means of an electronic communication is to be treated as having been delivered in the manner or form required by any provision of an authority's scheme on the day the conditions imposed;
(a) by this section; and
(b) by or under an enactment,
are satisfied.

104.2 The authority may determine that any information is to be treated as delivered on a different day (whether earlier or later) from the day provided for in sub-paragraph (1).

104.3 Information may not be taken to have been delivered to an official computer system by means of an electronic communication unless it is accepted by the system to which it is delivered.

105.0 Proof of identity of sender or recipient of information

105.1 If it is necessary to prove, for the purpose of any legal proceedings, the identity of—
(a) the sender of any information delivered by means of an electronic communication to an official computer system; or
(b) the recipient of any such information delivered by means of an electronic communication from an official computer system,
the sender or recipient, as the case may be, is to be presumed to be the person whose name is recorded as such on that official computer system.

106.0 Proof of delivery of information

106.1 If it is necessary to prove, for the purpose of any legal proceedings, that the use of an electronic communication has resulted in the delivery of any information this is presumed to have been the case where;
(a) any such information has been delivered to the relevant authority, if the delivery of that information has been recorded on an official computer system; or
(b) any such information has been delivered by the relevant authority, if the delivery of that information has been recorded on an official computer system.

106.2 If it is necessary to prove, for the purpose of any legal proceedings, that the use of an electronic communication has resulted in the delivery of any such information, this is presumed not to be the case, if that information delivered to the relevant authority has not been recorded on an official computer system.

106.3 If it is necessary to prove, for the purpose of any legal proceedings, when any such information sent by means of an electronic communication has been received, the time and date of receipt is presumed to be that recorded on an official computer system.

106A.0 Proof of content of information

106A.1 If it is necessary to prove, for the purpose of any legal proceedings, the content of any information sent by means of an electronic communication, the content is presumed to be that recorded on an official computer system.

Section 107

Counter Fraud and Compliance

107.0 Counter Fraud and compliance

107.1 In order to protect the finances of the authority and also in the interests of all council taxpayers, the authority will undertake such actions as allowed by law to;

a. Prevent and detect fraudulent claims and actions in respect of Council tax reduction;
b. Carry out investigations fairly, professionally and in accordance with the law; and
c. Ensure that sanctions are applied in appropriate cases

107.2 The authority believes that it is important to minimise the opportunity for fraud and;

a. will implement rigorous procedures for the verification of claims for council tax reduction;
b. will employ sufficient Officers to fulfil the authority's commitment to combat fraud;
c. will actively tackle fraud where it occurs in accordance with this scheme;
d. will co-operate with the Department for Work and Pensions (DWP), Her Majesty's Revenues and Customs and take part in joint working including prosecutions; and
e. will in all cases seek to recover all outstanding council tax.

107.3 The authority shall put into place such administrative policies, procedures and processes as are necessary to ensure that the actions outlined within paragraph 107.1 and 107.2 can be carried out successfully. In particular the authority shall undertake actions provided by the Council Tax Reduction Schemes (Detection of Fraud and Enforcement) (England) Regulations 2013.

Schedule 1

Calculation of the amount of Council Tax Reduction in accordance with the Discount Scheme

1 The authority's Council Tax Reduction scheme from 2023/24 shall be calculated on the basis of the following Banded Discount Scheme:

Band	CTR level	Passported	Single (weekly £)	Couple (weekly £)	Family 1 child (weekly £)	Family 2+ (weekly £)
1	100%	Relevant benefit	£0 - £85	£0 – 130	£0 – £210	£0 – 270
2	65%	N/A	£55.01 - £130	£130.01 - £170	£210.01 – £260	£270.01 - £320
3	45%	N/A	£130.01 - £180	£170.01 - £220	£250.01 - £310	£320.01 - £370
4	25%	N/A	£180.01 - £230	£220.01 - £270	£310.01 - £360	£370.01 - £420
5	0%	N/A	Over £230	Over £270	Over £360	Over £420

2 The amount of discount to be granted is to be based on the following factors:

a. The maximum Council Tax Reduction as defined within this scheme;
b. The Council Tax family as defined within this scheme
c. The income of the applicant as defined within this scheme;
d. The capital of the applicant as defined within this scheme.

4 For the sake of clarity all incomes shown within the table above are weekly in accordance with the scheme requirements and definitions.

5 Discount bands vary depending on both weekly income and the household (family as defined within this scheme). For the sake of clarity, It should be noted that in any application for reduction is limited to a maximum of two dependant children or young persons.

6 Any applicant who capital is greater than £6,000 shall not be entitled to any Council Tax Reductions whatsoever.

7. The authority **may** increase the level of incomes within the grid specified in paragraph 1 on an annual basis by the appropriate level of inflation measured by the Consumer Price Index (CPI) at 1st October preceding the effective financial year **or** by a percentage representing the increase in personal allowance within the applicable amounts for Housing Benefit for the relevant financial year, **whichever is the lowest**.

8. Where an applicant or partner is in receipt of a relevant benefit namely Income Support, Income Related Employment and Support Allowance or Income Based Jobseeker's Allowance, discount will be awarded at Band 1 level.

Schedule 2

Not Used

Schedule 3

Sums to be disregarded in the calculation of earnings

1. There shall be disregarded from an applicant's net earnings, £25 per week (the standard earnings disregard). This shall apply irrespective of the claimant's household and only one disregard shall be applied per claim.

2. The disregard shall apply where the applicant or partner is engaged in work.

Schedule 4

Sums to be disregarded in the calculation of income other than earnings[24]

[24] Any amounts shown in this schedule will be uprated in line with the Housing Benefit Regulations 2006 as amended

1. Any amount paid by way of tax on income, which is to be taken into account under section 30 (calculation of income other than earnings).

A2. Any payment made to the applicant and in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Mandatory Work Activity Scheme.

A3. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Employment, Skills and Enterprise Scheme or Back to Work Scheme, but only for 52 weeks beginning with the date of receipt of the payment.

2. Any payment in respect of any expenses incurred or to be incurred by an applicant who is–

(a) engaged by a charitable or voluntary organisation, or

(b) volunteer,

if he otherwise derives no remuneration or profit from the employment and is not to be treated as possessing any earnings under section 32.0 (notional income).

2A. Any payment in respect of expenses arising out of the applicant's participation in a service user group or where the applicant is participating as a service user.

3. In the case of employment as an employed earner, any payment in respect of expenses wholly, exclusively and necessarily incurred in the performance of the duties of the employment.

4. Where an applicant is on income support, an income-based jobseeker's allowance or an income-related employment and support allowance the whole of his income.

5. Where the applicant is a member of a joint-claim couple for the purposes of the Jobseekers Act and his partner is on an income-based jobseeker's allowance, the whole of the applicant's income.

6. Where the applicant, or the person who was the partner of the applicant on 31st March 2003, was entitled on that date to income support or an income-based jobseeker's allowance but ceased to be so entitled on or before 5th April 2003 by virtue only of regulation 13 of the Housing Benefit (General) Amendment (No. 3) Regulations 1999 as in force at that date, the whole of his income.

7. Any disability living allowance or personal independence payment or AFIP

8. Any concessionary payment made to compensate for the non-payment of;

(a) any payment specified in paragraph 7 or 10;

(b) income support;

(c) an income-based jobseeker's allowance.

(d) an income-related employment and support allowance.

9. Any mobility supplement under article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983or any payment intended to compensate for the non-payment of such a supplement.

10. Any attendance allowance.

11. Any payment to the applicant as holder of the Victoria Cross or of the George Cross or any analogous payment.

12. (1) Any payment–

(a) by way of an education maintenance allowance made pursuant to;

(i) regulations made under section 518 of the Education Act 1996 (payment of

school expenses; grant of scholarships etc);
(ii) regulations made under section 49 or 73(f) of the Education (Scotland) Act 1980 (power to assist persons to take advantage of educational facilities);
(iii) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992

(b) corresponding to such an education maintenance allowance, made pursuant to;
(i) section14 or section181 of the Education Act 2002(power of Secretary of State and National Assembly for Wales to give financial assistance for purposes related to education or childcare, and allowances in respect of education or training); or
(ii) regulations made under section 181 of that Act; or

(iii) in England, by way of financial assistance made pursuant to section 14 of the Education Act 2002.

(2) Any payment, other than a payment to which sub-paragraph (1) applies, made pursuant to;
(a) regulations made under section 518 of the Education Act 1996;
(b) regulations made under section 49 of the Education (Scotland) Act 1980; or
(c) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992,
in respect of a course of study attended by a child or a young person or a person who is in receipt of an education maintenance allowance or other payment made pursuant to any provision specified in sub-paragraph (1).

13. Any payment made to the applicant by way of a repayment under regulation 11(2) of the Education (Teacher Student Loans) (Repayment etc.) Regulations 2002.

14 (1) Any payment made pursuant to section 2 of the 1973 Act or section 2 of the Enterprise and New Towns (Scotland) Act 1990 except a payment;
(a) made as a substitute for income support, a jobseeker's allowance, incapacity benefit, severe disablement allowance or an employment and support allowance;
(b) of an allowance referred to in section 2(3) of the 1973 Act or section 2(5) of the Enterprise and New Towns (Scotland) Act 1990; or
(c) intended to meet the cost of living expenses which relate to any one or more of the items specified in sub-paragraph (2) whilst an applicant is participating in an education, training or other scheme to help him enhance his employment prospects unless the payment is a Career Development Loan paid pursuant to section 2 of the 1973 Act and the period of education or training or the scheme, which is supported by that loan, has been completed.

(2) The items specified in this sub-paragraph for the purposes of sub-paragraph (1)(c) are food, ordinary clothing or footwear, household fuel or rent of the applicant or, where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.

15 (1) Subject to sub-paragraph (2), any of the following payments;
(a) a charitable payment;
(b) a voluntary payment;
(c) a payment (not falling within sub-paragraph (a) or (b) above) from a trust whose funds are derived from a payment made in consequence of any personal injury to the applicant;
(d) a payment under an annuity purchased;
(i) pursuant to any agreement or court order to make payments to the applicant; or
(ii) from funds derived from a payment made,
in consequence of any personal injury to the applicant; or
(e) a payment (not falling within sub-paragraphs (a) to (d) received by virtue of any

agreement or court order to make payments to the applicant in consequence of any personal injury to the applicant.

(2) Sub-paragraph (1) shall not apply to a payment, which is made or due to be made by–

(a) a former partner of the applicant, or a former partner of any member of the applicant's family; or

(b) the parent of a child or young person where that child or young person is a member of the applicant's family.

16. 100% of any of the following, namely

(a) a war disablement pension (except insofar as such a pension falls to be disregarded under paragraph 9 or 10);

(b) a war widow's pension or war widower's pension;

(c) a pension payable to a person as a widow, widower or surviving civil partner under any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;

(d) a guaranteed income payment;

(e) a payment made to compensate for the non-payment of such a pension or payment as is mentioned in any of the preceding sub-paragraphs;

(f) a pension paid by the government of a country outside Great Britain which is analogous to any of the pensions or payments mentioned in sub-paragraphs (a) to (d) above;

(g) pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria.

17. Subject to paragraph 35, £15 of any;

(a) widowed mother's allowance paid pursuant to section 37 of the Act;

(b) widowed parent's allowance paid pursuant to section 39A of the Act.

18. (1) Any income derived from capital to which the applicant is or is treated under section 41 (capital jointly held) as beneficially entitled but, subject to sub- paragraph (2), not income derived from capital disregarded under paragraphs 1, 2, 4, 8, 14 or 25 to 28 of Schedule 5.

(2) Income derived from capital disregarded under paragraphs 2, 4 or 25 to 28 of Schedule 5 but only to the extent of–

(a) any mortgage repayments made in respect of the dwelling or premises in the period during which that income accrued; or

(b) any council tax or water charges which the applicant is liable to pay in respect of the dwelling or premises and which are paid in the period during which that income accrued.

(3) The definition of 'water charges' in paragraph 2(1) shall apply to sub-paragraph (2) of this paragraph with the omission of the words 'in so far as such charges are in respect of the dwelling which a person occupies as his home'.

19. Where the applicant makes a parental contribution in respect of a student attending a course at an establishment in the United Kingdom or undergoing education in the United Kingdom, which contribution has been assessed for the purposes of calculating–

(a) under, or pursuant to regulations made under powers conferred by, sections 1 or 2 of the Education Act 1962 or section 22 of the Teaching and Higher Education Act 1998, that student's award;

(b) under regulations made in exercise of the powers conferred by section 49 of the Education (Scotland) Act 1980, that student's bursary, scholarship, or other allowance under that section or under regulations made in exercise of the powers conferred by section 73 of that Act of 1980, any payment to that student under that section; or

(c) the student's student loan,

an amount equal to the weekly amount of that parental contribution, but only in respect of the period for which that contribution is assessed as being payable.

20. (1) Where the applicant is the parent of a student aged under 25 in advanced education who either;

(a) is not in receipt of any award, grant or student loan in respect of that education; or

(b) is in receipt of an award under section 2 of the Education Act 1962 (discretionary awards) or an award bestowed by virtue of the Teaching and Higher Education Act 1998, or regulations made thereunder, or a bursary, scholarship or other allowance under section 49(1) of the Education (Scotland) Act 1980, or a payment under section 73 of that Act of 1980,

and the applicant makes payments by way of a contribution towards the student's maintenance, other than a parental contribution falling within paragraph 19, an amount specified in sub-paragraph (2) in respect of each week during the student's term.

(2) For the purposes of sub-paragraph (1), the amount shall be equal to–

(a) the weekly amount of the payments; or

(b) the amount by way of a personal allowance for a single applicant under 25 less the weekly amount of any award, bursary, scholarship, allowance or payment referred to in sub-paragraph (1)(b),

whichever is less.

21. Any payment made to the applicant by a child or young person or a non- dependant.

22. Where the applicant occupies a dwelling as his home and the dwelling is also occupied by a person other than one to whom paragraph 21 or 23 refers and there is a contractual liability to make payments to the applicant in respect of the occupation of the dwelling by that person or a member of his family–

(a) where the aggregate of any payments made in respect of any one week in respect of the occupation of the dwelling by that person or a member of his family, or by that person and a member of his family, is less than £20, the whole of that amount; or

(b) where the aggregate of any such payments is £20 or more per week, £20.

23. (1) Where the applicant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation, an amount, in respect of each person for which such accommodation is provided for the whole or any part of a week, equal to–

(a) where the aggregate of any payments made in respect of any one week in respect of such accommodation provided to such person does not exceed £20.00, 100 per cent. of such payments;

(b) where the aggregate of any such payments exceeds £20.00, £20.00 and 50 per cent. of the excess over £20.00.

(2) In this paragraph, 'board and lodging accommodation' means accommodation provided to a person or, if he is a member of a family, to him or any other member of his family, for a charge which is inclusive of the provision of that accommodation and at least some cooked or prepared meals which both are cooked or prepared (by a person other than the person to whom the accommodation is provided or a member of his family) and are consumed in that accommodation or associated premises.

24. (1) Any income in kind, except where regulation 30(11)(b) (provision of support under section 95 or 98 of the Immigration and Asylum Act in the calculation of income other than earnings) applies.

(2) The reference in sub-paragraph (1) to 'income in kind' does not include a payment to a third party made in respect of the applicant which is used by the third party to provide benefits in kind to the applicant.

25. Any income which is payable in a country outside the United Kingdom for such period during which there is a prohibition against the transfer to the United Kingdom of that income.

26. (1) Any payment made to the applicant in respect of a person who is a member of his family–

(a) pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002 or in accordance or with a scheme approved by the Scottish Ministers under section 51A of the Adoption (Scotland) Act 1978(**b**) (schemes for payments of allowances to adopters); or in accordance with an Adoption Allowance Scheme made under section 71 of the Adoption and Children (Scotland) Act 2007 (Adoption Allowances Schemes)

(b) not used

(ba) which is a payment made by a local authority in pursuance of section 15(1) of, and paragraph 15 of Schedule 1 to, the Children Act 1989 (local authority contribution to a child's maintenance where the child is living with a person as a result of a residence order) or in Scotland section 50 of the Children Act 1975 (payments towards maintenance of children);

(c) which is a payment made by an authority, as defined in Article 2 of the Children Order, in pursuance of Article 15 of, and paragraph 17 of Schedule 1 to, that Order (contribution by an authority to child's maintenance);

(d) in accordance with regulations made pursuant to section 14F of the Children Act 1989(**c**) (special guardianship support services);

(2) Any payment, other than a payment to which sub-paragraph (1)(a) applies, made to the applicant pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002.

27. Any payment made to the applicant with whom a person is accommodated by virtue of arrangements made

(a) by a local authority under–

(i) section 23(2)(a) of the Children Act 1989 (provision of accommodation and maintenance for a child whom they are looking after),

(ii) section 26 of the Children (Scotland) Act 1995 (manner of provision of accommodation to child looked after by local authority), or

(iii) regulations 33 or 51 of the Looked After Children (Scotland)Regulations 2009 (fostering and kinship care allowances and fostering allowances); or

(b) by a voluntary organisation under section 59(1)(a) of the Children Act 1989 (provision of accommodation by voluntary organisations).

28. Any payment made to the applicant or his partner for a person ('the person concerned'), who is not normally a member of the applicant's household but is temporarily in his care, by–

(a) a health authority;

(b) a local authority but excluding payments of housing benefit made in respect of the person concerned;

(c) a voluntary organisation;

(d) the person concerned pursuant to section 26(3A) of the National Assistance Act 1948;

(e) a primary care trust established under section 16A of the National Health Service Act 1977 or established by an order made under section 18(2)(c) of the National Health Service Act 2006; or

(f) a Local Health Board established under section 16BA of the National Health Service Act 1977 or established by an order made under section 11 of the National Health Service (Wales) Act 2006

29. Any payment made by a local authority in accordance with section 17, 23B, 23C or 24A of the Children Act 1989 or, as the case may be, section 12 of the Social Work (Scotland) Act 1968 or section 22, 29 or 30 of the Children (Scotland) Act 1995 (provision of services for children and their families and advice and assistance to certain children).

29A. (1) Subject to sub-paragraph (2), any payment (or part of a payment) made by a local authority in accordance with section 23C of the Children Act 1989(**e**) or section 29 of the Children (Scotland) Act 1995(local authorities' duty to promote welfare of children and powers to grant financial assistance to persons in, or formerly in, their care) to a person ('A') which A passes on

to the applicant.

(2) Sub-paragraph (1) applies only where A;

(a) was formerly in the applicant's care, and

(b)is aged 18 or over, and

(c)continues to live with the applicant.

30. (1) Subject to sub-paragraph (2), any payment received under an insurance policy taken out to insure against the risk of being unable to maintain repayments;

(a) on a loan which is secured on the dwelling which the applicant occupies as his home; or

(b) under a regulated agreement as defined for the purposes of the Consumer Credit Act 1974 or under a hire-purchase agreement or a conditional sale agreement as defined for the purposes of Part 3 of the Hire-Purchase Act 1964.

(2) A payment referred to in sub-paragraph (1) shall only be disregarded to the extent that the payment received under that policy does not exceed the amounts, calculated on a weekly basis, which are used to–

(a) maintain the repayments referred to in sub-paragraph (1)(a) or, as the case may be, (b); and

(b) meet any amount due by way of premiums on–

(i) that policy; or

(ii) in a case to which sub-paragraph(1)(a) applies, an insurance policy taken out to insure against loss or damage to any building or part of a building which is occupied by the applicant as his home and which is required as a condition of the loan referred to in sub-paragraph (1)(a).

31. Any payment of income which, by virtue of section 36 (income treated as capital) is to be treated as capital.

32. Any social fund payment made pursuant to Part 8 of the Act (the Social Fund) or any local welfare fund provision

33. Any payment under Part 10 of the Act (Christmas bonus for pensioners).

34. Where a payment of income is made in a currency other than sterling, any banking charge or commission payable in converting that payment into sterling.

35. The total of an applicant's income or, if he is a member of a family, the family's income and the income of any person which he is treated as possessing under paragraph 15.2 (calculation of income and capital of members of applicant's family and of a polygamous marriage) to be disregarded under paragraph 47.2(b) and paragraph 48.1(d) (calculation of covenant income where a contribution assessed, covenant income where no grant income or no contribution is assessed), paragraph 51(2) (treatment of student loans), paragraph 52(3) (treatment of payments from access funds) and paragraphs 17 shall in no case exceed £20 per week.

36. (1) Any payment made under or by any of the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006).

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of–

(a) that person's partner or former partner from whom he is not, or where that person has died was not, estranged or divorced or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death;

(b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or

(c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person provided that the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced or, where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of;

(a) the person who is suffering from haemophilia or who is a qualifying person;

(b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or

(c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(4) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where;

(a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who is or had been a member of that person's family; and

(b) the payment is made either;

(i) to that person's parent or step-parent, or

(ii) where that person at the date of the payment is a child, a young person or a student who has not completed his full-time education and has no parent or step-parent, to his guardian,

but only for a period from the date of the payment until the end of two years from that person's death.

(5) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where;

(a) that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who was or had been a member of his family; and

(b) the payment is made either

(i) to that person's parent or step-parent, or

(ii) where that person at the relevant date was a child, a young person or a student who had not completed his full-time education and had no parent or step-parent, to his guardian,

but only for a period of two years from the relevant date.

(6) In the case of a person to whom or for whose support payment referred to in this paragraph is made, any income which derives from any payment of income or capital made under or deriving from any of the Trusts.

(7) For the purposes of sub-paragraphs (2) to (6), any reference to the Trusts shall be construed as including a reference to the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation and the London Bombings Relief Charitable Fund.

37. Any housing benefit or council tax benefit.

38. Any payment made by the Secretary of State to compensate for the loss (in whole or in part) of entitlement to housing benefit.

39. - 40. not used

41. Any payment to a juror or witness in respect of attendance at a court other than compensation

for loss of earnings or for the loss of a benefit payable under the benefit Acts.

42. Any exceptional amount of increase in welfare benefits made by Government in response to a national crisis.

43. Any payment in consequence of a reduction of council tax under section 13 or section 80 of the 1992 Act (reduction of liability for council tax).

44. Any amount awarded as a Local Welfare Payment

45. (1) Any payment or repayment made–

(a) as respects England, under regulation 5, 6 or 12 of the National Health Service (Travel Expenses and Remission of Charges) Regulations 2003 (travelling expenses and health service supplies);

(b) as respects Wales, under regulation 5, 6 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Wales) Regulations 2007 (travelling expenses and health service supplies);

(c) as respects Scotland, under regulation 3, 5 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Scotland) (No. 2) Regulations 2003 (travelling expenses and health service supplies).

(2) Any payment or repayment made by the Secretary of State for Health, the Scottish Ministers or the Welsh Ministers, which is analogous to a payment or repayment, mentioned in sub-paragraph (1).

46. Any payment made to such persons entitled to receive benefits as may be determined by or under a scheme made pursuant to section 13 of the Social Security Act 1988 in lieu of vouchers or similar arrangements in connection with the provision of those benefits (including payments made in place of healthy start vouchers, milk tokens or the supply of vitamins).

47. Any payment made by either the Secretary of State for Justice or by the Scottish Ministers under a scheme established to assist relatives and other persons to visit persons in custody.

48. (1)Where**, but for the implementation of this scheme,** an applicant's applicable amount includes an amount by way of a family premium, £15 of any payment of maintenance, other than child maintenance, whether under a court order or not, which is made or due to be made by the applicant's former partner, or the applicant's partner's former partner.

(2) For the purpose of sub-paragraph (1) where more than one maintenance payment falls to be taken into account in any week, all such payments such be aggregated and treated as if they were a single payment.

(3) A payment made by the Secretary of State in lieu of maintenance shall, for the purpose of sub-paragraph (1), be treated as a payment of maintenance made by a person specified in sub-paragraph (1).

48A. (1) Any payment of child maintenance made or derived from a liable relative where the child or young person in respect of whom the payment is made is a member of the applicant's family, except where the person making the payment is the applicant or the applicant's partner.

(2) In paragraph (1)

'child maintenance' means any payment towards the maintenance of a child or young person, including any payment made voluntarily and payments made under;

(a) the Child Support Act 1991;

(b) the Child Support (Northern Ireland) Order 1991;

(c) a court order;

(d) a consent order;

(e) a maintenance agreement registered for execution in the Books of Council and Session or the sheriff court books;

'liable relative' means a person listed in regulation 54 (interpretation) of the Income Support (General) Regulations 1987, other than a person falling within sub-paragraph (d) of that

definition.

49. Any amount determined by the Council as the housing element of Universal Credit

50. Any payment (other than a training allowance) made, whether by the Secretary of State or any other person, under the Disabled Persons (Employment) Act 1944 to assist disabled persons to obtain or retain employment despite their disability.

51. Any guardian's allowance.

52. (1) If the applicant is in receipt of any benefit under Parts 2, 3 or 5 of the Act, any increase in the rate of that benefit arising under Part 4 (increases for dependants) or section 106(a) (unemployability supplement) of the Act, where the dependant in respect of whom the increase is paid is not a member of the applicant's family.

(2) If the applicant is in receipt of any pension or allowance under Part 2 or 3 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006, any increase in the rate of that pension or allowance under that Order, where the dependant in respect of whom the increase is paid is not a member of the applicant's family.

53. Any supplementary pension under article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (pensions to surviving spouses and surviving civil partners) and any analogous payment made by the Secretary of State for Defence to any person who is not a person entitled under that Order.

54. In the case of a pension awarded at the supplementary rate under article 27(3) of the Personal Injuries (Civilians) Scheme 1983(**a**) (pensions to widows, widowers or surviving civil partners), the sum specified in paragraph 1(c) of Schedule 4 to that Scheme.

55 (1) Any payment which is

(a) made under any of the Dispensing Instruments to a widow, widower or

(b)surviving civil partner of a person;

(i) whose death was attributable to service in a capacity analogous to service as a member of the armed forces of the Crown; and

(ii) whose service in such capacity terminated before 31st March 1973; and equal to the amount specified in article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006.

(2) In this paragraph 'the Dispensing Instruments' means the Order in Council of 19th December 1881, the Royal Warrant of 27th October 1884 and the Order by His Majesty of 14th January 1922 (exceptional grants of pay, non-effective pay and allowances).

55A. Any council tax reduction or council tax benefit to which the applicant is entitled.

56. Except in a case which falls under sub-paragraph (1) of paragraph 16 of Schedule 3, where the applicant is a person who satisfies any of the conditions of sub-paragraph (2) of that paragraph, any amount of working tax credit up to £17.10

57. Any payment made under section 12B of the Social Work (Scotland) Act 1968, or under sections 12A to 12D of the National Health Service Act 2006 (direct payments for health care) or under regulations made under section 57 of the Health and Social Care Act 2001 (direct payments).

58. (1) Subject to sub-paragraph (2), in respect of a person who is receiving, or who has received, assistance under the self-employment route, any payment to that person–

(a) to meet expenses wholly and necessarily incurred whilst carrying on the commercial activity;

(b) which is used or intended to be used to maintain repayments on a loan taken out

by that person for the purpose of establishing or carrying on the commercial activity, in respect of which such assistance is or was received.
(2) Sub-paragraph (1) shall apply only in respect of payments, which are paid to that person from the special account

59. (1) Any payment of a sports award except to the extent that it has been made in respect of any one or more of the items specified in sub-paragraph (2).
(2) The items specified for the purposes of sub-paragraph (1) are food, ordinary clothing or footwear, household fuel or rent of the applicant or where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.
(3) For the purposes of sub-paragraph (2) 'food' does not include vitamins, minerals or other special dietary supplements intended to enhance the performance of the person in the sport in respect of which the award was made.

60. Where the amount of subsistence allowance paid to a person in a reduction week exceeds the amount of income-based jobseeker's allowance that person would have received in that reduction week had it been payable to him, less 50p, that excess amount.

61. In the case of an applicant participating in an employment zone programme, any discretionary payment made by an employment zone contractor to the applicant, being a fee, grant, loan or otherwise.

62. Any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001 as amended by the Welfare Reform Act 2012 (Consequential Amendments) Regulations 2013.

63. (1)Any payment made by a local authority or by the Welsh Ministers to or on behalf of the applicant or his partner relating to a service which is provided to develop or sustain the capacity of the applicant or his partner to live independently in his accommodation.
(2) For the purposes of sub-paragraph (1) 'local authority' includes, in England, a county council.

64. Any bereavement support payment in respect of the rate set out in regulation 3(2) or (5) of the Bereavement Support Payment Regulations 2017

65. Any payments to a claimant made under section 49 of the Children and Families Act 2014 (personal budgets and direct payments)

66. Any payments made by the London Emergencies Trust" means the company of that name (number 09928465) incorporated on 23rd December 2015 and the registered charity of that name (number 1172307) established on 28th March 2017 or the We Love Manchester Emergency Fund" means the registered charity of that name (number 1173260) established on 30th May 2017

67. Any payment of child benefit.

68. Any Carer's Allowance

69. Any support component of Employment and Support Allowance

70. Any payments disregarded for Housing Benefits under the Social Security *(Emergency Funds)* Amendment) *Regulations 2017*

71. An amount of £50 where the applicant, their partner or any dependant who resides with him receives Disability Living Allowance or Personal Independence Payments.

72. Any payment made under the Energy Rebate Scheme 2022 is to be disregarded in determining:
(a)an applicant's entitlement to a reduction under the scheme; or
(b)the amount of any reduction to which the applicant is entitled.
"The Energy Rebate Scheme 2022" means the scheme to provide financial support in respect of energy bills which was announced in Parliament by the Chancellor of the Exchequer on 3rd February 2022

Schedule 5

Capital to be disregarded[25]

[25] Any amounts shown in this schedule will be uprated in line with the Housing Benefit Regulations 2006 as amended

1. The dwelling together with any garage, garden and outbuildings, normally occupied by the applicant as his home including any premises not so occupied which it is impracticable or unreasonable to sell separately, in particular, in Scotland, any croft land on which the dwelling is situated; but, notwithstanding section 15 (calculation of income and capital of members of applicant's family and of polygamous marriage), only one dwelling shall be disregarded under this paragraph.

A2. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Mandatory Work Activity Scheme but only for 52 weeks beginning with the date of receipt of the payment.

A3. Any payment made to the applicant in respect of any travel or other expenses incurred or to be incurred, by him in respect of his participation in the Employment, Skills and Enterprise Scheme or Back to Work Scheme but only for 52 weeks beginning with the date of receipt of the payment but only for 52 weeks beginning with the date of receipt of payment.

2. Any premises acquired for occupation by the applicant, which he intends to occupy as his home within 26 weeks of the date of acquisition or such longer period as is reasonable in the circumstances to enable the applicant to obtain possession and commence occupation of the premises.

3. Any sum directly attributable to the proceeds of sale of any premises formerly occupied by the applicant as his home which is to be used for the purchase of other premises intended for such occupation within 26 weeks of the date of sale or such longer period as is reasonable in the circumstances to enable the applicant to complete the purchase.

4. Any premises occupied in whole or in part–

(a) by a partner or relative of a single applicant or any member of the family as his home where that person has attained the qualifying age for state pension credit or is incapacitated;

(b) by the former partner of the applicant as his home; but this provision shall not apply where the former partner is a person from whom the applicant is estranged or divorced or with whom he had formed a civil partnership that has been dissolved.

5. Where an applicant is on income support, an income-based jobseeker's allowance or an income-related employment and support allowance, the whole of his capital.

6. Where the applicant is a member of a joint-claim couple for the purposes of the Jobseekers Act 1995 and his partner is on income-based jobseeker's allowance, the whole of the applicant's capital.

7. Any future interest in property of any kind, other than land or premises in respect of which the applicant has granted a subsisting lease or tenancy, including sub- leases or sub-tenancies.

8. (1) The assets of any business owned in whole or in part by the applicant and for the purposes of which he is engaged as a self-employed earner, or if he has ceased to be so engaged, for such period as may be reasonable in the circumstances to allow for disposal of any such asset.

(2) The assets of any business owned in whole or in part by the applicant where–

(a) he is not engaged as a self-employed earner in that business by reason of some disease or bodily or mental disablement; but

(b) he intends to become engaged or, as the case may be, re-engaged as a self-employed earner in that business as soon as he recovers or is able to become engaged or re-engaged in that business;

for a period of 26 weeks from the date on which the claim for council tax reduction is made, or is treated as made, or, if it is unreasonable to expect him to become engaged

or re-engaged in that business within that period, for such longer period as is reasonable in the circumstances to enable him to become so engaged or re-engaged.

(3) In the case of a person who is receiving assistance under the self-employment route, the assets acquired by that person for the purpose of establishing or carrying on the commercial activity in respect of which such assistance is being received.

(4) In the case of a person who has ceased carrying on the commercial activity in respect of which assistance was received as specified in sub-paragraph (3), the assets relating to that activity for such period as may be reasonable in the circumstances to allow for disposal of any such asset.

9. (1) Subject to sub-paragraph (2), any arrears of, or any concessionary payment made to compensate for arrears due to the non-payment of;

(a) any payment specified in paragraphs 7, 9 or 10 of Schedule 4;
(b) an income-related benefit under Part 7 of the Act;
(c) an income-based jobseeker's allowance;
(d) any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001;
(e) working tax credit and child tax credit
(f) an income-related employment and support allowance

but only for a period of 52 weeks from the date of the receipt of arrears or of the concessionary payment.

(2) In a case where the total of any arrears and, if appropriate, any concessionary payment referred to in sub-paragraph (1) relating to one of the specified payments, benefits or allowances amounts to £5,000 or more (referred to in this sub-paragraph and in sub-paragraph (3) as 'the relevant sum') and is

(a) paid in order to rectify or to compensate for, an official error as defined in regulation 1(2) of the Decisions and Appeals Regulations; and
(b) received by the applicant in full on or after 14th October 2001,

sub-paragraph (1) shall have effect in relation to such arrears or concessionary payment either for a period of 52 weeks from the date of receipt, or, if the relevant sum is received in its entirety during the award of council tax reduction, for the remainder of that award if that is a longer period.

(3) For the purposes of sub-paragraph(2),'the award of council tax reduction' means–

(a) the award in which the relevant sum is first received (or the first part thereof where it is paid in more than one instalment); and
(b) where that award is followed by one or more further awards which, or each of which, begins immediately after the end of the previous award, such further award provided that for that further award the applicant;
(i) is the person who received the relevant sum; or
(ii) is the partner of the person who received the relevant sum, or was that person's partner at the date of his death.

10. Any sum

(a) paid to the applicant in consequence of damage to, or loss of the home or any personal possession and intended for its repair or replacement; or
(b) acquired by the applicant (whether as a loan or otherwise) on the express condition that it is to be used for effecting essential repairs or improvement to the home, which is to be used for the intended purpose, for a period of 26 weeks from the date on which it was so paid or acquired or such longer period as is reasonable in the circumstances to effect the repairs, replacement or improvement.

11. Any sum–

(a) deposited with a housing association as defined in section 1(1) of the Housing Associations Act 1985 or section 338(1) of the Housing (Scotland) Act 1987 as a condition of occupying the home;

(b) which was so deposited and which is to be used for the purchase of another home,

for the period of 26 weeks or such longer period as may be reasonable in the circumstances to enable the applicant to complete the purchase.

12. Any personal possessions except those which have been acquired by the applicant with the intention of reducing his capital in order to secure entitlement to council tax reduction or to increase the amount of that support.

13. The value of the right to receive any income under an annuity or the surrender value (if any) of such an annuity.

14. Where the funds of a trust are derived from a payment made in consequence of any personal injury to the applicant or applicant's partner, the value of the trust fund and the value of the right to receive any payment under that trust.

14A. (1) Any payment made to the applicant or the applicant's partner in consequence of any personal injury to the applicant or, as the case may be, the applicant's partner.

(2) But sub-paragraph (1)

(a) applies only for the period of 52 weeks beginning with the day on which the applicant first receives any payment in consequence of that personal injury;

(b) does not apply to any subsequent payment made to him in consequence of that injury (whether it is made by the same person or another);

(c) ceases to apply to the payment or any part of the payment from the day on which the applicant no longer possesses it;

(d) does not apply to any payment from a trust where the funds of the trust are derived from a payment made in consequence of any personal injury to the applicant.

(3) For the purposes of sub-paragraph (2)(c), the circumstances in which an applicant no longer possesses a payment or a part of it include where the applicant has used a payment or part of it to purchase an asset.

(4) References in sub-paragraphs (2) and (3) to the applicant are to be construed as including references to his partner (where applicable).

15. The value of the right to receive any income under a life interest or from a life rent.

16. The value of the right to receive any income, which is disregarded under paragraph 13 of Schedule 3 or paragraph 25 of Schedule 4.

17. The surrender value of any policy of life insurance.

18. Where any payment of capital falls to be made by instalments, the value of the right to receive any outstanding instalments.

19. Any payment made by a local authority in accordance with section 17, 23B, 23C or 24A of the Children Act 1989 or, as the case may be, section 12 of the Social Work (Scotland) Act 1968 or sections 22, 29 or 30 of the Children (Scotland) Act 1995 (provision of services for children and their families and advice and assistance to certain children).

19A. (1) Subject to sub-paragraph (2), any payment (or part of a payment) made by a local authority in accordance with section 23C of the Children Act 1989 or section 29 of the Children (Scotland) Act 1995 (local authorities' duty to promote welfare of children and powers to grant financial assistance to persons in, or formerly in, their care) to a person ('A') which A passes on to the

applicant.

(2) Sub-paragraph (1) applies only where A;

(a) was formerly in the applicant's care, and

(b) is aged 18 or over, and

(c) continues to live with the applicant.

20. Any social fund payment made pursuant to Part 8 of the Act.

21. Any refund of tax which falls to be deducted under section 369 of the Income and Corporation Taxes Act 1988 (deduction of tax from certain loan interest) on a payment of relevant loan interest for the purpose of acquiring an interest in the home or carrying out repairs or improvements to the home.

22. Any capital which, by virtue of sections 31 or 51 (capital treated as income, treatment of student loans) is to be treated as income.

23. Where any payment of capital is made in a currency other than sterling, any banking charge or commission payable in converting that payment into sterling.

24. (1) Any payment made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Independent Living Fund (2006), the Skipton Fund, the Caxton Foundation or the Charitable Fund.

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of–

(a) that person's partner or former partner from whom he is not, or where that person has died was not, estranged or divorced or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death;

(b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or

(c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person provided that the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced or, where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of–

(a) the person who is suffering from haemophilia or who is a qualifying person;

(b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or

(c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(4) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where–

(a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who is or had been a member of that person's family; and

(b) the payment is made either;

(i) to that person's parent or step-parent; or

(ii) where that person at the date of the payment is a child ,a young person or a student who has not completed his full-time education and has no parent or step-parent, to his guardian,

but only for a period from the date of the payment until the end of two years from that person's death.

(5) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or any of the Trusts to which sub-paragraph (1) refers, where

(a) that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced or with whom he had formed a civil partnership that had not been dissolved, nor any child or young person who was or had been a member of his family; and

(b) the payment is made either;

(i) to that person's parent or step-parent; or

(ii) where that person at the relevant date was a child, a young person or a student who had not completed his full-time education and had no parent or step-parent, to his guardian,

but only for a period of two years from the relevant date.

(6) In the case of a person to whom or for whose support payment referred to in this paragraph is made, any capital resource which derives from any payment of income or capital made under or deriving from any of the Trusts.

(7) For the purposes of sub-paragraphs (2) to (6), any reference to the Trusts shall be construed as including a reference to the Fund, the Eileen Trust, MFET Limited the Skipton Fund , the Caxton Foundation, and the London Bombings Relief Charitable Fund.

25. (1) Where an applicant has ceased to occupy what was formerly the dwelling occupied as the home following his estrangement or divorce from, or dissolution of his civil partnership with, his former partner, that dwelling for a period of 26 weeks from the date on which he ceased to occupy that dwelling or, where the dwelling is occupied as the home by the former partner who is a lone parent, for so long as it is so occupied.

(2) In this paragraph 'dwelling' includes any garage, garden and outbuildings, which were formerly occupied by the applicant as his home and any premises not so occupied which it is impracticable or unreasonable to sell separately, in particular, in Scotland, any croft land on which the dwelling is situated.

26. Any premises where the applicant is taking reasonable steps to dispose of those premises, for a period of 26 weeks from the date on which he first took such steps, or such longer period as is reasonable in the circumstances to enable him to dispose of those premises.

27. Any premises which the applicant intends to occupy as his home, and in respect of which he is taking steps to obtain possession and has sought legal advice, or has commenced legal proceedings, with a view to obtaining possession, for a period of 26 weeks from the date on which he first sought such advice or first commenced such proceedings whichever is the earlier, or such longer period as is reasonable in the circumstances to enable him to obtain possession and commence occupation of those premises.

28. Any premises which the applicant intends to occupy as his home to which essential repairs or alterations are required in order to render them fit for such occupation, for a period of 26 weeks from the date on which the applicant first takes steps to effect those repairs or alterations, or such longer period as is necessary to enable those repairs or alterations to be carried out.

29. Any payment made by the Secretary of State to compensate for the loss (in whole or in part) of

entitlement to housing benefit.

30. Not used

31. The value of the right to receive an occupational or personal pension.

32. The value of any funds held under a personal pension scheme

33. The value of the right to receive any rent except where the applicant has a reversionary interest in the property in respect of which rent is due.

34. Any payment in kind made by a charity or under or by the Trusts, the Fund, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006).

35. Any payment made pursuant to section 2 of the 1973 Act or section 2 of the Enterprise and New Towns (Scotland) Act 1990, but only for the period of 52 weeks beginning on the date of receipt of the payment.

36. Not used.

37. Any payment in consequence of a reduction of council tax under section 13 or, as the case may be, section 80 of the Local Government Finance Act 1992 (reduction of liability for council tax), but only for a period of 52 weeks from the date of the receipt of the payment.

38. Any grant made in accordance with a scheme made under section 129 of the Housing Act 1988 or section 66 of the Housing (Scotland) Act 1988 (schemes for payments to assist local housing authority and local authority tenants to obtain other accommodation) which is to be used–

(a) to purchase premises intended for occupation as his home; or

(b) to carry out repairs or alterations which are required to render premises fit for occupation as his home,

for a period of 26 weeks from the date on which he received such a grant or such longer period as is reasonable in the circumstances to enable the purchase, repairs or alterations to be completed and the applicant to commence occupation of those premises as his home.

39. Any arrears of supplementary pension which is disregarded under paragraph 53 of Schedule 4 (sums to be disregarded in the calculation of income other than earnings) or of any amount which is disregarded under paragraph 54 or 55 of that Schedule, but only for a period of 52 weeks from the date of receipt of the arrears.

40. (1) Any payment or repayment made–

(a) as respects England, under regulation 5, 6 or 12 of the National Health Service (Travel Expenses and Remission of Charges) Regulations 2003 (travelling expenses and health service supplies);

(b) as respects Wales, under regulation 5, 6 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Wales) Regulations 2007 (travelling expenses and health service supplies);

(c) as respects Scotland, under regulation 3, 5 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Scotland) (No. 2) Regulations 2003 (travelling expenses and health service supplies),

but only for a period of 52 weeks from the date of receipt of the payment or repayment.

(2) Any payment or repayment made by the Secretary of State for Health, the Scottish Ministers or the Welsh Ministers, which is analogous to a payment, or repayment mentioned in sub-paragraph (1), but only for a period of 52 weeks from the date of the receipt of the payment or repayment.

41. Any payment made to such persons entitled to receive benefits as may be determined by or

under a scheme made pursuant to section 13 of the Social Security Act 1988 in lieu of vouchers or similar arrangements in connection with the provision of those benefits (including payments made in place of healthy start vouchers, milk tokens or the supply of vitamins), but only for a period of 52 weeks from the date of receipt of the payment.

41A. Any payment made under Part 8A of the Act (entitlement to health in pregnancy grant).

42. Any payment made either by the Secretary of State for Justice or by Scottish Ministers under a scheme established to assist relatives and other persons to visit persons in custody, but only for a period of 52 weeks from the date of the receipt of the payment.

43. Any payment (other than a training allowance) made, whether by the Secretary of State or any other person, under the Disabled Persons (Employment) Act 1944 to assist disabled persons to obtain or retain employment despite their disability.

44. Not used

45. Any payment made by a local authority under section 3 of the Disabled Persons (Employment) Act 1958 to homeworkers assisted under the Blind Homeworkers' Scheme.

46. (1) Subject to sub-paragraph (2), where an applicant satisfies the conditions in section 131(3) and (6) of the Act (entitlement to alternative maximum council tax reduction), the whole of his capital.
(2) Where in addition to satisfying the conditions in section 131(3) and (6) of the Act the applicant also satisfies the conditions in section 131(4) and (5) of the Act (entitlement to the maximum council tax reduction), sub-paragraph (1) shall not have effect.

47. (1) Any sum of capital to which sub-paragraph (2) applies and
(a) which is administered on behalf of a person by the High Court or the County Court under Rule 21.11(1) of the Civil Procedure Rules 1998 (as amended by the Civil Procedure (Amendment No. 7) Rule 2013) or by the Court of Protection;
(b) which can only be disposed of by order or direction of any such court; or
(c) where the person concerned is under the age of 18, which can only be disposed of by order or direction prior to that person attaining age 18.
(2) This sub-paragraph applies to a sum of capital which is derived from;
(a) an award of damages for a personal injury to that person; or
(b) compensation for the death of one or both parents where the person concerned is under the age of 18.

48. Any sum of capital administered on behalf of a person in accordance with an order made under section 13 of the Children (Scotland) Act 1995, or under Rule 36.14 of the Ordinary Cause Rules 1993 or under Rule 128 of those Rules, where such sum derives from
(a) award of damages for a personal injury to that person; or
(b) compensation for the death of one or both parents where the person concerned is under the age of 18.

49. Any payment to the applicant as holder of the Victoria Cross or George Cross.

50. Not used

51. In the case of a person who is receiving, or who has received, assistance under the self-employment route, any sum of capital which is acquired by that person for the purpose of establishing or carrying on the commercial activity in respect of which such assistance is or was received but only for a period of 52 weeks from the date on which that sum was acquired.

52. (1) Any payment of a sports award for a period of 26 weeks from the date of receipt of that payment except to the extent that it has been made in respect of any one or more of the items

specified in sub-paragraph (2).

(2) The items specified for the purposes of sub-paragraph (1) are food, ordinary clothing or footwear, household fuel or rent of the applicant or, where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.

(3) For the purposes of sub-paragraph (2) 'food' does not include vitamins, minerals or other special dietary supplements intended to enhance the performance of the person in the sport in respect of which the award was made.

53. (1) Any payment;

(a) by way of an education maintenance allowance made pursuant to–

(i) regulations made under section 518 of the Education Act 1996;

(ii) regulations made under section 49 or 73(f) of the Education (Scotland) Act 1980;

(iii) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992;

(b) corresponding to such an education maintenance allowance, made pursuant to;

(i) section 14 or section 181 of the Education Act 2002 (power of Secretary of State and National Assembly for Wales to give financial assistance for purposes related to education or childcare, and allowances in respect of education or training); or

(ii) regulations made under section 181 of that Act ;

or in England, by way of financial assistance made pursuant to section 14 of the Education Act 2002.

(2) Any payment, other than a payment to which sub-paragraph (1) applies, made pursuant to;

(a) regulations made under section 518 of the Education Act 1996;

(b) regulations made under section 49 of the Education (Scotland) Act 1980; or

(c) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992,

in respect of a course of study attended by a child or a young person or a person who is in receipt of an education maintenance allowance or other payment made pursuant to any provision specified in sub-paragraph (1).

53A.-53B. Not used

54. In the case of an applicant participating in an employment zone programme, any discretionary payment made by an employment zone contractor to the applicant, being a fee, grant, loan or otherwise, but only for the period of 52 weeks from the date of receipt of the payment.

55. Any arrears of subsistence allowance paid as a lump sum but only for the period of 52 weeks from the date of receipt of the payment.

56. Where an ex-gratia payment of £10,000 has been made by the Secretary of State on or after 1st February 2001 in consequence of the imprisonment or interment of–

(a) the applicant;

(b) the applicant's partner;

(c) the applicant's deceased spouse or deceased civil partner; or

(d) the applicant's partner's deceased spouse or deceased civil partner,

by the Japanese during the Second World War, £10,000.

57. (1) Subject to sub-paragraph (2), the amount of any trust payment made to an applicant or a member of an applicant's family who is

(a) a diagnosed person;

(b) the diagnosed person's partner or the person who was the diagnosed person's partner at the date of the diagnosed person's death;

(c) a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death; or

(d) a member of the diagnosed person's family (other than his partner) or a person who was a member of the diagnosed person's family (other than his partner) at the date of the diagnosed person's death.

(2) Where a trust payment is made to;

(a) a person referred to in sub-paragraph (1)(a) or (b), that sub-paragraph shall apply for the period beginning on the date on which the trust payment is made and ending on the date on which that person dies;

(b) a person referred to in sub-paragraph (1)(c), that sub-paragraph shall apply for the period beginning on the date on which the trust payment is made and ending two years after that date;

(c) a person referred to in sub-paragraph (1)(d), that sub-paragraph shall apply for the period beginning on the date on which the trust payment is made and ending–

(i) two years after that date; or

(ii) on the day before the day on which that person–

(aa) ceases receiving full-time education; or

(bb) attains the age of 20,

whichever is the latest.

(3) Subject to sub-paragraph (4), the amount of any payment by a person to whom a trust payment has been made or of any payment out of the estate of a person to whom a trust payment has been made, which is made to an applicant or a member of an applicant's family who is–

(a) the diagnosed person's partner or the person who was the diagnosed person's partner at the date of the diagnosed person's death;

(b) a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death; or

(c) a member of the diagnosed person's family (other than his partner) or a person who was a member of the diagnosed person's family (other than his partner) at the date of the diagnosed person's death,

but only to the extent that such payments do not exceed the total amount of any trust payments made to that person.

(4) Where a payment as referred to in sub-paragraph (3) is made to–

(a) a person referred to in sub-paragraph (3)(a), that sub-paragraph shall apply for the period beginning on the date on which that payment is made and ending on the date on which that person dies;

(b) a person referred to in sub-paragraph (3)(b), that sub-paragraph shall apply for the period beginning on the date on which that payment is made and ending two years after that date; or

(c) person referred to in sub-paragraph (3)(c), that sub-paragraph shall apply for the period beginning on the date on which that payment is made and ending–

(i) two years after that date; or

(ii) on the day before the day on which that person

(aa) ceases receiving full-time education; or

(bb) attains the age of 20,

whichever is the latest.

(5) In this paragraph, a reference to a person–

(a) being the diagnosed person's partner;

(b) being a member of a diagnosed person's family;

(c) acting in place of the diagnosed person's parents,

at the date of the diagnosed person's death shall include a person who would have been such a person or a person who would have been so acting, but for the diagnosed person residing in a care home, an Abbeyfield Home or an independent hospital on that date.

(6) In this paragraph– 'diagnosed person' means a person who has been diagnosed as suffering from, or who, after his death, has been diagnosed as having suffered from, variant Creutzfeld- Jakob disease;
'relevant trust' means a trust established out of funds provided by the Secretary of State in respect of persons who suffered, or who are suffering, from variant Creutzfeld-Jakob disease for the benefit of persons eligible for payments in accordance with its provisions;
'trust payment' means a payment under a relevant trust.

58. The amount of any payment, other than a war pension, to compensate for the fact that the applicant, the applicant's partner, the applicant's deceased spouse or deceased civil partner or the applicant's partner's deceased spouse or deceased civil partner
(a) was a slave labourer or a forced labourer;
(b) had suffered property loss or had suffered personal injury; or
(c) was a parent of a child who had died,
during the Second World War.

58 (1) Any payment made by a local authority, or by the Welsh Ministers, to or on behalf of the applicant or his partner relating to a service, which is provided to develop or sustain the capacity of the applicant or his partner to live independently in his accommodation.

(2) For the purposes of sub-paragraph (1) 'local authority' includes in England a county council.

60. Any payment made under regulations made under section 57 of the Health and Social Care Act 2001 or under section 12B of the Social Work (Scotland) Act 1968, or under section 12A to 12D of the National Health Service Act 2006 (direct payments for health care)**.**

61. Any payment made to the applicant pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002.

62. Any payment made to the applicant in accordance with regulations made pursuant to section 14F of the Children Act 1989 (special guardianship support services).

63. Any payments to a claimant made under section 49 of the Children and Families Act 2014 (personal budgets and direct payments)

64. Any payments made by the London Emergencies Trust" means the company of that name (number 09928465) incorporated on 23rd December 2015 and the registered charity of that name (number 1172307) established on 28th March 2017 or the We Love Manchester Emergency Fund" means the registered charity of that name (number 1173260) established on 30th May 2017

65. Any bereavement support payment in respect of the rate set out in regulation 3(2) or (5) of the Bereavement Support Payment Regulations 2017.

66. Any payment made under the Energy Rebate Scheme 2022 is to be disregarded in determining:
(a)an applicant's entitlement to a reduction under the scheme; or
(b)the amount of any reduction to which the applicant is entitled.
"The Energy Rebate Scheme 2022" means the scheme to provide financial support in respect of energy bills which was announced in Parliament by the Chancellor of the Exchequer on 3rd February 2022

CABINET
FEBRUARY 7 2023

PAY POLICY

Cabinet Member(s): Cllr Bob Deed
Responsible Officers: Matthew Page, Corporate Manager for People, Governance and Waste
James Hamblin, Operations Manager Human Resources

Reason for Report: To comply with the legislative requirements of the Localism Act 2011 relating to senior pay in particular the role of the Chief Executive, Directors and other senior officers. The Localism Act 2011 requires an annually published Pay Policy which has been adopted by the full Council.

Recommendation: The Cabinet is asked to recommend to Council the Pay Policy 2023.

Financial Implications: None arising from this report which aims to ensure that the Council pays enough to recruit and retain senior staff, but avoids excessive pay levels.

Budget and Policy Framework: This policy sits within the current budget and policy framework.

Legal Implications: None directly arising from this report. The Head of Paid Services (Chief Executive) is required by Article 14 of the Constitution to keep under review the number, grade and organisation of officers, as well as the manner in which the Council's functions is coordinated and discharged. Further, the overall developmental and management structure, as well as the deployment of officers, is to be published.

Risk Assessment: The risk to the Council of not complying with the legislative requirement is mitigated by this report and having a robust performance management system.

Equality Impact Assessment: Equality of pay is a legal requirement and while no specific issues arise from this report, it should be noted that the pay policy contains the annual gender pay gap reporting (as required by law).

Relationship to Corporate Plan: To have a robust Pay Policy which ensures good use of public money in respect of the salaries of the most senior employees of the Council that is both transparent and visible. To ensure the Council is able to recruit and retain staff of a sufficiently high calibre who are able to deliver the objectives of the Corporate Plan.

Impact on Climate Change: No climate change issues highlighted in this report.

1.0 Introduction/Background

1.1 The localism bill required that all local authorities publish a Pay Policy on an annual basis. The Policy should be agreed by a meeting of the Council and be published on the Council's website.

1.2 The purpose of having a Pay Policy is so that the pay and related awards structure of the Council are transparent. The Pay Policy is detailed in Appendix 1.

1.3 At the present time, the Chief Executive is appraised on an annual basis by a group of Members as set out in the Constitution. The Leader consults a review panel which includes the Deputy Leader, the Chairman and Chair of Scrutiny on the objectives to be set and these are agreed with the Chief Executive.

1.4 Cabinet and Leadership Team meet on a monthly basis to monitor progress within each service area. Cabinet members can raise issues with the Chief Executive and Directors on performance in any area of the Council.

1.5 In discussion with the Cabinet Member for the Working Environment and Support Services, a commitment was given last year to regularly review the content of the Pay Supplement Policy. It is attached in Appendix 2 for information.

1.6 In addition, we have also attached a scheme of delegation as required by law to agree potential settlement agreements should a situation arise where they be seen as necessary.

1.7 The Cost of Living rise agreed between the LGA and the Unions gave each employee a rise of £1, 925 regardless of their role or grade. This was awarded at the start of November and was paid on the 22 November 2022.

1.8 This increase has resulted in the annual mean pay of all employees increasing from £25, 415 in 21/22 to £27, 724 in 22/23. It has also resulted in the pay multiple of the Chief Executive for 22/23 to both the mean salary in the Council and the lowest paid FTE employee decreasing from 21/22.

1.8 The pay talks for the 23/24 cost of living rise are due to commence in early February 2023 and so a settlement could be achieved a lot earlier than usual which would be beneficial for both the recruitment and retention of staff. I will keep members updated on the progress of these negotiations.

2.0 Recommendation/Action

2.1 The Council is asked to note and approve the attached Pay Policy and its contents regarding the establishment and its pay.

Contact for more Information: Matthew Page, Corporate Manager for People, Governance and Waste, James Hamblin, Operations Manager Human Resources, Cllr Bob Deed Leader of the Council

Circulation of the Report: Cabinet Member seen and approved yes – Cllr Bob Deed, Cabinet, Leadership Team seen and approved yes

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Human Resources Policy

Version Control Sheet

Title: Pay Policy 2022

Reference No: **HR/**

Purpose: The Localism Act requires that all local authorities publish a Pay Policy on an annual basis. The Policy should be agreed by a meeting of Council and be published on the Council's website.

The purpose of having a Pay Policy is so that the pay and related rewards structure of the Council is transparent.

Owner: **Corporate Manager for People, Governance and Waste**
mpage@middevon.gov.uk

Date: Feb 2023
Version Number: 7

Status: **Final**

Review Frequency: **Every year**

Next review date: **February 2024 to be published by March 2024**

Pay Policy

1. INTRODUCTION

Local authorities must publish a pay policy statement for each financial year. This must be approved by a Council resolution before 31 March each year. The Act specifies a number of elements that must be covered by the statement including: the level and elements of remuneration for each chief officer, remuneration of chief officers on recruitment, increases and additions to remuneration for each chief officer, the use of performance-related pay for chief officers, the use of bonuses for chief officers, the approach to the payment of chief officers on their ceasing to hold office under or to be employed by the authority, and the publication of and access to information relating to remuneration of chief officers.

The specific part of the Localism Act 2011 relating to a pay policy is Section 38 (1). Pay is an emotive issue for staff, Councillors and also for the public at large. Transparency in what and how we pay our senior staff particularly, but also all Council employees is of paramount importance.

A pay policy statement will be updated and taken to full Council each year in February, in this way a clear view of the salaries and benefits paid to the most senior staff at the Council can be tracked.

2. REFERENCES

Equal Pay Act 1970
Equality Act 2010
Localism Act 2011

3. SCOPE

This policy applies to:-

- Chief Executive Officer including Head of Paid Service responsibilities
- Directors, Corporate Managers and Operations Managers/Strategic Managers including Monitoring Officer responsibilities and Section 151 Officer responsibilities

4. POLICY

Clarity in the provision of pay and other benefits is essential to ensure that the Council can attract and retain good calibre employees at all levels but particularly at the most senior level.

In the context of managing scarce public resources, remuneration at all levels within the Council needs to be adequate to secure and retain high-quality

employees dedicated to the service of the public, but at the same time needs to avoid being unnecessarily generous or otherwise excessive.

This pay policy statement applies specifically to chief officers (a term which includes both statutory and non-statutory chief officers which for the purposes of this policy are the Directors, Corporate Management Team, Monitoring Officer) and addresses the legal requirement to set out how the policy for agreement of chief officer remuneration differs to that of other Council employees. For the purposes of this statement this includes:

- **Chief Executive Officer (Head of Paid Service)**
- **Deputy Chief Executive (151)**
- **Director of Corporate Affairs & Business Transformation**
- **Director Of Place**
- **District Solicitor & Monitoring Officer**
- **Corporate Management Team**
- **Operations Manager/Strategic Manager**

The definition of chief officers (as set out in section 43(2) of the Localism Act 2011) is not limited to Directors, Heads of Paid Service or statutory chief officers. It also includes those who are their direct reports (who may or might not be statutory chief officers and those who report directly to non-statutory chief officers (deputy chief officers)).

The metric used for pay dispersion is the multiple of Chief Executive to mean earnings. Tracking this multiple will ensure public service organisations are accountable for the relationship between the pay of their executives and the wider workforce. Through this pay policy statement Mid Devon will track this multiple annually. **(This is shown as Officer Remuneration in the accounts).** This will include;

- the level and elements of remuneration for each chief officer
- the remuneration of the lowest paid employees
- the relationship between the remuneration of its chief officers and other officers
- other specific aspects of chief officer remuneration.

In respect of Officer Remuneration Note in the accounts: It should be noted that this information will relate to the previous year as shown in the annual accounts. This will include;

- Salary, fees and allowances
- Bonuses
- Expenses allowance

- Compensation for loss of employment
- Employers pension contribution
- Any other emoluments

Pay multiple
This is calculated by comparing all taxable earnings for the given year (including base salary, variable pay, bonuses, allowances and the cash value of benefits in kind) for the Chief Executive compared to mean earnings and the lowest paid in the organisation.

Specific Policy Areas
The National Joint Negotiating Committee has previously emphasised that 'it is good governance that local authorities can demonstrate that decisions on pay and reward packages for Chief Executives and chief officers have been made in an open and accountable way.'

The Leader of the Council may recommend to Full Council changes to the remuneration package following an annual review. Any structural changes to the remuneration packages of the Chief Executive or Directors will be subject to Full Council approval.

Salary increases in relation to cost of living will be made in line with National Joint Council recommendations.

The cost of living increase does not apply automatically to the Chief Executive and the Director roles as of 1st April each year. Any increase given to them will take into account the national pay award and will be agreed by the Leader of the Council, having sought the views of the Cabinet, and will be based on performance. The annual assessment/pay award for the Chief Executive and Directors is implemented from 1st July each year in order to allow for reflection on the previous year's performance (salary increases for all other employees continue to take effect from 1st April each year).

The use of market supplements may be applied in certain circumstances but at present are not considered necessary for any senior role.

At present, there are no additional payments made to senior officers which specifically relate to performance such as performance bonuses; neither is there an element of pay which can be enhanced for performance, other than those already mentioned in respect of the Chief Executive and Director roles. Performance issues will be dealt with through the achievement of agreed objectives and appraisal review process.

Any termination payments to chief officers on ceasing office will comply with Mid Devon District Council's Redundancy Policy and no additional payments will be made without the express approval of Full Council.

Through this policy the pay multiple of the Chief Executive will be monitored annually. Should the multiplier between the annual salary paid to a full time employee on the lowest spinal column point and the annual salary paid to the Chief Executive be greater than 10, this will be reported by the Leader of the Council to Full Council for consideration.

Our support for apprenticeships, which may be considered a temporary employment, will not be used to skew the pay multiple metric and will therefore be excluded from the calculation. In order to ensure complete transparency however we have also included the salary of apprentices.

There are no arrangements currently in place for tax and national insurance payments to be paid other than through the normal channels, i.e. through the normal PAYE route for all officers of the Council.

5. PAYMENT OF RETURNING OFFICER

Additional payments are set and made by Central Government to officers carrying out additional duties at elections. These payments will only be received when elections take place and although fixed, do vary according to the type of election for which the payment is made. These payments are not within the scope of this policy.

6. OUTCOMES

In having this policy Mid Devon District Council will ensure that the process for setting pay at a senior level is transparent. This policy will be reviewed annually to track the relationship of chief officer pay with the rest of the workforce.

7. PERFORMANCE MONITORING

Annual monitoring of this policy will take place in February. Monitoring of the Chief Executive's performance takes place through an annual appraisal process. This is supplemented by mid-year reviews.

8. POLICY/STRATEGY CONSULTATION

This policy will be agreed with the Council's Leadership Team, Cabinet and Full Council.

9. EQUALITY IMPACT CONSIDERATIONS

The principles of equal pay are integral to this policy. 'Equal work' is defined as:

- Like work where the woman and the man are doing the same job or
- Work rated as equivalent where the 2 jobs are different but have been evaluated by the employer's job evaluation scheme (JES) at the same level/grade or
- Work of equal value where the jobs are again different but an argument is made that both jobs should be regarded as being of equal value or worth.

10. RESPONSIBILITIES

The Corporate Manager for People, Governance and Waste will be responsible for this policy and for updating information on an annual basis.

11. RECORDS

Documents and records generated as a result of the application of this policy will be held electronically and retained as legally required.

All records will be maintained and processed in compliance with the Data Protection Act.

12. DOCUMENT HISTORY

Date	Version	Update
10/02/2017	1	Pay Policy
05/04/2018	2	Pay Policy
07/02/2019	3	Pay Policy
13/02/2020	4	Pay Policy
Feb 2021	5	Pay Policy
Feb 2022	6	Pay Policy
Feb 2023	7	Pay Policy

1. The level of remuneration for all officers earning over £50,000 is shown below:

Post Title	Remuneration	
	2022/23	2021/22
Chief Executive	£118,549	£116,624
Deputy Chief Executive (S151)	£87,027	£85,102
Director of Corporate Affairs and Business Transformation	£85,358	£83,433
Director of Place	£85,358	£83,433
District Solicitor and Monitoring Officer	Grade P £68,687 to £72,773	Grade P £66,672 to £70,848
Corporate Manager Public Health, Regulation & Housing	Grade N £58,904 to £62,392	Grade N £56,979 to £60,467
Corporate Manager People, Governance & Waste	Grade N £58,904 to £62,392	Grade N £56,979 to £60,467
Corporate Manager Digital Transformation & Customer Engagement	Grade N £58,904 to £62,392	Grade N £56,979 to £60,467
Corporate Manager Property, Leisure & Climate Change	Grade N £58,904 to £62,392	Grade N £56,979 to £60,467
Corporate Manager Income, Benefits & Recovery	Grade N £58,904 to £62,392	Grade N £56,979 to £60,467
Corporate Manager Financial Services	Grade N £58,904 to £62,392	Grade N £56,979 to £60,467
Operations Manager Property Services (From 14/12/2022)	Grade L £50,579 to £53,534	
Operations Manager StreetScene and Open Spaces	Grade L £50,579 to £53,534	Grade L £48,654 to £51,609
Operations Manager Housing Services	Grade L £50,579 to £53,534	Grade L £48,654 to £51,609

Post Title	Remuneration	
Operations Manager Human Resources (From 01/05/2022)	Grade L £50,579 to £53,534	
Operations Manager Performance & Governance (From 10/10/2022)	Grade L £50,579 to £53,534	
Operations Manager Revenues Benefits & Recovery	Grade L £50,579 to £53,534	Grade L £48,654 to £51,609
Operations Manager Building Services	Grade L £50,579 to £53,534	Grade L £48,654 to £51,609
Operations Manager ICT Services	Grade L £50,579 to £53,534	Grade L £48,654 to £51,609
Operations Manager Public Health	Grade L £50,579 to £53,534	Grade L £48,654 to £51,609
Operations Manager Leisure Services	Grade L £50,579 to £53,534	Grade L £48,654 to £51,609
Strategic Manager Growth, Economy & Delivery	Grade L £50,579 to £53,534	Grade L £48,654 to £51,609

2. The full time remuneration of the lowest paid employee.

Post Title	Remuneration		Other Allowances	
	2022/23	2021/22	2022/23	2021/22
Recreation Assistant (FOH)	£21,575	£18,562	None	None
Apprentice	£16,206	£14,277	None	None

The lowest paid employees in the 21/22 tax year were the Recreation assistants in the Leisure Service. During the 22/23 tax year, these roles have been re-evaluated and are now graded the same as a refuse loader.

The apprentice rate has been uplifted to £8.40 per hour for the 2022/23 tax year.

3. The multiplier of the remuneration of the Chief Executive based upon taxable earnings.

Category	Total Remuneration	
	2022/23	2021/22
Pay multiple of Chief Executive to Mean	4.28	4.35
Pay multiple of Chief executive to lowest paid FT employee	5.49 (based on Recreation Assistant) 7.32 (based on apprentice rate)	6.19 (based on Recreation Assistant) 8.05(based on apprentice rate)
Annual Mean Pay of all employees (Total Salaries/Number of contracts)	£27,724	£25,415

Officer Remuneration Note in Accounts

Publication of Officers Remuneration
We are required to publish the following information in respect of officer remunerations:

a) The number of employees whose remuneration in the year was greater or equal to £50,000, grouped in rising bands of £5,000.

b) An analysis by job title of the remuneration and employer's pension contributions in respect of senior employees whose salary is £50,000 or more per year (or by name and job title where the salary is £150,000 per year)

4. Officers' Emoluments

This table includes all statutory and non-statutory posts whose overall remuneration exceeds £50k excluding pension contributions and non-taxable allowances as published in MDDC Statement of Accounts - Draft (Pre Audit) 21-22 (middevon.gov.uk)

	2021/22		2020/21	
Remuneration Band	**Number of Employees**	**Left During Year**	**Number of Employees**	**Left During Year**
£50,000 - £54,999	**5**	**0**	**3**	**0**
£55,000 - £59,999	**2**	**0**	**4**	**0**
£60,000 - £64,999	**4**	**0**	**1**	**1**
£65,000 - £69,999	**0**	**0**	**2**	**0**
£70,000 - £74,999	**0**	**0**	**0**	**0**
£75,000 - £79,999	**0**	**0**	**0**	**0**
£80,000 - £84,999	**2**	**0**	**3**	**1**
£85,000 - £89,999	**0**	**0**	**0**	**0**
£95,000 - £99,999	**0**	**0**	**0**	**0**
£100,000 - £104,999	**0**	**0**	**0**	**0**
£105,000 - £109,999	**0**	**0**	**0**	**0**
£110,000 - £114,999	**0**	**0**	**1**	**0**
£115,000 - £119,999	**1**	**0**	**0**	**0**

The above table includes two employees who received a termination payment in 2021/22. These employees are included in the Termination Benefit note. Nine employees in the above table are not Senior Officers so have not been included in the Senior Officers table, all other employees are included.

In completing the 2021/22 Accounts we have complied with the statutory instrument regarding officer emoluments. The statutory instrument requires the individual naming of any Officers with an annual salary of £150,000 or more and the post title of any officers earning £50,000 or more who occupy statutory roles or are responsible for managing the strategic direction of services.

The Council had no officers earning at or in excess of £150,000 in 2021/22.

5 Termination Benefits

2021/22	Number of	Number of	Total number	Total cost of

Exit Package Cost Band	Compulsory redundancies	Other Departures Agreed	Of exit Packages by Cost band	Exit packages in each band £'000
£0 - £19,999	2	9	11	65
£20,000-£39,000	-	0	0	0
£40,000-£59,999	0	0	0	0
£60,000-£79,999	0	0	0	0
Total	**2**	**9**	**11**	**65**

During 2021/22 a number of settlement agreements were made. These were associated with service restructures and changes in order to reduce future employee costs. This helps match ongoing expenditure against the well documented cuts in Central Government funding.

6 Gender Pay Gap

6.1 Pay quartiles by gender

The Mid Devon District Council figures set out below have been calculated using the standard methodologies used in the Equality Act 2010 (Gender Pay Gap Information) Regulations 2017.

Under the law, men and women must receive equal pay for:

- the same or broadly similar work;
- work rated as equivalent under a job evaluation scheme; or
- work of equal value.

Quartile	Males	Females	Description
1	60%	40%	Includes all employees whose standard hourly rate places them at or below the lower quartile
2	36%	64%	Includes all employees whose standard hourly rate places them above the lower quartile but at or below the median
3	44%	56%	Includes all employees whose standard hourly rate places them above the median but at or below the upper quartile
4	46%	54%	Includes all employees whose standard hourly rate places them above the upper quartile

6.2 Mid Devon District Council's Gender Pay Gap

	Mean Average Hourly Rate	Median Average Hourly Rate
Male	£14.38	£12.92
Female	£14.36	£12.92

HMRC % gap	**0.139082%**	**0%**

The mean gender pay gap for the whole economy (according to the October 2022 Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE) figures) is 15.4%; at 0.139082% Mid Devon District Council's mean gender pay gap is, therefore, significantly lower than that for the whole economy.

PAY SUPPLEMENT POLICY

1. INTRODUCTION

This Policy contains the agreed approach to be taken in the application, monitoring and review of pay supplements within Mid Devon District Council.

Pay supplements incorporate mechanisms for managing recruitment, retention and market related issues by temporarily increasing the total pay awarded to a post (without altering the job evaluation determined grade for that post) when it can be shown that the salary range attached to the grade is significantly lower than those offered by a competitor and therefore it impacts adversely on the ability to recruit or retain staff. They also cover methods of recognition and reward.

During times of specific upheaval and change, it may be necessary to secure the delivery of key services and moreover, to retain a particular skill set within the authority using retention payments, market supplements, acting up payments and honorarium.

The objectives of this Policy are:-

- To recruit the best possible staff for each post and enable the Council to mitigate against any adverse impact on its ability to compete in the local labour market by looking at pay supplement payments

- To facilitate flexibility to resource the Council whilst ensuring compliance with equal pay legislation, achieving transparency and adopting best practice.

- To secure the consistent delivery of key services to the public that may be at risk by giving the ability to retain key post holders.

- To manage the usage of pay supplements responsibly with an aim to ensure that it does not create excessive or unnecessary pay disharmony.

This policy will be attached to the annual Pay Policy which is a statutory submission each year to be approved by both the Cabinet and Full Council.

2. SCOPE

This Policy applies to all Mid Devon District Council employees. Supplements are only considered where all reasonable methods to improve recruitment or

retention have been exhausted, and / or there is considerable risk to service delivery. Pay supplements will always be considered against the needs of the specific role as opposed to the post holder.

3. MARKET SUPPLEMENTS

A market supplement payment is paid in addition to basic salary for a specific individual post or cluster of identical posts. It may be paid where a post has been identified as 'hard to fill' and the Council is prevented from being able to recruit and/or retain existing staff on the salary determined by the Council's job evaluation scheme.

Payment will be:

- used in exceptional circumstances only
- mindful of any equal pay/value considerations, in order to avoid/minimise the potential for challenge on this point
- made as a clearly identified supplement with properly documented supporting reasons, for the amount of payment
- time limited in its application ie the guaranteed period will be up to a maximum of 12 months
- subject to regular monitoring and review
- pensionable
- applicable to all individuals appointed to the post

Any case for the payment of a market supplement must be properly justified, with supporting evidence from the following range of criteria:

- Evidence of a difficulty to recruit or pay related retention difficulties, together with market pay data
- Turnover rates
- Market based salary comparisons with competing local/regional/national employers (both public and private sector)
- Evidence that other retention initiatives have been explored/exhausted (e.g. learning and development opportunities, promoting non-pay benefits)
- Assessment of the impact of a failure to maintain adequate staffing levels in order to ensure service delivery requirements are met
- Consideration of the impact on other existing staff within the defined job group
- Robust budget impact assessment

In addition to the criteria above, account should be taken of the wider employment context applicable to the occupational group and whether the payment of the market supplement will address the particular issues underlying the retention difficulties, or whether alternative/additional actions are required.

For example:

- Are the difficulties an indicator of other issues of concern within the service/occupational group, which can be more appropriately resolved by other management action and/or non-pay measures?
- Is there a regional/national shortage for which new/alternative training schemes would be a more appropriate solution?
- Are there more appropriate ways of resourcing/delivering the service rather than through an in house workforce?

The amount of the market supplement will not be greater than 15% of the top of the salary range for the post.

Market supplements, and the conditions applicable to them, shall be clearly set out and separately identified in any job advertisement and offer/appointment letter.

Market supplement reviews will be undertaken in the following circumstances:

- At least three months prior to the end of the guaranteed period, Human Resources will instruct the Line Manager to commence the review of the market place related to that post and present the findings to the Pay and Grading Group no later than six weeks prior to the end of the guaranteed period.
- If a review indicates that the market supplement is no longer justified, it will be withdrawn. Employees will receive a minimum of one months' notice if the market supplement is being withdrawn and the reasons for this decision.
- Failure to present the findings of the review to the pay and grading group within six weeks of the end of the Guarantee Period will result in the withdrawal of the pay supplement with 1 months' notice.

4. RETENTION PAYMENTS

Deferred retention payments are paid after an agreed period of employment has been completed, and will only be authorised on the basis of the provision of robust evidence amounting to a material factor (suitable for defending any potential equal pay claims). The following evidence will be required as a minimum:

- defined skills or knowledge of an individual not available elsewhere within the authority which are deemed essential to service delivery, or other equitable material differential
- a written offer of employment with another employer, including details of the terms and conditions being offered
- reasons for leaving are clearly related to remuneration / job security, and not other factors such as dissatisfaction with role, manager, team or organisation
- evidence that other measures have been explored, together with the impact on the team.

Payments may be made at the end of a given period, or staggered throughout the specified period of retention.

Requests can only be brought by management, and will have to satisfy the Pay and Grading Group that there is not an Equal Pay issue. A clear business case detailing the significant impact on service delivery will be required for submission to the Pay and Grading Group following authorisation by Director or the Chief Executive.

Managers will also need to include information in their business case as to why a retention payment is more applicable than a market supplement before any payment can be approved.

Retention payments will be subject to the appropriate contractual conditions being met, e.g. remaining within the Council's employment for a specified period and/or the completion of specific tasks. Individuals will be required to sign an agreement to this effect.

The amount of a deferred retention payment will not be greater than 10% of substantive salary.

These payments will made in addition to the individual's normal salary but will be subject to the normal income deductions in respect of tax and National Insurance. They are not pensionable.

If a deferred payment is made in stages and not at the end of the period and an individual leaves the Council within the agreed period of operation of the payment, the individual will be required to pay back all monies received under the scheme, except in the circumstances set out in below.

If an individual leaves the Council because of illness, injury, disability or redundancy, the member of staff will not be required to refund payment

During the specified period when a retention payment is being made a Manager will be required to manage the risk of the employee leaving by undertaking the necessary measures such as ensuring the employee shares their knowledge with other colleagues and/or undertaking recruitment to the role.

If a retention payment is being proposed that relates to a Director then the CEO, the Leader of the Council, the relevant Cabinet Member and the Corporate Manager with responsibility for People will need to agree and sign off any proposal. This will then be sent to SW Councils for independent evaluation and ratification.

If a retention payment is being proposed that relates to the CEO, then the Leader of the Council, the relevant Cabinet Member, Chairman and the Corporate Manager with responsibility for People will need to agree and sign off any proposal. This will then be sent to SW Councils for independent evaluation and ratification.

Payments, their structure (e.g. payment before or after the retention period) and the criteria are subject to the needs of the authority. Therefore discretion can be

exercised by the relevant service director, such as proposing payments, in limited scenarios (e.g. the risk faced by the Council in not acting) whereby not all criteria are met.

6. INCREMENTAL PROGRESSION

The Council's financial rules provide Operational Managers and above with delegated powers to place an individual on the spinal column point of their choosing, provided it is within the evaluated grade for the post, and follows satisfactory performance.

In support of this delegated authority, and in order to ensure that equal pay is maintained the determination of an individual spinal column point either at the commencement of employment in the job role or at any other time will be based on objective material factor criteria as follows:-

- Possession of skills, knowledge, experience or qualifications beyond those which are essential to the job which will enhance performance in the role
- Demonstrable accelerated growth in the role beyond that expected (attainment of skills/knowledge/experience).
- An alternative to a retention payment or market supplement where the criteria for such payments is met.

In the event that an employee has not met their performance targets in line with their annual appraisal or has not been working to the required standard of work they will not be awarded a pay increase, and this will be reviewed again in the following year.

For appointments effective between 1 October and 31 March inclusive, the next increment will be six months after the effective date and then 1 April thereafter.

Subsequent increments are achieved when there has been a demonstration of high performance against the expectations of the role. Any incremental pay progression will be awarded to employees once this has been evidenced through the annual pay review.

The annual performance review is an opportunity for managers and their staff to review performance throughout the year and make a judgement as to whether a pay increase will be awarded. If a pay increase is not awarded then the manager will be required to give specific details about any performance shortfalls, and provide the employee with specific targets and support. In certain circumstances where an informal process has not reached a solution this may proceed to a capability process.

Any incremental pay increases will be payable on 1 April. Pay increases will no longer be awarded once the employee has reached the top of the pay scale for their role.

7. HONORARIUM PAYMENTS

An honorarium payment may be made to an employee who is undertaking duties of a higher level than those for which they are graded. This can be related to:

- covering a vacancy
- covering an ongoing absence within the department (such as long term sickness, but not annual leave)
- undertaking work on an ongoing basis which is over and above that expected for the grade of the post
- *a special project/activity – work outside normal scope of duties*

Any honorarium paid should not only be for a justifiable reason, but also clearly calculated. The payment, which is pensionable, should be calculated as follows:-

Extra responsibilities for between 6-8 weeks
For the first 6-8 weeks this is considered as a development opportunity offered without payment. As with any request for a staff member to take on extra responsibilities the extent of the duties will need to be clearly confirmed, and the member of the staff has the right to decline the opportunity. It is crucial that this aspect is confirmed in advance of any extra responsibilities being proposed.

Extra responsibilities for over 8 weeks
Any staff who have responsibilities longer than 8 weeks should receive an acting up allowance to the equivalent of 10% of their current salary if it is work at their grade. If duties are belonging to a role of a higher grade the staff member will receive 10% of the salary of the role being covered.

*Payments being awarded in respect to the above should be for no longer than 12 months as per the CMT principle adopted in 2020.

Extra responsibilities for a period longer than 12 months
If there is a requirement for additional duties to be taken for a period longer than 12 months then a formal evaluation of the staff members role will need to be considered which may lead to a formal restructure within the department.

In accordance with the Council's financial rules, the Line Manager must obtain approval prior to the confirmation of any honorarium by making a request using the Honorarium Payment Approval Form, which must be completed and signed off by themselves and the Operational Manager/Director. This should then be forwarded to Human Resources. Staff are not able to put themselves forward for an honorarium.

8. PROCESS FOR APPROVAL

In order to maintain the integrity of our Job Evaluation scheme, requests for market supplements, retention payments, and honoraria are all subject to additional approval by the Pay and Grading Group. Any such requests will be

submitted for consideration at the next available meeting of the Pay and Grading Group following receipt of the authorised request.

All requests must be made on the appropriate application form and all supporting documentation must be attached. Business cases which propose market supplements, retention payments and honorariums must be robust in order to provide a defence against an equal pay claim.

9. RESPONSIBILITIES

Managers are responsible for making the business case, including carrying out any research, completing the necessary application form and obtaining the necessary level of authorisation prior to submitting the request to Human Resources.

Managers are responsible for ensuring that any proposals in respect of incremental progression and honoraria can be met from their own budget. There will be a central budget for market supplement/retention payments, which will be controlled by Human Resources.

The Pay and Grading Group are responsible for approving market supplements, retention payments and honoraria.

Human Resources will ensure that all the necessary paperwork and information has been submitted, provide the check and balance arrangements in respect of that supporting evidence, ensure that any payments are supported with an objective justification, and will specifically be responsible for identifying reasons for leaving upon receipt of requests for retention payments. Human Resources will review this policy annually to ensure continued relevance.

Human Resources will be responsible for providing an annual summary of:

- the number of applications under each strand of this Policy
- the number of applications approved under this Policy
- the breakdown of applications approved by gender

to the Pay and Grading Group. Data monitoring the application of incremental progression will be reported to each Pay and Grading Group meeting, and annually to the Corporate Negotiation and Joint Consultative Committee.

10. RECORDS

Documents and records generated as a result of the application of this policy will be retained permanently on the individuals personnel file.

Records of will be held permanently on the Council's HR and Payroll information systems.

All records will be maintained and processed in compliance with the Data Protection Act.

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Appendix 3 – Scheme of Delegation

Special Severance Payments

In line with guidance published by the Department for Levelling Up, Housing & Communities, Mid Devon District Council has the following approval process for payments deemed 'Special Severance Payments'.

Monetary Amount	**Approval By**
> £100,000	Approved by a vote of full council, as set out in the Localism Act 2011
> £20,000 but < £100,000	Must be personally approved and signed off by the Head of Paid Service, with a clear record of the Leader's approval and that of any others who have signed off the payment
< £20,000	Must be approved according to the local authority's scheme of delegation. It is expected that local authorities should publish their policy and process for approving these payments

At MDDC our local scheme of delegation for Special Severance Payments requires approval and sign off by our Head of Paid Service and S151 Officer, with advice sought from the Monitoring Officer where appropriate.

Where the proposed payment is to the Head of Paid Service (Chief Executive), to avoid a conflict of interest it is expected that the payment should be approved by a panel including at least two independent persons.

As part of their duties, an authority's s151 Officer, and where appropriate, the Monitoring Officer, should take a close interest in and be able to justify any special severance payments that are made by that authority and in particular any payments made that are not consistent with the content of this guidance.

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CABINET
7 FEBRUARY 2023

ESTABLISHMENT

Cabinet Member:	Clive Eginton, Deputy Leader and Cabinet Member for the Working Environment and Support Services
Responsible Officer(s):	Matthew Page, Corporate Manager for People, Governance and Waste James Hamblin, Operations Manager Human Resources

Reason for Report: To give Members an update on both the Establishment of the Council together with its performance. This report should be read in conjunction with the functions of individual officers highlighted in the Constitution. This builds upon information shared in February 2022 and September 2022.

RECOMMENDATION: The Cabinet is asked to recommend to Council the contents of the below report.

Financial Implications: Financial risk will only occur where the structure of a service changes without adherence to allocated budgets.

Budget and Policy Framework: This report sits within the current budget and policy framework.

Legal Implications: In accordance with Article 14 of the Constitution.

Risk Assessment: If the Establishment is not appropriately managed and reviewed then service delivery may be put at risk.

Equality Impact Assessment: No equality issues are highlighted in this report.

Relationship to Corporate Plan: This report highlights the Establishment figures and, as such, supports our aim to reduce costs without affecting service quality and continuity.

Impact on Climate Change: No climate change issues are highlighted in this report.

1.0 **Introduction/Background**

1.1 The purpose of this report is to provide an update on the performance of our workforce as we continue to move out of the COVID-19 pandemic and into Spring 2023.

1.2 These items include updates on the key Establishment indicators of sickness and agency expenditure, turnover and the impact of COVID-19 on our workforce.

1.3 Scrutiny of this data has been enhanced throughout 2022 as we developed the service quarterly performance review report and subsequent meeting. As outlined in the February 2022 Establishment Report, these meetings are attended by the Corporate Manager, Service Lead (if applicable), HR Business

Partner and Accountant. These meetings are also supported by monthly updates on workforce data provided at our Corporate Performance Meeting and shared with both the Corporate Management and Leadership teams.

2.0 Sickness Absence, Agency Expenditure and Establishment

2.1 Last year (2021/2022) MDDC had an average of 7.82 sickness days per FTE. This compares to 5.58 sickness days that were lost per FTE in 2020/21 and 8.10 sickness days that were lost per FTE in 2019/2020. Within our current policy, the aim set for each employee is not to exceed 6 days of absence in a rolling 12 month period. It should be noted that there will be a difference between FTE and per employee statistics, however the statistics show a dip in sickness during the pandemic. See Graph 1.

2.2 Acknowledging absence levels since 2019, an updated policy and training for managers is due to be rolled out in 2023. However it should be noted that absence levels faced at the Council track closely with both local and national feedback on sickness absence levels. As predicted in the September 2022 Scrutiny Report, an increase in absence is unsurprising as the workforce have not been exposed to illnesses which have been supressed over the last 2 years.

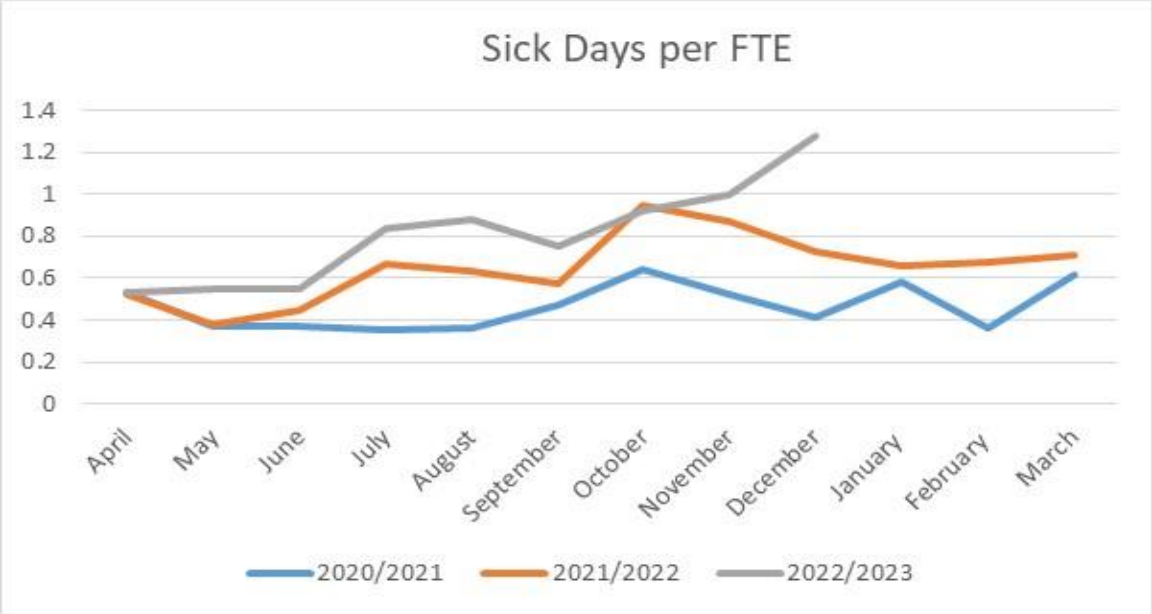
2.3 In house management training has been rolled out in 2022, with managers able to access both live and recorded sessions on the following: 'Managing Difficult Conversations', 'Managing Poor Performance' and 'Investigations, Disciplinaries and Grievances'. Feedback from the sessions has shown content has been well received with confidence in managers increasing as a result of the information provided. An underlying theme of all training provided in house is to encourage early intervention by managers.

2.4 In the first three quarters of this financial year we recorded 7.30 days sickness absence per FTE. As a result we are currently in line to see sickness absence levels this year in excess of 2019/2020. Projections would suggest we end 2022/2023 with approximately 9.73 days lost per FTE. Our sickness absence is usually less in the first two quarters of the financial year than in the last two due to the Autumn and Winter seasons and we are still seeing substantial employee absence due to COVID-19 and related infections (referenced in Section 4.0).

2.5 Wellbeing and supportive measures for employees have been highlighted throughout 2022, as we look to encourage employees to take positive action. A heavily discounted Leisure membership has been rolled out to employees at the Council (circa 50% of the public fees), as well as, a one off wellbeing day and there being increased communication regarding our Employee Assistance Programme. A review of our Wellbeing Ambassador initiative is due in 2023 as we look to provide clarity on the support we have in place for employees, alongside the existing mental health first aider scheme, Employee Assistance Programme and occupational health support.

2.6 The Council offered all staff under 50 a free voucher for a flu vaccination, acknowledging the current sickness levels and in order to prevent future sickness absence in the workforce. Despite regular advertisement of the benefit, uptake has been low to date.

2.7 Following the all staff survey in Autumn 2021 to gauge opinion and feedback on key organisational performance indicators including communication, leadership, development and wellbeing, the subsequent action plan is still in focus with the next round of all staff briefings due in early 2023. A further all staff survey is scheduled for Summer 2023.



Graph 1. Sickness at MDDC 2020 - 2023

2.8 In October 2022 a benefits survey was rolled out to employees at the Council. The aim was to understand what benefits employees currently value and understand, as well as, what benefits they would like the Council to consider in the future. As a result of the survey, a 'Benefits Overview' is being published in January 2023. This will highlight the existing benefits employees at the Council can already access and it will be used as part of our recruitment literature.

2.9 An ongoing challenge, further cemented by the impact of sickness absence levels, has been our access to temporary/agency workers. Costs of temporary/agency workers has been steadily increasing, as nationally we see high levels of employment against a backdrop of record high levels of vacancies.

2.10 During the first three quarters of 2022/23 the organisation spent £723,879.98 on agency workers. This compared to a total spend in 2021/22 of £823,288.55, £576,368.28 in 2020/21 and £534,378.49 in 2019/20. Projections using our existing figures would suggest we end 2022/2023 with approximately £965,173.31 in agency spend. Table 1 outlines agency spend since 2019.

2.11 There is an underlying theme within our agency make up, as we move away from 'lower cost/higher volume' agency workers (e.g. Waste and Recycling) to 'higher cost/lower volume' agency workers (e.g. Planning). The use of agency workers has been brought under further scrutiny as we continuously review our Establishment and seek to improve processes to allow for greater rigour and

challenge regarding staffing (e.g. the updated Vacancy Approval Process and Workforce Review Group rolled out in December 2022).

Year	Agency Spend	YOY Change (+/-)
2019/2020	£534,378.49	
2020/2021	£576,368.28	+7.56%
2021/2022	£823,288.55	+35.28%
2022/2023	£965,173.31*	+15.87%*

**9 months data grossed up to 12 months*

Table 1. Agency Spend 2019 - 2022

2.12 Table 2 compares the Establishment for the Council and the associated costs from 2019/2020 to 2022/2023. Costs for 2022/2023 will include the flat payment made to employees following the completion of Pay Award negotiations that was confirmed in November 2022. Work is already underway for the 2023/2024 Pay Award, with Unions expected to confirm their expectations at the end of January 2023. This comes against a backdrop of increased industrial action across sectors in the UK and ongoing negotiations highlighted within the media.

	2019/2020	2020/21	2021/22	2022/23*
Total number of employees /workers paid	718	697	728	698
Establishment FTE	422.11	422.79	426.43	431.02
Total Taxable Gross Pay	£11,170,336.78	£11,515,324.63	£12,197,334.88	£12,802,503.87*
Employers NI	£1,024,710.32	£1,038,135.28	£1,126,244.53	£1,288,737.39*
Employers Pension	£1,595,839.06	£1,832,713.73	£1,938,973.16	£2,103,271.45*

**9 months data grossed up to 12 months*

Table 2. Establishment 2019 - 2023

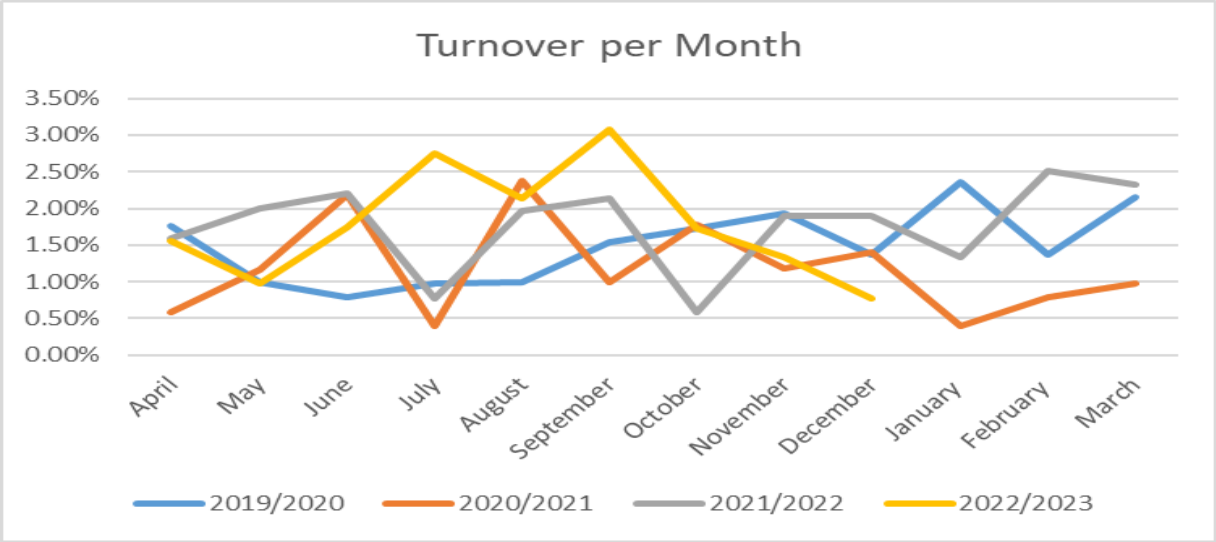
3.0 Turnover

3.1 Turnover for the first three financial quarters (1 April to 31 December 2022) stands at 16.07%. This compares to a turnover of 2021/22 in 21.25%, 14.23% in 2020/21 and 17.98% in 2019/20. Graph 2 highlights turnover per month since 2019 with estimates, based on current turnover, suggesting we end the current financial year with a turnover of 21.42%.

3.2 A full breakdown of all leavers and data collected during exit interviews for the last financial year is shown in Appendix 1. For those that completed the exit interview, career progression was cited as the main reason for leaving. Appendix 2 highlights the reasons for leaving during quarters 1 to 3 of 2022/2023.

3.3 A new exit interview format is launching in February 2023, with a focus on collating data in a more efficient and effective way. The new exit interview will allow for greater learning from those that are departing the Council and this, in turn, can help formulate more informed decision making and action planning.

3.4 Mid Devon, like other local authorities, has faced increasing challenges over turnover due to a number of different external factors. In terms of manual work the lack of supply of European workers has hit different industries hard which has had the result of increased competition for drivers, loaders and other types of worker amongst different sectors. In some sectors a movement towards 'contractor' work rather than 'employed' work has been supported by record levels of vacancies across the UK as workers attempt to earn more money in the current cost of living crisis.



Graph 2. Turnover at MDDC 2019 - 2023

3.5 These challenges have brought into sharp focus the need to consider our longer term employment offer for potential applicants. Key aspects include promoting our benefits (as will be seen with the 'Benefits Overview' document in January 2023) and encouraging greater flexible working where it is possible to do so (as has been seen in our roll out of hybrid working in 2022). Whilst delayed, the launch in 2023 of the skills review will allow for the Council to understand the skills and knowledge gaps within services and contribute to succession planning.

3.6 Apprenticeships across services are supporting the 'grow your own talent' initiative at the Council. The Council supported the 'KickStart' initiative in 2022, however this government scheme has subsequently come to a conclusion. The Council continues to maximise the apprenticeship levy by utilising this for both those joining the Council as an 'apprentice' and those currently employed by the Council but who are developing further skills/knowledge through training accessed via the levy.

3.7 In June 2022 the Council was award the Petroc Employer of the Year Award. This reflects the ongoing work with educational providers to ensure the Council is an employer of choice for those entering the workplace.

3.8 Our work around the Evolve learning and development project continues to develop. This round of Appraisal/PDR has been completed with a 94% response rate achieved. Guidance on the new appraisal process has been shared with our Leadership Team, Corporate Management Team and Service

Leads, as we extend the appraisal window this year due to significant events scheduled later this year (e.g. local elections).

4.0 COVID-19

4.1 The Council continued to enforce protective measures in line with the Government guidance. As these were phased out in 2022, employees returned to their 'normal' place of work. Feedback, as highlighted in the all staff survey, has been largely supportive of the communication and measures put in place to protect staff during the pandemic.

4.2 As is referenced within the sickness absence reporting in Section 2.0, COVID-19 does still significantly contribute to sickness absence. In December 2022, 92 days were lost due to COVID-19 accounting for 14.9% of all absence in the month. As responsibility for testing and the associated costs are held by the employee, the actual amount of sickness absence due to COVID-19 is likely to be higher.

5.0 Conclusion and Recommendations

5.1 There are a number of priorities which the Corporate Manager for People, Governance and Waste wants to focus on in terms of our Establishment performance.

5.2 It is vital that we continue to plan, review and scrutinise business continuity plans in the face of the challenges brought by the high levels of sickness absence. This should run in parallel with continued scrutiny of our Establishment through mechanisms such as the Workforce Review Group.

5.3 We continue to instil best employment practice and benefits, using the information obtained through the all staff survey action plan and findings from other surveys (e.g. Benefits Survey). We are committed to communicating with employees to keep them updated with business developments and changes.

5.4 We will review the skills analysis once completed to understand the gaps we have as an organisation and use this data to support long term succession planning at the Council. This needs to run in parallel with our focus on growing our own talent (e.g. apprenticeships) vs hiring talent vs developing existing talent.

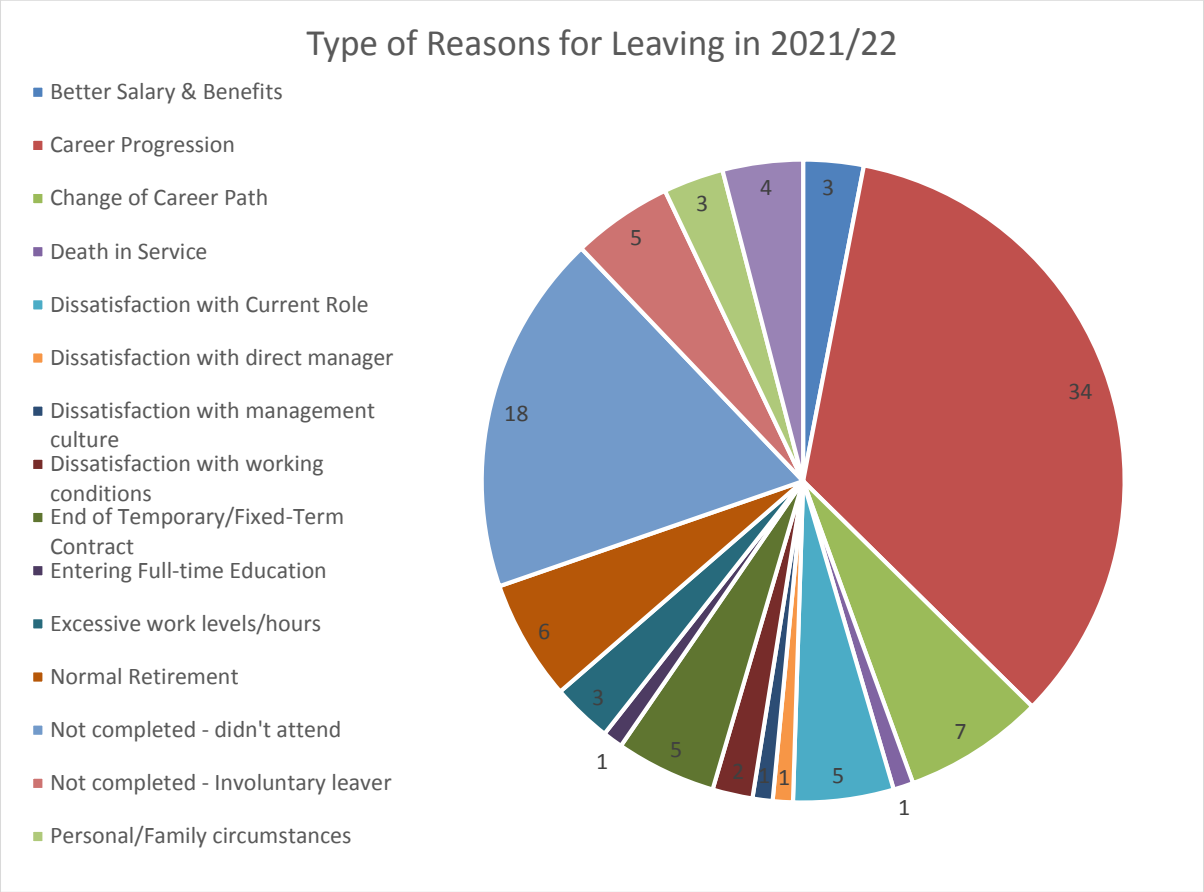
5.5 As a result of the above our overarching long term focus is simplified as follows: Getting the right people, with the right skills, in the right roles, performing at the right level at the right time.

Contact for more Information: Matthew Page, Corporate Manager for People, Governance and Waste (MPage@middevon.gov.uk), James Hamblin, Operations Manager Human Resources (JHamblin@middevon.gov.uk)

Circulation of the Report: The Cabinet Member has seen and approved the report. Cllr Clive Eginton Deputy Leader and Cabinet Member for the Working Environment and Support Services

List of Background Papers: Previous Establishment Reports taken to both Scrutiny and Cabinet in 2020, 2021 and 2022

Appendix 1



Type of Reasons for Leaving 2021/22	
Better Salary & Benefits	3
Career Progression	34
Change of Career Path	7
Death in Service	1
Dissatisfaction with Current Role	5
Dissatisfaction with direct manager	1
Dissatisfaction with management culture	1
Dissatisfaction with working conditions	2
End of Temporary/Fixed-Term Contract	5
Entering Full-time Education	1
Excessive work levels/hours	3
Normal Retirement	6
Not completed - didn't attend	18
Not completed - Involuntary leaver	5
Personal/Family circumstances	3
Travel	4

Appendix 2

Quarter 1 to Quarter 3 2022 – Reasons for Leaving

Reason	Total	%
Better salary & benefits	1	1.19
Career Progression	19	22.62
Change of Career Path	2	2.38
Dissatisfaction with current role	2	2.38
Dissatisfaction with management culture	1	1.19
Dissatisfaction with working conditions	2	2.38
End of Temporary/Fixed Term contract	1	1.19
Excessive work levels/hours	2	2.38
Normal Retirement	3	3.57
Not completed - didn't attend	37	44.05
Not completed - didn't return from sick	1	1.19
Not completed - involuntary leaver	5	5.95
Other.	2	2.38
Personal/Family circumstances	6	7.14
Grand Total	**84**	**100**

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CABINET
7 February 2023

NNDR 1 for 2023/24

Cabinet Member: Cllr Bob Deed
Responsible Officer: Andrew Jarrett - Deputy Chief Executive (S151)

Reason for Report: To provide Members with an update of the income generation and financial implications of the number of Business Rate properties in Mid Devon and to approve the NNDR1 (estimated income to be generated in 2023/24 from business rates). There is a statutory deadline for notifying Precepting Authorities and the Government by 31 January 2023 of their appropriate shares in accordance with the Non Domestic Rating (Rates Retention) Regulations 2013 Regulation 2(b). The Government return has been submitted and Preceptors informed of the estimated income.

RECOMMENDATIONS:

1. **That the calculation of the NNDR1 net yield of £16,921,552 from 3,519 Business Rated properties is noted for 2023/24;**

2. **That the proportions distributed to the respective authorities and Central Government be allocated as per the statutory regulations; and**

3. **That Members note that Central Government will reimburse the Council through a Section 31 grant to compensate it for the reduction in collectable business rates as a result of introducing various reliefs under section 47.**

Relationship to Corporate Plan: This report sets out the estimated net business rates for 2023/24; the estimate will then be used in the calculation of future Council business rates budgets. This report is in line with the Council's Corporate Plan objectives and is essential to delivering the necessary funding to balance the 2023/24 General Fund Revenue budget.

Financial Implications: Mid Devon District Council is a Statutory Billing Authority and has a duty to carry out this task each year as part of the budgetary process. Although no resolution is required as with Council Tax Charges.

Legal Implications: This is a statutory function and is a legal requirement. The Council must set its budget annually based on the Council Tax tax base and the projected NNDR1 values.

Risk Assessment: If the Council fails to carry out this duty, then it will not be able to forecast its future budget positions. The calculation of the NNDR1 involves a number of estimates made by professional officers, but due to the volatility and uncertainty of Business Rates appeals and Central Government retention policies, the Council holds a Business Rates Smoothing Reserve which can be used to mitigate fluctuations in Business Rates receipts.

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

Climate Change Assessment: No climate change issues identified for this report.

1. Introduction

1.1. Councils must submit a return known as the NNDR1 form to the Department for Levelling Up, Housing and Communities (DLUHC). This form provides the local tax base for business properties in the area for the forthcoming year and determines the value of income from Non-Domestic Rates between Central Government, Mid Devon District Council and the Devon and Somerset Fire & Rescue Authority. As such the NNDR1 form is a key document in the budget setting process.

1.2. The NNDR1 form must be certified by the Section 151 Officer. Councils are expected to adopt a similar approval process used for the Council Tax Base, i.e. approval by Council.

2. Business Rates Retention Scheme

2.1. Prior to 1 April 2013, all billing authorities collected the business rates in their area and passed this money onto a Central Government pool. The pool was then redistributed to local authorities throughout the country based on their needs, resources and the services they provide to their community. For example, one billing authority may collect £15m and only require £10m to run its services, whereas another billing authority may collect £10m and require £15m to run its services. The shortfall and excess was then redistributed by Central Government through a fixed sum as part of the Formula Grant Settlement.

2.2. From 1 April 2013, Central Government changed the way this financing is distributed. Each billing authority now has to forecast the amount of revenue it will generate from business rates and then redistribute that income between Central Government, the County Council, the Fire Authority and itself, based on a centrally prescribed formula (see below).

2.3. The Business Rates Retention Scheme as it is now known, also allows the billing authority to keep a share of the increase in revenue it generates, therefore encouraging billing authorities to encourage business growth in its area. However, the converse of this applies and if a billing authority's business rates decline, the District Council (i.e. MDDC) will see a proportionate drop in revenue.

2.4. This is the key difference between the old and new schemes. As under the old business rates scheme, the level of funding was determined at the beginning of the year and was fixed thereafter, thereby protecting billing authorities.

2.5. In order to assist local authorities in retaining revenue within the counties, Central Government allowed Upper Tier Councils (Unitary and County Councils) and Lower Tier Councils (District Councils) to join together to pool their growth and offset the growth of one area against a decline in another area. Effectively, this

creates a larger critical mass across the county to alleviate exposure to individual authority losses, thus enabling Counties and Districts to retain more of the rates collected instead of contributing this money to the central pool.

2.6. Mid Devon District Council joined the Devon County-wide pool in 2014 and will remain in the pool for 2023/24 to maximise the amount of Business Rates it can retain.

2.7. This report details the calculations necessary to determine the estimated debit the Council is expected to collect in business rates for the 2023/24 year. The net collectable debit is then split proportionally in accordance with the provisions of the Local Government Finance Settlement issued in December 2020 which enables the whole of Devon to have a 50% rates retention, subject to tariffs / Top-ups and levies. The tier split for Devon is as follows:

- 9% is distributed to Devon County Council
- 40% is kept by Mid Devon District Council
- 1% is distributed to the Devon & Somerset Fire & Rescue Authority

2.8. The new 2023 Valuation list takes effect from 1st April 2023. By law rateable values need to be reviewed every 3 years, it was 5 years. Then table at 2.9 helps illustrate some of the movements in the list.

2.9.

List	**Rateable Value (RV)**
2023 Draft List Rateable Value 09/01/2023	£52,776,105
2017 List as at 04/01/2023	£46,827,209
Gross RV Increase	**£5,948,896**
% Gross RV Increase	**12.70%**

MDDC Property Estimate Gross RV	**Gross RV**
2017 List	£1,393,465
2023 List	£1,485,855
Increase	**£92,390**

Top 15 RV Movement	**Gross RV**
2017 List	£8,254,000
2023 List	**£9,040,000**
Increase	**£786,000**

3. S31 Grant Reliefs (funded reliefs)

3.1. The Government provides grants to Councils under Section 31 (S31) of the Local Government Act 2003 (LGA 2003) for a wide range of purposes. Within the Business Rates service area, S31 grants are provided to recompense the Council for a range of reliefs such as, including the Small Business Rate Relief,

Retail, Hospitality and Leisure schemes, Supporting Small Business Relief, Public Toilets and Rural Rate (50%) top up.

3.2. Part 2, line 45 (fund reliefs) of the NNDR1 is estimated to be £2,753,762, S31 will be applied to pay back the cost at MDDC share (40%). This is largely due to the Government's announcement to continue the relief available to Retail, Hospitality and Leisure businesses in 2023/24 at a rate of 75%. Other reliefs apply.

4. 2023/24 Forecast Yield

4.1. The Council is notionally able to keep 40% of the total business rates it collects and this would generate an estimated £6,768,621 (less Tariff and Levy). MDDC gets £120,580 as a cost of collecting the years' business rates and will continue to retain the estimated income from renewable energy schemes of £254,906 in 2023/24.

4.2. Prudent forecast are included for the possibility of losing income as a result of a business appealing its Rateable Value, or for non-payment of the charge.

5. Changes being introduced for 2023/24

5.1. A new Supporting Small Business Scheme is being introduced with effect from the 1st April 2023 whereby increases in charge due to loss or reduction of either Small Business Rate Relief or Rural Rate Relief will be capped at £600 annually. Those on SSBR whose 2023 rateable values are £51,000 or more will not be liable to pay the supplement (1.3p) to fund Small Business Rate relief while they are eligible for 2023 SSBR.

5.2. There will be no downward Transitional Relief for properties that have had a reduction in rateable value; they will receive the full benefit of the reduction. Additional New Burdens funding will be available to help meet the cost of undertaking the additional work.

6. Conclusion

6.1. Due to the associated volatility and significant sums of revenue involved, we will continue to maintain a Business Rates Smoothing Reserve and provide Members with regular updates on the level of business rates being collected during 2023/24.

Contact for more information: Andrew Jarrett, Deputy Chief Executive (S151)
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Circulation of the Report: Leadership Team, Cabinet

Background Papers: NNDR1

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NATIONAL NON-DOMESTIC RATES RETURN - NNDR1
2023-24

All figures must be entered in whole £

If you are content with your answers please return this form to DLUHC as soon as possible

Ver 1.1

Local Authority : Mid Devon

PART 4: ESTIMATED COLLECTION FUND BALANCE

This section estimates the collection fund closing balance for the current year (*not* the forecast year otherwise referred to in this form). Please refer to guidance notes for details. Note that you can edit the blue-bordered cells, but you will be asked to provide a comment explaining why they are changed from the prepopulated figures.

	£	£
OPENING BALANCE		
1. Opening Balance (From Collection Fund Statement)		-4,347,784
BUSINESS RATES CREDITS AND CHARGES		
2. Business rates credited and charged to the Collection Fund in 2022-23 (enter as +ve)	14,619,476	
3. Sums written off in excess of the allowance for non-collection (enter as -ve)	-1	
4. Changes to the allowance for non-collection	-90,240	
5. Amounts charged against the provision for alteration of lists and appeals following RV list changes (enter as +ve)	181,345	
6. Changes to the provision for alteration of lists and appeals	-181,345	
7. Total business rates credits and charges (Total lines 2 to 6)		14,529,234
OTHER RATES RETENTION SCHEME CREDITS (enter as +ve)		
8. Transitional protection payments received, or to be received in 2022-23	0	
9. Transfers/payments to the Collection Fund for end-year reconciliations	0	
10. Transfers/payments into the Collection Fund in 2022-23 in respect of a previous year's deficit	4,145,706	
11. Total Other Credits (Total lines 8 to 10)		4,145,706
OTHER RATES RETENTION SCHEME CHARGES (enter as -ve)		
12. Transitional protection payments made, or to be made, in 2022-23	-15,591	
13. Payments made, or to be made, to the Secretary of State in respect of the central share in 2022-23	-7,199,343	
14 Payments made, or to be made to, major precepting authorities in respect of business rates income in 2022-23	-1,439,869	
15. Transfers made, or to be made, to the billing authority's General Fund in respect of business rates income in 2022-23	-5,759,474	
16. Transfers made, or to be made, to the billing authority's General Fund; and payments made, or to be made, to a precepting authority in respect of disregarded amounts in 2022-23	-324,656	
17. Transfers/payments from the Collection Fund for end-year reconciliations	-36,043	
18. Transfers/payments made from the Collection Fund in 2022-23 in respect of a previous year's surplus	0	
19. Total Other Charges (Total lines 12 to 18)		-14,774,976

ESTIMATED SURPLUS/(DEFICIT) ON COLLECTION FUND IN RESPECT OF FINANCIAL YEAR 2022-23 - Surplus (positive), Deficit (Negative)

	£
20. Opening balance plus total credits, less total charges (Total lines 1, 7, 11,19)	-447,820

APPORTIONMENT OF ESTIMATED SURPLUS / DEFICIT (See Note N)

	Column 1 **Central Government**	Column 2 **Mid Devon**	Column 3 **Devon County Council**
21. % for distribution of prior year surplus/deficit (i.e. 2021-22)	50%	40%	9%
22. Total prior year surplus (+)/deficit (-)	-101,039	-80,831	-18,187
of which:			
22a. Amount deferred in respect of estimated 2020-21 surplus-deficit	-190,026	-152,020	-34,205
22b. Amount in respect of 2021-22	88,987	71,189	16,018
23. % for distribution of in-year surplus/deficit (i.e. 2022-23)	50%	40%	9%
24. In year surplus (+)/deficit (-)	-122,871	-98,297	-22,117
25. Total (total lines 22 and 24)	-223,910	-179,128	-40,304

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CABINET
7TH FEBRUARY 2023

UK Shared Prosperity Fund and Rural England Prosperity Fund Delivery Plan

Cabinet Member(s): Cllr Richard Chesterton

Responsible Officer: Richard Marsh, Director of Place

Reason for Report: To update members on the proposed delivery plan for the UK Shared Prosperity Fund (SPF), approve year 1 spend (2022/23) and approve delegated authority to the Director of Place, in conjunction with Cabinet Members, to approve the detailed SPF Policy and any accompanying guidance materials.

RECOMMENDATION: That Cabinet:

1) **approve the UKSPF expenditure & Delivery Plan for Year One (2022/23) as outlined throughout the report.**
2) **approve delegated authority to the Director of Place, in conjunction with the Cabinet Member for Finance, to finalise the detailed SPF Policy & grant arrangements;**
3) **approve delegated authority to the Director of Place, in conjunction with the Cabinet Member for Planning and Economic Regeneration, to approve variations to the Delivery Plan, Investment Plan and/or grant scheme criteria; and**

Financial Implications: The Council's funding bid for year one of the SPF is confirmed as successful; funding for years two and three is dependent on successfully completing year one targets.

Budget and Policy Framework: The activities described in the report help to deliver the Council's Corporate Plan and the objectives and actions identified in Mid Devon's Economic Strategy.

The UKSPF Investment Plan was developed in conjunction with key stakeholders and was subject to engagement with Members prior to submission to Government. The Investment Plan is therefore informed & supported by recent engagement and an up to date understanding of the socio-economic context of the District.

Legal Implications: MDDC's UKSPF policy/grant conditions will reflect criteria set by the Government regarding eligibility for receipt of Government funds. These will also cover matters including Procurement and Subsidy Control requirements and will ensure that MDDC, and grant recipients, are acting in accordance with Government requirements and the law.

Risk Assessment: There is a risk where failure to deliver Year One projects on time occurs, this may impede our ability to access funding for Years Two and Three. This risk has increased owing to the delayed approval of the UKSPF investment plans submitted to Government by Local Authorities for approval. However, the Economic Development team is seeking to mitigate this risk and has been proactively progressing our Investment Plan workstreams in order to minimise the risk of non-delivery.

Equality Impact Assessment: The Shared Prosperity Fund aims to help address inequalities in our society. However, there is a risk due to the expediency needed to deliver actions within year one, that business communities more difficult to reach due to any current disconnect with existing networking channels, contact lists or due to technological/digital disadvantage may not benefit from funding in year one. Therefore, we have prioritised our approach to delivery in year one with the aim of establishing schemes so that years two and three focus on more direct support projects with businesses, which will have full communication plans aimed at target sectors.

Relationship to Corporate Plan: The work of the Growth, Economy and Delivery team supports the corporate objectives for the economy:

- Bringing new businesses into the District
- Business development and growth
- Improving and regenerating our town centres
- Growing the tourism sector

The successful deployment of the UKSPF programme, and in due course the REPF, will support the Economic Development team in achieving these corporate objectives.

Impact on Climate Change: No direct impacts have been identified, although several of the projects may have a positive environmental impact (eg through supporting low food miles in year one or through green technology grants later in the plan). The programme is therefore expected to have a positive impact on climate change in a general sense.

1.0 Background

The Economic Development Team received confirmation on 5th December 2022 from the Department for Levelling Up, Homes and Communities (DLUHC) that the MDDC UKSPF Investment Plan has been approved.

Mid Devon District Council has secured £67,748 for capital projects and £61,398 for revenue projects (plus a further £20,000 capacity funding to cover the costs of forming the bid). However, at this time, the funding confirmed is for year 1 (2022/23) only; confirmation of funding of SPF for years 2 and 3 is subject to successfully spending allocated funding in year 1 first, which must be spent (not committed) before the end of March 2023.

It is important to note that we had expected to hear the outcome of the assessment of our UKSPF Investment Plan by the beginning of October and yet with the two month delay on approval of it, the spend deadline has not been extended. We are therefore still bound to spend (not simply commit) the year 1 funding by the end of March 2023 and, as set out above, subsequent years funding is dependent upon our performance in year 1.

This report details the proposed delivery plan for year one in order to ensure swift and meaningful use of the funds given the short timescale. All of the proposals are within the original scope of the Investment Plan bid, which received prior approval from the Economy PDG and Cabinet.

The report also outlines the framework for the SPF Policy along with a timescale for delivery of actions within years 2 and 3. This includes projects within the Rural England Prosperity Fund (REPF), although as this element of the SPF only closed for applications on 30 November, we do not expect to hear the outcome from this bid until sometime in January.

2.0 Year One Delivery Plan

The Delivery Plan includes the following areas of intervention which will be delivered directly by the Economic Development Team:

- Love Your Town Centre
- Field to Fork
- Visitor Economy
- Work Hubs

In addition, the following areas of intervention will be delivered by external partners:

- Business Innovation Centre
- Business Innovation Outreach
- Business Support Programme

For the purposes of this report, we are focusing on the areas that we are directly responsible for; the team have been engaging with delivery partners for the remaining elements to ensure spend within the timeframe.

2.1 Love Your Town Centre

This area of intervention includes aspects of funding programmes delivered within the Council's existing budget and workplan (such as vibrant town centres grant scheme and shopfront enhancement schemes) as well as new elements introduced through SPF (business growth scheme).

Key Outputs required from this area of intervention are:

- Improvements to town centres & high streets: Number of commercial buildings developed or improved
- Improvements to town centres & high streets: Reduced vacancy rates (%)
- Local arts, cultural, heritage and creative activities: Number of organisations receiving grants
- Local arts, cultural, heritage and creative activities: Number of community-led arts, cultural, heritage and creative programmes as a result of support
- Open markets and town centre retail and service sector: Number of businesses receiving grants
- Open markets and town centre retail and service sector: Number of potential entrepreneurs provided assistance to be business ready
- Open markets and town centre retail and service sector: Number of new businesses created

Proposal for Year one:

LOVE YOUR TOWN CENTRE		SPF	REPF	Other
Business Growth Scheme	cap	**£ 7,748.00**	£ -	£ -
Vibrant Town Centres	rev	£ -	£ -	£ 37,000.00
Shopfront Enhancement Scheme	cap	£ -	£ -	£ -
> Crediton		£ -	£ -	£ 15,000.00
> Cullompton		£ -	£ -	£ 10,000.00
> Tiverton		£ -	£ -	£ 15,000.00
Digital High Street	rev	£ -	£ -	£ -

There is £7,748 of capital funding through SPF for a Business Growth Scheme. We will launch this scheme for expressions of interest in January, accept applications in February and award grants in March.

The Business Growth Scheme is intended to complement the existing Shopfront Enhancement Schemes by offering fit-out grants of up to £2,500 (with match-funding required at 50%). The original idea was to incentivise occupancy of vacant units by targeting those moving into properties that had been empty for more than 3 months. While this is still a primary goal, in order to meet the reduced timeframe available to deliver funding within, we can expand the eligibility criteria to include other capital improvement works not covered by the existing enhancement schemes and still meet the key outputs.

The Vibrant Town Centres Scheme is the existing Love Your Town Centre scheme renamed. It will continue to support applications from businesses and community groups, including town councils and town teams, working in partnership to deliver projects that revitalise the town centres. The next round of Vibrant Town Centres will open for applications in January, with funding awarded in March.

It is intended to launch the Digital High Streets Scheme in Year Two, for which further information will be provided in future reports.

Recommendation: That the eligibility criteria for Business Growth Scheme be expanded to allow applications for capital improvement projects in town centre units not covered by the existing shopfront schemes and that these are assessed in accordance with the SPF Policy by the same Funding Panel as the existing Vibrant Town Centres Scheme.

2.2 Field to Fork

This area of intervention focuses on supporting local producers in Mid Devon and encouraging their business growth either through transition from producing, to supplying and retailing or expansion into food tourism such as food tours and experiences or farm shops.

Key outputs required from this area of intervention are:

- Development and promotion of visitor economy: Number of businesses receiving non-financial support

- Development and promotion of visitor economy: Number of people reached
- Development and promotion of visitor economy: Number of local events or activities supported
- Development and promotion of visitor economy: Increased visitor numbers (%)
- Strengthening local entrepreneurial ecosystems: Number of businesses receiving non-financial support
- Strengthening local entrepreneurial ecosystems: Number of potential entrepreneurs provided assistance to be business ready

Proposal for Year One:

FIELD TO FORK		SPF	REPF	Other
Food Tourism				
> Farmers' Markets Initiative	rev	£ **4,500.00**	£ -	£ -
Support Local Producers (Taste Mid Devon)				
> Promote local producers	rev	£ -	£ -	£ -
> Food and drink trails/events	rev	£ -	£ -	£ -
> Local Food Initiatives (Capital Grants Scheme)	cap	£ -	£ -	£ -

There is £4,500 of revenue funding available for Field to Fork projects in year one. In order to encourage more local producers into direct retail, we intend to approach the three main Farmers' Markets in Mid Devon (on the basis that they operate within the main town centres and occur at least monthly throughout the year) with an incentive scheme. The Farmers' Market Initiative will offer an upfront grant of £1,500 to the market operator to cover tolls and promotion costs for each new Mid Devon producer that attends. As part of the agreement, the markets will need to supply us with data for reporting against the key outcomes. The funding will be a one-off arrangement that must be spent within the three-year period of the SPF timeframe.

Looking ahead to years two and three, we intend to run a series of featured "meet the producer" promotions with Taste Mid Devon (on the Visit Mid Devon channels), highlighting local producers including video and photography, interviews, recipes etc. The revenue elements of the SPF will support the purchasing of media and sponsored posts, to continue monthly throughout the two years. In year three, we hope to have the REPF to run a capital grants scheme for producers to enhance their offer (such as brewing equipment, demo kitchens, new equipment to allow food box deliveries).

Recommendation: That the SPF for Field to Fork is offered to the three main town's Farmers' Markets to run an incentive scheme to attract new Mid Devon producers.

2.3 Visitor Economy

This area of intervention focuses on raising awareness of Mid Devon as a visitor destination and increasing visitor footfall.

Key outputs required from this area of intervention are:

- Campaigns to encourage visits and exploring of local area: Increased number (%) of web searches for a place
- Campaigns to encourage visits and exploring of local area: Number of people reached
- Development and promotion of visitor economy: Number of businesses receiving non-financial support
- Development and promotion of visitor economy: Number of people reached
- Development and promotion of visitor economy: Number of local events or activities supported
- Development and promotion of visitor economy: Increased visitor numbers (%)

Proposal for Year One:

VISITOR ECONOMY		SPF	REPF	Other
Sustainable Tourism				
> Promoting Mid Devon	rev	£ **6,388.45**	£ -	£ 15,000.00
> Showcasing Equipment	cap	£ -	£ -	£ -
> Willow Trail	cap	£ -	£ -	£ -
> Sustainable Tourism (Capital Grants Scheme)	cap	£ -	£ -	£ -
Visitor Signage				
> Town Visitor Boards		£ -	£ -	£ 10,000.00
> Gateway Signs (eg J27)		£ -	£ -	£ -

There is £6,388.45 of revenue funding through the SPF for year one to support tourism in Mid Devon. For expediency, year one spend will be focused on the outputs relating to reach and improving number of online searches for Mid Devon places. By increasing awareness of Mid Devon in Year One, it is hoped that the follow-on projects will have a better start point to launch from. Therefore, we are looking to invest in enhanced Search Engine Optimisation with improvements to the website and Google Ads campaigns. We are also looking into extending the reach of the Visit Mid Devon guide to attract visitors from locations close to Mid Devon's rail networks (such as Plymouth, Bristol, Taunton, North Devon, London). This element of the project will be complemented by additional promotional features using existing budget.

For years two and three, the main project will see the development and piloting of a two-week Mid Devon walking festival to encourage more people to explore the local area and increase visitor numbers, particularly at the close of the main holiday season. The Love Your Town Centre area of intervention will sit alongside this area, with the Vibrant Town Centres funding scheme able to support activities and events in Mid Devon's towns to coincide with the walking festival.

Years two and three will be complemented with a number of capital projects through the REPF developing a Willow Trail (to support the walking festival) and improved visitor signage at the main entry points into Mid Devon. There will also be a Capital Grants Scheme delivered through the REPF to support

tourism businesses seeking to diversify or grow in order to enhance their visitor offer.

Recommendation: that the SPF for Year One is focused on the reach and web searches outputs with activities that deliver against these.

2.4 Work Hubs

This area of intervention focuses on supporting provision of flexible workspace in Mid Devon with the wider aim of supporting the start-up and growing micro businesses that use that space.

Key outputs required from this area of intervention are:

- Community and neighbourhood infrastructure projects: Number of organisations receiving grants
- Community and neighbourhood infrastructure projects: Number of facilities supported/created
- Community and neighbourhood infrastructure projects: Increased users of facilities/amenities
- Enterprise infrastructure and employment / innovation sites: Number of businesses receiving grants
- Enterprise infrastructure and employment / innovation sites: Number and m^2 of commercial buildings developed or improved
- Enterprise infrastructure and employment / innovation sites: Increased amount of investment
- Enterprise infrastructure and employment / innovation sites: Number of premises with improved digital connectivity

WORK HUB & INCUBATOR SPACE DEVELOPMENT		SPF	REPF	Other
Work Hub Study		£ -	£ -	£ 22,000.00
Flexible Workspace (Capital Grant Scheme)	cap	£ 30,000.00	£ -	£ 5,000.00

This project will deliver a Capital Grant Scheme to support incubator space and work hub development in Mid Devon with the aim of creating small flexible office and workshop space. This will both support the growth and expansion of existing work hubs as well as the development of new locations and facilities across the District. It is anticipated that there will be an element of supporting provision with the town centres as well as rural areas, with the rural element focusing on developing existing community facilities to create a network of community work and learning hubs.

There is a need to determine and understand Mid Devon's need and existing offer across the District as well as identify the right opportunities for investment with this scheme. There is £22,000 of earmarked reserves set aside for a work hub study to provide this base information. However, it will not be possible to undertake the study ahead of all financial spend within the timeframe required. Therefore, for Year One, we propose launching the Grants Scheme for existing work hubs only to enhance their offer. Alongside this, we will progress the Work

Hub Study. Then, in Years 2 and 3, we will run the Grants Scheme to deliver new provision as directed by the Study.

Recommendation: That the year one allocation for the Flexible Workspace Capital Grants Scheme is prioritised for existing work hubs in Mid Devon with aspirations for growth. Secondly, that a study be commissioned to understand the demand for flexible workspace in Mid Devon's town centres and rural areas is commissioned using the allocated earmarked reserves.

2.5 External Delivery Projects

Within Year One, we have three areas of intervention to commence but will be led by external partners:

- **Business Innovation Centre:** Petroc College are delivering on this project. There is £30,000 of capital funding to spend in Year One, for which they are seeking quotes for phase one of delivering the new Business Innovation Centre.
- **Business Innovation Outreach:** There is £16,750 of revenue funding to deliver business workshops and facilitated support to encourage start-ups, growth and innovation. It was originally intended that this would run alongside the Business Innovation Centre project to be delivered by Petroc College. However, we have the option to use Year One's funding with a separate provider in order to deliver the funding on time if Phase One of Petroc's BIC project cannot incorporate this.
- **Business Support Programme:** There is £7,812.55 of revenue funding for Year One to invest in a continued business support programme with Devon County Council.

3.0 Years Two and Three Delivery Plans

The SPF is an annualised grant and funding for the next year is not confirmed until the current year spend is achieved and it is demonstrated that MDDC has successfully delivered against forecast outcomes. Therefore, it is challenging to commit funding plans for year two ahead of this confirmation. However, we have identified an overview of plans for years two and three within the areas of intervention above and propose bringing a more detailed plan to a future PDG & Cabinet meeting.

4.0 SPF Policy

Mid Devon requires a Shared Prosperity Fund Policy outlining how the use of the Shared Prosperity Funding (including Rural England Prosperity Funding) will be allocated in line with Government requirements. The Purpose of the Policy is to ensure a consistent and transparent approach to awarding grants within the remit of the funding and to ensure that the required level of due diligence regarding SPF spend is followed.

Similar to the previous Additional Restrictions Grants policies, it identifies business eligibility criteria for the Capital Grants Schemes and required

compliance checks. Although, formation of the grant schemes is discretionary, these will align with our agreed areas of intervention as outlined within the Shared Prosperity Fund Investment Plan and all business recipients must meet the Government-set criteria (such as subsidy thresholds and solvency status).

The Policy will focus on financial control and outline the general requirements for all use of the funding. This will be appended by more specific grant scheme criteria for the individual capital grant scheme elements. For instance the Shopfront Enhancement Schemes have different scheme-specific criteria to the Vibrant Town Centres Scheme.

It is important, due to the timescales, that Mid Devon can approve an overarching Policy swiftly and any variations in response to Government requirements. With previous business grant schemes, delegated authority was awarded to the Cabinet Member for Finance along with a senior officer/officers of the Council to approve the policies relating to financial controls.

Individual scheme criteria are agreed at service level. Due to the annualised arrangement for Mid Devon to access further funding, it is important that each scheme is flexible and can be adapted to ensure swift delivery of the funding and that projects funded meet a) local needs and b) the key outputs. Similarly, it is important to note that within the Policy, due to the need to specifically allocate revenue or capital funding, some projects while meeting the criteria, may not be eligible and as a result, weaker scoring projects for the right funding type towards the end of the scheme may instead be successful.

Recommendation: We recommend that, similar to previous business grant policies, delegated authority is awarded to the Cabinet Member for Finance and the Director of Place to approve the SPF Policy. Clearly, given the relationship to finance matters, the Council's S151 officer will also be fully consulted in the formulation and finalisation of such policies with agreement secured to the policies, as required.

On the basis of the risks outlined above with regards to capital and revenue funding levels, we also recommend that delegated authority is given to the Cabinet Member for Planning and Economic Regeneration along with the Director of Place to jointly approve any required variations to the delivery plan and/or scheme guidance. That they also have joint delegated authority to approve variations to the SPF (and REPF) Investment Plan to reallocate funds from one area of intervention to another as required to support appropriate and timely spend of the funds. Any major variations to the Investment Plan must also have approval from the DLUHC.

We also recommend that for the duration of this scheme, the Economic Development Team Programme Update reports to Economy PDG, be updated to provide programme delivery updates for the SPF/REPF to allow transparency and enable member engagement and oversight.

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Circulation of the Report:

Cllr Richard Chesterton
Cllr John Downes
Economy PDG
Cabinet
Leadership Team

List of Background Papers:

Agenda Item

CABINET REPORT

7th February 2023
CULLOMPTON TOWN CENTRE MASTERPLAN SPD AND DELIVERY PLAN

Cabinet Member	**Cllr Richard Chesterton, Cabinet Member for Planning and Regeneration.**
Responsible Officer	**Mr R Marsh, Director of Place.**

Reason for the Report: To approve the Draft Cullompton Town Centre Masterplan SPD and Delivery Plan.

RECOMMENDATIONS:

1. **That Members note the comments received at the Stage 2 public consultation (Appendix 1 and 2) and the proposed changes as set out in Appendix 2;**

2. **That the Cabinet recommend to Council that:**

   i) **Subject to the updates, detailed in Appendix 2, that the Cullompton Town Centre Masterplan Supplementary Planning Document (Appendix 3) and Delivery Plan (Appendices 4 & 5) be adopted; and**

   ii) **Delegated authority be given to the Director of Place in consultation with the Cabinet Member for Planning and Economic Regeneration prior to publication to make any typographical, grammatical, imagery and formatting changes to the Cullompton Town Centre Masterplan SPD; &**

   iii) **That Cabinet note the Strategic Environmental Screening Report (Appendix 6) and the Habitats Regulations Assessment Screening Report (Appendix 7).**

Financial Implications: The consultant contract for the Cullompton Town Centre Masterplan was awarded 10th July 2019 under delegated authority following a procurement process. Prior to that a budget of £60,000 had been approved, funding for which was identified in the 18/19 service budget.

The financial implications in the delivery of the projects and strategies identified within the Draft Masterplan SPD and Delivery Plan will need further consideration in light of service budget, whether they can be managed and delivered in house or will require further work through external commissions. As each particular project is 'worked up', each will be subject to financial costings and to Cabinet consideration and approval (where applicable). Funding for these projects is likely to involve a range of public and private sector investment.

No other financial implications are anticipated at this time. The Council made a successful bid for regeneration funding under the Heritage Action Zone (HAZ) as part of the Future High Street Fund.

Budget and Policy Framework: The budget for the production of the Cullompton Town Centre Masterplan and Delivery Plan was agreed at a previous meeting of Cabinet. The Draft Masterplan SPD identifies strategies and projects for implementation. With the support of a Delivery Plan that will sit alongside the Masterplan and, in time, a business case for each of the strategies and projects, this will ensure each scheme will be in a state of readiness should future external funding opportunities arise. No other budgetary implications are anticipated at this time.

The Policy Framework consists of both statutory documents that have to be adopted or approved by the Council as well as locally determined policies and strategies that form an integral part of the decision making process. Once adopted, the Cullompton Town Centre Masterplan and Delivery Plan would have Supplementary Planning Document status and be a material consideration for planning decision making purposes. No direct impacts on the policy framework are anticipated at this time.

Legal Implications: The process for preparing and adopting the Cullompton Town Centre Masterplan SPD will need to comply with the Town and Country Planning (Local Planning) (England) Regulations 2012 and the Council's Statement of Community Involvement. Whilst the Adopted Masterplan SPD will not form part of the Development Plan, it will be a material consideration in the determination of planning applications relating to the town centre.

The Delivery Plan will include a set of indicative key milestones. These will be kept under review and will be reported back to Members at key milestones or as individual projects progress which require their own decisions.

There are no other legal implications arising from this report.

Risk Assessment: Failure to support the regeneration of Cullompton town centre would in itself lead to deterioration in commercial activity, a less vibrant centre, less coordinated development and uncertainty over essential infrastructure; this being recognised by the bid to the levelling Up Fund and the successful HAZ bid. The Draft Masterplan SPD and Delivery Plan will be focused on mitigating risk to aid regeneration.

As strategies and projects from the Draft Masterplan SPD and Delivery Plan are 'worked up' an assessment of risk will be undertaken as part of project development.

Equality Impact Assessment: No equality issues are identified for this report. Nonetheless, an Equality Impact Assessment is attached as **Appendix 8**.

Impact on Climate Change: A core principle within the Draft Cullompton Town Centre Masterplan SPD and Delivery Plan is the achievement of net zero carbon emissions by 2030 through design and timely delivery of infrastructure, dwellings and employment. Revitalising Cullompton town centre and encouraging local residents to

'buy local' and undertake trips by more sustainable means including walking and cycling will assist in reducing the area's carbon emissions.

Relationship to Corporate Plan: The Draft Cullompton Town Centre Masterplan SPD will provide guidance on the planning and delivery of development within Cullompton. A Delivery Plan is produced separately, as an addendum to the Masterplan, allowing for re-appraisal and updating as projects progress and develop. Together they will contribute to the delivery of the 4 key priorities as relating directly to the Corporate Plan 2020-24 including housing delivery, caring for the environment, supporting a thriving economy and local communities.

1.0 BACKGROUND.

1.1 The Council resolved to produce a Masterplan and Delivery Plan for Cullompton Town Centre as a Supplementary Planning Document. Work on the document commenced in 2019. The Draft Masterplan and Delivery Plan seek to enhance the economic prospects of the town centre including its look and the user experience. Its scope is broader than a purely spatial plan and includes wider spatial strategies such as the role and function of the town centre, Cullompton's identity and its unique selling points.

1.2 The Masterplan and Delivery Plan will form a key document for the regeneration of the town; enhancing the town's economic prospects and providing a clear strategy to ensure the town meets its full potential as an attractive and thriving town. It provides the umbrella framework within which the HAZ works will be delivered and is likely to also support progression and delivery of the UK Shared Prosperity Fund and Rural England Prosperity Fund workstreams.

1.3 The Draft Masterplan was developed in the context of the strategic projects planned in and around Cullompton, including the North West Cullompton urban extension, the proposed Culm Garden Village, the proposed new Cullompton Relief Road, the re-opening of Cullompton railway Station and the successful HAZ submission. It was also developed within the context of the Cullompton Conservation Area Assessment and Management Plan now adopted (Feb 2022).

1.4 In accordance with the Council's Statement of Community Involvement, the Draft Masterplan SPD has been subject to two stages of public consultation; Stage 1 to scope out the proposed contents of the masterplan and present the options that might be included and Stage 2 to present the draft masterplan itself. Following a Stage 1 public consultation that was held during 2020 a Stage 2 public consultation was held between 28th June and 13th August 2021 including two staffed events, a letter drop to approximately 1600 homes and businesses in addition to emails, press releases and social media announcements and the posting of public notices in and around the town centre. Permanent exhibitions were made available at the Cullompton Community Centre and the Hayridge Centre (with the ability to submit

questionnaires / observations). All the associated documentation (including a copy of the draft masterplan, exhibition boards, baseline report, online questionnaire and interactive map) were made available on the Council's website for viewing, downloading or for submitting comments. The public were also able to make direct contact (email and telephone) with the lead Officer.

1.5 The Draft Cullompton Town Centre Masterplan SPD was presented to PPAG on the 29th November 2021. PPAG Members requested:

- Clarity between Appendix 1 (on line survey findings) and the number of responses submitted through the interactive map (detailed within the report below);
- A further review of the Draft Masterplan SPD for typographical errors; &
- That the report be brought back to a future PPAG ahead of Cabinet resolution.

2.0 Summary of Public Consultation

2.1 The Stage 2 public consultation invited feedback on 5 distinct themes:

1. The proposed vision for the town centre including the enhancement of historic buildings and public spaces, opportunities for work and visitor destinations and the provision of homes, community and recreational facilities;

2. Enhanced walking, cycling and public transport opportunities in combination with improved public spaces, a greater variety of town centre uses, employment opportunities and digital connectivity.

3. Using the historic character of Cullompton as a foundation to shape a distinctive identity for the town.

4. Identification of key opportunity sites (8 in total) – including

    i) reinstatement of the railway station,

    ii) enhancement of Fore Street,

    iii) the Tannery site

    iv) improved cycle links along Station Road,

    v) enhancement of the Higher Bull Ring,

    vi) enhancement of Alexandria Industrial Estate,

    vii) bringing the Old Cinema back into use, and

    viii) reinstating the former Iron Bridge leat crossing.

5. Responding to climate change including enhanced biodiversity, sustainable modes of transport and carbon neutral ways of construction.

2.2 In total, 73 on-line survey responses and 15 paper copy responses were received. The on-line interactive map proved particularly successful. The interactive map invited comments on the 8 key opportunity sites. The number of responses added to the interactive map totalled 449. Whilst this is not individual responses (a single individual may have commented on a number of the individual opportunity sites) it nonetheless indicates a good level of response. An analysis of the consultation responses to the on-line survey including demographic breakdown is provided at Appendix 1. An analysis of statutory and other consultee responses received by email is provided at Appendix 2.

3.0 Summary of Findings

3.1 Appendix 1 and 2 provide a detailed analysis of the feedback received to the on-line survey and email responses. The key findings that have emerged through either the email responses or to the on-line survey are as follows:

a) Enhanced and restored historic town centre
The on-line survey (Q3) invited comments on the historic character of Cullompton being used as a foundation to shape a distinct identity for the town. Q1(1) of the on-line survey asked if Cullompton's historic buildings and landscape should be enhanced and restored.

91% of on-line survey respondents agreed or strongly agreed that Cullompton's historic buildings and landscape should be enhanced and restored (Appendix 1). Specific comments made reference to:

1. A need to encourage and support owners to keep the buildings in good condition and use.
2. A need to embrace new buildings and construction techniques with a view to climate change.
3. Cullompton's history lends itself to arts and crafts.
4. Greater emphasis of St Andrew's Hill Roman Fort and its inclusion within the themes and objectives for new green space, enhanced pedestrian access and visitor attractions.

The specific comments above are generally accepted with the masterplan seeking to support the town's economic prospects and regeneration within a recognition of its historic past. The HAZ project supports the use and maintenance of historic buildings. Comments associated with the Roman Fort are detailed more fully in Appendix 2 with recommendations for change to the masterplan.

b) Enhanced pedestrian and cycle links.
The on-line survey (Q2(2)) asked if there was support for enhanced cycle and pedestrian provision throughout the town. 81% of respondents indicated support for its enhancement with 81% of respondents indicating support for pedestrian and cycle improvements specific to Station Road (Q2(3)) and 73% for improved pedestrian and cycle links between the town centre and the CCA fields (Q2(7)).

The response indicates an over-whelming level of support. As such, the proposals outlined in Chapters 4.2 Routes and Movement will be retained.

c) Town centre uses, services and facilities.
Q2(9) of the on-line survey asked if respondents would like to see a greater variety of town centre uses including leisure, food and drink, retail, residential and employment. 83% of respondents indicated a level of support. 55% of respondents indicated support for more flexible work space in the town centre where workers could access office space, equipment and training while 17% disagreed and 28% were of no opinion. 78% of respondents were in support of initiatives to encourage visitors into the town centre, while 60% of respondents recognised the value of enhanced town centre digital connectivity to promote local business and visitor experience.

Whilst it is acknowledged that there were a number of respondents who did not value or had no opinion with regard to enhanced employment space in the town centre a greater number of respondents were able to support this as a means to enhance town centre activity and footfall. For this reason, the initiatives outlined in Chapter 4.4 Activity and Land Use will be retained.

d) Historic Environment
Care of the historic environment and buildings is considered an essential element to the re-imagining of the town centre. The significant benefits it can bring to the perception of the town centre are recognised throughout the comments received on the on-line survey.

e) Re-opening of the railway station.
The on-line survey (Q2.5) asked if a new railway station would be beneficial. 88% of respondents either agreed or strongly agreed that the railway station would be beneficial while 4% disagreed or strongly disagreed. When asked (Q4(1) of the on-line survey) respondents indicated a 91% level of support for reinstating the railway station. This was reflected in the responses received to the interactive map with 62.5% of respondents supporting the opening of the railway station. When invited through the on-line survey and interactive map to comment the following broad themes emerged:

1. The station would be a great opportunity for residents to travel not only within Devon but the greater South West and beyond, without the need to use the car and the associated carbon emissions produced.

2. Improved rail connections apply to those visiting the town as much as those living in and around Cullompton; improving economic activity.

3. Improved rail connections allows a fast and efficient service for students who use the College and University campuses in Exeter, Taunton and beyond.

4. Ensure the service is affordable, convenient with adequate and affordable parking.

5. Improved pedestrian and cycle links, and town service bus are essential to its success.

6. Improve the existing station of Tiverton Parkway so monies can be better invested into social infrastructure such as doctor, dental and educational facilities.

7. People will not walk / cycle to the station. It will cause traffic chaos along Station Road and J28.

Whilst the concerns of respondents relating to investment into the existing (Tiverton Parkway) railway station are acknowledged, the masterplan confirms that a limited amount of car parking will be made available at the new proposed station and the establishment of an 'interchange hub' facilitating transfer between rail, bus, car, walk and cycle will be provided (Chapter 4.2). More specifically, the masterplan promotes pedestrian and cycle links along Station Road (Chapter 4.2), within the key opportunity sites and between the new rail station and CCA fields (Chapter 4.6). Overall, the response to the re-opening of the railway station indicates an over-whelming level of support. As such, the proposals outlined in Chapters 4.2 Routes and Movement and within key opportunity sites 1, 2, and 5 will be retained. Clearly, this project is progressing well with the station forecast to open by May 2025, but the further policy support provided by this masterplan to the station re-opening project will further support the Council and its partners in demonstrating is continued firm commitment to accelerating and delivering this strategically important project for Cullompton.

f) Enhancement of Fore Street.
The on-line survey wanted to understand respondents' views on the enhancement of the High Street.

Responses to the on-line survey, Q2(1), indicated a 95% level of support for the enhancement of the High Street with 85% of respondents seeking an improved pedestrian environment in the following order of importance:
1. Wider pavements;
2. Pedestrianisation;
3. No or less parking and a one-way system;
4. Time restricted deliveries, restricted access, improved public realm in the form of resurfacing, café seating or benches and 'greening of the high street in the form of trees and planting.

The interactive map also invited comments on the enhancement of Fore Street. 72% of those responding supported the enhancement of the high street with comments following a broad theme of:
- Climate change: installation of solar panels; planting / shading.
- Enhanced pedestrian environment: wider pavements; pedestrianisation or one-way system; restricted and enforced parking and deliveries, de-cluttering, shared surfacing (removal of high kerbs).

- Historic high street: shop front enhancement; surface materials to reflect historic setting whilst improving footfall, business activity and general safety.
- Social spaces: public art, seating, water features, planting, multiple pedestrian crossing places, a cleaner and greener (trees, planning, hanging baskets) high street with weekend road closures.

A number of respondents both through the on-line survey and interactive map, felt able to support the enhancement of Fore Street but only following the construction of the relief road &/or an additional motorway junction. Others were concerned that the loss of road space and/or widened pavements would limit access to or rely on the private ownership of land.

The level of support for the enhancement of Fore Street nonetheless remained high. As such, the proposals outlined in Chapters 4.2 Routes and Movement, including the pedestrian / cycle and vehicle network, 4.3 Public Realm and Open Space including improving the High Street / Courts and Lanes / Pocket Parks and 4.6 Fore Street will be retained.

g) Re-design of the Higher Bull Ring.
The on-line survey (Q2.6) asked if respondents would like the Higher Bullring as an enhanced community space. 86% expressed a level of support, whilst 8% disagreed and the remaining 6% had no opinion. Respondents expressed a preference towards its use in the following order of importance:
    - Improvements in and the frequency of markets.
    - Outdoor dining and seating
    - Events including music, performance and busking
    - No or less traffic and / or parking, planting, pop up kiosks, art installations and social spaces.

    More specific comments on the Higher Bullring related to:
    - The orientation of the sun and relocation of the vehicular route to the shaded side of the Bull Ring.
    - The importance and celebration of the historical importance of the Higher Bull Ring.
    - Redevelopment of the Harlequins site as a thoroughfare and community space.
    - A family friendly, cosmopolitan central space that encourages day and early evening use.

    The interactive map also invited comments on the enhancement of the Higher Bull Ring. 66% of those responding supported the enhancement of it commenting that it should act as a centre piece to draw people into the town centre. Others commented that it can only be sustainable once the relief road is constructed.

    Acknowledging the level of support, the proposals detailed in the masterplan at Chapters 4.2 Routes and Movement, 4.3 Public realm and open space, 4.5 Environment and Sustainability and 4.6 The Higher Bull Ring are retained.

h) Climate Change.
The means and ways for the town centre to support and respond to climate change is interwoven throughout the masterplan with opportunities for sustainable modes of transport, carbon neutral ways of construction and enhanced biodiversity, and a re-imagined town centre with enhanced uses, activities and public spaces considered in some detail. Chapter 4.6 of the masterplan introduces 8 sites that currently have varying levels of active use. Enhancement of them may bring a variety of benefits including benefits for the climate. The interactive map dealt specifically with these sites and received the following responses:

Alexandria Industrial Estate.
62.5% of respondents to the interactive map expressed support for the identification of Alexandria Industrial estate as a Regeneration and Enhancement Area; 37.5% disagreed. The masterplan outlines opportunities for it to create an enhanced arrival point into the town for the new rail station with enhanced pedestrian and cycle links possibly through the estate, enhanced River Culm frontage with regeneration of uses operating from the estate. Comments made specifically through the interactive map generally supported the proposal on the understanding that it does not result in the loss of existing businesses and is not financed by the public purse.

Railway Station.
As detailed above 91% of respondents (via the online survey) supported the opening of the railway station. With 62.5% of those commenting via the interactive map supporting re-opening.

Improvements to cycling between the new rail station and the town centre.
78% of respondents to the interactive map expressed support for improved cycle links to the new rail station with many seeing the benefits of it for short journeys. A hazardous cycle and pedestrian environment along near roads was expressed as the need to segregate cycles from pedestrians.

Tannery Site.
66% of respondents to the interactive map expressed support for the identification of the former Tannery site for redevelopment. A wide range of comments were received through the interactive map and made reference to opportunities for housing, employment and community functions including artisan teaching spaces and workshops, a site for a public park and /or swimming pool.

Fore Street enhancement.
72% of respondents to the interactive map expressed support for the enhancement of Fore Street. With further details provided at Paragraph 3.1(f) (above).

Leat Footbridge.
68% of respondents expressed support for the reinstatement of the former iron bridge over the leat through the interactive map. Comments specifically

received on the reinstatement of the former bridge are mixed; many concerned about its expense and the level of use it will receive whilst others saw benefits for enhanced connections between the CCA fields and town centre. Construction should not increase flood risk.

The Old Cinema site.
54% of respondents to the interactive map expressed support for the re-development and/or enhancement of the former cinema site. Comments received site saw value in its use as a multi functional events and activity space to enhance footfall and activity. Financial cost and viability were seen as a concern.

In summary, the key opportunity sites generally received a high level of support through the interactive map ranging from 78% to 54%. This too was reflected in the on-line survey (Appendix 1) with support ranging from 91% to 61%. Whilst the concerns of respondents are acknowledged, officers recommend the retention of the opportunity sites identified in Chapter 4.6 of the masterplan.

3.2 The 8 key findings (a-h detailed above) and the comments received on the 8 key opportunity sites are acknowledged. All will be retained within the Masterplan SPD. Changes proposed within the Masterplan SPD are detailed within Appendix 2 and offer text changes.

3.3 In support of the Draft Masterplan SPD (Appendix 3) is a Draft Delivery Plan. The Delivery Plan will sit as an addendum to the Masterplan SPD and identifies the priority projects, as identified through the Masterplan SPD, that the Council is keen to see progressed. Under pinning the Delivery Plan is a set of cross-year targets outlining what could take place, when and how (Appendix 5).

4.0 Strategic Environmental Assessment / Habitats Regulation Assessment Screening

4.1 A Strategic Environmental Assessment (SEA) (Appendix 6) and Habitats Regulation Assessment (HRA) (Appendix 7) is required in accordance with regulations and Directives on any plan or programme prepared for town and country planning or land use purposes or which sets the framework for future development consent for certain projects. An HRA and SEA formed part of the Stage 2 public consultation material. No specific comments relating to them were received.

5.0 Planning Policy and Advisory Group (PPAG)

5.1 PPAG considered this report at the meeting on 17th January 2023. Members of PPAG had no specific comments to make. The Ward Member expressed support for the enlarged process of public consultation; including on-line interactive maps. PPAG supported the recommendations as set out in this report.

6.0 Conclusion

6.1 A thorough analysis of the consultation responses has been undertaken and amendments accordingly proposed to the Draft Masterplan SPD as detailed in Appendix 2. The draft Masterplan SPD and Delivery Plan once adopted will provide a comprehensive framework to guide development in a coordinated and comprehensive manner. Once adopted it will achieve full weight in decision making as a material planning consideration.

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Background Papers: The Adopted Local Plan (2013-2033):
https://www.middevon.gov.uk/residents/planning-policy/adopted-local-plan-and-policies-maps/

Examination submission version Cullompton Neighbourhood Plan
https://www.middevon.gov.uk/media/348271/cnp-final-submission-version-aug19.pdf

Public consultation material:
https://www.middevon.gov.uk/residents/planning-policy/masterplanning/public-consultation-cullompton-town-centre-masterplan-and-delivery-plan/

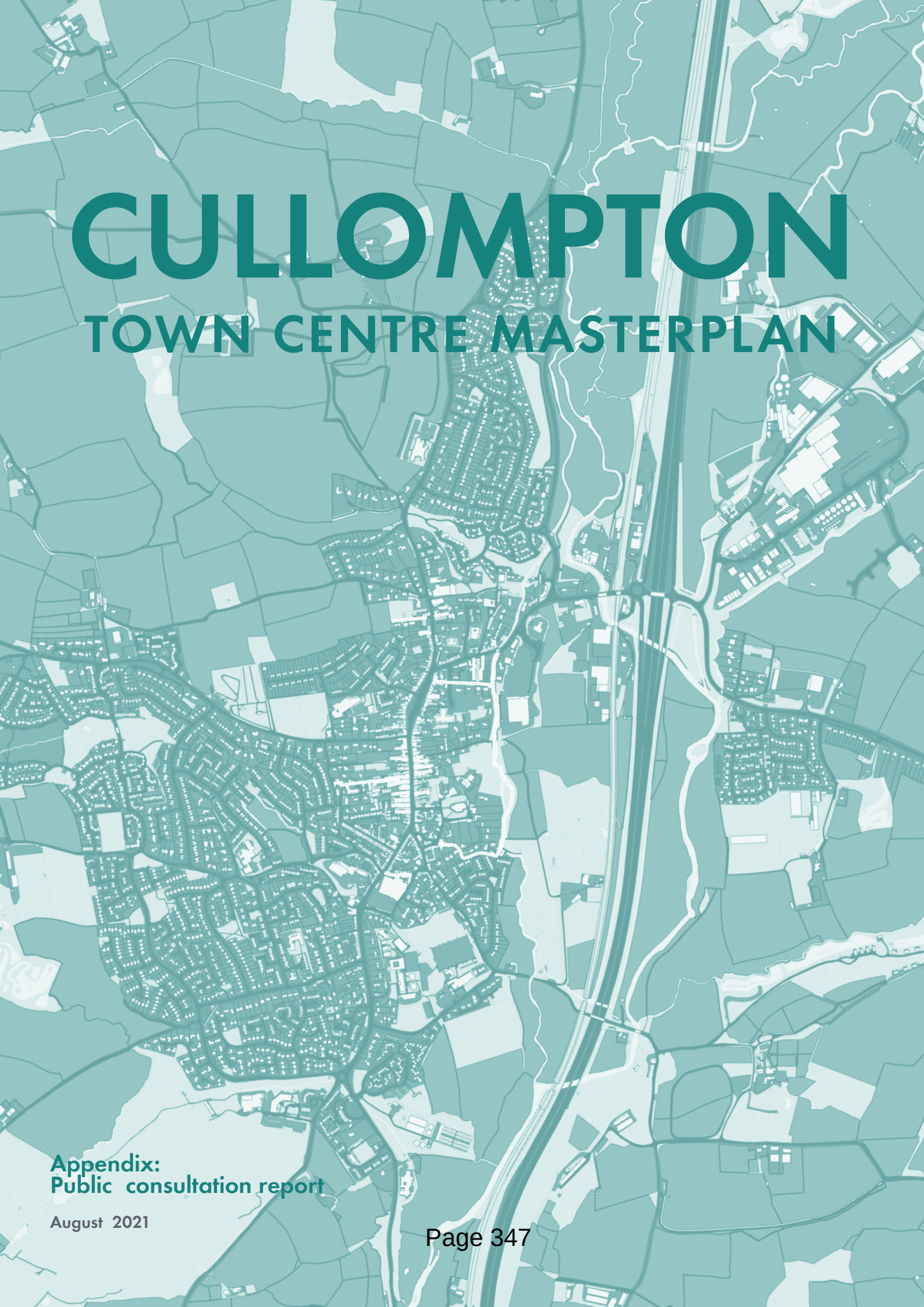
Cabinet 5 April 2018
Scrutiny 30 September 2019
Cabinet 16 January 2020
Cabinet 9th July 2020

Circulation of the Report: Members of Cabinet

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CULLOMPTON

TOWN CENTRE MASTERPLAN



Appendix:
Public consultation report

August 2021

Cullompton Town Centre Masterplan Public Consultation

88 survey responses

X events

X map comments

The Cullompton Town Centre Masterplan, once adopted by the District Council, will form the basis for the regeneration of the town; enhancing the town's economic prospects and providing a clear strategy to ensure the town meets its full potential as an attractive and thriving town post COVID-19 and into the future. The Draft Masterplan has been prepared by consultants in the context of the major projects planned in and around Cullompton. These include:

- North West Cullompton Urban Extension;
- The new homes allocated to the east of the town;
- The proposed Culm Garden Village;
- The High Street Heritage Action Zone which will see investment into Cullompton's historic high street; and
- The potential reopening of Cullompton railway station.

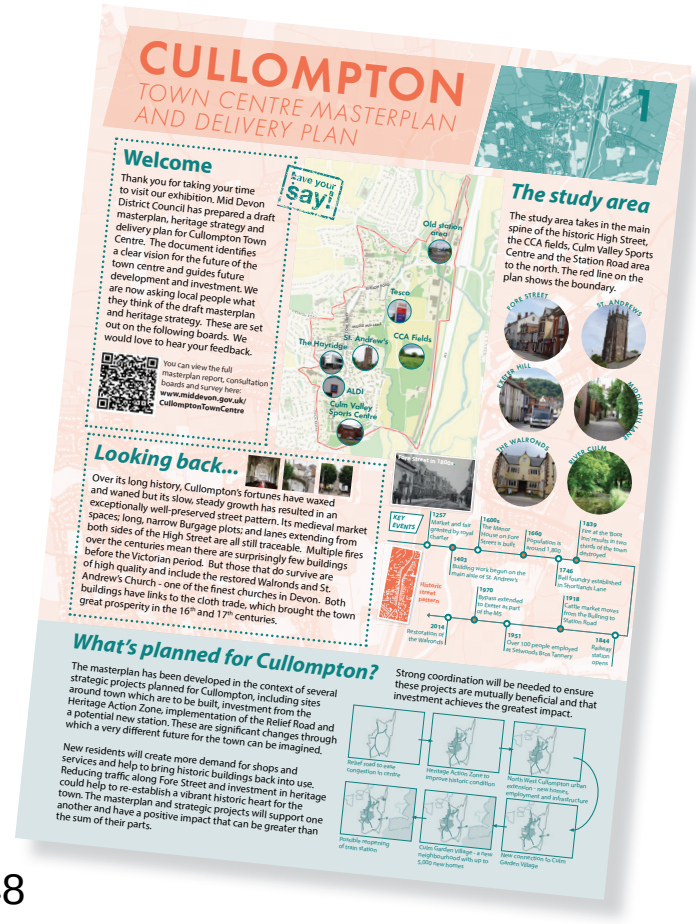
A public consultation was held between 28 June and 13 August 2021. During this period, people could view the document and consultation boards online and could submit comments or responses via:

- The online survey
- Directly on to the online interactive map
- Paper copies of a the survey at the Hayridge Centre from 28 June to 13 August 2021 during normal working hours.
- By posting a written response.

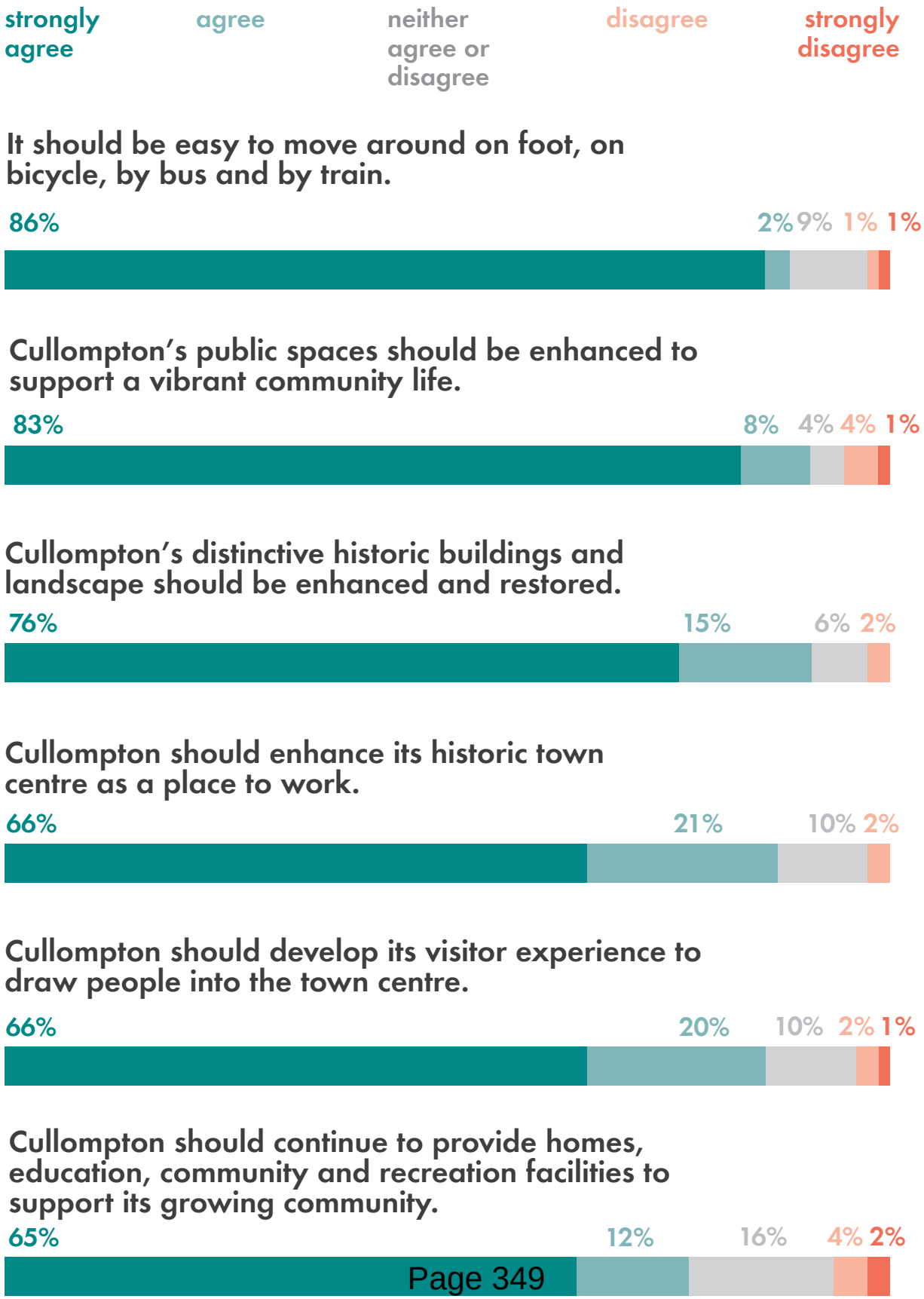
There were also drop in events at The Walronds, Tesco and the Hayridge Centre. This is the final stage of public consultation ahead of the District Council being able to formally adopt the masterplan.

An estimated X people were engaged in the public consultation. 88 responses were made to the survey online and in person; the feedback is reported in this document. In addition X comments were made via the interactive map.

This feedback is in addition to the first round of engagement which took place between February and April 2020, which included a workshop with 50 community members and local stakeholders, four town centre events, 55 survey responses and engagement with local school children. The comments raised at this first stage have been given full consideration by the District Council and incorporated into the Draft Cullompton Town Centre Masterplan.



Do you agree with the proposed vision for the town centre?



Is there anything missing from the vision?

- The reopening of the train station is really important for locals to get to Bristol, London and Exeter for work.
- Woodland accessible by foot from Cullompton
- Patience this plan should not be approved or incur additional cost until the impact of the relief road and train station if happening are quantifiable.
- Train station
- More easily accessible and reasonably priced parking.
- Stop building houses
- Need to stop building houses and wasting money on things like 19 high street, should stop employing people who don't do the work the the cemetery
- You can't exclude cars totally - maybe encourage more charging points? But don't pretend they don't exist.
- No more homes required, but amenities to support those we have with adequate off road parking
- Train station
- Cullompton should be GREEN in every sense
- Improper parking blights the town centre. Off road parking much be improved.
- Lack of clarity regarding traffic control measures
- Deaf friendly shops, services and community
- Street cafes
- Maybe some more parking
- Car parking is paramount and disabled spaces in the high street
- Supporting more shops and the market
- A more welcoming entry to the town and no right turn at the traffic lights onto Willand road
- Stop building on good agricultural land - we don't need thousands of new houses
- The infrastructure and roads are in dire need of attention.
- TRAIN STATION
- Schools should be thought about before building more houses
- Creation of high quality parks and open green spaces which rival the quality parks that exist in Tiverton.
- Promote local businesses and offer support
- The project should be collaborative with the people of the town involving them in the doing. by being activlty involved they gain skills, relationships, and feel ownership. This feels like a project being done to the town very laudable but not owned. see the blue house project http://www.jankattein.com/blue-house-yard-up-running/
- Strict rules for high street landlords to maintain their buildings.
- Get some double yellows on the outer bypass where needed and make the town one way, down through the town and back on the outer bypass and down Tiverton lane
- Parking space for the many town centre dwellings
- No cycle paths, many people would

commute to Exeter if there was a safe cycle path. Cullompton high street should be pedestrian friendly e.g

- Improve safety and celebrate multicultural population to make all inhabitants feel welcome and safe
- Electric charging points in the main car park
- Night times are badly managed. There are a number of drinking establishments that are not mindful of people living in the town centre. In a short period of living in the centre, we have had to call 999 due to fighting a number of times. The pubs are binge drinking establishments, not inviting public houses in a traditional and historical centre. The Manor Hotel is the root of the issue currently
- There could be more reference to how the Visions and Objectives inter-relate. For example historic and archaeological sites might be green space, or the green space might be the setting of a Listed Building. Key views can be obtained from St Andrew's Hill, which has the Scheduled Roman fort on top of it.
- The people in charge allow about 6 antisocial people to park as and when they like in the Main Fore Street all day on a Saturday as an example and block access to residents property in the conservation area. I won't matter what happens because these 6 people will just make pollution worse for all driving around them, trying to pass their vehicle on the pavement or smelling their rubbish / dog mess on the wrong days.
- The neglected town Leat needs improvement. Together with source weir, pathways and interconnecting ways.
- Don't forget car users - they won't go away! Public toilets - at several points in the town.
- More natural features tree shrub borders and flowering containers - public seats off the main street - more shade.

Do you support the Masterplan for the town centre?

strongly agree | agree | neither agree or disagree | disagree | strongly disagree

Do you agree that opportunities should be pursued to enhance the pedestrian experience along the high street?



Do you support enhanced cycle and pedestrian provision throughout the town?



Would you support improved cycle and pedestrian provision along the Station Road?



Do you support opportunities to improve the bus users experience in the town centre?



Do you agree a new rail station for the town centre would be beneficial?



Would you like to see the Higher Bullring as an enhanced community space?



strongly agree | agree | neither agree or disagree | disagree | strongly disagree

Would you like to see improved pedestrian and cycle links between the town centre and the CCA Fields?



Do you agree with the pocket parks identified?



Would you like to see a greater variety of uses in the town centre including leisure, food and drink, retail, residential and employment?



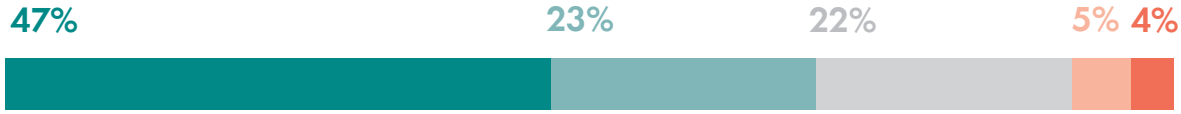
Do you agree that initiatives to encourage visitors into the town centre are desirable?



Would you like to see more flexible work space in the town centre where workers can access office space, equipment and training?



Would you like to have town centre WiFi provision that would promote local businesses and enhance the visitor experience?



Higher Bullring

strongly agree | agree | neither agree or disagree | disagree | strongly disagree

Would you like to see the Higher Bullring as an enhanced community space?



If so, how would you like to use the space?

The bubbles show the most frequent themes. The full record of responses is shown on the next page.

- 1 Markets (improved or more)
- 2 Outdoor dining/ seating
- 3 Events
- 3 Music/ perform/ busking
- 4 No or less traffic or parking
- 4 Pop ups
- 4 Trees and planting
- 4 Art installations
- 4 Social space

High Street

strongly agree | agree | neither agree or disagree | disagree | strongly disagree

Would you like to see any pedestrian environment improvements in the high street?



If so, what improvements would you like to see?

The bubbles show the most frequent themes. The full record of responses is shown on the next page.



Higher Bullring

How would you like to use the space?

- Farmer's Markets, events, dining/drinking space outdoors.
- Social space
- There needs to be more employment locally not community initiatives that require funding.
- Music, busking, stalls for sellers.
- Outdoor events in Summer e.g. food festivals. Pop up catering and outdoor eating spaces.
- How about you look after what is already there
- Continue to use as market/ pop up shop area
- Antiques Market
- town square, markets, socialising
- A much more diverse market promoting local produce, products, arts and crafts. Space for entertainment, outside seating area's.
- Events
- Permanent structures for market stall holders
- No traffic market stalls seats
- Outdoor cafe/bar/restaurant space
- Temporary sites for food vendors and seating
- less intimidating, using nature to soften the noise from traffic and people congregating to make it deaf friendly
- Outside eating area
- Local businesses and small businesses expanding their companies
- Markets, open restaurants space, shops and restaurants being able to use the pavements
- More benches for people to sit on and the bus stop moved.
- More market traders, music, outside seating for cafes, artists displaying their work, street theatre
- More market days , entertainment , eating areas
- Continue the farmers market
- More markets and provision to run car boot sales etc at weekends.
- It would be nice to have a Christmas Market leading up to Christmas
- Market enlargement, displays, social gatherings, performing arts, charity events
- Restaurants,cafes,bars,shops.
- Weekly market place expanded to see more local producers and trades.
- "Entertainment area, bands, singers, musicians, street players etc.
"
- Permanent market stalls that pop up shops can use too
- Shops, stalls, be proud of our town
- Providing more opportunities for those on the edge of society
- Sponsor music and entertainment

- This space was historically created as a market place and has retained all the hallmarks of that. the benefits of open space are that it can be used flexibly. serious consideration should be given to where the the open space is as it stands the opens space is where the morning sun is so markets in the morning are great however as the sun moves this becomes a dark and shadowed spot whilst the other side of the street gets better light and sun in the afternoon evening. Perhaps the relocation of the vehicle route to the east side of the bull ring should be a consideration
- Attractive seating area with parking spaces removed and open area created
- Less parking. More art and culture needed.
- More of a community space for experiences and festivals. Business to be able to expand into outdoor spaces
- Do not send bikes down Station road, use middle mill lane or higher mill lange and out through tesco carpark, keep biles and cars off the same bits of road, its not rocket science
- Market and festivals
- Larger market on high Street, get rid of the cars and it will be a nicer shopping experience.
- Weekly weekend markets, community events, art installations
- We are missing a greengrocers, a nice wine shop, a good coffee shop. We need somewhere that is family friendly and cosmopolitan. And stays open past lunch on Saturdays
- Higher Bullring is an important late historic feature in its own right, as well as containing various historic structures and buildings. This heritage should be presented and celebrated.
- Move the road closer to the East by using the parking spaces and have all the people area as one with out a road through the middle. Stop the same 6 antisocial people taking parking spaces on Festival days and put in a bicycle rack, (The Council have been “going”this for over a year. Prosecute the cyclists that cycle on the pavement and stop people parking on the Crossing, we all know they do and it is dangerous.
- More activity over a longer time space. I would like to see hustle and bustle all day every day, evenings too, for local people and visitors, including weekends.
- Trees /cafes / market
- Better market provision
- More outdoor cafes - better planting opportunities and enhanced market. Better signage.
- The site of the old Harlequins could be developed into a green thoroughfare with seating and gardens to provide a pleasant respite area for people to enjoy a lunch break, meeting place for friends etc. Soft play place for children under 13. Somewhere for teenagers.

Higher Street

What improvements would you like to see?

- Wider pavements, less traffic.
- Solar panels
- Deliveries should be time restricted to avoid rush hour
- No parking at all and loading/unloading times limited and strictly enforced. More diverse shopping.
- Wider pavements
- Reduce parking, widen pavements.
- How about pavements are not cluttered up
- Fencing barriers between road and pavement
- Double red lines and cameras to stop traffic parking in high street.
- wider pavements where possible, reduced traffic, a one-way system (already voted fr by Town Council), improved pavements for mobility scooters and push chairs
- “Shop fronts made more inviting, wider footpaths, better signage to areas of interest. Access only for delivery vehicles, residents vehicles or a one way system?“
- better pavements - cohesive, more in keeping with the historic nature of the town
- Reduce pavement obstructions including cars parked on pavements and at junctions.
- As per previous answer, improved road traffic management and control.
- Make it one way until bypass is built then pedestrianise and impose a weight limit up old Tiverton road Langlands and Swallow way
- There needs to be some safety measures outside mrs campbells house next to the Baptist church. There have been several near misses with cars rolling across the road into her wall. Needs some barriers to prevent injury to pedestrians
- Shaded seats
- Wider footpaths and minimal traffic
- Reduce to 1 way and widen pavements
- Make it pedestrian
- More trees
- Pedestrianise the high street
- No parking at all. Camera can be fitted to Fine people from parking.
- No parking on the high street at all from 8am until 9am and 5pm until 7pm also remove the traffic lights , there for saving our community field as it’s for the people of Cullompton
- Widen the pavement make it a one way system no deliveries at peak times.
- Wider pavements,also would be nice for the pavements to be tarmac, at the moment parts of the pavements are very slipper when it is wet,and also uneven in places.
- Removal of the high curb stones, wider pavements on one side, encouraging shape to paint their frontages
- No cars allowed
- Once relief road has been built, remove all vehicular access to the high street. Cafe’s with seating down the road, restaurants with seating on the street etc.

- “I would like to see the town centre pedestrianised with cafes offering outside seating.“
- The footpaths need widening up near Aldi into town. You can’t socially distance as only room for one person!
- Better pavements, maintained properly
- “Wider pavement
Better quality pavement which is more aesthetically pleasing Regeneration of shop fronts “
- Wider pavements
- Weekend road closures. Shops with flowers outside and supporting businesses with free parking
- wider pavemtn /shared surface see italian hill towns and the relationship with people and traffic
- Wider pavements
- Reduce traffic - one way or pedestrianise
- less dog shit would be a start, all in all it is good, wide paths and multiple crossing points
- Cleaner buildings, no parking on high Street, get rid of all the cars.
- Make it one way or pedestrianise
- Wider footpaths, more greenery
- Enhancing pedestrian access will enhance understanding, appreciaition and hopefully conservation of the built historic environment.
- Pavements for pedestrian to cyclists or vehicle parking. No parking on the crossing, and please don’t tell me people shouldn’t because we know that just stop this dangerous parking before it kills someone.
- Relief Road needs urgent progress, then all these attributes could be pursued. One cannot be against any of them.
- Proper pedestrian crossings in Higher Bullring - Baptist Church / St Andrews area.
- Fountain, art, benches, cafe
- Make Fore Street delivery and access to lanes only. No through traffic except maybe buses.
- Wider, more even pavements. Easier road crossing.
- Preferably traffic free - limited hours for deliveries. More shade.
- More trees, more flower tubs

Sustainability

The masterplan introduces ways that the town can respond to climate change and move towards becoming a sustainable town including enhancing biodiversity, shifting towards sustainable means of transport (cycling, walking and public transport) and embracing carbon neutral ways of construction. Do you have any comments on the environment and sustainability strategy for Cullompton Town centre?

- All of the points mentioned in the plan are valuable, as long as they are implemented meaningfully and maintained. New developments should not be allowed to "tack on" or ignore their climate/environment responsibilities either. They must be closely monitored.
- Have free parking walking distance away from the high street so that the high street is not so busy
- If streets had dedicated safe bike lanes, I would be very likely to use a bike
- All public buildings to have solar or other environmental energy.
- All new development should go beyond legislation to include swift bricks or similar to encourage breeding birds. Green space development should incorporate insect-friendly planting and insect hotels - involve local school children and consult wildlife groups. Walking/cycling routes should allow for people with disabilities. Public transport should try to be integrated for convenience. Encourage car share schemes. Make Cullompton plastic free and encourage local businesses to use low carbon, fair trade and plastic free. Establish community groups and community champions. Community rubbish clear up groups.
- Look after what we have and stop wasting money
- Again, don't ignore cars. If you want to draw visitors most will come by car for sometime yet. There needs to be suitable parking and as I said before, possibly more charging points..
- All homes should have solar panels
- Realistically we will need personal transport in the form of cars for some time because we are living in a rural setting and public transport will never address all our needs. So we need to accommodate electric vehicles and have the infrastructure to support them, whilst also watching for what other options may appear e,g, hydrogen etc
- Anything to help
- Build a proper relief road east of the motorway instead of destroying the open space we have.
- Once again, road traffic management and control, pollution levels are very bad, pollution levels are very bad.
- We need to make use of nature based solutions to manage flooding
- There needs to be more parks, not just for children but garden style parks for adults where they can walk, relax and have quiet calm place to be themselves.
- Make it pedestrian
- Shop owners are not maintains their fronts and signs, these should be enforced as it makes the town look poor.
- Cycle routes that are safe, even for children so they can walk and cycle around the town and to school
- Yep, stop building house in Every nook and cranny in the town centre, all future homes should have solar panels,
- Less cars
- Stop the ridiculous levels of building and contain our community
- I think cycling through the town is so dangerous with all the traffic and hgv that go through, it would be nice to have a cycle

path,but the roads and pavements are not suitable.

- The secondary school students should be involved so that they have more pride on the town and stop dropping plastic and glass everywhere.
- Offer people loyalty cards in businesses to stop them going out of town
- Getting rid of the traffic and encouraging walking and cycling would be a good start
- Pedestrianise the high street for less pollution
- Reduce vehicles in the town centre. Encourage more public transport use and develop more extensive cycle routes
- lead by example, lets have all the council vans being electric, lets force all the buses to be electric, set an example for the town to follow. Set up a free or low cost school bus system for the town, get all the cars away from schools at the start and end of the school days
- No 19 higher bullring should be part of the project
- Pedestrianisation is the only way to do this.
- The station would be a great opportunity for residents to travel not only within Devon (Exeter, Torbay, Plymouth, Barnstaple and, shortly, Okehampton) but opens up the greater South West and beyond without using the car and the associated carbon emissions being produced (especially if the line is electrified). Obviously, these improvements will apply to those visiting the town. It also allows a fast and efficient service for students who use the College and University campuses in Exeter.
- Way to go. Add a cycle hire shop
- Fix the pollution and traffic issues first and foremost
- Proposals to enhance the natural environment need to be balanced with respect for the historic environment, including archaeology. Trees, water management features and other landscaping involving groundworks coupled damage sensitive Roman and medieval archaeological deposits.
- Too many people pretend they are not parked because they wait with the engine or or are rude when you ask them to turn off the engine. Night life s fine but take a way delivery drivers and customers cause a big problem on weekend evenings, no wheelchair access to nearby property because they are only”5” minutes. The problem is another 10 people selfishly think the same. Do tourists want to visit the Church with waste containers / dog mess drug butt ends on route, and loud music from cars pretending not to be parked?
- Careful thinking and consultation (careful, not slow) resulting in sustainability. More sustainable power sources on buildings etc.
- Approve of plans suggested

Heritage Strategy

The Heritage Strategy for Cullompton looks to use the historic character of Cullompton as a foundation to shape a distinctive identity for the town. Do you have any comments on the Heritage Strategy for Cullompton Town Centre?

- Cullompton has a history that lends itself well to arts and crafts. Look at establishing a craft centre - studios for local artists and a co-operative gallery. Get the schools engaged in paper/fabric based activities e.g. making banners. Consider making the railway station heritage in the long term (ie not using shipping containers! Birmingham's Moor Street is a good example).
- Like the crap heritage trail .
- Look up, we have wonderful buildings, many Grade II, hidden behind ugly shop fronts
- Can't come soon enough
- Pie in the sky. Great ideas but we will be starved of the necessary cash as usual.
- I live within the conservation area off of the town centre, I would like to hear more about enhancement around the area of Church Stree, Pye Corner, Gravel Walk and Queens Square.
- Heritage is the old tanning town not the commuter town it has become due to over development stop this now before itâ€™s too late
- Should be enhanced
- The nature of the town is one where the buildings built before planning are of more interest and and character than those built controlled by the planning process it is my belief that the heritage strategy should embrace the new especially in view of climate change impacts plus it adds a contemporary layer to the fabric making it more interesting rather than a poor pastiche
- Something needs to be done to tackle the issue of some business owners who refuse to improve the exterior of their properties. There is a lot of potential to enhance what is already there and now assistance to do so in the form of grants, so no excuse.
- Fully supported. And all PVC windows on the high street should be replaced with traditional versions.
- Pull all the old taty looking buildings down, cullompton has been a shit hole for the last 35 years, all the talk never changes anything
- Shouldn't just be shops on the main street
- It's exactly the right thing to do with seven Grade II* listed buildings in one small town - surely that is unheard of! But that comes with it a need to support owners of these properties with both knowledge and funding to keep these buildings in positive usage and condition
- The proposed treatment of the built historic environment and the historic town plan, particularly the burgage plots, is very positive and welcome. However, one of the town's most important archaeological sites, the Roman Fort on St Andrews Hill, does not get much of a mention. There is reference to looking at grants to get it off the at Risk Register, but a lot more could be done to raise awareness of this site and turn it into a real asset for the town. This would have synergies with a number of other themes and objectives, such as new green space, enhanced pedestrian access, key views and attracting visitors. More could also be made of the town's historic water features, its Leats and channels, mill ponds and water meadows. As interesting/ attractive features in their own right, but also linked to their biodiversity and potential to contribute to modern water management initiatives.

- Give the Town Council some teeth when they object to a development. We will have no meeting place bigger than 12 left soon when it is all flats, and wheelie bring and cars on the pavement.

- Always need more information available - enlarging the existing boards/QR links/ leaflets. Local blue plaque type scheme for both people and histories of specific buildings. Plaques to indicate which buildings are listed.

The Masterplan identifies eight key spatial opportunities for Cullompton.

Please select all that you support.



Reinstating the Railway Station.



Enhancing Fore Street with wider pavements, new surfacing and de-cluttering.



Improving cycling links between the proposed new rail station and the town centre.



Redesign the Bullring as a flexible and enhanced public space



Enhancing Alexandria Industrial Estate as an arrival point, complementing the Railway Station proposals.



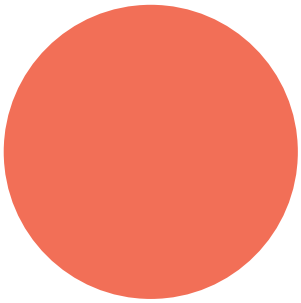
Promoting the Old Cinema site to be brought back into use.



Reinstating the former ironbridge crossing over the Leat near St Andrews Church.



Reinstating the former ironbridge crossing over the Leat near St Andrews Church.



Is there anything else you would like to tell us in relation to the Town Centre Masterplan?

- The railway station is crucial to attract new locals, visitors and businesses alike
- The SDP focusses on encouraging travellers to break their journeys at the town and have an enhanced experience beyond what the service station can offer. However, could more be done to encourage people to break their journeys for 24 hours or more? There is nothing about improving the hospitality industry locally. Cullompton's location also lends itself to becoming a destination town for good restaurants/pubs and/or arts and crafts. Highlight that it can be a hub for exploring both the North and South coasts as well as Dartmoor and Exeter City. (Note: we are moving to Cullompton shortly.)
- Look after what we have and stop wasting money. Employ people that actually work and do their job instead of talking and going on a computer
- Don't group cyclists with pedestrians. I would support more pedestrian areas, but too many cyclists are disrespectful and spoil it for the majority. I am therefore forced to answer strongly disagree to many questions which include cycling provision, this skewing my answers.
- We need footfall in the town centre. Ultimately this means we need people living and working in and near to the town centre
- It needs to be more inclusive, that means finding ways to stop people congregating on pavements restricting disabled access and to reduce noise and make the entire community deaf friendly so it becomes less intimidating.
- Please do it
- More family friendly areas. Parks for all ages, not just the very little ones.
- Don't allow the tannery to be developed for housing
- Improve the footpath to Willand. The road is fast and vehicles often speed down the road. It is easily walkable and improving the footpath would be a great addition to Cullompton and Willand.
- I also back a swimming pool for Cullompton
- The HAZ grant scheme needs to be really pushed in order to convince business owners to individually make a difference to the attractiveness of the town as this will increase footfall and encourage more businesses to move to the town.
- "you do know that the old Cullompton station had 2 tunnels either side of the station road bridge, so that trains could use the sidings, these where blocked up and built over when the railway bridge was widened many years ago. To open the station back up will require replacing that bridge.

  Best thing for the town would be to buy the carpark at the site of the old court house and let the public use it without risk of jumped up fines, we all know the owner is forcing people to park else where by fining people for not parking straight or any other jumped up reason, so he can say no one uses it can I build house on it. You wait"
- Mural on last building of Fore St, overlooking the car park as a visual welcome to the town centre
- Can't make a silk purse out of a sows ear
- Pedestrians only in town
- Opposes the NW housing development that will lose valuable beautiful green spaces for current inhabitants

- The high street doesn't work at the moment. Inevitably cars, vans and lorries need to pull over on Fore St and it causes chaos. There's not enough parking to accommodate more visitors to the centre, not helped by The Hayridge Centre car park being run by a horrible private company. Not sure how widening Fore St will help with the traffic chaos. We live in the Merchant's House and have nowhere to park and it's really tricky.

- Just as mentioned above - more positive action for the Roman fort and more integration of the landscape, streetscape, natural, built and historic environment across the themes. Also the importance of Cullompton as an Anglo-Saxon church/town could be brought out.

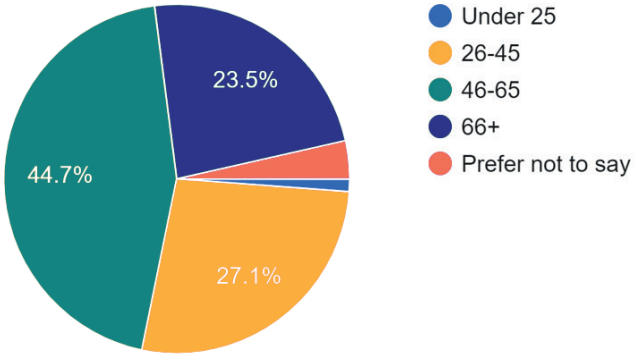
- Did any one ask the owner of the Cinema his plans? How will the bridge across the Leat help? you still have to get to middle mill lane to gain access to the church land. Any one ask them? Make the pavement wider? Is this just a sneaky hidden way to say make the road narrower and one way? The 6 anti social people with their unchallenged right to park need to be told NO NO NO and fined if they can't understand we are planning to spend Millions because of them. So why are we spending all this money and not finding the no parking (all day) solution?

- It's all taking far too long. Dynamism required.

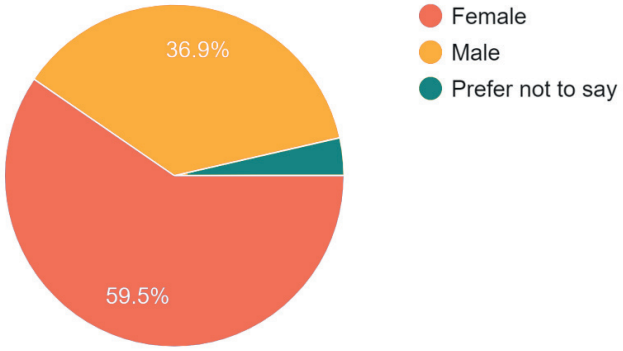
- If the town leat can't be reinstated (unlikely) make it clearer where it ran and why. Stop tarmacking pavements, do it properly with paving stones (no cobbles!). Railway station as proper transport hub/interchange. Move the service station down

Who took part?

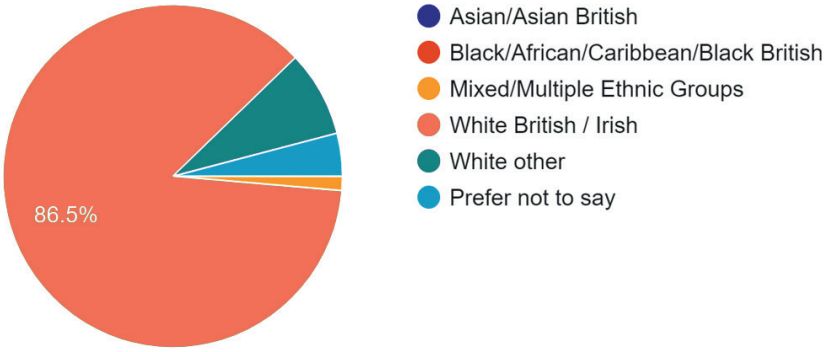
What is your age?



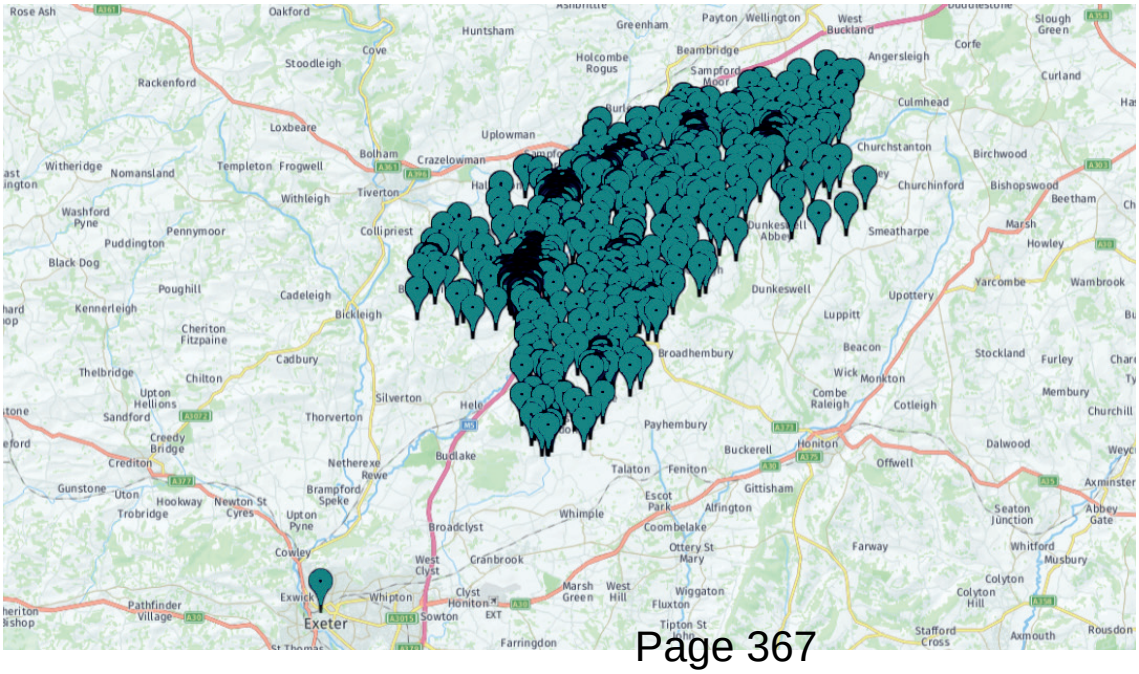
What is your gender?



What is your ethnicity?



What is your postcode?



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Allies and Morrison Urban Practitioners accepts no responsibility for comments made by members of the community which have been reflected in this report.

Statutory & Other Consultee Comments

Appendix 2

Cullompton Town Centre Masterplan		
Consultee: Natural England	**Consultee Comment**	**Response**
Proposed pedestrian, cycle, leisure & recreational routes	Such routes provide an opportunity for multi-functional green spaces improve air quality, aid flood risk management and reduce noise pollution, as well as enhance biodiversity, ecological resilience and support more joined up habitat networks.	Noted
	We would welcome further detail to show the opportunities for nature and wildlife in the outline for the proposals; these routes may provide opportunities to form green corridors, enhancing local sites and improving connectivity, for instance.	Detail to be provided at planning application stage. Request for involvement noted.
	Include reference to Mid Devon's Green Infrastructure Plan.	Insert at end of para 4.2.21: and the Mid Devon Green Infrastructure Plan.
	Give further consideration to the potential environmental value of brownfield sites including links to habitats beyond the site.	The environmental value of sites proposed for development as key opportunity sites is included. However, their full potential including within the wider network of green links will be fully considered at planning application design stage
Biodiversity Net Gain	Where Masterplan proposals such as CCA Fields and The Bullring identify enhanced biodiversity through their delivery, we recommend reference to Biodiversity Metric. The tool Environmental Benefits from Nature has also been designed for use alongside the Biodiversity Metric.	Reference to biodiversity gain is reference throughout the masterplan document. The 'Biodiversity Matrix' and 'Environmental Benefits from Nature' will be fully applied at planning application stage. Specific mention is not required at this stage.
Landscape	The masterplan should recognise the impact that the 'key opportunities' may have on protected landscapes such as the Blackdown Hills AONB and East Devon AONB. Landscape Character Assessments (LCAs) and Natural Character Area (NCAs) profiles provide a context within which to assess development.	The 8 key opportunity sites are town centre focused and modest in scale. Their impact on protected landscapes such as the AONBs will be fully considered at design stage inc reference to LCAs & NCAs.

		Specific mention is made to the AONBs at paras 4.3.26 – 4.3.27.
Trees & Woodland	Any impact on ancient woodland and ancient and veteran trees should be considered in line with paragraph 175 of the NPPF	The impact of any proposals identified within the masterplan on ancient or veteran trees will be fully considered at design stage inc reference to Natural England's Ancient Woodland Inventory.
Community Engagement	We are pleased to see that local people have been given the opportunity to contribute to the masterplan from the outset	Noted
Habitats Regulations Assessment (HRA) & Strategic Environmental Assessment (SEA) Screening.	We agree with the conclusions set out in section 7.1 of the screening report that concludes that the Cullompton Town Centre Masterplan is not likely to have significant adverse effects on the integrity of European Sites, either alone or in combination with other plans or projects, and therefore advises that further Habitats Regulations Assessment is not required	Noted
Habitats Regulations Assessment (HRA) & Strategic Environmental Assessment (SEA) Screening.	We agree that strategic environmental interests (including but not limited to statutory designated sites, landscapes and protected species, geology and soils) within the SEA Screening Opinion are unlikely to experience significant environmental effects from the proposed Cullompton Town Centre Masterplan	Noted
Consultee: Historic England	This is a very impressive report. It demonstrates an authoritative understanding of the town, its history and character and the issues which currently affect it, and sets out a comprehensive agenda for its future. We are particularly pleased to see such an extensive and well-informed section on the Heritage Strategy. This helps significantly in setting a spatially and thematically broad framework for the town which provides a useful context for the HSHAZ and other heritage related work which may complement and succeed it.	Noted.
	Liaison in the preparation of this report with the updated Conservation Area Appraisal and Management Plan will ensure complementarity, and contribute to the creation of a holistic agenda for the heritage-led regeneration and sustainable management of the town.	Agreed
	Section 4.2.38 refers to a traffic analysis recently undertaken in association with roadworks in Fore St/High St. It would be useful to know these findings & what further assessment may be necessary to inform the public realm design work for the Bullring.	Available through Devon County Council and have been made available to the project team for the redesign of the Higher Bullring.

	Page 56 includes a section on Broadening Cullompton's Offer. This is a very short and simple section, and somewhat disappointing given the expansive and invigorating conversations regarding this to redefine and enhance the town's specific Unique Selling Point e.g capitalising on Devon tweed for promoting Cullompton's heritage and as an economic offer.	The masterplan seeks to set out physical parameters within which Cullompton's offer can be expanded. The offer e.g Devon tweed is dependent on market opportunities.
	We would encourage key messages highlighted within boxes or as bullet points to ensure that they have impact and are not lost in main bodies of text	Key messages are delivered by means of titles & sub headings, aims & objectives. A re-structured and formatted document is not consider necessary.
	We note in section 6.9.3 (p100) that a Delivery Action Plan will form an addendum to this masterplan. This would set out a time scale for interventions and delivery mechanisms. This is a very welcome and important part of the masterplan, especially if it can also identify priorities and delivery dependencies	Noted including need for time scales.
Consultee: NHS Primary care	The Cullompton masterplan includes proposals for a considerable number of new homes in the area. The increased population will require increased primary care capacity to provide medical services to these patients. NHS Devon CCG will engage with the Council via the Local Authority Engagement Team to negotiate S106 contributions towards the cost of increasing the required primary care infrastructure to meet the needs of the larger population.	Noted including invitation to negotiate at detailed planning application stage
Consultee: DCC (Historic) Environment group	Although the Roman Fort is outside the Town Centre Boundary it is briefly referred to in the Objectives of the Heritage Strategy (Section 5). We feel that there are significant opportunities to further integrate the fort for reason that it is a nationally important heritage asset, fundamental significance to the town's origins, is a dominant landscape feature and a significant open green space (albeit farmed). It has public rights of way running adjacent to it. It is also strategically located between the town centre and the new developments on the north and north-west of the town. This ties in with the Baseline Report (5.1 Emerging themes and objectives) where objectives for heritage/historic landscape - particularly (1) key views, green spaces, amenity roles, and (5) raising the profile of rural walks, support having more ambition for the future of the Roman fort. Include as a key opportunity site.	Whilst briefly referenced, the Roman Fort lies outside the boundary of the town centre masterplan. The Cullompton Conservation Area Appraisal and Management Plan that is being updated alongside the adoption of this masterplan, gives the Roman Fort particular consideration.

	Para 4.3 (Public Realm and Open Space) could mention that the CCA Fields contain historic managed water meadows. These heritage assets could have a role in modern water management and biodiversity enhancement	Insert at para 4.3.2, second sentence: 'open fields, managed water meadows with an opportunity for biodiversity enhancement….'
	Paras 4.3.18-20: We welcome proposals to enhance the courts and lanes.	Noted.
	Paras 4.5.12-13: The management of floods and SUDS could reference Cullompton's long history of water management, including mill ponds, mill least, water meadows, urban water supply conduits. These could play a role in modern solutions.	Insert at the end of para 4.3.16: …'whilst acknowledging Cullompton's long history of water management in the form of town centre water channels, mill leats and ponds'.
	Para 4.6(3) There is some reference to heritage of the former Tannery Site but the focus is on the wildlife of the watercourse rather than it also being a significant heritage asset. This, and the importance of the Tanning industry to the town's development needs greater mention	Noted. The impact of development proposals upon the heritage of the tannery site and its relevance to the town's development will be fully considered at planning application design stage.
	Para 4.6.22 (Next Steps) should include a heritage impact and opportunity assessment, looking at the built heritage and below ground archaeological potential	The heritage impact including built heritage and below ground archaeological potential will be fully considered at planning application design stage.
	Chapter 5 (Heritage Strategy) does not mention the Roman fort in the introduction or on the Summary of Significance (though it is on the map, Fig.62). Despite being a nationally designated but at-Risk heritage asset, it is not referred to in 5.4 – Strengths, weaknesses, opportunities, and threats.	The Roman Fort lies outside the boundary of the town centre masterplan. The Cullompton Conservation Area Appraisal and Management Plan that is being updated alongside the adoption of this masterplan, gives the Roman Fort full consideration.
	The fort is specifically referred to in the Heritage Strategy under Strategy for change, Aim 2 (Protect) with 5.8.11 containing the objective to remove the fort from Historic England's Heritage at Risk Register. While we very much support this and the following Objective H, we feel that the key actions are limited in scope, relating principally to Historic England grant aid to the landowner. We feel that the Plan provides significant opportunities to link the objectives for the fort with	Reference included in the CAMP to the Roman origins of the town and how it has influenced the town historically. Additional reference to be included in the masterplan as follows: First sentence of para 5.8.4 to now read as follows:

	the wider aspirations for the town and could be much more ambitious. For example: A) Para 5.8 A Strategy for change, Aim 3 (Perceive), 5.8.4 – 5.8.5 do not mention the significance of the Roman origins of the town and the enduring influence of the fort and Roman road network. There is also, in consequence, a significant Roman archaeological resource in the town centre and on St Andrew's Hill. B) Para 5.8 A Strategy for change, Aim 3 (Promote), Objectives I to L do not mention the Roman fort. The Roman fort should be integrated into promotion of the town's heritage. Promotion and awareness raising will also be beneficial for the long-term protection (Aim 2) of the fort.	Cullompton's heritage has many layers, from the prehistoric settlement through to the Roman occupation in the Fort and associated civilian settlement. Objective I relates specifically to the historic buildings of Fore Street and the Bullring with Objective K making reference to Cullompton's distinct heritage including pop-up museum of archived materials. Specific reference to Cullompton's Roman past is not necessary at Objective I & K. However Objective J to be re worded as follows: increase awareness of heritage, including archaeology, in Cullompton's surrounding streets and spaces.
	Promotion and protection of the fort should be integrated with the Masterplan's Vision and Objectives, including: A) Historic Buildings and Landscapes (3) Protecting, enhancing, key views, green spaces – including seeking to provide more green space. B) Enticing Experience for Visitors (12) Raise profile and make use of attractions … and open spaces. (20) Link new development through a network of attractive spaces enabling connections to the town centre.	The updated CAMP provides additional protection to the setting of the Roman Fort to the east. However, the Point 1, bullet 3 of the Vision for the Masterplan Vision to read as follows: Protect, enhance and create key views to and from historic assets, green spaces and waterways……
	The fort is referred to as 'Roman fort and camp' in the document. It would be more accurately referred to as 'fort', 'forts' or 'fort and annexes'. There is no evidence for a 'camp' – which is a specific type of temporary Roman field defence.	Noted. All reference to be to the 'Roman Fort'.
	There are a number of comments relating to the Baseline Report.	The comments received to the baseline report whilst welcomed have not been set out in detail as it is not the intention of the Local Authority to update this document as part of this advanced stage of masterplanning.
Consultee: member of the public	As a new resident of Cullompton with a young family the exciting plans set out in the Masterplan was something that really attracted us	Noted.

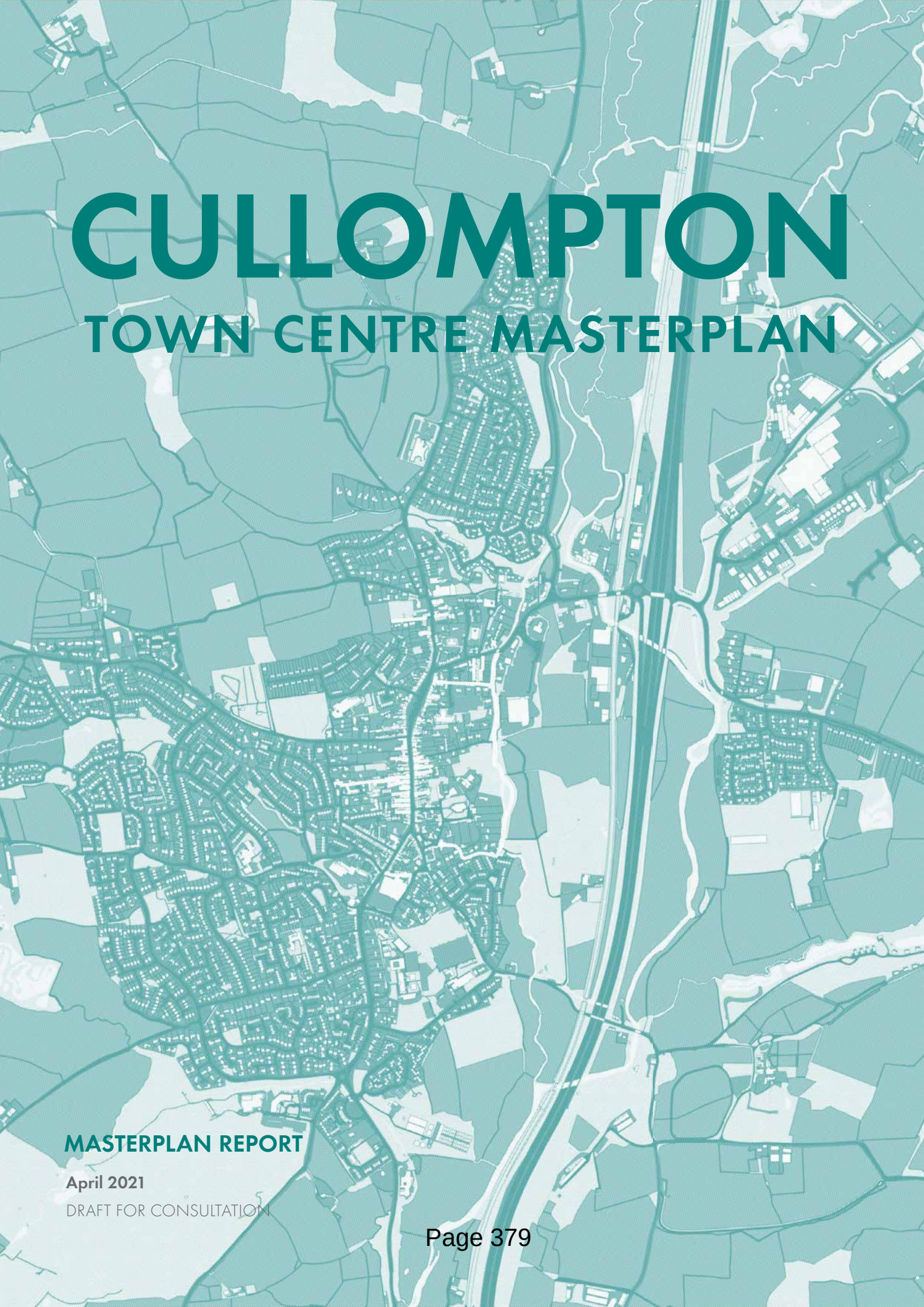
	to the town. We are particularly keen to see the relief road, the Culm Garden connection and train station to be built.	
Consultee: DCC Planning, Transportation & Environment.		
Local Transport Provision	Paragraph 4.2.8 refers to the Manual for Streets and states that a carriageway width of 5.5m would enable two Heavy Goods Vehicles to pass, with 6.0m for two-way bus movements. However, the Devon County Council Design Guide outlines that a carriageway of this nature needs to be 6.5m wide for two-way bus movements *with the possibility of additional widening on bends where required*." This approach should be reflected in the masterplan.	Amend para 4.2.8, fourth sentence to read as follows: 'The Devon County Council Design Guide indicates that a carriageway width of 6.5m would generally enable two Heavy Goods Vehicles to pass, with the possibility of additional widening on bends as required.'
	Paragraph 4.2.11 discusses the conversion of narrower lanes to formal shared surfaces. It should note that potential shared spaces would need to be in line with the new Department for Transport guidance on shared space.	Add to the end of para 4.2.11: ….including the Department of Transports guidance on shared space.
	Figure 15 should include the same caveat as that included for Figure 16, that being, "*Note: the points of access off the Cullompton Relief Road are not finalised and may change*".	Agreed. Insert Note next to the title of Figure 15*: the points of access off the Cullompton Relief Road are not finalised and may change.*
	Bullet point 32 on Page 31 should remove '*with improved cycle access to Exeter'* as this is not something which Devon County Council are looking to provide at present.	Agreed. Bullet point 32, page 31 to read as follows: 'Establish strategic cycle links between Cullompton and Willand.
	Figure 25 seems to suggest new bus stops along the Relief Road however the county council does not consider that buses will take this route as people want to access the Town Centre. We will not be providing bus laybys as part of the scheme and it will be difficult to add in later due to the impact on the floodplain. As such the bus stops indicated on the Relief Road should be removed.	Agreed. Delete 2x bus stop on Figure 25.
	Figure 29 shows public parking provision. This includes a car park off the football club car	Agreed. Amend accordingly.

	park; however, it should be noted that there is no agreement for the football car park to be used publicly. Instead the new and existing CCA car parks could be shown.	
	Devon County Council is supportive in principle for a new railway station to serve the town. Further work and discussion with the railway sector and other stakeholders is required to confirm how deliverable this aspiration is. Any new station would need to ensure appropriate access is achieved without generating additional traffic around J28 and also that it would not impact upon the functioning of the faster, long distance trains.	Noted. Working parties towards the delivery of the railway station, that include Devon County Council and other stakeholders, are established. Impact of the station on J28 and long distance train services noted.
Waste Planning	The waste planning authority have no strategic issues to offer.	Noted.
	The final sentence in paragraph 4.5.14 refers to "*storage for recycling and landfill waste*". It is recommended that '*landfill waste'* is replaced by '*residual waste'*.	Agreed. Replace final sentence of para 4.5.14 as follows: New development should include appropriate internal and external storage for residual waste'.
Flood Risk Management	The County Council welcomes the consideration of SuDs within the masterplan. There are a number of ways Mid Devon District Council may wish to add to this: A) SuDS could be constructed within pocket parks, such as swales and rain gardens. These features could manage surface water from surrounding impermeable areas. B) SuDS could be multifunctional. For example, green roofs could be constructed on top of bus shelters and cycle shelters. Kerbed rain gardens could be constructed as traffic calming measures or pedestrian crossings. C) Rainwater could be re-used, for example for use at public toilets or water planted areas. D) SuDS could be designed to replicate historical features or be representative of a local region or area. Rills could be constructed to represent the use of leats and water although these features may require space.	Noted. For consideration in the detailed design of pocket gardens and other development opportunities as planning permission requires.

Health & Wellbeing	It is necessary to ensure that the overall community is equally benefited and there is a strategic overview to ensure social and health disadvantages are mitigated and accounted in view of current and future local policies.	Noted. Health and wellbeing integrated as a 'golden thread' through the document with particular relevance to Vision point 5, bullet 23.
Economic development	There is a need for a strong phased approach to delivery of employment land focusing both on the spatial integrity of any enlarged settlement (i.e. making sure if no more were to be built afterwards, that what is built is in the right place). This phased approach should also focus most on sectors where current demand is, rather than be speculative – current demand is strongly skewed away from office and towards warehousing and some industrial.	Paras 4.4.23 – 4.4.29 are dedicated to employment opportunities within the town centre; with accessibility & the creation of a vibrant town centre in mind. Speculative warehousing and industrial opportunities are limited within the geographic area of the masterplan.
	Office and retail space to be focused towards the re-use of buildings within the town centre.	Noted. See paras 4.4.27.
	Developer contributions need to be realistically accounted for.	Noted.
Other	The fastest possible broadband connectivity at the time of development should go into all new buildings as a matter of course and policy.	Noted.
	The best and most sustainable energy saving and generation at the time of development should be applied to all new buildings as a matter of course and policy. This should be a prerequisite of Devon heading towards Net Zero.	Noted. Details to be addressed at detailed planning application stage.
	Sufficient Electric Vehicle charge points using the best and most up-to-date technology at the time of development should be installed.	Noted. Details to be addressed at detailed planning application stage.
Consultee: Highways England	Draft Masterplan 2021: Consideration given to connectivity to sustainable travel modes, amenities and facilities will be an important aspect in the likely success of modal shift and reducing the reliance on Junction 28 for localised trips across Cullompton.	Noted.
	Strategic Road Network Connections: In order to accommodate more than 500 dwellings at East Cullompton and development at the proposed Culm Garden Village, a strategic scale intervention will be required which may comprise a new Junction 28a as assumed in the transport evidence, or an alternative scheme as is yet to be identified through further assessment.	Noted.

	Masterplan considerations – Movement: The masterplan will need to ensure that the proposed development of Cullompton Town centre is supported by an adequate and sustainable transport network to ensure there is no adverse impact on the existing highway network, including M5 Junction 28. Data published by Government confirms that traffic levels on the strategic road network have now returned to pre-pandemic levels.	Noted. The masterplan gives particular consideration to modes of transport that do not rely on the private car. Recognition is also made to the capacity issues of J28.
	Town centre: Cullompton High Street forms part of an agreed strategic diversion route in the event of disruption on the M5 motorway. Highways England and Devon County Council will need to fully understand the transport implications of any measures proposed for Fore Street or use of the Relief Road to ensure an adequate diversion route is maintained to fulfil its strategic function.	Noted. Devon County Council are working party members to Cullompton's strategic projects including the relief Road, the Railway Station, enhancement of Fore Street and the Higher Bullring.
	Public transport: The masterplan should consider how public transport services can be improved, both through a potential increase in service provision and enhancements to infrastructure to encourage the use of sustainable modes. The principle of investing in the Railway Station is strongly supported by Highways England.	It is not within the remit of the Local Planning Authority to establish means to increase local public transport service. Enhancements are identified including the railway station proposal, enhanced pedestrian, cycle and bus stop provision.
	Commuting: The provision and delivery of the employment sites are key to ensuring that the need to commute to external destinations is minimised & to reduce the need for peak hour private car trips. Commercial development should also be well connected by sustainable travel connections from the outset. Masterplan Themes & Objectives: a) Reclaiming Cullompton's spaces to support a vibrant community life: Highways England supports the objective to alleviate traffic through Cullompton High Street. The transport implications of any changes to the local road network on the operation of Junction 28 will need to be fully understood, including how the proposals may impact on the role of the High Street as an agreed strategic diversion route for the M5 motorway. b) Easy to move around on foot, on bicycle, by bus and by train: Highways England welcomes the proposal to create a high-quality pedestrian and cycling link between the town centre and surround areas. Additional emphasis should be placed	Noted. Paras 4.4.23 – 4.4.29 are dedicated to employment opportunities within the town centre; with accessibility in mind. Noted.

	on the early re-opening of the Cullompton rail station to provide an alternative travel mode, and the masterplan should consider how the rail station could be best integrated into the town and what infrastructure is required to encourage its use.	Noted.



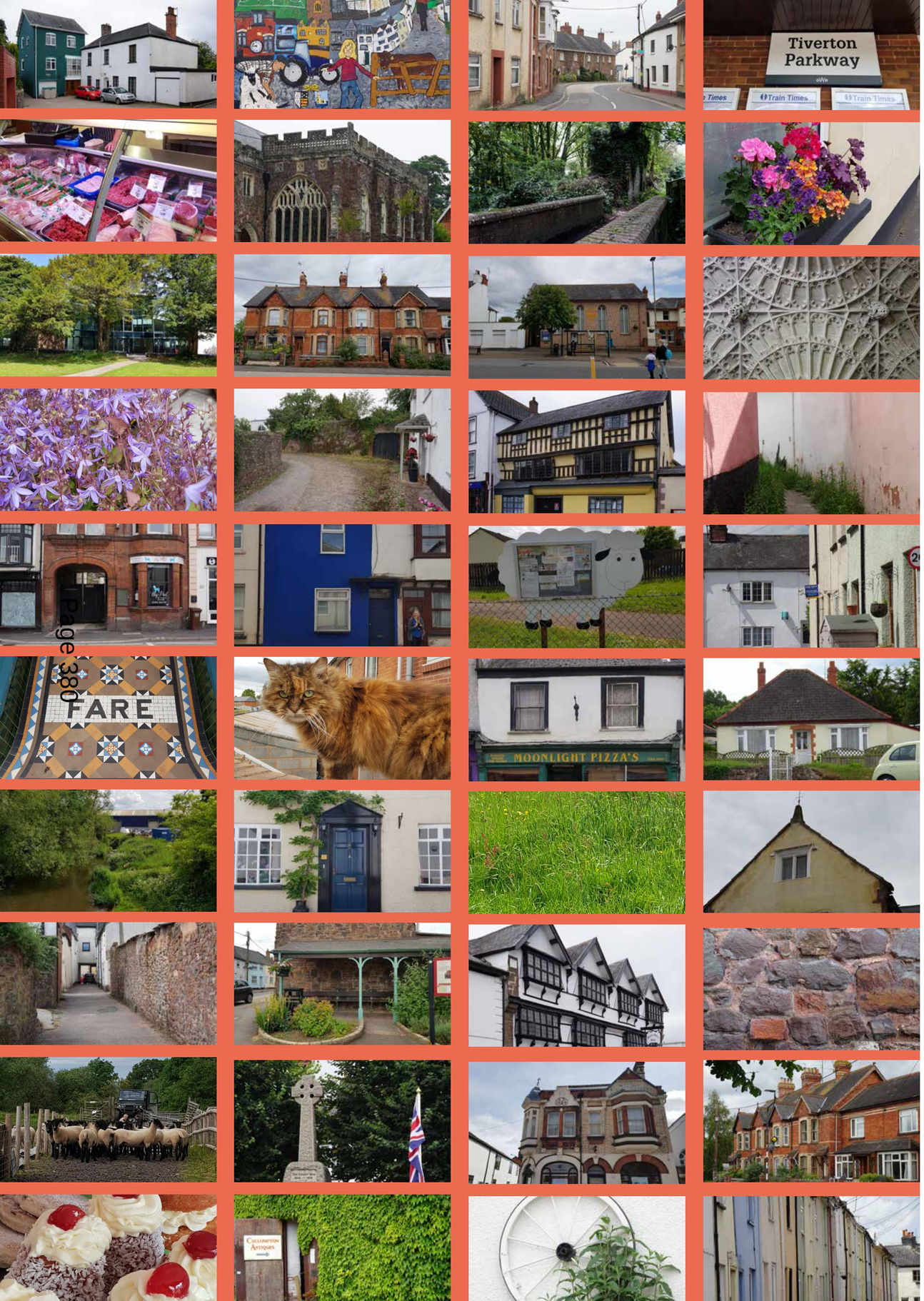
CULLOMPTON

TOWN CENTRE MASTERPLAN

MASTERPLAN REPORT

April 2021

DRAFT FOR CONSULTATION



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1 Introduction

1.1 Role of the masterplan

Allies and Morrison Urban Practitioners was commissioned to prepare a masterplan and delivery strategy for Cullompton Town Centre on behalf of Mid-Devon District Council. The consultant team for the project includes transport and movement experts Hydrock and property and economic development specialists, Avison Young.

This report presents the vision and spatial masterplan for Cullompton town centre, including:

- **The policy and strategic context;**
- **Summary of analysis and community engagement undertaken for the project;**
- **A vision and thematic objectives for the town centre;**
- **A Masterplan setting out spatial and design priorities;**
- **A heritage strategy; and**
- **A phasing and delivery strategy.**

A detailed baseline study was prepared for the project and can be found here.









1.1.1 The Cullompton town centre masterplan identifies a clear vision for the town centre and sets out a spatial framework to guide future development and investment in Cullompton. The role of the masterplan is to provide realistic principles and overarching guidance that brings together the design and future delivery of development, public realm improvements and transport projects in Cullompton.

1.1.2 The masterplan has been developed in the context of a number of strategic projects planned in and around the town, set out in section 2.3. With these strategic projects on the horizon, a clear vision and spatial strategy is needed to help ensure that Cullompton town centre can realise its full potential as the commercial hub of an expanded town, making the most of its distinctive characteristics. The masterplan sets a framework for these strategic projects to support one another and to have a positive impact on the future of the town that can be greater than the sum of their parts. It also identifies further studies and steps that should follow the masterplan to help achieve this vision.

1.1.3 The masterplan will be adopted as a supplementary planning document and is part of the evidence to inform the Council's emerging Local Plan. It will be a material consideration in determining planning applications.

1.2 Project process and engagement

Overview of project process

1.2.1 The project commenced in July 2019 and has consisted of two main phases of work:

- Stage 1: understanding the context and developing a vision; and
- Stage 2: producing a masterplan, heritage strategy and delivery guidance for the town centre.

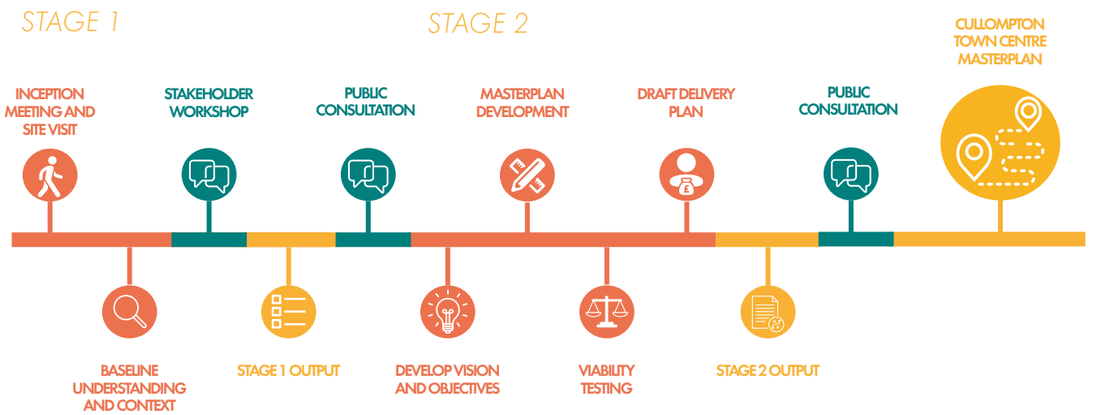
1.2.2 In Autumn 2019 the project team undertook research and analysis to develop a thorough understanding of Cullompton and its surrounding context. This included a policy review, an analysis of the socioeconomic make-up of the local population, a review of the property market, historic research and mapping of the town's urban design characteristics. A visioning workshop was held to ask key stakeholders about what works well and what could be improved in Cullompton. This all fed into an interim report which was completed in December 2019.

1.2.3 Through the baseline analysis, issues, opportunities and priorities emerged which evolved into a vision and thematic objectives for the town. These were consulted on during a six week consultation period in Spring 2020, and a refined vision and objectives were used to develop a strategic spatial plan and draft masterplan. This report presents the draft masterplan, as well as a heritage strategy and high-level advice for delivery and phasing.

Community engagement

1.2.4 The process has been deeply informed by community input, through:

- A Visioning workshop, September 2019
- End of stage 1 6-week public consultation, February 2020
- Draft masterplan 6-week public consultation, spring 2021



Visioning Workshop

1.2.5 To kick-off the process, a Visioning Workshop was held on Wednesday 4th September at the Hayridge Centre. Fifty people attended representing community groups, businesses and wider stakeholders, as well as councillors and officers. The event included a presentation setting out some initial thoughts about what makes Cullompton special, as well as an introduction to the baseline analysis undertaken so far. A workshop followed which comprised a roundtable discussion structured in two parts - the first part focused on issues and opportunities relating to buildings and character, Cullompton's identity, public spaces, town centre uses, and movement. Attendees were also asked to consider the opportunities associated with the planned investment in and around the town e.g. the relief road and potential reopening of the station. The second part explored the 'Big Ideas for Cully', which intended to raise the level of ambition for the town. The key messages are set out on this spread.

1.2.6 There is a lot that makes Cullompton special - from its historic courts and lanes to its markets and strong sense of community. There is a high level of ambition for positive change in the town centre, including the possibilities for enhancement associated with the relief road, the opportunity to improve public spaces, and the opportunity to strengthen the sense of arrival into Cullompton. There was recognition that some bits of the town are not functioning as well as they should be, for example the pedestrian experience, the historic fabric and the vacant shops. This feedback has helped to shape the emerging vision and objectives for the masterplan.



Figure 1 **Photos of the stakeholder workshop**

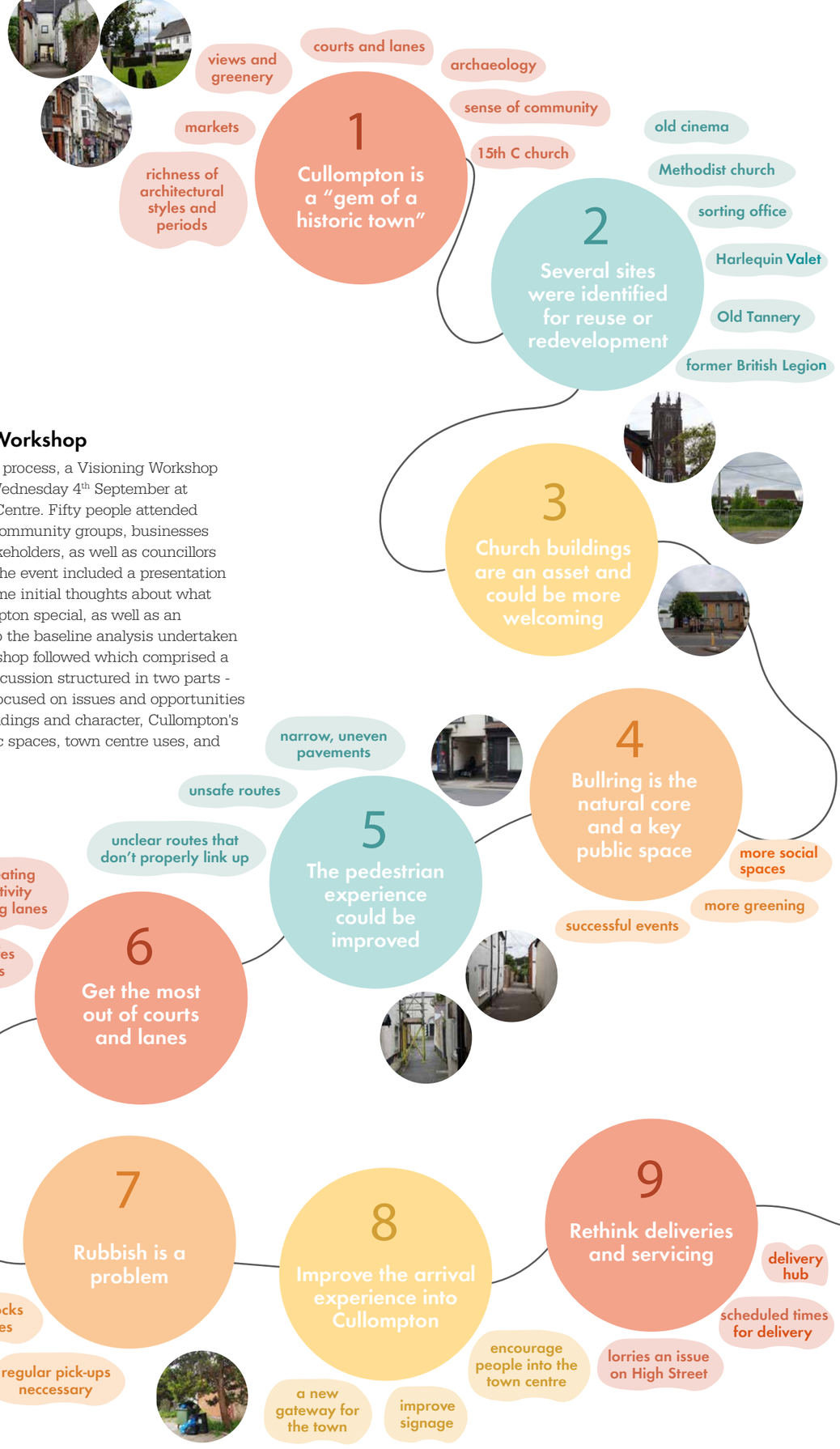




Figure 2 **A leaflet advertising the stage 1 engagement**

4
town centre events

40+
survey responses

15
written responses made

35
school children engagement at 2 local primary schools

Figure 3 **A summary of the stage 1 engagement**

End of stage one, 6-week public consultation

1.2.7 A public consultation was held between 25 February and 15 April 2020 to test the baseline analysis findings and the emerging vision and objectives for the masterplan.

1.2.8 The consultation was communicated through the council's website, social media, the council's email list for those interested in planning in Cullompton and was featured in Devon Live. The consultation materials were displayed online and in town:

- Wednesday 4 March, 10am-2pm, Cullompton Town Hall
- Friday 13 March, 2.30-6pm, Tesco entrance, Station Road
- Saturday 14 March, 9.30am-12.30pm, Farmers Market
- Monday 16 March, 4-7pm, The Hayridge Centre

1.2.9 People were able to give their feelback through completing a questionaire (either online or written at the events) or providing a written response (via email or post).



Figure 4 **Photos of engagement with school children**

If you were in charge of Cullompton's future, what one thing would you change?
42 people responded to this question.

1.2.10 In addition, this phase of consultation sought to engage young people in their town,through two workshops with local schools:

- Tuesday 19th November 2019, St. Andrew's Primary School, 5-11yrs, 10 children
- Wednesday 20th November 2019, Willowbank Primary School, 10-11yrs, 25 children

1.2.11 Throughout all of the engagement activities, demographics were monitored to check that all parts of the community were involved. The response was representative of the community in Cullompton in terms of gender, ethnicity and location with a decent spread of addresses across the town. In terms of age, there was a higher response rate from over 65s than the town's population, however engagement with schools helped to bring in the views of young people.

1.2.12 The feedback from this stage of consultation is summarised on the following pages and helped to inform the masterplan priorities and proposals.

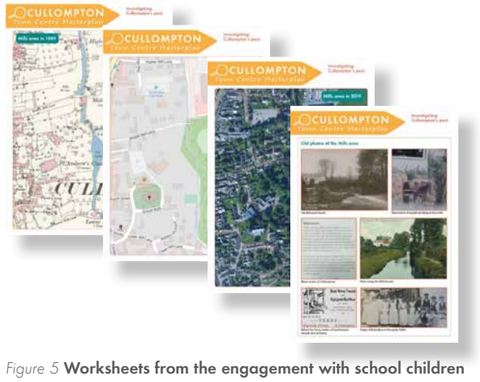


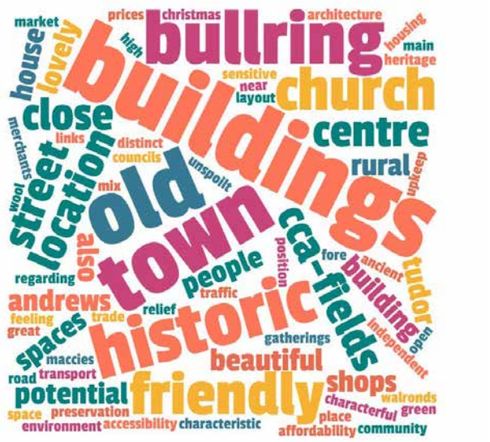
Figure 5 **Worksheets from the engagement with school children**



Figure 6 **An infographic, summarising the feedback to the question: If you were in charge of Cullompton's future, what one thing would you change?**

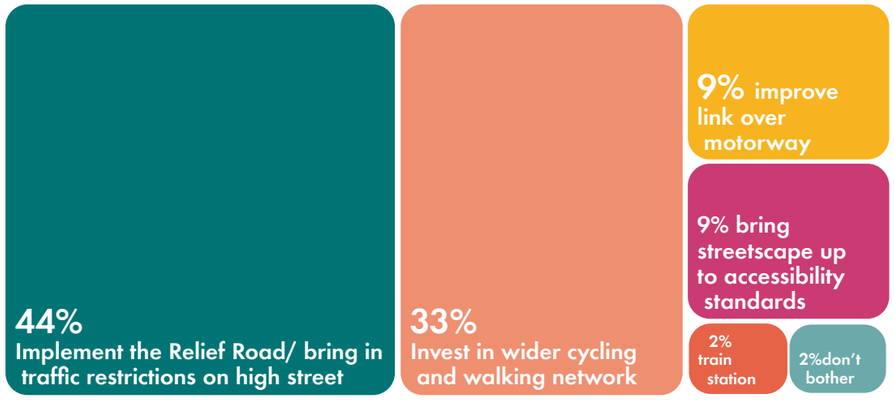
What do you think is Cullompton's best characteristic?

40 people responded to this question.



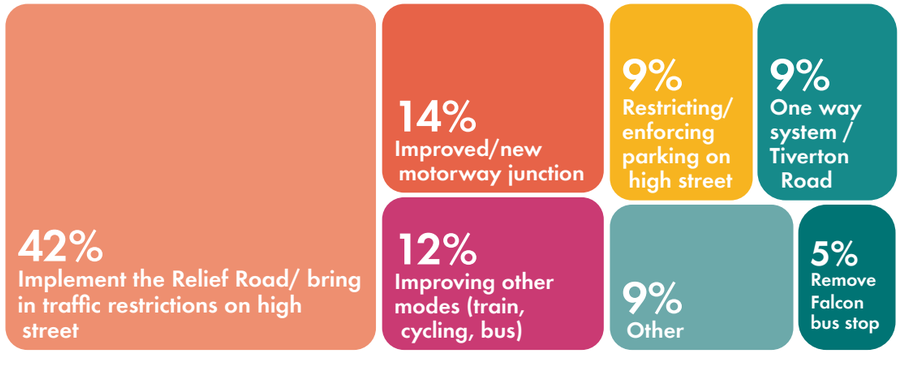
What are your priorities for improving pedestrian and cycle movement in and around Cullompton?

36 people responded to this question.



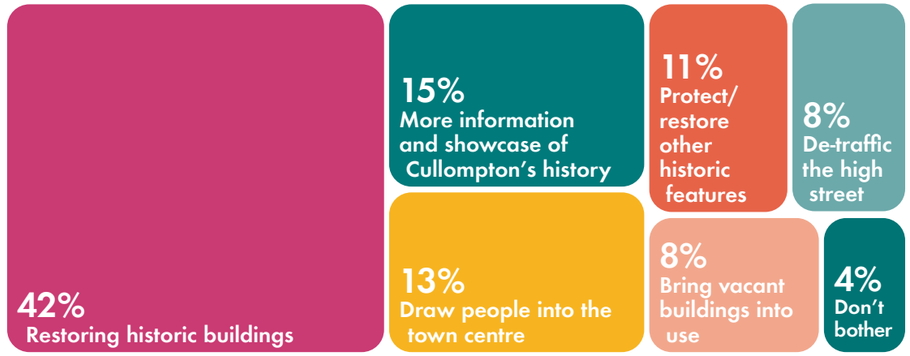
What are your priorities for improving vehicular movement in and around Cullompton?

34 people responded to this question.



What are your priorities for making the most of Cullompton's heritage?

40 people responded to this question.



What are your priorities for improving public and open spaces?

39 people responded to this question.



How can we support the town centre's role as a focus for homes, shops, work and community life?

39 people responded to this question.

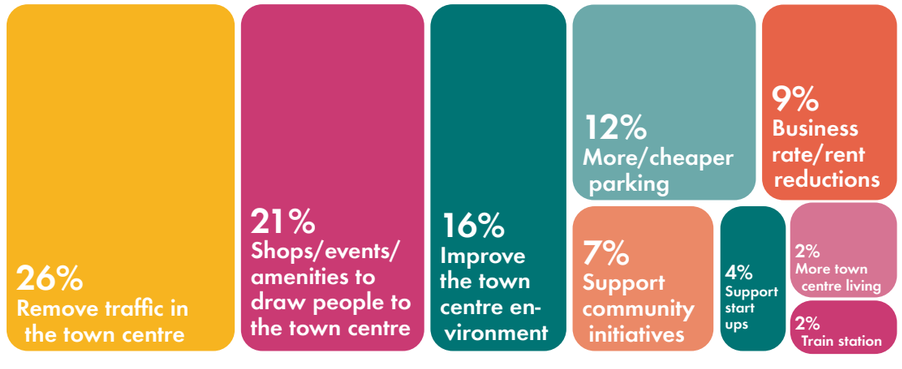
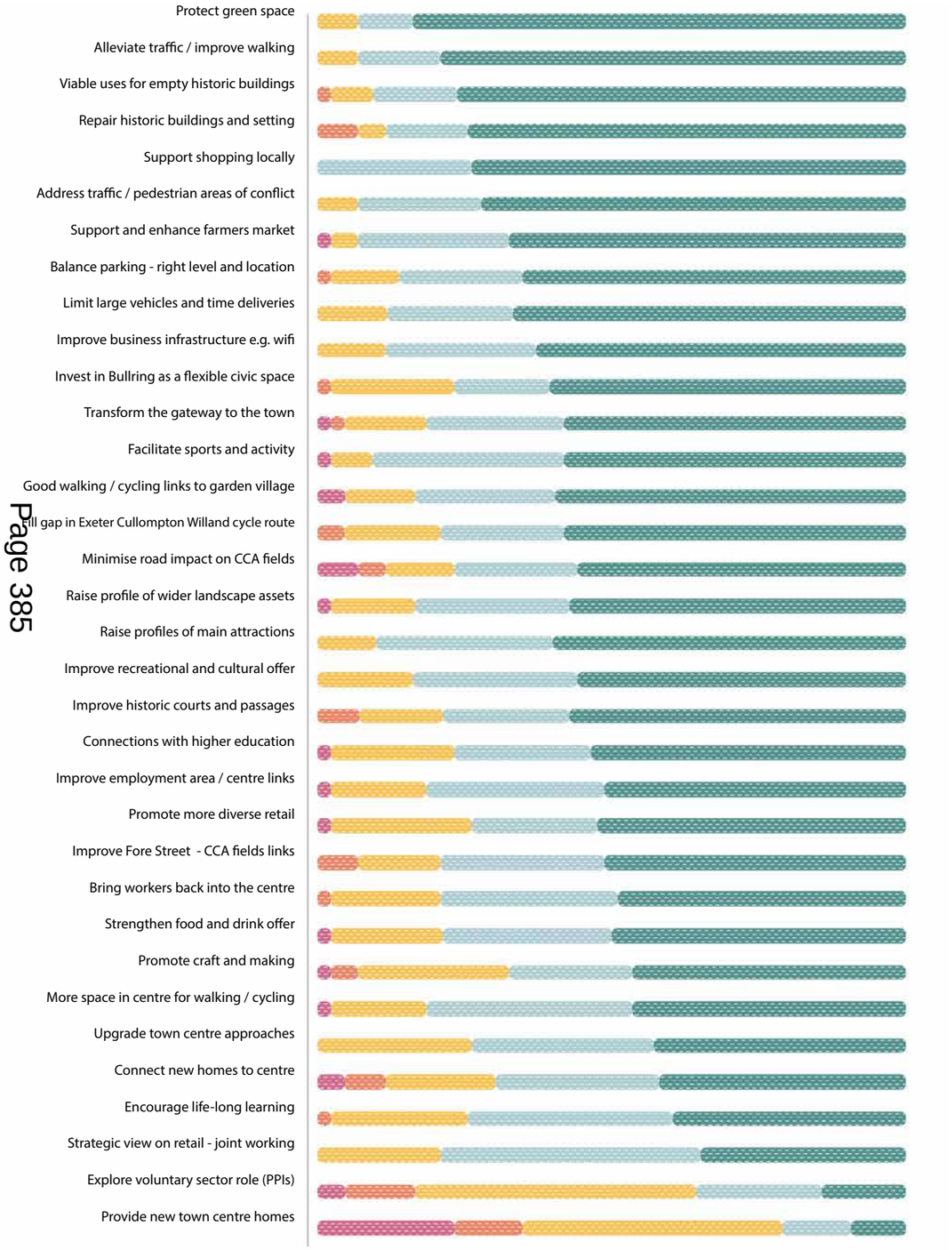
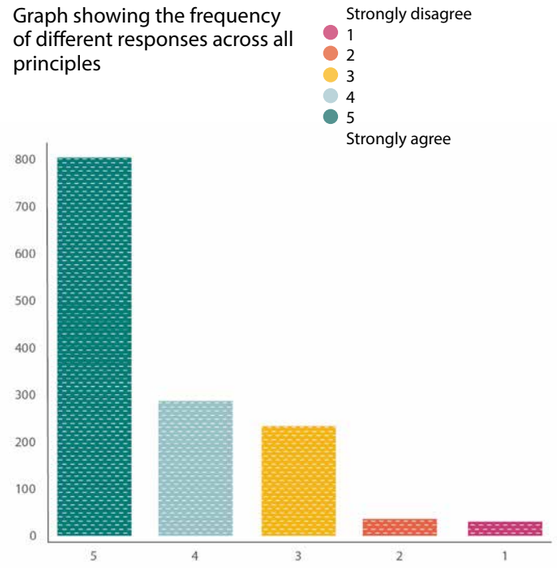


Figure 7 **Infographics, summarising the feedback from the Stage 2 online and written survey.**

How strongly do you agree or disagree with the following principles?



Graph showing the frequency of different responses across all principles



Five principles with the highest % of people who strongly agree



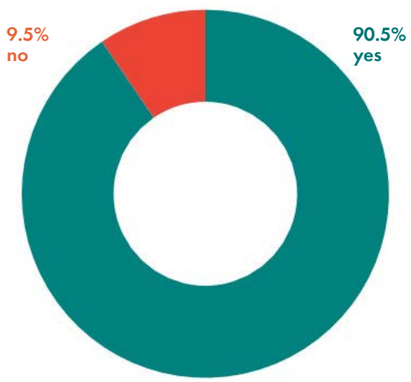
Three principles with the highest % of people who strongly disagree and disagree combined



In answering the following questions please assume that the proposed Relief Road will have been completed and be open for use:

Do you think restricting traffic in High Street is a good idea?

42 people responded to this questions.



If yes, what do you think should be done?

38 people responded to this questions.

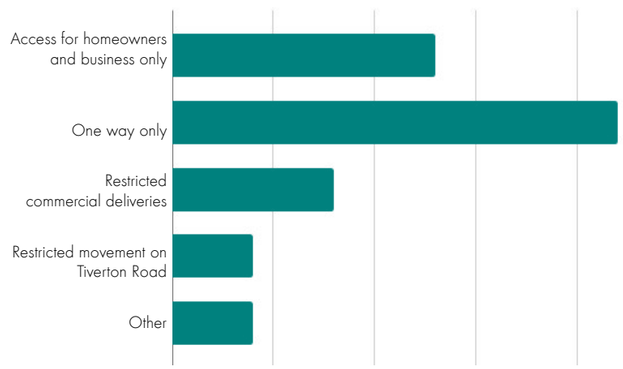


Figure 8 **Infographics, summarising the feedback from the Stage 2 online and written survey.**

2 Context

2.1 Planning context

Local Plan Review (2013-2033)

2.1.1 The Local Plan Review, adopted 29 July 2020, will guide sustainable development in Mid Devon District over a 20 year period. The Review sets out a vision for the District that promotes community well-being, supports sustainable economic success, conserves and enhances the area and respects environmental limits.

2.1.2 The Local Plan Review reinforces Cullompton's role as a strategic location for growth, considering its accessibility, economic potential and environmental capacity. The review allocates further land for development. Development will be targeted to: provide sustainable urban extensions; provide enhancements to the town centre through additional investment; develop any remaining underused brownfield sites; and protect and enhance the key environmental assets including heritage, biodiversity and air quality.

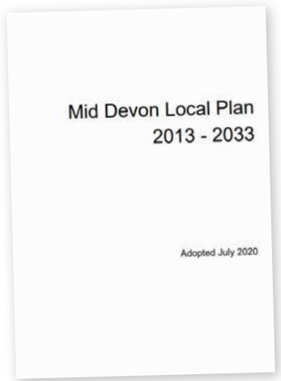


Figure 9 **Adopted Local Plan**

Cullompton Neighbourhood Plan submission

2.1.3 The Cullompton Neighbourhood Plan is the community's vision and priorities for how they would like to see the Cullompton area develop and change in the coming years. At the time of writing this report, Mid Devon District Council has determined that the Cullompton Neighbourhood Plan, as modified to incorporate the independent examiner's recommendations, should proceed to a Referendum during 2021. Although, it is not yet adopted as part of the development plan for the area, it now carries significant weight. It sets out a number of planning policies which seek to:

- Ensure all new developments contribute to the overall sustainability of Cullompton as a town and a community
- Improve mobility, accessibility and reduce the overall use and impact of the motor vehicle
- Provide new dwellings to meet a wide range of needs and demands
- Respect and appreciate the countryside
- Protect and enhance the historic built environment whilst broadening the appeal of the town and its cultural activity
- Make Cullompton more business friendly

"Cullompton is a market town with a distinct character and identity rooted in a rich history that will be conserved as the town grows into the future as a vibrant centre for its residents and the surrounding rural area."

Extract from the vision statement for Cullompton as set out in the Neighbourhood Plan

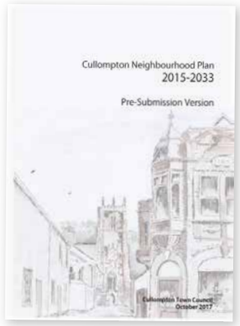


Figure 10 **Cullompton Neighbourhood Plan**

- Provide first class local community facilities and develop community-based services that meet the growing demands of the community

Conservation Area Appraisal and Management Plan

2.1.4 The Appraisal describes what makes the area special in terms of architecture, history, character, landscape, open spaces and trees, appearance and building material and ornamentation. The 2009 Appraisal has recently been updated and is well advanced with an expectation that it will be finalised in 2021. The management plan identifies three key issues for the conservation area: through traffic which detracts from the environment of the town centre; erosion of historic character and appearance throughout the conservation area; and decreasing vitality and viability of the town centre. The Plan sets out opportunities and principles to address these issues to enhance the conservation area.

Mid-Devon Climate Emergency Declaration

2.1.5 In recognition of the impact of climate change Mid Devon District Council joined other Devon wide local authorities in May 2019 to form the Devon Climate Emergency Response Group. Further to this, Mid Devon District Council has set the ambitious target of being carbon neutral by 2030, against the Devon-wide and nation-wide target of 2050. The interim Devon Carbon Plan is now out to public consultation and the Mid Devon District Council Climate Change Strategy and Action Plan has been adopted.













Figure 11 **Photos of Cullompton**



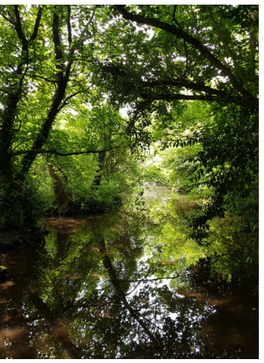











Figure 12 **Photos of Cullompton**

National Design Guidance (2019)

2.1.6 In October 2019 the Ministry of Housing Communities and Local Government published a new National Design Guide, along with an update to the Planning Practice Guidance (PPG) in relation to 'good design'. The new Design Guide provides some explanation to the definition of 'good design' for use by Local Planning Authorities. The document sets out characteristics of a well-defined place under ten themes: context, identity, built form, movement, nature, public spaces, uses, homes and buildings, resources and lifespan.

2.1.7 In terms of Cullompton's future, given the two significant planned developments (Culm Garden Village and the North West Urban Extension) as well as any future development, the National Design Guidance will serve as a policy tool as authority planning officers prepare local planning policy and guidance and assess the quality of planning applications.

2.1.8 This National Design Guidance can be supplemented with design guidance on a local level. Mid Devon District Council accordingly adopted the Mid Devon Design Guide Supplementary Planning Document during October 2020.



Figure 13 **National Design Guide**

Change in planning use classes (2020)

2.1.9 The Government on 21st July 2020 published The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1st September 2020. The main change is the introduction of Use Class E, subsuming A1, A2, A3, B1, D1, D2 (retail, office and non-residential institutions and assembly and leisure uses), into one single class E. This means that a change of a building's use between the following use classes will no longer require planning permission: retail, professional services, food & drink, business (office, research and development and light industrial process), Non-residential institutions (medical or health services, crèches, day nurseries and centres), and assembly and leisure (indoor sport, recreation or fitness, gyms).

2.1.10 The changes are still relatively new and there is limited data on their impact, however it is anticipated that the extension of permitted development rights will have an impact in town centres and high streets.

2.1.11 There is also two further new classes:

- F.1 for non-residential institutions (education, art gallery, museum, public library, public exhibition hall, places of worship, law courts)
- F.2 for shops no larger that 280sqm (selling mostly essential goods and at least 1km from another similar shop); community hall, outdoor sport/ recreation area, indoor or outdoor swimming pool, skating rink.

2.1.12 The premises within these planning use classes would therefore need planning permission for a change of use, securing their place in the town.

Planning White Paper (2020)

2.1.13 In August 2020, the Ministry of Housing, Communities & Local Government published the The Planning for the Future paper for consultation. The objective of the paper is to streamline and modernise the planning process, 'cutting red tape not standards' and ensuring more land is available for development where it is needed.

2.1.14 Among other proposals, the paper puts forward a system where local authorities would zone all land in their areas for "growth", "renewal" or "protection". Areas zoned for growth would accommodate "substantial development" and would benefit from outline permission (but developers would still need to secure reserved matters permission in accordance with a locally drawn up design codes). Areas zoned for renewal would be seen as suitable for some development.

2.1.15 There is an emphasis on building environmentally friendly, sustainable homes, taking a digital-first approach to modernising the planning process, reviving town and city centres and improving the system of developer contributions towards infrastructure.

2.1.16 The consultation is now closed and there remains uncertainty over if and when measures will be introduced.

2.2 Strategic context: Responding to Covid-19

2.2.1 Covid-19 has added a further layer of challenge and complexity to the planning and designing of town centres across the UK. The country's town centres were already on a trajectory of significant structural change prior to the pandemic. Many of these shifts have been accelerated by the pandemic, whilst others have been diverted to a different course. High Streets may look very different in the future - but it is not yet fully clear how these changes will manifest themselves.

2.2.2 Economies, places and mindsets will change but other essential traits will endure. For example, humans are social animals and will continue to come together. We are also incredibly adaptable. However, Central Government has underlined that any adaptation must align with climate objectives, identifying post pandemic responses as a once in a generation opportunity to shift living patterns and habits to help reduce our carbon emissions.

Placemaking implications

2.2.3 A number of trends and opportunities have been identified since the emergence of the Covid-19 pandemic in early 2020. These each have implications for the Cullompton Town Centre Masterplan and the future operation of the town centre.

Working patterns

2.2.4 Work patterns have been transformed and will not bounce back even with the roll out of a vaccine. Companies and workers have discovered that many types of work can be done remotely and there has been a corresponding shift to home and hub working.

- Many people will work from home in future and the design of homes should reflect this. Perhaps with a move away from open plan living, to flexible interiors that can support two separate home workers without disruption and with the retention of living space that can be separate from work space. Access to outside space for all residents and superfast and reliable broadband will also be key.
- Now people can work from anywhere, there may well be greater demand for flexible workhubs, either in co-working spaces or at local cafes and pubs for people to escape the home for work without having to commute. These could be flexible spaces, with separate or spacious, open desk space, superfast broadband, bike access and coffee provision. The Nook provides a great model for Cullompton.
- For Cullompton, this freedom of working locations is a real opportunity to attract new residents who no longer feel they must live in town or city centres in order to be close to workplaces.

A community focus

2.2.5 Lockdowns during 2020 helped to foster neighbourliness and community networks and resulted in the emergence and growth of circular and exchange economies across the country, which can be harnessed for the good of Cullompton and other small towns

- Local grocery and independent shops have been newly appreciated and seen an increase in custom, reversing a historic trend away from these shops towards supermarkets. Given that much of Cullompton town centre's catchment is within a 10 minute cycle, this is a real opportunity for a stronger town centre role.
- There has been an increase in home grown foods and allotment use and a new appreciation for the resilience or buffer this provides in food supply as well and the physical and mental well-being benefits.
- Local community groups have been more active than ever, with many making good use of technology such as through Whats App groups or Next Door websites. Cullompton's well-established community networks are well placed or benefit from this trend.
- There has been a more general growth in the appreciation of care work, socially constructive and front line jobs and community roles. Many of these important jobs are found in and around Cullompton.

Open spaces

2.2.6 Open space became a far greater priority for those in lockdown and during various transition phases in 2020. There are a number of key facets to this which are important for the masterplan.

- Green open spaces provide access to nature, the opportunity for exercise and a relatively safe setting for small social gatherings. In Cullompton, this translates as a crucial role for the CCA fields and the water meadows and fields which surround the town centre
- Streets and public spaces are critical for impromptu and informal catch-ups when people bump into friends and neighbours when out and about. For these to work effectively, pavements must be wide enough for people to pause and benches be provided. This has clear implications for Fore Street and the Bull Ring.
- Outdoor spaces connected to cafes and restaurants and to cultural venues help these businesses to survive during times of social distancing and support residents in living sociable but safe lives.
- Initiatives in Paris and elsewhere to create the '15 minute city' based on walking and cycling - this is also relevant to smaller centres

The life of the town centre

2.2.7 Shops, food and drink businesses and cultural and leisure venues have been particularly hard hit by the pandemic and need as much support as possible from town strategies and masterplans.

- Many local theatres need a new (or interim) model that can enable them to stage performances in a socially distanced manner. Good alternative outdoor performance spaces are key, as are good alternative interim uses for interior spaces so these can still have some use and bring an income
- There are many creative responses by food and beverage venues from the simple take over of street space in Paris and London for tables and chairs, to the establishment of greenhouse eating pods where space allows. The removal of some traffic from Fore Street will help Cullompton embrace this approach.
- Shops are the heart of a town centre and provide more than a utilitarian service. Many provide identity and a sense of belonging for local residents. Independent shops, which are more nimble than large retailers, can help revive town centres and Cullompton is very well placed for this.
- Creative use of vacant units in town centres is critical and can help to both address blight on the high street and provide valuable community uses and pop-up shops for residents.
- 2020 has taught us that new buildings in town centres should be adaptable and loose fit design so that these can respond to future economic and cultural shifts without having to be demolished and replaced.
- Town centre coordination between businesses, management of key issues and curation of the town centre is more important than ever. Bringing Cullompton's businesses together, such as through the existing group Culm Valley in Business, the town council or an independent group would aid this. The town's active community groups can also be involved in taking forward masterplan ideas.
- Changes to business rates have been discussed in recent years to address the discrepancy between online and bricks and mortar retailers that penalises businesses with physical stores. The 2020 Grimsey Review made a strong case for these changes and it is currently under consideration by Central Government.

Addressing economic insecurity

2.2.8 2020 saw a sharp recession and a significant rise in unemployment, with some sectors such as the aviation industry, retail and the leisure industry being

disproportionately affected. This will result in economic insecurity for some residents and masterplans can play a key role in supporting low cost living for residents in the future. Key opportunities include:

- Keeping household bills down by ensuring low operational carbon requirements for new homes, through insulation, ventilation and renewable energy sources
- Encouraging walking and cycling as a form of transport that is free at the point of use

Supporting centres of exchange such as tool libraries and maker spaces, perhaps making use of vacant units on the high street or Fore Street.

Movement implications

2.2.9 There are a number of movement trends and opportunities which have arisen as a result of the pandemic and its associated lockdowns during 2020. These can be summarised as:

- A lower level of commuting and therefore lower levels of private cars on the road for long trips as a result of the greater emphasis on working from home
- An associated uptake in walking and cycling during lockdown – lots of people have been on a bike for the first time in a while, and technology (e.g. e-bikes and scooters) means that micro-mobility should be key to access strategies going forward. It is important to capitalise on and embed this trend in local Cullompton movement patterns.
- User confidence in public transport has plummeted due to safety concerns and it will be a challenge to restore former use levels in the coming few years. It will be critical to support local public transport by making it accessible, reliable and attractive. Short-medium term, we can directly influence the quality and setting of public transport stops.
- There may be an uptake of private car commuting in the short-medium term which would be difficult to accommodate in the medium-long term. It is important that this trend is not allowed to continue. Increased working from home, cycling and walking can hopefully have a mitigating effect on this. There will, however, be potential impacts on town centre parking of course.
- Funding available during 2020 for temporary improvements to increase space for social distancing while walking and cycling provides a good starting point for assessing these schemes and establishing the more successful elements on a permanent basis.

Property implications

Office space (B1)

2.2.10 In the short term, offices will have to accommodate fewer people, i.e. lower density occupation, which may hit achievable rents. Looking forward, this may increase the amount of floor space required by tenants for 'safe' occupation but conversely, the lockdown has forced flexible working practices on many businesses which we expect to become more acceptable going forward, reducing required floor space. How this manifests itself in the market and if it has a lasting effect is too early to tell.

- Tenants may seek increased rent free periods, shorter leases and more frequent breaks to allow for the need to vacate in the future should economic weakness persist which will hit investment values, and investors may apply higher investment yields to office investments to allow for risk, which will also negatively impact investment values.

High street retail, banks/building societies, estate agencies, restaurants and cafes, pubs/bars and takeaways (A1 – A5)

2.2.11 Retail units will have to accommodate social distancing requirements thus raising cost and reducing efficiency, and may suffer from falling revenue as high street retailers and service providers that can move from physical to online do so.

2.2.12 There is an emerging trend of retailers seeking turnover rents (i.e. rent linked to achieved turnover rather than a fixed rent with periodic increases); while popular with tenants as a slower month/ quarter means they will pay less rent, the uncertainty is an issue for investors who will place a higher yield on the investment, therefore reducing property investment value. Despite this, a pragmatic view of turnover rents suggests that they may contribute to a more sustainable business and stable occupation, and in turn this stability could translate into stronger trading and therefore higher rent in better times. We anticipate that most landlords will be reluctant to switch to turnover rents in the short term and will resist surrendering existing leases to re-sign on a turnover basis.

Residential (C3)

2.2.13 It's not yet clear what impact Covid-19 will have on residential sales values as the market is only just beginning to emerge from the lockdown and demand is strong, as many transactions that were pending at the time the lockdown started are being pushed through at previously agreed prices. Initial feedback from estate agents suggests that now viewings are available, there is a pent-up demand formed of those whose search was put on hold during lockdown and those who want/need to move in the interim weeks, compounded by the low level of stock in the market. In many areas we anticipate a short spike in values back to or in excess of pre-Covid values, however this will soon fall back once this backlog is cleared – although the extent to this fall is unknown.

2.2.14 What we do not yet know is what impact a sustained and serious economic slowdown/recession will do to employment and earnings. A significant downturn will have an impact on what buyers are able to pay, and what mortgage lenders are prepared to lend, both of which may have an impact on the sale prices for homes, and the rate (i.e. the speed) of sale achievable by housebuilders – and hence land values.

Grimsey Review 2020 and High Street Task Force

2.2.15 In June 2020 an updated Grimsey Review was released, largely in response to the impact of Covid-19 on Britains town centres. The report sets out three headline priorities of:

- A shift to Localism, with local people encouraged to redesign their own high streets and have a say on the businesses, services and amenities there
- Fewer cars, more green space, with centres that are designed for people rather than the car
- Local leadership by people with a broad range of skills which is valued and recognised

2.2.16 A number of recommendations are then made to help achieve these three overarching goals which cover:

- Establishing participatory planning with high street Citizen's Assemblies, Community Value Charters and community right to buy and the establishment of community trusts through the National Lottery Community Fund.
- Amending business rates, replacing the current system with a 2% sales tax that will level the playing field between online and offline retailers
- Re-skilling for new employment sectors for those predominantly young and female workers likely to lose retail and leisure jobs in the future
- Encouraging people to give up cars, introduce a pedestrianisation task force and pilot mobility hubs for sustainable transport modes

2.2.17 In addition to the updated Grimsey Review, The High Street Task Force recently developed a framework for place regeneration in response to Covid-19 impacts, focused on repositioning, reinventing, rebranding and restructuring UK High Streets.

Cullompton's context

Cullompton is located 12 miles north of Exeter in the heart of Mid Devon, situated adjacent to the M5 which is the main transport corridor through Devon. Cullompton is the second largest town in the district with a population of over 8,800. The town is close to rail services from nearby Tiverton Parkway and is set within a stunning valley landscape, with views towards the Blackdown Hills and East Devon AONBs.

Figure 14 **Strategic context diagram**

2.3 Related projects

2.3.1 A number of significant changes are proposed for Cullompton through which a very different future can be imagined. Sites in the town, identified in the Adopted Local Plan (2013-2033) which are due to be built include:

- North West Cullompton
- East Cullompton (Culm Garden Village)
- Ware Park and Footlands, and
- Land at Colebrook. C

Together, they could more than double the town's population, which would create more demand for shops and services, bringing historic buildings back into use. This coupled with investment from the Heritage Action Zone funding and reduced traffic on the High Street (as a result of the Relief Road implementation), could result in a renewal of the centre, re-establishing a vibrant historic heart for the town. Movement patterns would change; there is a risk that new development would result in more traffic for the town. A new station would help bring people out of their cars for trips to Exeter, Bristol and Taunton, while strong cycling and walking routes (in particular over the M5/river/rail) will be needed to support active travel for trips within the town. Strong coordination will be needed to ensure these projects are mutually beneficial and that investment achieves the greatest impact. The following pages highlight the critical interdependencies and considerations as these initiatives move forward.

Relief Road

2.3.2 Traffic in the town centre is having an adverse effect on air quality, living conditions, the heritage assets and their setting, and the attractiveness overall. A key objective of the Local Plan has been to implement a relief road which diverts traffic away from the town centre and improves capacity. Following an option analysis and consultation, a preferred route option was approved by Devon County Council in March 2019. The route runs through the CCA fields alongside the rail line, joining Duke Street to the south and Station Road to the north. A planning application was submitted to the Council in June 2020. Planning permission has now been given for the construction of the Relief Road with a planned completion date of 2023 / 2024.

Improvements to M5 Junction 28

2.3.3 Devon County Council is pursuing funding for works intended to address capacity, environmental and safety concerns, whilst also providing a substantial improvement for pedestrian and cycle movements across the motorway.

Cullompton Rail Station

2.3.4 The Adopted Local Plan (2013-2033) identifies and allocates a site for the reopening of the railway station, on the Bristol to Exeter line. The Station would benefit the town by providing a sustainable transport option and decreasing travel times to Exeter (the main destination for commuters from Cullompton), as well as Taunton and Bristol. In May 2020, Mid-Devon secured funding to develop a Strategic Outline Business Case (SOBC).

Heritage Action Zone

2.3.5 Following a successful bid, Cullompton has been selected for the High Streets Heritage Action Zones scheme and will now work with Historic England to develop plans to revive the high street over a four-year programme. The fund will deliver physical improvements and cultural activities to regenerate the high street and restore local historic character. Through the programme, councils, businesses and community groups will be able to access expert advice and investment to bring historic buildings back to life.

Culm Garden Village

2.3.6 In January 2017, the Government identified an area to the east of Cullompton on the other side of the M5 as a 'Garden Village', with the potential to deliver up to 5,000 new homes alongside jobs, schools and community facilities. The Garden Village includes an area which is allocated for mixed use development in the Local Plan. A masterplan is being developed for the Garden Village which considers the strategic location of homes, neighbourhood centres, employment areas, community facilities, green infrastructure and connections. The stage 1 draft of the masterplan was consulted on in January/ February 2019.

North-West Urban Extension

2.3.7 The Local Plan allocates this site and a masterplan for the area was adopted as a Supplementary Planning Document in 2016. Since then planning applications for the first phase are in the process of being approved, including 600 homes, a link road which serves the development from off Willand Road, a primary school, green infrastructure, sports pitches, allotments and a community orchard. Phase 2 / 3 will include 750 homes, a local centre, community building, more green infrastructure, a MUGA, employment land and Gypsy and Traveller pitches.

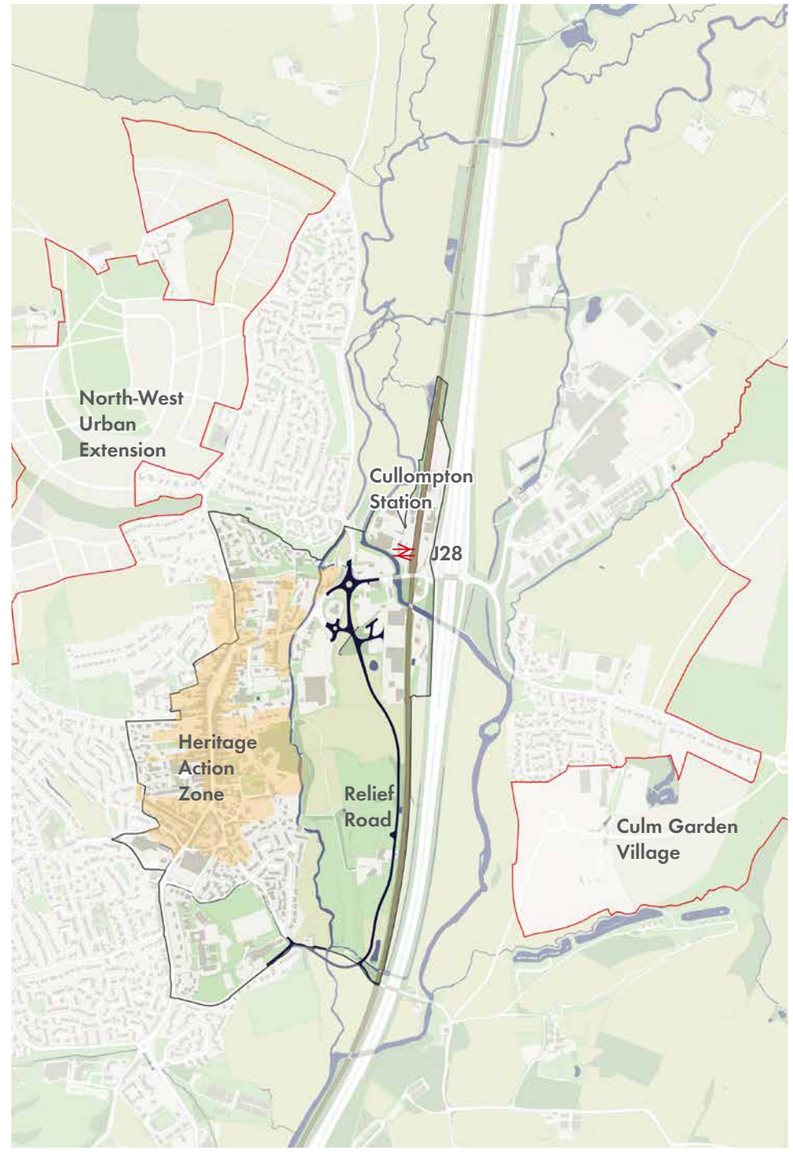


Figure 15 **A plan of proposed projects** — masterplan study area

Interdependencies and key considerations

	RELIEF ROAD	CULM GARDEN VILLAGE	NEW RAIL STATION	HERITAGE ACTION ZONE	CCA FIELDS	NORTH-WEST URBAN EXTENSION
CULM GARDEN VILLAGE	• CGV initial stages are scheduled to come forward following the completion of the Relief Road.					
NEW RAIL STATION	• Opportunities to integrate public transport, access, parking and pedestrian / cycle connections • Opportunity to improve the sense of arrival.	• The railway station will make a positive contribution to the emerging movement strategy for the CGV with benefits for the wider town. • Good pedestrian / cycle connections are needed.				
HERITAGE ACTION ZONE	• The Relief Road takes cars off the High Street, reducing levels of pollution in the historic core of the town. • The new streetscape of the high street should provide a sensitive context for historic assets.	• The growth in population will benefit economic activity and private investment into the historic town centre.	• The station could help to limit car use locally, reducing levels of pollution and related impact on the town centre and its heritage. • Good signage and wayfinding and an improved arrival experience are needed between station and historic core of the town.			
CCA FIELDS	• Enhancement of the resulting re-configured green space for resident and visitor enjoyment. • Enhancement through existing and new tree planting and management. • Opportunities to improve pedestrian / cycle connections.	• Good pedestrian and cycle links between the town centre and the CGV through the CCA fields will provide an attractive alternative to the use of the motor vehicle. This will need to include a link over the M5 / river / rail.	• Good cycle lanes and safe walking links through the CCA fields could support active travel to and from the train station if well designed. Cycle measures would need to consider integrating with other routes in the town and ensure safe crossing of Station Road.	• Enhancement of the laneways between Fore Street and CCA field will help to raise the profile and accessibility of the open space		
NORTH-WEST URBAN EXTENSION	• The north west urban extension will contribute to traffic volumes in the town.	• Together, they will result in a large population increase for the town. The growing population has the potential to support shops and services in the town centre helping to bring historic buildings back into use. Strong connections via sustainable transport modes to the town centre are important.	• There is an opportunity to enhance the walking / cycling route from the new development to the station, along the footpath between Willand Road and Millennium Way. Millennium Way currently has no footpath. If Alexandria Industrial Estate were to be developed, a continuation of this route could be considered.	• The growing population has the potential to support shops and services helping to bring historic buildings back into use.	• The increased population will generate a greater use of the CCA fields and sports facilities. • Pedestrian / cycle routes should be enhanced.	
J28	• Provision of a relief Road will be the first stage of highway improvements in the area with Stage 2 including measures to address capacity constraints at J28. • Opportunities to enhance connectivity for non-motorised modes of transport.	• Highway measures to address the capacity constraints are required at J28 to facilitate the development of the garden village. • Any highway improvement works will need to ensure the safe movement of pedestrian and cyclists across the motorway.	• In the long term, a new rail station should help to shift modes, decreasing traffic and alleviating pressure on J28. • Highway measures to address capacity issues will need to consider how they would relate to each other.	• Traffic management measures in the town centre would need to keep apace with wider strategic highway interventions in the area. • Good signage / wayfinding and an improved arrival experience are needed between Station Road and the historic centre.	• Opportunity to enhance pedestrian / cycle signage and wayfinding	• Significant developments will add to traffic volumes increasing the need for strategic highway improvements in the area.

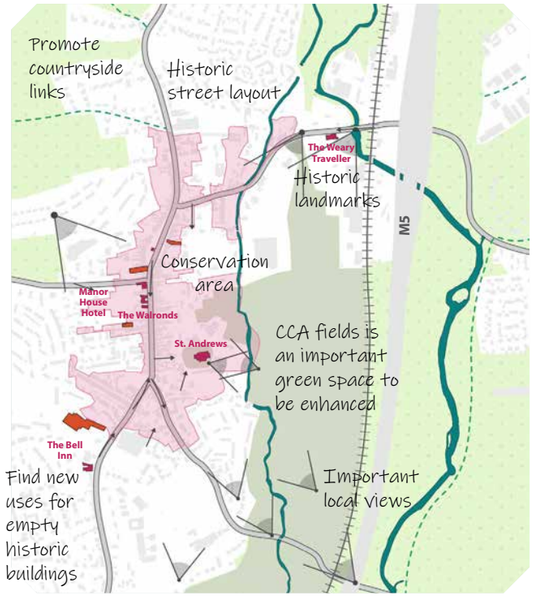
Key messages

- ***Cullompton's population is planned to grow significantly. This creates an opportunity to bring historic buildings back into use and to revitalise the town centre. Planning and investment should aim for new residents use the high street for their shops and services, travelling there on foot or by bicycle.***
- ***Many of the planned projects (the Relief Road, new station, Culm Garden Village and J28 improvements) would place new demands on Station Road which is currently heavily trafficked. Station Road will need to be carefully designed to provide the required capacity, while also improving the arrival experience and making space for pedestrians and cyclists.***
- ***There are a number of barriers between the proposed Culm Garden Village and the town centre: the M5, the River Culm, the CCA fields and the rail line. A number of the proposed projects have the potential to contribute further to this separation (the Relief Road and J28 improvements). A pedestrian and cycle crossing over these barriers is critical to the success of Culm Garden Village. A crossing should be prioritised and designed in now.***

3 Vision and objectives

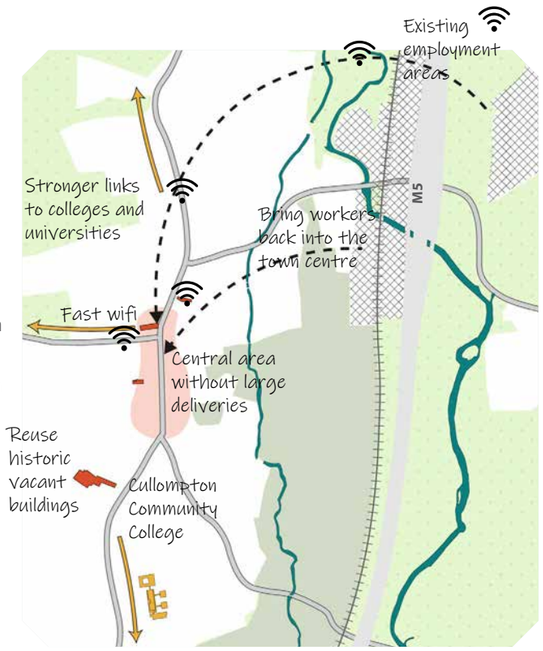
1 CULLOMPTON'S DISTINCTIVE HISTORIC BUILDINGS AND LANDSCAPE SHOULD BE ENHANCED AND RESTORED.

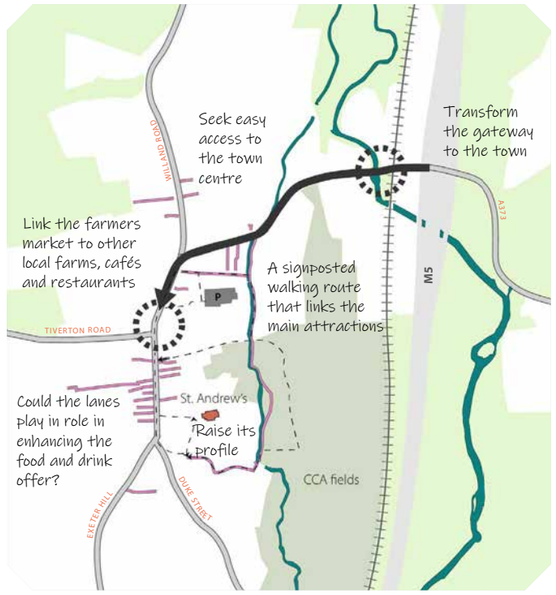
1. Find viable uses for empty historic buildings, including more and improved residential accommodation in the town centre.
2. Seek to improve the appearance and setting of the historic buildings through the planning process and through on-going repair and maintenance by private individuals.
3. Protect, enhance and create key views, green spaces and waterways, with consideration of their biodiversity and amenity roles. Seek to provide more green spaces.
4. Enhance the attractiveness, use and public enjoyment of the CCA fields following the delivery of the relief road.
5. Increasing Cullompton's attractiveness as a place to work, visit and enjoy.



2 CULLOMPTON'S CENTRE SHOULD REDISCOVER ITS HISTORIC ROLE AS A PLACE OF WORK.

6. Seek out the potential of vacant and under used sites and buildings in the town centre to complement the existing employment offer and enhance town centre vitality. This could provide different types of work space that meet today's needs.
7. Celebrate the town's history and how it can contribute to Cullompton's identity and future offer. Potential opportunities exist to create a unique offer.
8. a) Enhance infrastructure to meet the needs of business including WiFi connectivity and speed with consideration of deliveries and servicing.
   b) Secure the productive use of historic buildings through occupation that meets modern day requirements
9. Improve the town centre's attractiveness and offer to those working in Cullompton's peripheral employment areas including its accessibility via improvements to physical links.
10. Forge connections between businesses and nearby higher educational institutions.



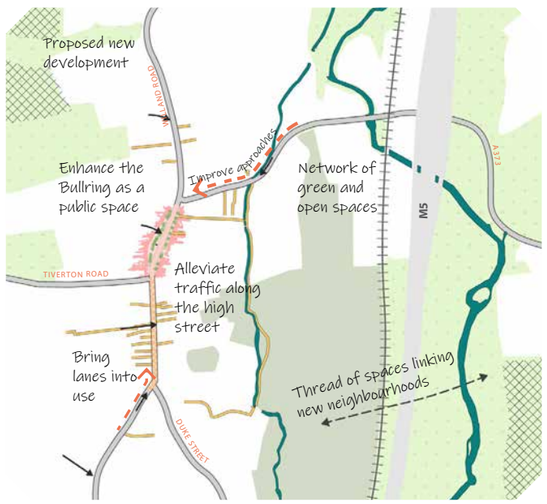


3 AN ENTICING EXPERIENCE FOR VISITORS WILL AIM TO DRAW PEOPLE INTO CULLOMPTON'S TOWN CENTRE.

11. a) Transform the 'gateway' into the town to create a positive first impression.
    b) Encourage holiday-makers en-route to the south west to venture beyond the M5 service station.
12. Raise the profile and make use of Cullompton's main attractions, historic buildings, courts, lanes and open spaces.
13. Strengthen Cullompton as a food and drink destination promoting its cafe's, restaurants and Farmer's Market and forging links with producers in the local area.
14. Enhance the retail, leisure, food and drink offer within an improved historic environment to encourage visits and dwell time.
15. A holistic view of the town centres' parking provision and on-going requirements.

4 CULLOMPTON'S SPACES SHOULD BE RECLAIMED AND REDESIGNED TO SUPPORT A VIBRANT COMMUNITY LIFE.

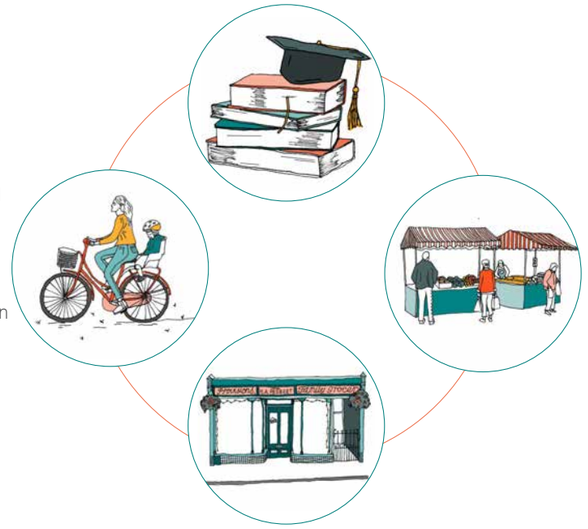
16. Alleviate traffic along the high street and redesign the space creating a better pedestrian and cycle environment.
17. Establish the Bull Ring as the town's primary outdoor civic space framed by historic buildings enabling flexible use by the community.
18. Upgrade the approaches to the town centre including the leat path on Station Road and on Exeter Road in the area of the Hayridge.
19. Assess opportunities to bring the historic courts and passageways off Fore Street into use with signage, surfacing and lighting improvements.
20. Link new developments through a network of attractive spaces enhancing connectivity to the town centre and reinforcing its purpose.

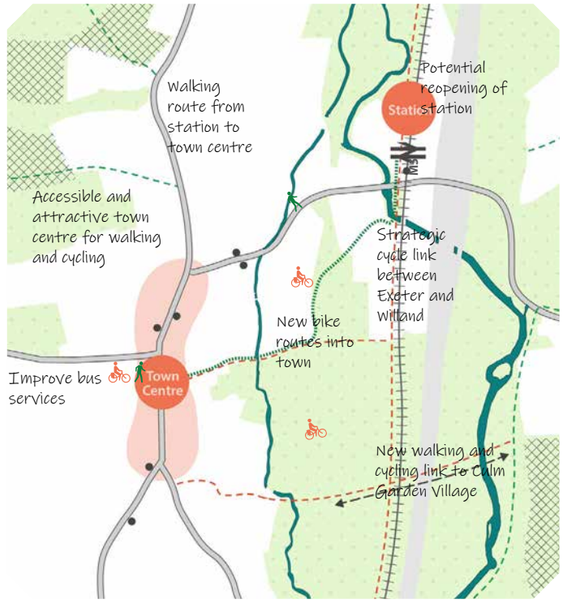




5 CULLOMPTON SHOULD BE A SUSTAINABLE TOWN FOR ITS GROWING COMMUNITY: WITH HOMES, EDUCATION, COMMUNITY AND RECREATIONAL FACILITIES.

21. Make it easy for all new residents to shop locally and identify with Cullompton as their home town.
22. Support Cullompton's schools outside the planning system to encourage opportunities for life-long learning.
23. Ensure recreational outdoor space and leisure facilities support healthy living and social interaction for all.
24. Support and expand Cullompton's popular street markets to cater for a growing community.
25. Provide new homes in the town centre to increase vitality, footfall and spend.
26. Explore the potential for the community and voluntary sector to forge partnerships to support community services.





6 IT WILL BE EASY TO MOVE AROUND ON FOOT, ON BICYCLE, BY BUS AND BY TRAIN.

27. Create high quality pedestrian and cycle links to the proposed train station, Culm Garden Village and other planned development.
28. Give more space and priority to people getting around on foot, on bicycle and by bus in Cullompton, including between the town centre and the proposed train station.
29. Encourage uses which are reliant on large delivery vehicles to relocate from the historic core where possible. Consider how servicing and delivery needs can be accommodated within an enhanced town centre pedestrian environment.
30. Improve links between Fore Street and the CCA fields.
31. Address points of conflict between road traffic, cyclists and pedestrians where possible.
32. Establish strategic cycle links between Cullompton and Willand with improved cycle access to Exeter.
33. Improve signage to encourage exploration around the town by foot and cycle.

4 Masterplan

4.1 Overview

4.1.1 This chapter sets out the spatial strategies that underpin the vision for Cullompton and provides planning and design guidance to achieve this vision.

A diagram showing the main areas of activity are set out to the left showing the key relationships and areas of focus within the town centre and its immediate environs.

Further detail on each of the spatial strategies is provided on the following pages. This covers:

- transport and movement
- open space public realm;
- activity and land use;
- and environment and sustainability.

4.1.2 A closer look is then taken into key sites, including:

- The Station/Gateway area
- The Tannery site

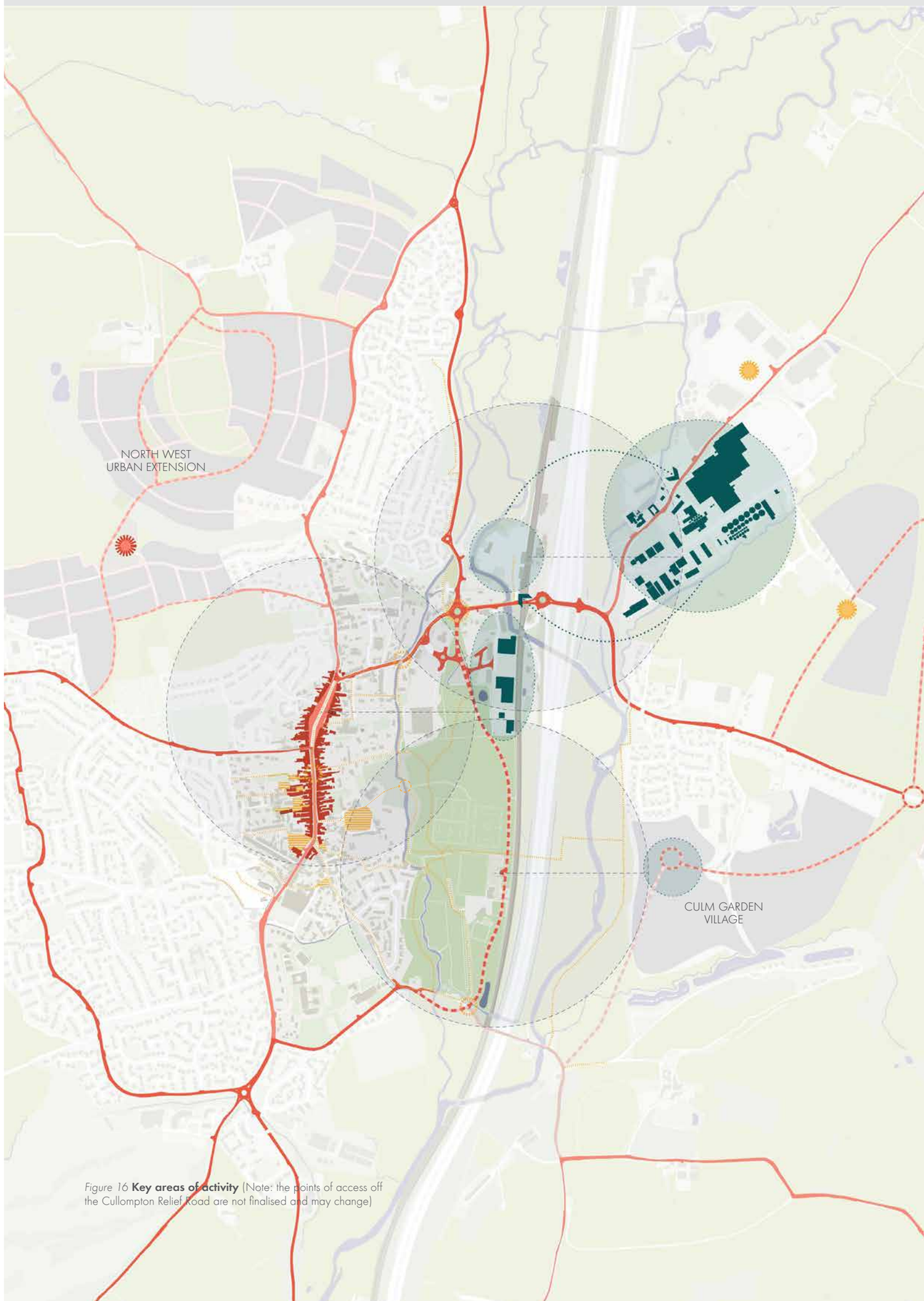


Figure 16 **Key areas of activity** (Note: the points of access off the Cullompton Relief Road are not finalised and may change)

4.2 Routes and movement

4.2.1 In line with national and local guidance, the masterplan looks to support a shift in travel modes, decreasing use of private vehicles and increasing walking, cycling and public transport. This shift would benefit Cullompton residents through decreasing town centre traffic, improving air quality, making travel more affordable, helping respond to the climate emergency as well as boosting the health and wellbeing of residents.

4.2.2 The masterplan's approach to movement is also shaped by a number of proposed projects: the Relief Road, the new station and J28 improvements.

4.2.3 This chapter sets out the routes and movement strategy in terms of:

- Pedestrian network
- Cycling network
- Public transport
- Vehicular network
- Parking strategy

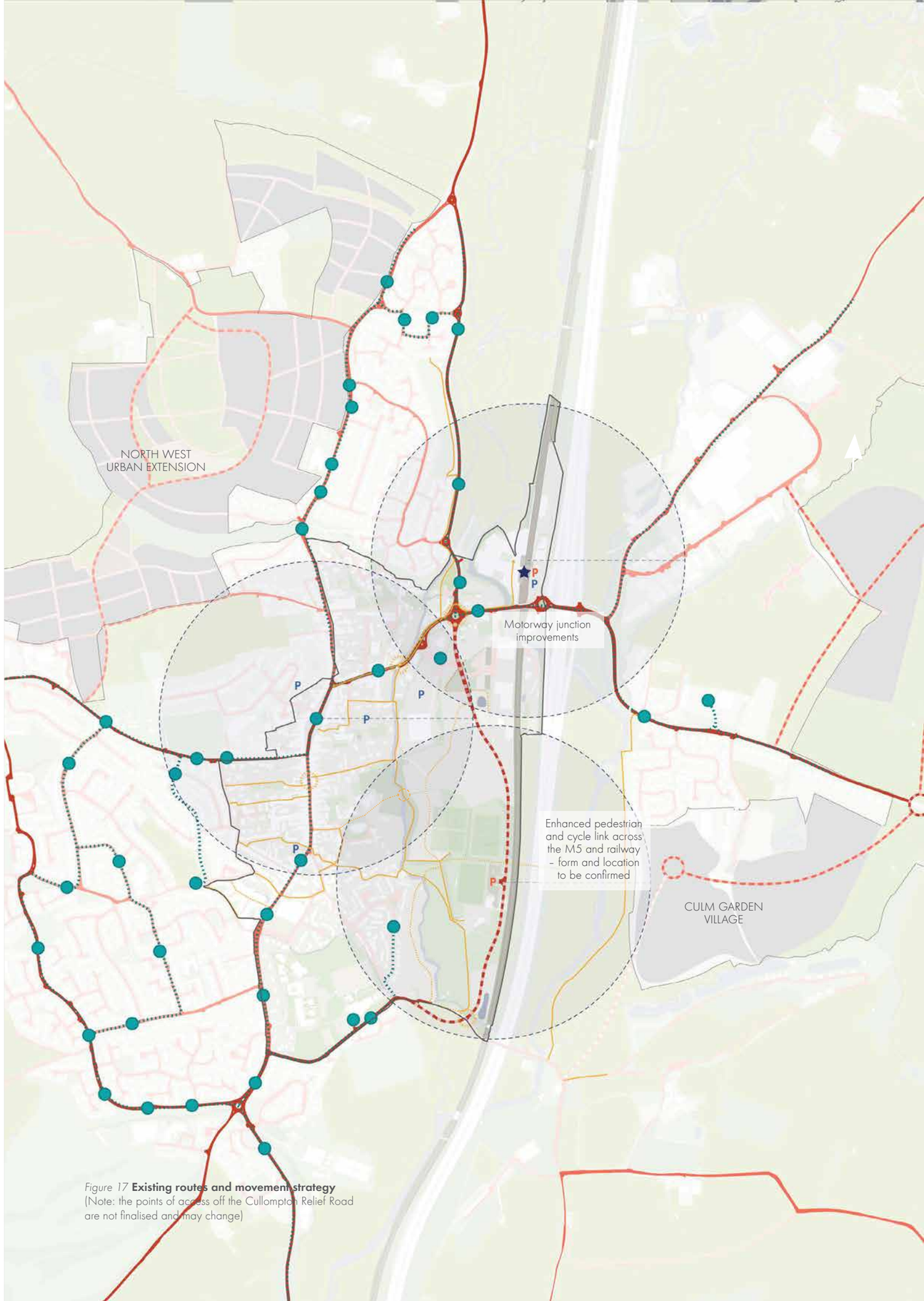


Figure 17 **Existing routes and movement strategy**
(Note: the points of access off the Cullompton Relief Road are not finalised and may change)



Figure 18 **Proposed pedestrian network**
Includes existing routes and proposed routes (subject to landowner agreement) and reinstatement of former leat crossing)



Figure 19 **Pedestrian priority at side roads**

Pedestrian Network

4.2.4 The town centre provides an existing network of footways, lanes, shared and off-carriageway routes for pedestrians. However, the historic nature of much of the network and the domination of roads and parking spaces means that the network is compromised and incomplete. The town centre predates the motor car with use by horse and cart and pedestrians. The arrival of the motor car has resulted in competition for space, reduced air quality and amenity. Whilst some historic routes are commonly lightly trafficked and may operate as informal shared spaces, there are opportunities to improve pedestrian provision in the town centre for all users.

4.2.5 A significant proportion of footways around the town are <2m wide and our calculations show that, between Station Road and Cockpit Hill, 55% of the area of the main street is given-over to roads and parking spaces - a balance which needs to be tipped in favour of pedestrians, cyclists and public transport uses of town centre shops and facilities. The Covid - 19 crisis has prompted a re-focus on the quality of pedestrian space and connectivity.

The Bullring, High Street and Fore Street

4.2.6 The relief road proposals and associated reduction in traffic through the Bullring and Fore Street present a particular opportunity to improve the pedestrian environment. There is an opportunity to narrow the carriageway and widen footways for the length of the high street. Opportunities should be investigated to rationalise parking to increase pedestrian areas whilst still supporting business footfall and allowing deliveries to take place in defined lay-bys. Space could also be used flexibly for different purposes at different times. The Bullring and Fore Street should be designed comprehensively to better control parking, enhance pedestrian areas and provide a more consistent use of surface materials. It also presents an opportunity to declutter the space from the proliferation of bollards, signage, lighting, seating, planters.

4.2.7 There is an opportunity to improve the pedestrian environment at side roads, prioritising pedestrians over turning traffic. There is also potential to narrow and tighten the junction of Bullring / St Andrews Road which is presently 19m wide as it meets the main road - this would reduce the speed of approaching vehicles, particularly from the High Street. The Fore Street / Cockpit Hill junction could be similarly amended, providing additional footway whilst enabling all vehicle turning movements at an appropriate speed. Side road should prioritise pedestrian movements across junctions.

4.2.8 There is the potential within the town centre to address the domination by motor vehicles. This could include providing opportunities to reclaim space for public use such as at the Bullring. The Bullring has carriageway widths of almost 11m in places, with significant parts of the area given over to perpendicular and echelon parking which generates reversing vehicle movements. Manual for Streets indicates that a carriageway width of 5.5m would generally enable two Heavy Goods Vehicles to pass, with 6.0m being suitable for two-way bus movements. This means a significant amount of space in the Bullring could be given over to pedestrians and cyclists, while maintaining two-way vehicular access. As part of any works, attention should be given to the consistency of materials and street furniture; the location of parking / delivery spaces; and the management of signage and other potential 'clutter'.

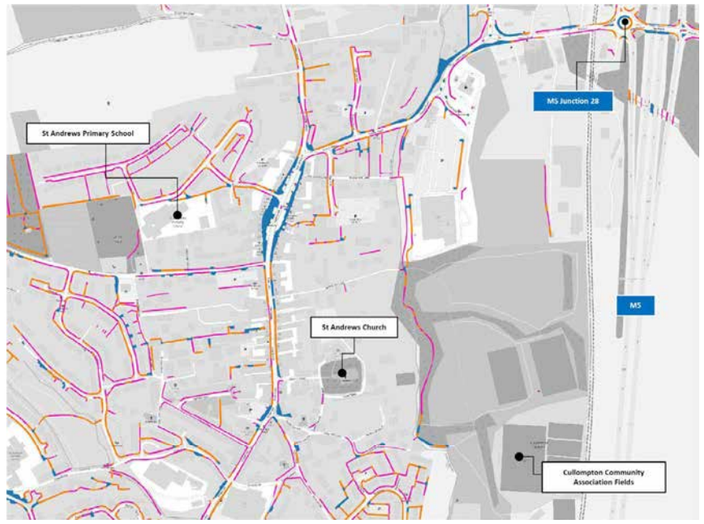


Figure 20 **Footway widths in the town centre (pink under 2m / amber 2-3m / blue over 3m)**

4.2.9 There are four principal crossing points on Fore Street, High Street and the Bullring - two zebra crossings, a central pedestrian island and a signalised crossing at the Station Road junction. The four existing formal crossing points serve a section of road 420m in length, with an average distance between crossings of 105m. If the high street were to be improved there is an opportunity to integrate crossings at desire lines, for example between Middle Mill Lane and the lane which connects to the Methodist Church. Narrowing the carriageway would also help to improve the ability for people to cross the road. Careful use of materials and traffic calming measures should be used to reduce vehicle speeds and prioritise pedestrians.

Pedestrian network

4.2.10 The town centre is relatively well connected on a north-south axis and there are many smaller roads and lanes providing for east-west movements. However, these east-west movements through the town centre are more fragmented, often using narrower footways, lanes with variable surfacing, and requiring people to cross main roads.

4.2.11 The masterplan recognises the need to improve existing east-west movements through better way-finding, improved surfacing and footpath widening where possible. The conversion of narrower lanes to formal shared surfaces could also be considered i.e Ways Lane, Crow Green, New Street, Cockpit Hill and Queen Square. Enhancement works will need to meet latest Government guidance.

4.2.12 Pedestrian connectivity is also critical on key routes into the town centre including along Tiverton Road and on Station Road. On Tiverton Road, DCC is implementing schemes to provide 'missing links' between footways. At Station Road the new relief road roundabout is to include pedestrian crossing facilities to complement the existing Zebra crossing and provide connections to the potential new rail station to the north, reconnecting the town with the national rail network and enabling sustainable long distance trips from within and around Cullompton.

4.2.13 Away from the road network, the CCA fields accommodate public footpath links and provide a pleasant and convenient route along the eastern side of the town. Consideration to be given to upgrading current footpaths to accommodate those with mobility issues. This potentially could include greater use of stone or hoggin surfacing on less heavily used paths, whilst the flood impact of non-permeable materials such as tarmac or other hard wearing-course will need to be considered on other paths.

4.2.14 There is also an opportunity to reinstate the former ironbridge crossing over the leat close to St Andrew's Church. Subject to landowner agreement it could provide new and improved connections to the town centre.

4.2.15 Proposals for the Culm Garden Village will need east west pedestrian and cycle links across the M5 motorway to the town centre. These routes should be of a high standard of construction enabling their use throughout the year.

4.2.16 Footway improvements to the Culm Garden Village will include Meadow Lane and linkages at Duke Street / Old Hill.

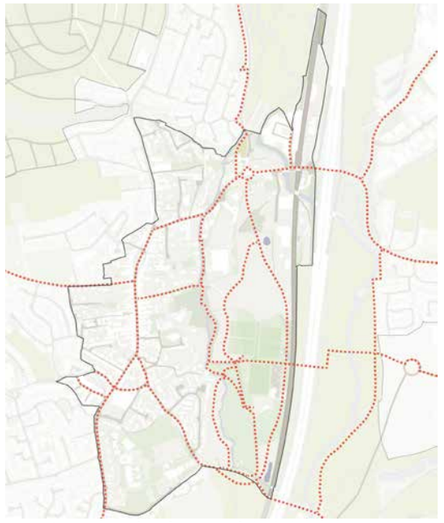


Figure 21 **Proposed cycle network** (includes existing and proposed routes)



Figure 23 **Mini Holland scheme in Waltham Forest showing cycle lanes and zebra crossings**



Figure 22 **The CCA Fields could be brought up to standard for cycling and Cullompton could help close the gap becoming part of the National cycling Network.**

Cycle Network and Cycle Parking

4.2.17 Given the size of the town, cycling should be an alternative to cars for short journeys. However, the current volume of motorised traffic in the town centre is a deterrent to many would-be cyclists.

4.2.18 There is no dedicated cycle provision in the town centre and this should be addressed in the design of the Bullring and Fore Street as part of future plans for the high street once the Relief Road is constructed. Given the width of the high street cycle lanes could be considered.

4.2.19 Cycle measures should also be implemented on Station Road, Willand Road and Tiverton Road where space permits. Cycle provision in the town centre will be viewed comprehensively within an enhanced pedestrian environment whilst ensuring vehicular traffic is adequately provided for. This will allow a connected in-town network which can then link to outlying villages.

4.2.20 Likewise, comprehensive cycle parking should be provided in convenient and safe locations around the town centre. The level of provision should take account of the growing population and emerging evidence of likely behavioural change during and post-Covid, including increased levels of cycling as a means of socially-distanced travel. Cycle parking should be located alongside existing public transport bus stops and travel nodes.

4.2.21 The relief road proposes a 2m footway along the western side. Pedestrians and cyclists will be encouraged to use the CCA fields. It is recommended that existing and new paths through the CCA fields are upgraded / provided in accordance with recommendations of Local Transport Note 1/20 regarding cycle infrastructure design (Department for Transport, July 2020).

4.2.22 STRAVA data shows the wide network of direct routes (e.g B3181) and parallel country lanes, enable the 14 mile trip to Exeter to be undertaken by the more experienced cyclist. However, improvements to the National Cycle Network between Exeter and Cullompton could attract other less confident cyclists to cycle to Exeter.

Covid-19 recovery focus









Figure 24 **Examples of cycle and footbridges. Clockwise from top left: Queen Elizabeth Olympic Park, Hassett Park Gollings, Luchtsingel Rotterdam and a green bridge at Mile End**

Pedestrian/cycle crossing over the motorway

4.2.23 Culm Garden Village proposes up to 5,000 new homes on the opposite side of the M5 from Cullompton's town centre. While there will be small local centres and convenience shops, the aspiration is that these new residents and workers will also visit the historic town centre for services and shops. The two existing crossings are J28/Station Road, which currently has a very poor environment for pedestrians and cyclists, and Duke Street.

4.2.24 There are a number of barriers (existing and proposed) between the town centre and the proposed Culm Garden Village. From west to east there is: the proposed Relief Road, the railway line, the M5 and the River Culm. Work is required to understand what type of pedestrian and cycle-bridge would be feasible and if the bridge should span all of these barriers. For example, the bridge could land before or after the Relief Road to the west and the River Culm to the east where smaller crossings could be integrated.

4.2.25 Key considerations for the design of the crossing include:

- The bridge should connect directly with pedestrian / cycle routes in the town.
- The bridge and approaches should be wheelchair accessible and should allow cyclists to traverse without dismounting.
- The design of the bridge should result in a safe and comfortable environment, considering ascent/descent, noise, lighting and wind.
- The crossing should be in place at the earliest opportunity to embed sustainable habits for use of the town centre.
- If viability allows, the potential of creating a green bridge and/or wildlife crossing could be explored. This would mean integrating planting and green infrastructure and would provide an expansion for the CCA Fields, integrating them into the wider countryside. A green bridge has the potential to improve the character of the space, enhance the green network and to support the movement of wildlife.

4.2.26 A feasibility and design process should be undertaken as a next step.

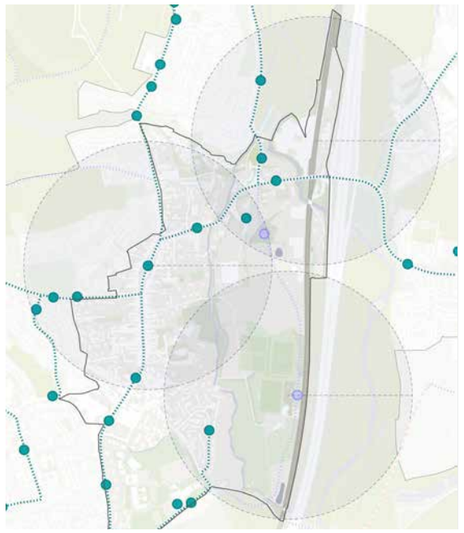


Figure 25 **Proposed bus network**



Figure 26 **Photo of railway line from Tiverton Parkway**

Public Transport - Bus

4.2.27 The town is served by buses including local and strategic services, focussed on well-used stops on the High Street. Cullompton is also served by the Plymouth - Bristol Airport Falcon coach service which travels along the M5 and can presently be accessed on Station Road opposite to the Weary Traveller Pub.

4.2.28 It is critical to the wellbeing of the town centre that buses are retained within the High Street. Any future traffic management will need to ensure that the provision of bus journeys are accommodated.

4.2.29 Bus provision should be extended to provide services to areas of new development including the North West Urban Extension and Culm Garden Village.

4.2.30 As regards to the Falcon, drop off / pick up moved to the northern side of Station Road early in 2020. Devon County Council are reviewing opportunities to provide a layby on the northern side of Station Road alongside relief Road works. This would integrate well with the proposed rail station and travel node.

Public Transport - Train

4.2.31 Both Cullompton and Wellington stations were closed in 1964 with the loss of a stopping train service; however both towns have grown in population since then and are the largest settlements between Exeter and Taunton. The Devon and Somerset Metro Partnership has been working towards the reinstatement of these stations. This partnership includes local authorities, the Heart of the South West Local Enterprise Partnership, the two local Members of Parliament and representatives from the rail industry. In 2019, Mid Devon District Council and Somerset West and Taunton Council became the Project Sponsors.

4.2.32 The rail mainline through Cullompton would provide onward travel to local stations such as Wellington, and also to the wider regional / national rail network serving Taunton, Exeter, Bristol and beyond. This would be a very positive advancement for the town, in particular in creating sustainable travel option for commuters, most of which travel to/from Exeter. The station area provides great opportunities to provide an interchange hub; facilitating rail, bus, car, walk and cycle mode transfer and co-location of cycle and vehicular parking. The proposals to re-open Cullompton Train Station is part of a wider project to improve rail services along the Bristol – Exeter corridor. Enhancement of rail services, including the reopening of new stations, is an important part of the multimodal approach to meeting the travel needs of the region.

4.2.33 Re-instating the train station aims to provide sustainable transport options for residents and visitors to Cullompton and contribute towards reducing carbon emissions, congestion and air quality in the town as well as cutting residents commuting times. Importantly in addition to improving rail accessibility to the key centres of Exeter and Taunton it will also open up economic opportunities for Cullompton and act as a catalyst for the wider regeneration of the town.

4.2.34 In February 2021 the Devon and Somerset Metro Board submitted its Strategic Outline Business Case (SOBC) to the Department for Transport to reopen

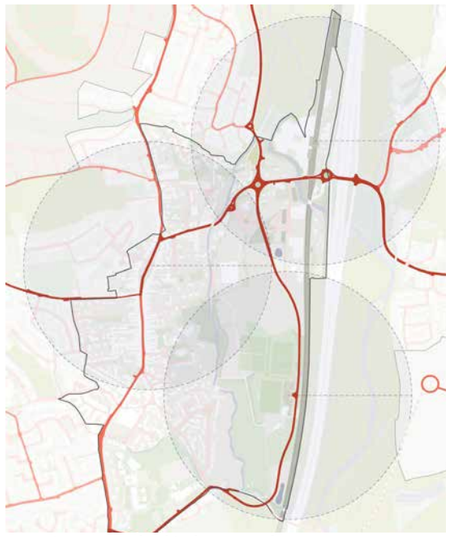


Figure 27 **Proposed vehicular network**

stations at Cullompton and Wellington. This work was funded through the Government's 'Restoring Your Railways Fund'. There is a great deal of support for the proposal and initial feedback from the Department for Transport is encouraging. Should the next stages of the scheme's development prove successful construction could take place in 2024, subject to funding.

Motor Vehicle Network

The Bullring, High Street and Fore Street

4.2.35 The Relief Road is proposed to be built by 2023 / 2024 to reduce traffic on the high street. Once in place, there is an opportunity to redesign the high street. Through the consultation process, residents were asked for their views. 90.5% of respondents thought that once the Relief Road is in place that restricting traffic is a good idea. When asked what they thought should be done, the most popular response was 'One-way working' followed by 'Access for homeowners/businesses only'.

4.2.36 Given this feedback, detailed assessments will be undertaken once the Relief Road has been constructed, to understand options available within the constraints, for example of space and existing rights of access.

4.2.37 Drivers should be encouraged to take the Relief Road instead of the High Street whenever possible. A gateway feature at the junction of Exeter Road / Meadow Way might encourage this. Drivers should also be motivated to drive slowly along the High Street. The carriage way could be narrowed in places to provide a more conducive pedestrian environment. Other traffic measures could include a lower speed limit, a weight limit or the use of shared surfacing (to latest Department for Transport guidance).

4.2.38 During the preparation of the Masterplan roadworks were undertaken in Cullompton which closed the Fore Street / High Street route between Cockpit Hill and Tiverton Road. Traffic data shows that there was an overall reduction in vehicle trips through the town centre as a result, despite vehicles transferring onto alternative routes. During this time traffic analysis took place.

J28

4.2.39 Devon County Council is working with Highways England to identify longer term transport solutions to address capacity issues at J28, unlock housing growth and ensure smooth flow of traffic on and off the M5. This work is currently at strategic outline business case stage where a number of potential options are being investigated. As part of the scheme improved pedestrian / cycle movements will be developed.

4.2.40 In either case, it is understood that pedestrian and cycle facilities would be provided as part of the scheme, and there is an ongoing commitment to the early provision of a dedicated pedestrian / cycle bridge separate from the motorway junction. These sustainable transport facilities are needed in order to establish appropriate patterns of travel from the outset of occupation of the Garden Village.

4.2.41 Junction improvements will alleviate current delays to traffic in peak periods. Traffic in the town centre would be significantly improved with the construction of the Cullompton Relief Road

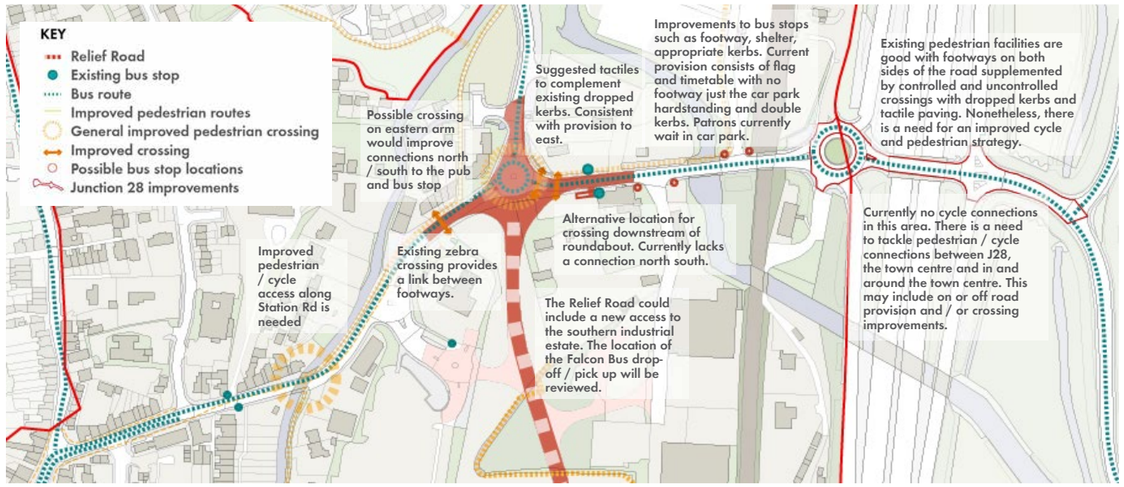


Figure 28 **Potential pedestrian and cycle improvements at Station Road and M5 J28 (current layout)**

and junction improvement works; reducing the environmental impact of queued and slow-moving vehicles.

4.2.42 Traffic accessing the town from the motorway should pass through distinct 'gateways' which demonstrate a change in character from a strategic highway route into a town centre area where pedestrian / cyclists have greater emphasis. These gateways will need to make it clear where drivers have entered a low speed area where priority is shared between users.

4.2.43 Existing pedestrian and cycle provision across town including along Station Road can be difficult; particularly where it is not continuous and where it is shared with vehicles. Further detailed analysis of cycle and pedestrian provision will be required. Of particular importance is the need to improve pedestrian / cycle access to and from the town, the new Railway Station and Culm Garden Village. This could include improved provision along Station Road, along with an investigation of alternative and complimentary east / west routings. Measures to be investigated could include a range of improvements including dedicated cycle and pedestrian routes, signing and installation of tactile paving where this is missing at access junctions.

COVID-19 and traffic patterns in Cullompton

4.2.44 Emerging evidence suggests that COVID-19 is likely to result in significant shifts in commuting by those that are able to work from home (a stated preference to work at home 40% of the week seems commonplace). This leads to key considerations including:

- The need for flexible work / meeting / collaboration / IT spaces in the town centre, in lieu of longer-distance commuting.
- Embedding the increase in walking and cycling, and embracing inclusive travel technologies that may include e-bikes and e-scooters in urban design.
- Supporting and maintaining local public transport through the Covid crisis and into a post-Covid future.
- A 'decide and provide' / 'vision and validate' approach to the assessment of travel demand, as opposed to outmoded 'predict and provide' techniques which serve largely to create the same sorts of transport environments and issues which have happened in the past.

Covid-19 recovery focus

Parking Strategy

4.2.45 The town's car parking provision is well used and for the most part well placed to intercept vehicles at arrival points in the town.

4.2.46 The masterplan recommends retaining sufficient delivery and disabled parking spaces in convenient locations within the town centre, whilst enhancing access to well-located carparks around the edge of the centre and increasing the level of use of 'interceptor' carparks at the northern and southern ends of the town centre.

4.2.47 This strategy enables the transformation of the Bull ring / Fore Street corridor into a more pedestrian focused space, whilst providing and improving access for people that need to use cars to access the town given its rural hinterland.

4.2.48 It is not proposed through this masterplan that additional parking is provided. Over provision of car parking undermines the strategy for sustainable transport movements and would be an inefficient use of land.

4.2.49 In general, car parking should prioritise disabled car parking spaces and electric car parking charging points.

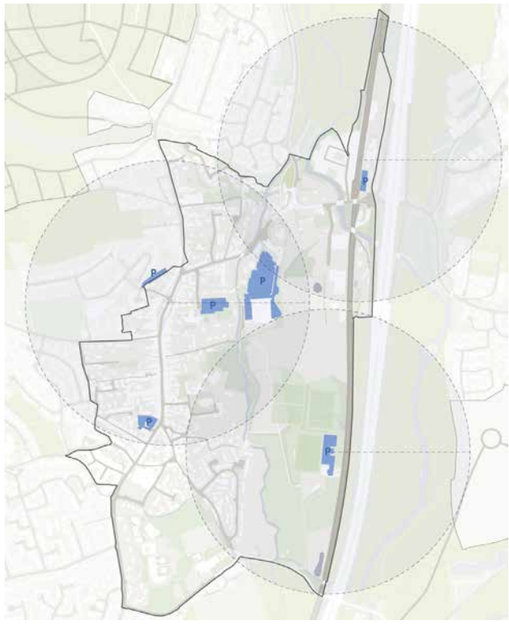


Figure 29 **Plan showing public parking provision including provision as part of the relief road proposals. The circles show primary travel nodes.**

4.3 Public realm and open space

4.3.1 Cullompton has a number of public and green spaces. However, the connections between them currently lack cohesion. The CCA fields are currently the town's primary green space. There is an opportunity for the lanes to provide strong and characterful pedestrian connections to the high street and beyond. Following the implementation of the Relief Road, the Bullring will be transformed into a public space that has the flexibility to hold markets and community events. Alongside wider improvements to make the high street more pedestrian friendly, a number of smaller spaces could be re-imagined as places to rest and play, whilst integrating nature.

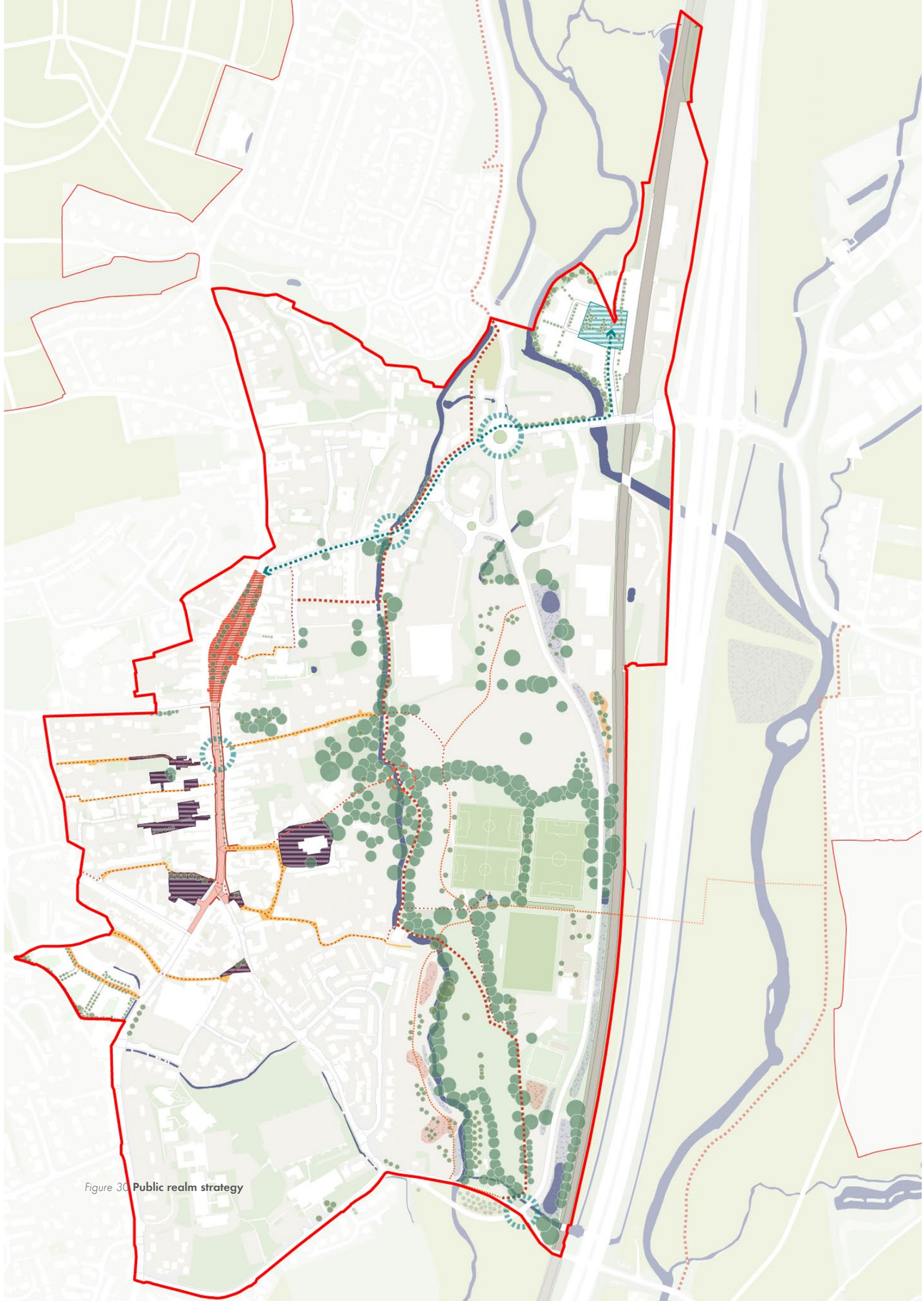


Figure 30 **Public realm strategy**





Figure 31 **Stockbridge Water Meadows, an example of a green space investments and water course improvements.**

CCA Fields

4.3.2 Cullompton's principal green space is the Cullompton Community Association (CCA) Fields. The community owned CCA Fields provide a children's playground, a footpath along the leat, open fields/ meadows and a home to the Rangers' Football Club and Cullompton Bowling Club. Being in an area of high flood risk, they also serve as the town's floodplains.

4.3.3 The CCA Fields are well integrated with the town, with access from Duke Street in the south, Lower Mill Lane, Middle Mill Lane and Higher Mill Lane from west, as well as from Station Road and Tesco in the north. While accessibility is good, the prominence of this green space could be better communicated to visitors through wayfinding and signage. There is also an opportunity to increase the number of connections between the CCA fields and the town centre through the reinstatement of the former leat crossing, close to St Andrew's Church. This is set out more fully in Chapter 4.6.

4.3.4 The town lacks connections to the east, with the railway line and motorway creating a barrier for both people and wildlife. There are opportunities to improve pedestrian / cycle connectivity to the proposed CGV to the east. The current Duke Street bridge could also potentially assist in improving pedestrian / cycle connectivity as well as providing a wildlife east / west corridor.

4.3.5 The Relief Road proposals reconfigure the sports facilities, including provision of new car parking and adjustments to the CCA boundaries to reflect compensatory land utilised as a result of the relief road scheme. The sports facilities will be well integrated within the CCA fields and as such will benefit from the existing network of paths. Measures are proposed to create biodiversity gain and mitigate the road's impacts on the green space.

4.3.6 The Culm Garden Village proposals will deliver a new neighbourhood on the opposite side of the motorway. There will be a need for better connections between the new development and the town centre. The solution could be the construction of a bridge. However, more detailed analysis is required to understand the most appropriate solution; whether it be a new bridge, enhancement of existing whilst considering the most appropriate location for the improved connections.

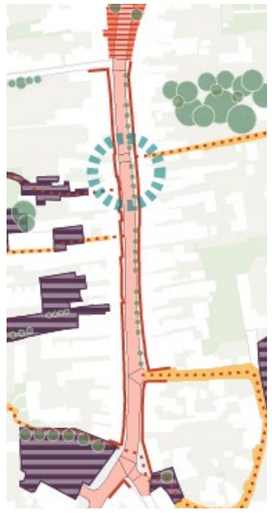




Figure 32 **The High Street in Lewes is one way with traffic calming measures. As a result the space is better for pedestrians and shops** ©Google



Otley Street, Skipton provides a one way through route while giving wide pavements and a characterful environment ©Google

Improving the High Street

4.3.7 Cullompton's high street (Bullring and Fore Street) is heavily trafficked with narrow pavements, making it unappealing to spend time there and limiting the commercial potential of the shops. A key step in reviving the town centre is a shift from being 'a place to go through', to 'a place to go to'. The implementation of the Relief Road will relieve the High Street of traffic. This change creates the opportunity to transform the character and function of the High Street.

4.3.8 A key ambition for the transformation of the high street is to rebalance the street space given to pedestrians and cyclists. The relief road proposals and associated reduction in traffic through the high street present a particular opportunity to review the pedestrian environment. Opportunities should be investigated to reclaim space for pedestrians / cyclists whilst still supporting business footfall and deliveries but ensuring traffic is adequately provided for. There is potential to transfer informal off-street carriageway parking to footway. Better and more consistent use of materials could control footway parking by design, whilst providing an opportunity to declutter the space from the proliferation of bollards, signage, lighting, seating, planters. Side roads would need to adopt a standard DCC treatment which could prioritise pedestrian movements across junctions. Where possible junction radii should be reduced to make it easier to cross, for example at the St Andrew's Hill junction.

4.3.9 Given the size of the town, cycling offers a promising alternative to cars for short journeys. Integrating segregated cycling lanes along the length of the high street should be explored to improve comfort-levels for non-seasoned cyclists. The high street cycle provision should be designed to enhance connections to the future Station, to Tiverton Road and to the Community College. The route could also provide connection onto the town's lanes and courts which are already largely car-free routes. Cycle parking should be provided in locations which provide easy access to shops without cluttering pedestrian routes, such as the Bullring and the Hayridge Centre.

4.3.10 Bus stops are very well used on the high street. Public transport should be retained and given pride of place in the town centre once the relief road is in place. Space around bus stops could be enhanced for comfortable waiting.

4.3.11 Drivers should be encouraged to take the Relief Road instead of the high street whenever possible, as well as to drive slowly along the high street. At the design stage of the enhancement of Fore Street, a review of access (one way, business and resident access only) could be considered. Traffic calming measures such as timed delivery restrictions, lower speed and weight limits, narrowing of the carriageway and different surfacing are all elements that could be considered. A design process with modelling and consultation will be needed to determine the future layout of the high street.

4.3.12 Cullompton's high street contains buildings of historic merit and architectural quality, however many of these are in a state of disrepair and they often suffer from a poor streetscape setting. The HAZ project will provide a programme of works to improve the heritage of the town. This wider project will include shop front improvements and public realm works to help unify the character of the High Street and restore original architectural features and shop fronts (see section 5).





Figure 33
Reigate High Street still has traffic through it but wider pavements near the market building ©Google



Figure 34
Lewes High Street has a wider section which can close to traffic to support the town's markets and events. Image copyright: Editor5807, CC BY 3.0

The Bullring

4.3.13 As its name suggests, the Bullring has long been the location of the town's market. However its current use as the principle north-south route has meant the space feels more like a road than a market square. Alongside the changes to the wider high street, with implementation of the Relief Road the Bullring has the potential to be reimagined as a flexible public space which supports markets and events.

4.3.14 At the design stage for the enhancement of the Bullring as a flexible public space, consideration could be given to the area as a shared surface or level area that brings together the whole of the Bullring – pavements, parking, carriageway – as one larger space. This space could adapt flexibly to accommodate events of different scales. For example, for smaller events car parking could be suspended with vehicular access remaining, while the street could be closed off to traffic entirely for larger events. Electricity and water access should be integrated to better support the market and events. A cohesive approach to surfacing and materials would enable the space to support a variety of functions, while being read as one.

4.3.15 Consideration should be given to how the space could be used at different times. There is potential for the space to be brought to life by local businesses, including outdoor seating for restaurants, pubs and cafes, as well as displays by local shops. Pop-ups and kiosks could also be used to generate more activity with additional festivals and events.

4.3.16 Opportunities will be explored to provide sustainable drainage to reduce the risk of surface water flooding, to provide treatment of the runoff and to increase biodiversity.

4.3.17 There are currently 36 car parking spaces in the Bullring. They are arranged perpendicular or echelon to the carriageway for one hour maximum use. Subject to capacity, the nearby car parks at St Andrews and Forge Way could facilitate additional parking, such that the Bullring could be redesigned to reduce the number of spaces provided, giving over more space to more active town centre uses such as the market, pop up uses, café seating and cycle parking. Remaining car parking spaces could be provided as parallel or diagonal bays and should prioritise disabled people.



Figure 35
Ashwin Street, Dalston, an example of activation of the space through SUDS planting and spill out of local businesses.



Improving the Courts and Lanes

4.3.18 The Courts and Lanes off the High Street provide permeable, less trafficked routes. However, they are poorly signed and have inconsistent, low grade surfacing.

4.3.19 A wayfinding and signage strategy should be implemented for the Lanes, raising the prominence of through routes and directing people towards landmarks or public space. This wayfinding could communicate a visitor's loop - along the Leat, Lower Mill Lane, High Street, Higher Mill Lane taking in St Andrew's Church. There is also an opportunity for historic interpretation signage, helping to tell Cullompton's story.

4.3.20 Lanes could also be improved by upgrading the surfacing to a common palette of materials. Subtle cues in the surfacing could help with legibility of these routes from the high street. Rain gardens which allow for sustainable urban drainage could be integrated where space allows. Resident and servicing access should be maintained.



Figure 36
Top left: Oswestry, an examples of a lane improved through lighting
Left: Kendal, an example of distinctive surfacing at entry points
Above: Holt, an example of a planted lane.



Figure 37
Above: signage currently discourages use of the lanes
Below: the lanes have potential to become characterful routes and spaces.

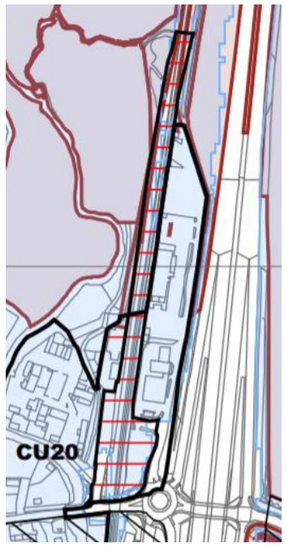




Figure 38
Barneveld Noord Station in the Netherlands uses shipping containers to make a very light touch and cost effective facility. Image Copyright: Spoorjan, CC BY-SA 3.0 <https://creativecommons.org/licenses/by-sa/3.0>, via Wikimedia Commons

Figure 39 **Adopted policies map (July 2020) showing safeguarded area for railway station (red hatching)**

The Future Railway Station

4.3.21 An important part of the station project will be ensuring an attractive sense of arrival with pleasant outdoor spaces. The detailed design of the station would also need to provide for adequate pedestrian and cycle movements, parking and other public transport provision.









Figure 40
Top left: Holt, a bench and some planting create a quiet space to rest in the town. Left: Hackney Downs Studios, terraced steps built into an awkward corner give people a place to catch the evening sun. Above: Walthamstown street corner planted informally.

Developing a network of 'pocket parks'

4.3.22 Public spaces can play a multitude of roles for local people, they can provide places to sit and rest; places to experience nature; places for children to play; places to experience art or culture; or places to socialise. Cullompton lacks connections between its areas of public open space.

4.3.23 There are a number of small scale spaces in the town which have the potential to be enhanced as active public spaces, including;

- Pound Square and the area in front of the Hayridge Centre Car Park
- The space in front of the Methodist Church
- Part of the Community Centre Car Park

4.3.24 The masterplan proposes these are transformed into 'pocket parks', providing doorstep play (a play space within sight of home, where children can play within view of known adults), public seating, pop up activities, tree planting and/or rain gardens.

4.3.25 There are examples in the town of where this has already been done successfully, including the gardens of the Walronds and the corner of Cockpit Hill and the high street.





Figure 41
Above: the Walronds garden
Right: the Corner of Cockpit Lane



Figure 42 **Plan showing access from Cullompton to the countryside and nearby cultual and historic landmarks. There are also a range of smaller privately owned facilities including, for example, farmshops and country pubs, glamping and wineries.**

Covid-19 recovery focus

Strengthening access to the countryside

4.3.26 Cullompton residents also benefit from its rural setting with access to the countryside. There are a number of popular routes from the town for walking, cycling and running along country roads and public rights of way. In addition to these, there are popular destinations within short reach of the town including Blackdown Hills AONB, East Devon AONB, Killerton, Knightshayes Court, Ashclyst Forest, Grand Western Canal Country Park and Broadhembury Hill Fort.

4.3.27 This access to the countryside provides high quality walking/cycling routes, as well as the many positive benefits of contact with nature. There are a number of opportunities to improve and enhance access to the countryside for Cullompton residents, including:

- The M5 represents a significant barrier to the east of the town. Old Hill Road, including the bridge over the M5 will be required to carry vehicular traffic. However, opportunities should be embraced for Duke Street and Old Hill to help improve accessibility as a high quality route for people on foot and cycle as a means to provide a high quality crossing over the M5 which links the town and CCA fields to the Culm Garden Village and beyond.

- New developments should respect existing rights of way and integrate and enhance connections to the countryside. Routes for walking and cycling should be prioritised over vehicular routes. They should link housing to schools, shops, employment areas, recreational/sports facilities and rights of way/ countryside to encourage healthier lifestyles and minimise car use.

- There is an opportunity to develop cycling routes which join with the National Cycling Network. There is a strategic gap between route 3 (Tiverton, Halberton, Willand) and route 34 (Exeter, Topsham) which Cullompton could play a role in connecting. This would both provide residents access to safe, enjoyable cycling routes as well as draw visitors into the town for a stop on their journey.

- Key exit/entry points from the town could be upgraded to better serve pedestrians and cyclists, with wider pavements, higher priority at junctions and improved signage. This includes Tiverton Road, Five Bridges and Station Road/Millenium Way.

4.4 Activity and land use











Figure 43
Examples of vacant and historic shop fronts being brought back into use for temporary/pop up uses. Left, Glasgow City Council's transformation of Saltmarket and right, Meanwhile Space and Harrow Council's transformation of a key shopfront in Harrow.

Homes

4.4.1 A significant number of new homes is planned for Cullompton, including on two large strategic sites. The NW Cullompton Urban Extension proposes 600 homes in the first phase and 750 in the second. The East Cullompton Local Plan allocation proposes 2,600 homes and is intended to form the first phase of Culm Garden Village, which could see the delivery of up to 5,000 new homes.

4.4.2 New developments should integrate with existing rights of way and enhance connections to the town centre and the countryside, as well as providing attractive walking and cycling routes to schools, shops, employment areas, recreational and sports facilities to encourage healthier lifestyles and minimise car use.

4.4.3 Cullompton's town centre should remain the retail and civic centre for the growing population. Retail facilities in new developments should complement rather than compete with the town centre.

4.4.4 Given the high rate of town centre vacancy, there is also an opportunity for upper storeys of buildings to be converted into high quality homes. Additional town centre living both increases the footfall on the high street and adds to the diversity of types of homes on the market.

Shops and services

4.4.5 Cullompton is the shopping and civic centre supporting residents of the town and the surrounding villages and countryside. The high street includes a high proportion of shops, cafes and restaurants (65% of occupiers are A1-5), with a small proportion of offices (6% B1) and leisure (7% D1). In recent years, there has been a surge in cafes, dog grooming salons, charity shops and health related uses (chiropractors, dentists, etc).

4.4.6 Many towns in the UK have been subject in recent years to a homogenization of both the types of shops and the general uses in town centres. Cullompton, in contrast, has remained highly independent in its offer. Just 10% of current occupiers are classed as 'national', 6% are 'regional', while the remaining 84% are 'local; independents or smaller chains. These local businesses are an asset to the town, being more agile than larger chains to respond to the changing market and contributing to the town's unique appeal.

4.4.7 Across the UK, High Street retail has suffered in recent years, largely due to the rise in internet shopping. The decline in High Street shopping has been exacerbated by the COVID-19 pandemic. In Cullompton, there are a number of notable vacancies, though comparatively the vacancy rate is not overly high (7% compared to the pre pandemic national average of 10.3%). This may be an example of Cullompton's ability to adapt flexibly, with 10% of retail units with frontage onto the high street area having been converted to residential use.









Covid-19 recovery focus

4.4.8 While the vacancy rate is not overly high, there has been a decline in the quality and variety of businesses along the high street. It may be that landlords have taken the first tenant possible in order to start the rental flow quickly. Longer term over a wider area, this becomes a self-perpetuating trend, where the lower-quality tenants tend to put off stronger tenants, leading to lower demand for property, lower rents and little reinvestment. Opportunities could be explored to break this cycle so Cullompton can more readily diversify its offer.

4.4.9 In terms of national retailers, Tesco, Aldi and Home Bargains are located on the edges of the town centre. On one hand, these larger supermarkets generally attract visitors from other locations in mid Devon, but they also compete with the high street businesses. Changes to the high street should focus on creating linked trips and increasing dwell time, to benefit more from the presence of these larger chains.

4.4.10 Cullompton is serviced by a local post office branch at the Pillar Box. In recent years, the town has experienced the loss of a number of the high street banks. Banks have more recently been required to have a more centralised provision with a reduction in their high street portfolio. Given this, it is unlikely that banks will look to locate back into the high street.

4.4.11 The Masterplan aims to increase the vibrancy of shops and services. This can be facilitated through the following:

- encouraging greater footfall on the high street
- broadening Cullompton's offer
- enhancing the visitor economy
- A Business Improvement District (BID). Other towns have benefitted from the creation of a BID. This might be something that the town wants to consider.

Encouraging more footfall on the high street

4.4.12 The commercial potential of shops is closely related to the number of people visiting the high street. The proposals to improve the physical environment will be critical to draw people to the town centre. The future designs for this space should prioritise creating a comfortable and enjoyable environment for people on foot, to make shopping in Cullompton an obvious choice. This includes: widening pavements, tackling car domination and associated air pollution, tree planting and shopfront improvements. In addition to the public realm improvements, there are a number of other ways that more people can be attracted to the high street:

- The masterplan proposes connections to and from the Alexandria Business Park. Connections to Kingsmill Industrial Estate will need to form part of a wider review of measures to address issues at Junction 28.
- The town is forecast to grow in population over the coming years which it is hoped will give a boost to the high street area and the viability of retailers. It will be important that a strong relationship is established between the town centre and Culm Garden Village so that new residents use Cullompton as their town centre for shops and services. To these ends, strong cycling and walking routes (in particular over the M5/river/rail) will be needed to support active travel for trips. It will also be important that Culm Garden Village does not provide any significant retail as to not draw people away from the town centre.
- One further way that footfall can be enhanced is to prioritise workspace and/or homes in the development of any town centre developments or conversions. More people working and living within the town centre means more customers for whom high street shops, restaurants, pubs and cafes are an obvious choice. See Page 58 for more on employment provision.



Figure 44
The Low Line, London. An example of a wayfindings strategy and visitors loop.



Figure 45
An example of an outdoor coffee cart improving provision for visitors.



Figure 46
Church of St Mary the Great, Cambridge © Mat Fascione. An active church which is also a tourist attraction, allowing visitors to climb the bell tower.



Figure 47
An example of how motorway signage can help attract visitors into the town. Photo copyright David Smith.



Figure 48
Gloucestershire farm shop motorway services. An example of how local produce and a niche offer can attract visitors. Photo copyright Anthony O'Neil.

Broadening Cullompton's offer

4.4.13 While there are a number of unique and thriving local businesses, there has been a downward trend in the variety and the quality of shops in the town centre. Across the country, demand for retail property is down, with the focus shifting to "experience" retail, where customer service, activities or food and beverage become significant drivers of a shopping trip. In order to compete with surrounding centres and to attract more people into the town centre, Cullompton would benefit from a diversity of traders on the high street. There are a number of sectors that would benefit its appeal.

4.4.14 Cullompton has a good food or drink offer and growing 'cafe culture'. While the town is currently well provided for, as the population of Cullompton grows it is anticipated that cafés, restaurants and bars will become a more viable proposition, which would also benefit from proposed public realm improvements. These businesses would be complemented by other evening based activities starting up in the town, such as a cultural venue (ie. live music venue, small cinema or gallery space).

4.4.15 Looking at the town's demographics, there is a growing eastern European population in Cullompton with the potential to support Cullompton's wider multi-cultural appeal.

4.4.16 Cullompton would benefit from developing its own readily identifiable niche. This would attract interest, draw footfall, helping Cullompton to remain viable.

4.4.17 The vacant premises in the town centre present an opportunity for Cullompton to host pop-ups and temporary shops. Affordability of the premises will play a key role in the success of a pop-up shop scheme.

Enhancing the visitor economy

4.4.18 Cullompton is conveniently located just off of the M5, a key route for tourists heading to south Devon and Cornwall's holiday destinations. This location presents a strong opportunity for Cullompton to establish itself as a stopping point on route, drawing people beyond the motorway services and into the town centre. Cullompton already has a number of key components: car parking which is easily accessed from the motorway; en route petrol stations; the CCA Fields where people can walk their dog; and a characterful High Street with shops, cafes and restaurants. Some ways Cullompton could attract more visitors in town include:

- A visitor's 'loop' could be promoted to visitors through signage and marketing, along the Leat, Lower Mill Lane, High Street, Higher Mill Lane taking in St Andrew's Church. There is also an opportunity for historic interpretation signage, helping to tell Cullompton's story, for example the town's milling history. Public realm improvements could help make this route feel cohesive and welcoming.

- Celebrating the town's heritage could be used to attract visitors into the town. Appropriate signposting from the motorway and information about the town's history and architecture are simple measures to increase visitor numbers. Town centre destinations include the Grade 1* listed St Andrew's Church, a key landmark building and rated among the top 1000 churches in Britain, the Grade II* listed Manor House Hotel and the Grade 1 listed Walronds.

Exploring the potential of creating a Business Improvement District (BID)

4.4.19 Cullompton has a large number of traders which are operating very effectively but potentially in isolation from one another. An assessment of freehold ownership of the high street area shows that just 17 of the 98 properties fronting high street are owned by companies instead of individuals. Where the ownership is by individuals, there is often less of an ability for a cohesive management plan across an area. It could be beneficial for all businesses in the town centre for a Business Improvement District (BID) to be created in the centre. This would enable a number of common priorities to be identified by the businesses in the town centre, such as public realm improvements, shop front improvements, curation of Cullompton's offer and marketing and promotional activities.

4.4.20 A BID scheme is designed to be operated by the local businesses, requiring initial support and occasional input thereafter from the local authority. Its function is to develop projects and services that will benefit the trading environment within the boundary of a clearly defined commercial area. A vote on whether or not to establish a BID is open to tenants and if a majority, both by number and by rateable value, approve the proposal, all ratepayers will contribute through a small levy (identified by local businesses i.e. 0.5%, 1%, 2% etc) on their business rates.

4.4.21 Once voted for, the levy becomes mandatory on all defined ratepayers. The BID has a lifespan of five years and any further proposals will have to be reaffirmed through a subsequent vote. The District Council and Town Council can help traders should they wish to pursue a BID.

4.4.22 BID gives local businesses the power to effect changes that will benefit them in their local community. Improvements may include cleaning and environmental measures, improved promotion of the area, improved events, and greater advocacy on key issues, but the legislation does not put a limit on what products or services are provided.





Figure 49
Signature Brewery, an example of an industrial use taking on a customer-facing activities by opening a taproom at weekends.

Employment

Industry and making

4.4.23 Historically, Cullompton has been a place of making; its economy was founded on weavers who used the river's power and water to produce cloth. The masterplan seeks to reinforce this strand of Cullompton's identity and to strengthen the town as a place for industry and making. Industrial and warehousing property is in good demand, evidenced by the lack of availability and number of developers looking to deliver more space in the area. Alexandria Business Park, Longbridge Meadow and the Kingsmill Industrial Estate are thriving and there is potential to intensify these areas to provide additional floorspace. All three of these estates are well positioned off of the motorway and there is also an opportunity to create better provision for people to walk, cycle and take public transport, enabling local people to commute to work and workers to use the town centre's shops and services without driving.

4.4.24 The proposed future Station location is adjacent to the Alexandria Business Park. If funding is secured and the new station goes ahead, it will change the context significantly. In terms of industrial and business space, it is anticipated that existing businesses which can sit comfortably alongside other uses (lighter industry, fewer vehicular movements, little noise/smell) could be rehoused on the same site. This would be part of a redevelopment to create a positive station arrival experience and intensify the use of the land given the changing market context that the station brings.

Office and co-working space

4.4.25 The supply of office space is limited in the town. The Nook, a local success story, draws occupiers from across Devon. The Nook offers flexible workspace for those predominantly working from home including entrepreneurs, freelancers and business owners. Situated in a converted factory in Kingsmill Estate, the characterful setting and proximity to the motorway are ingredients for its success; to the extent that demand exceeds the amount of office space available.

4.4.26 The COVID-19 pandemic has led to changing working patterns which is likely to create new demand for small and flexible workspace. Many companies are exploring 'hub and spoke' office models, rather than having their staff commute into large centres. For many, working from home has become a new reality; as the Covid-19 pandemic subsides, people will reconsider their working patterns finding a balance between commuting and working from home.Hiring a desk-space locally, on a flexible basis, can provide a delineation between work and home which can be advantageous. Similarly, it can reduce commuting times helping work life balance.

the nook
WHERE CHANGE COMES TO WORK

"The Nook has become an iconic and beloved place to work in the South West, not only because of the unique, quirky office spaces born from its creators' vision, but due to the community of 'nooksters' who work within the walls of the building.

James and Vicki were presented with the opportunity to take on their Father's truck factory in Cullompton in 2016. They saw huge potential to develop the large space into something really special."

Extract from the Nook's website





Figure 50
Qworky in Skipton is an example of a high street building conversion into co-working, creating 12 desks for hire. This helps to bring vacant buildings back into use and contributes to footfall on the high street.

4.4.27 There could be an opportunity for Cullompton to benefit from changing working habits and to build on the success of the Nook, by creating a small, flexible workspace in the town centre, run either by the Nook or a competitor. The presence of office space near the high street area could also act as a catalyst for related economies, with cafes, pubs and restaurants all benefiting from having a new workforce centrally.

Securing high-speed broadband connectivity for Cullompton

4.4.28 High-speed broadband signal is an increasingly important factor in the decision of where people want to live and work. This trend has been accelerated by the Covid-19 pandemic, during which lockdown made us more dependent than ever on our internet signal for all parts of our lives from working to learning to socialising. Faster internet connectivity helps to promote business development (e.g access to on-line learning programmes) and would attract inward investment to Cullompton. It would also equip education, social and community groups with access to technology that will enable them to expand their programme and improve their effectiveness.

4.4.29 In recognition of the poor broadband connectivity across the sub-region, local authorities have developed the Connecting Devon and Somerset Initiative. The project is working to deliver next generation broadband infrastructure to areas where the market has failed to invest.

Covid-19 recovery focus

Closing the skill gap

4.4.30 There remain pockets of acute deprivation in Cullompton and the population has lower than average skills, qualifications and income. Utilising key players that make up a strong community infrastructure network, there is an opportunity to create structured links between local businesses, high learning organisations and members of the local community not in employment, education or training. Mid-Devon District Council, Cullompton Community College and Cullompton Community Centre could work together to help address this gap.

4.4.31 Cullompton Community College educates approximately 750 students aged 11-16, a key age group for forging aspirations for the future. Exposure to people in high skilled jobs can help to give students inspiration and open up options for their future. This could include involvement with programmes like STEM (science, technology, engineering and maths), through which STEM ambassadors volunteer their time and visit schools, helping to bring STEM subjects to life and demonstrate the value of them in life and careers. There is also an opportunity for students to be involved in some of the upcoming developments in the town, for example working with engineers, developers, architects and planners on the design and delivery of the rail project and/or Culm Garden Village. Additionally, with Exeter University only a half an hour drive away, it would be fruitful for the Community College to forge a strong relationship with this reputable higher learning organisation. For example, there could be an annual trip for students to visit the University Campus and to be exposed to university life and the breadth of subjects they could go on to study.

4.4.32 Mid-Devon District Council is part of the Government's apprenticeship scheme, subsidising and matching businesses to those looking for skilled work with on the job training and development. The

National Apprenticeship Service has reported that nearly every employer that takes on an apprentice (96%) reports benefits to their business, with 72% of businesses reporting improved productivity. With a flourishing business community around the Kingsmill Industrial Estate, the Alexandria Business Park and at Longbridge Meadow, there is potential for more local businesses to be recruited to the scheme, in turn offering apprenticeships to local people who are out of work. This would be a benefit to local businesses, while also helping to improve the skills and employability of local people.

Community and civic uses

4.4.33 Community, culture and civic uses play an important role in attracting people into the town centre; supporting a vibrant and fulfilling town life. Having them centrally located supports footfall, other commercial uses and activities. There are a number of facilities in the town centre including Cullompton Community Centre, Culm Valley Sports Centre, the sports clubs at the CCA Fields and the Hayridge Centre. The Cullompton Neighbourhood Plan recognises the importance of town centre-based arts, cultural and leisure activities and its role in promoting a visitor and evening economy. The creation and enhancement of outdoor performance space including for example at the Bull Ring and the construction of a swimming pool within the north west urban extension will bring significant gains.



Figure 51
Saffron Screen cinema in Saffron Walden doubles as an auditorium for the secondary school in the weekday.



Figure 52
The Depot, Lewes is a former brewery and vacant historic building which was converted into a community cinema.

4.5 Environment and sustainability

Biodiversity and green space investment

4.5.1 The regeneration of Cullompton should seek to maximise opportunities to tackle climate change at a local level. This fits well with the District Council's Climate Emergency declaration aims and the government's aspiration to build back better in response to the Covid 19 pandemic.

4.5.2 Culm Garden Village will be planned and delivered to ensure it is sustainable and positively contributes to combating challenges associated with climate change. A sustainability strategy will set out how the garden village will deliver a low carbon, environmentally sensitive development. The sustainability strategy will also encourage healthy lifestyles and a shift to active (pedestrian / cycle) travel modes.

4.5.3 In terms of the new developments (Culm Garden Village and the North West Urban Extension) design will be landscape-led retaining and enhancing existing green infrastructure wherever possible. They will create places that contribute to net biodiversity gain.

4.5.4 The Relief Road proposal includes measures to prevent biodiversity loss and mitigates the impact of the road on the CCA fields including:

- Pre-development surveys including ecological assessments;
- Maintaining green infrastructure wherever possible,
- Measures to address and prevent water pollution;
- Additional and planting to create a number of different habitats including shrubs, trees, hedges, grassland / wildflower and wetland,
- Maximising the biodiversity potential of the two proposed highway drainage ponds;
- Installing bat and bird boxes; and
- Wildlife passages for bats, birds and otters.

4.5.5 There is an opportunity to enhance biodiversity and mitigate against climate change within the town centre. This may include:

- Installing bat and bird boxes perhaps with an emphasis on a particular species e.g. swifts,
- Pocket parks with an emphasis on foraging bird or insect species,
- Retention and enhancement of green infrastructure links to support ecological connectivity across and around the town for species that would benefit from wildlife commuting zones such as amphibians, bats and hedgehogs;
- Environmental improvements that benefit people and nature - such as energy saving measures to lessen climate impact and reduce light pollution;
- Infrastructure to support electric vehicle charging;
- Improved pedestrian and cycle connectivity including installation of cycle lanes, bike stands and seating;
- Retrofit projects to support the town centre's greener future e.g. energy efficiency measures; and
- Encourage the use of sustainable construction designs, methods and materials that complement and highlight the town's heritage.

Sustainable transport

4.5.6 The masterplan encourages a modal shift away from private motor vehicles, towards sustainable transport modes. This highway approach is consistent with national policy and the stance taken by Highways England.

4.5.7 To these ends, a key ambition for the transformation of the high street following the construction of the Relief Road is:

- to rebalance the street space given to pedestrians and cyclists whilst still supporting business footfall, deliveries and ensuring traffic is adequately provided for. This is anticipated to result in reduced air pollution.














- The improved pedestrian and cycle environment making these modes the obvious choice for short journeys.

- The retention of buses in the High Street with any future traffic management needing to ensure that the provision of bus journeys are accommodated.

4.5.8 Section 4.2 sets out guidance for the improvement of walking and cycling provision.

4.5.9 The re-opening of Cullompton rail station would also help to increase the uptake of sustainable travel to and from the town. The majority of Cullompton residents currently commute out of the town by car, and the rail station has the greatest potential to reduce the level of vehicular outbound commuting.

4.5.10 Publically accessible electric vehicle charging points could be established in the town centre car parks.

4.5.11 New developments should be well connected to sustainable travel routes to allow sustainable travel patterns. In the case of the Culm Garden Village, critical to this is a crossing over the M5 and railway line. New developments could look to explore how proposed driveways and / or street parking can be adapted to open / green space, should demand for them fall over time.Flood risk management

4.5.12 There is a long history of flooding in Cullompton from the River Culm, its tributaries and from surface water flooding. Any redesign of the high street should seek out opportunities to provide sustainable drainage techniques to reduce the risk of surface water flooding, to provide treatment of the runoff and to provide habitat for biodiversity as well as amenity space for residents and visitors.

4.5.13 Opportunities to enhance the watercourses in the area should be sought. Any new housing developments, any new town centre parking areas or pedestrian cycle links should use sustainable drainage techniques as per the SuDS for Devon Guidance (2017). Historic courts and passageways off Fore Street could consider permeable surfaces where appropriate to mitigate the speed of water run off and water quality. Similarly, measures could also include features such a rain gardens.

Guidance for new buildings

4.5.14 For new homes and commercial buildings, designs should explore and provide opportunities for best practice in Net Zero design, manufacture, construction and performance. New developments will be expected to demonstrate how household efficiency and waste management will create demonstrably lower domestic energy use, reduced utility bills and increased rates of recycling. New development should include appropriate internal and external storage for recycling and landfill waste.








4.6 Key opportunities

4.6.1 Cullompton is a compact market town with a sensitive historic environment that is one of its greatest assets. This presents both an opportunity and a constraint. The town is located alongside the River Culm and its associated leats. These waterways provide an attractive natural environment in close proximity to the town centre yet also present a flood risk for existing and new homes, work spaces or community venues in close proximity.

4.6.2 New development within the town will need to give consideration to the constraints imposed by the historic environment and flood risk. Any new development must enhance the character and function of the town centre whilst making a positive contribution towards climate change.

4.6.3 In order to enhance the role of the town centre, a number of transformational opportunity sites have been identified. This document outlines the potential for each site but these would be subject to further discussion with landowners and partners.

4.6.4 The opportunity sites should be read in the context of broader proposals for the area. To the north of the town, strategic proposals for new homes, jobs and community space are proposed. Such proposals will result in a population increase of approximately 18,000 people within Cullompton. These strategic developments increase the footfall for the town centre and will help enhance the town's vitality and viability.

4.6.5 These strategic developments including the CGV and infrastructure projects such as Relief Road, the railway and J28 improvements present an opportunity to improve connections across town, the public realm, as well as the economic and social life of the town centre and Cullompton's valuable heritage.

1 **Alexandria Industrial Estate**

2 **Railway Station**

3 **Tannery Site**

4 **Higher Bullring**

5 **Improvements to cycling between proposed new rail station and the town centre**

6 **Fore Street enhancement**

7 **Leat footbridge**

8 **The Old Cinema site**



Figure 53 **Plan showing approximate locations of key opportunity sites**

1 Alexandria Industrial Estate

Context

4.6.6 There is a recognition that the approach to Cullompton from Station Road has scope for enhancement. The Alexandria Industrial Estate has potential for enhancement particularly given its close proximity to the proposed new railway station.

4.6.7 Should the railway station get government funding it is likely that would be for basic railway infrastructure including ticket machine, shelters and benches with a pedestrian / cycle and wheelchair accessible overbridge.

4.6.8 There is therefore an opportunity to supplement this provision in the immediate vicinity. This could include footway / cycleway improvements, electric bike and car hire, improvements to the public realm and other complimentary uses.

4.6.9 The River Culm flows to the west of Alexandria Industrial Estate and presents an opportunity for an enhanced environment. Notwithstanding this, parts of the Industrial Estate lie within flood Zone 3 which limits the scope of land uses that can be provided including residential.

Objectives

4.6.10 Alexandria Industrial Estate is identified as a Regeneration and Enhancement Area. Key objectives for any future approach will consider the following:

- Provide a positive arrival point for Cullompton and walking and cycling access to a new rail station
- Enhance pedestrian and cycle links through the estate between the new railway station and town centre including investigation of the potential for a new cycle / pedestrian route via Millennium Way
- Establish a more positive relationship with the River Culm, as a valuable natural asset and amenity space
- Establish an enhanced sense of arrival at the new railway station and investigate opportunities for a small station square and shop to the west of the railway lines
- To minimise additional vehicular traffic on to Alexandria Industrial Estate / Station Road junction
- Develop a scheme that helps enhance and regenerate the Industrial Estate whilst being complimentary to the railway station proposal

Next steps

4.6.11 Next steps will require:

- A review of flood risk associated with the site.
- Further liaison with landowners regarding redevelopment of the site including uses, building form and layout.
- Design and layout to be developed in response and informed by emerging plans for the railway station.
- A detailed review of improved cycle and pedestrian links between the town and the railway station including consideration of a Millennium Way route over the River Culm.
- A review of the visual, public realm and wildlife benefits that may be achieved adjacent to the River Culm.

DIAGRAM TO BE INCLUDED HERE

Figure 54 **Diagram showing design principles for the Alexandra Industrial Estate**

2 Railway Station

Context

4.6.12 Mid Devon District Council is in the process of preparing a Strategic Outline Business Case (SOBC) and applying for funding to reinstate the former Cullompton train station. The proposal is progressing well and at some pace. This proposal is likely to include a ticket office, shelters and benches with a pedestrian footbridge over the tracks.

4.6.13 The station proposal lies in close proximity to Alexandria Industrial Estate which is identified as a Regeneration and Enhancement Area. It has the ability to enhance the setting and sense of arrival to the railway station.

4.6.14 It is important to ensure that the railway station provides opportunities for multi modal travel i.e bus, cycle and pedestrian access. Transport interchange facilities will need to complement the provision of the station.

Objectives

4.6.15 Key objectives for the future delivery of the railway station will consider the following:

- An improved setting to the area of the proposed railway station including an improved sense of arrival that may include tree planting, public seating, cycle parking, drop-off and pick-up space.
- An improved sense of arrival into the town from the railway station.
- Station parking to consider future forms of mobility. Station parking to include bike / scooter hire, car club schemes and infrastructure such as electric charging.
- Improved pedestrian and cycle connections between the railway station, the town centre and its hinterlands.

Next Steps

4.6.16 Next steps will require:

- Detailed review of design and layout in response to the emerging railway scheme.
- A detailed review for improved cycle and pedestrian links to and from the station.
- Continued liaison with landowners and partners.

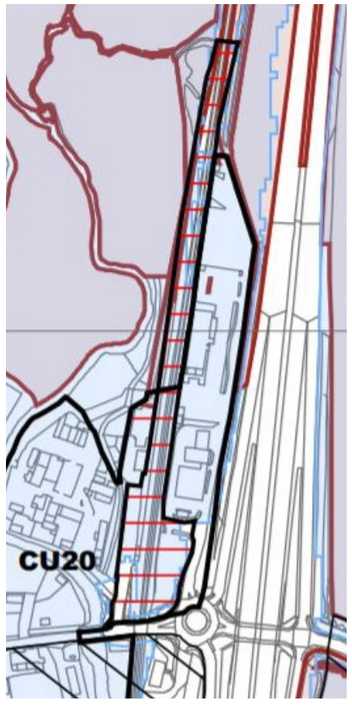


DIAGRAM TO BE INCLUDED HERE

Figure 56 **Diagram showing key design principles for the Railway Station area**

3 Former Tannery Site

Context

4.6.17 The former Tannery site covers an area of land between Exeter Hill and Crow Green. A greater part of the site lies vacant and presents an opportunity for a mixed use redevelopment.

4.6.18 Opportunities should seek to retain the antiques centre building and seek to retain the soft play provision on the site. However, the site is currently underused with vacant and / or areas of 'left-over-space'. This presents an opportunity for a mixed use redevelopment scheme incorporating and raising the profile of both the antiques centre and soft play provision.

4.6.19 The waterway to the south of the site provides an opportunity for an enhanced wildlife corridor. Whilst the area is in Flood Zone 2, this does not preclude development options.

4.6.20 Whilst development would need to be in-keeping with the surrounding scale and character of buildings, redevelopment presents an opportunity for an innovative scheme with the potential to incorporate zero-carbon built forms of development. The site has the ability to improve the sense of arrival into the town via Exeter Road whilst improving pedestrian and cycle links across the site to Crow Green. Active frontages on to Crow Green and Exeter Road will enliven the approaches to the site.

Objectives

4.6.21 Key objectives for the redevelopment of the Former Tannery site will consider the following:

- Establish a mixed use development that is within the town centre; supporting local shops and services.
- Establish active frontage through main entrances onto Crow Green and Exeter Hill to provide a better sense of arrival into the town centre.
- Explore opportunities for alternative forms of development such as zero carbon. development or similar standards. This could be an exemplar scheme for Mid Devon.
- Retain the historic antiques building, rehoming the soft play elsewhere within the site.
- Seek opportunities to relocate any uses such as storage to peripheral town centre locations.
- Enhance the water course for visual and wildlife benefits whilst integrating new cycle and pedestrian routes into the existing town centre wide network of routes.

Next steps

4.6.22 Next steps will require:

- A review of flood risk considerations.
- Liaison with landowners exploring options for redevelopment including uses, building form and layout.
- A detailed review of improved cycle and pedestrian through the site.
- A review of the visual, public realm and wildlife benefits that may be achieved adjacent to the waterway.
- A review of the relocation / rehoming of existing uses as required.

DIAGRAM TO BE INCLUDED HERE

Figure 57 **Diagram showing key design principles for The Tannery site**

4 Higher Bullring

Context

4.6.23 The Higher Bullring has long been the location of the town's market. However, in more recent years the space has felt less of a market square and more of a primary traffic route for those travelling through the town centre. The Higher Bullring has the potential to be reimagined as a flexible public space, with the creation of a larger, level, shared use area. Detailed design and layout will ensure its safe and accessible use for all members of the public including those that may be visually impaired.

4.6.24 Redesign of the space will allow it to be used flexibly to accommodate different events of different scales. Reconfiguration of the parking may allow for the temporary suspension of parking during event days. A comprehensive approach to surfacing, materials, street furniture and utilities such as water and electricity would allow for a co-ordinated approach. This would better facilitate a range of day time and evening uses, including outdoor seating that would contribute to the level and activity and vibrancy in the town centre.

4.6.25 The existing trees are a valuable asset to the appearance of the Higher Bullring, to the surrounding historic buildings and their setting.

Objectives

4.6.26 Key objectives for the redevelopment of the Higher Bullring will consider the following:

- Enhancement of the space for use by a variety of activities
- Comprehensive redesign of the space as a larger, level, shared use area that will met all standards for safe use
- Review a reconfiguration of the parking
- Design and layout to include a comprehensive use of materials and street furniture
- Retention of trees and integration of other biodiversity benefits
- Enhanced sense of arrival into the town centre

Next steps

4.6.27 Next steps will require:

- Survey and other preparatory work- utilities, archaeology etc
- Traffic surveys
- Preparation of a landscape design
- Liaison with landowners, stakeholders and other interested parties.



Figure 58 **Diagram showing key design principles for the Higher Bullring**

5 Improvements to cycling between proposed new rail station and the town centre

Context

4.6.28 Existing pedestrian and cycle provision across town including along Station Road can be difficult; particularly where it is shared with other vehicles and its uninviting due to a lack of dedicated provision. Given the proposal for a new railway station, Culm Garden Village, aspirations to enhance opportunities at Alexandria Industrial Estate and recognition of trips to the facilities at the service station there is a need to enhance pedestrian and cycle provision along this corridor.

4.6.29 A number of partner organisations including Devon County Council and Highways England are investigating longer term transport solutions to address capacity issues in and around Cullompton including looking to address capacity issues at Junction 28. There is an ambition to bring forward pedestrian and cycle provision along this corridor at the earliest opportunity, subject to funding.

4.6.30 Improvements in cycle and pedestrian provision to and from the railway station and town centre will need to be considered in close association with the construction of the Relief Road and Culm Garden Village, as well as with existing routes including those through the CCA Fields.

Objectives

4.6.31 Key objectives to improve the ability to cycle between the proposed new railway station and the town centre will consider the following:

- Improved pedestrian / cycle crossings north and south of Station Road.
- Installation of signage and tactile paving where missing at junctions.
- Investigation of a new cycle route through Alexandria Industrial Estate linking to Millennium Way.
- Integration of the CCA pedestrian / cycle ways into proposals for Station Road.
- Provision of appropriate signage
- Cycle parking provision at the new railway station and in the town centre.

Next Steps

4.6.32 Next steps will require:

- Detailed analysis of cycle and pedestrian options and other related works
- Preparation of detailed design
- Liaison with landowners, stakeholders and other interested parties.

6 Fore Street

Context

4.6.33 Following construction of the Relief Road (2023 – 2024) there is an opportunity to redesign Fore Street. The construction of the Relief Road creates an opportunity to transform the character and function of the high street to the benefit of existing businesses, residents and visitors as well as enhancing the setting of the historic environment.

4.6.34 The need for two way traffic through Fore Street cannot be discounted at this stage and will be the subject of further investigation by Devon County Council. The construction of the Relief Road and the associated reduction in traffic through the high street presents a particular opportunity for the pedestrian environment; an opportunity to rebalance the space given to pedestrians and cyclists versus the car. This can be achieved through a number of measures.

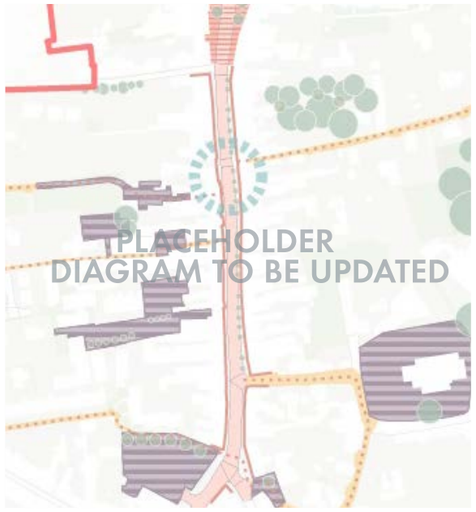
Objectives

- To rebalance the street space given to pedestrians and cyclists versus the car.
- To reclaim space for pedestrians / cyclists and thereby create an environment conducive with supporting local businesses.
- To have a consistent use of materials.
- Consolidation and decluttering of the high street of street furniture.
- Integrated cycle provision along the high street.
- Retention of public transport within the high street including bus stops.
- Designed measures to reduce traffic speeds including narrowing of the carriageway, surface treatments.
- Prioritise pedestrian movement where possible.

Next Steps

4.6.35 Next steps will require:

- Traffic surveys and modelling.
- Liaison with landowners, stakeholders and other interested parties.
- Scheme option development and design.



7 Leat Footbridge

Context

4.6.36 Cullompton's principal green open space is the CCA Fields. These community owned fields are bounded towards their western edge by the leat. This historic landscape feature is an important relic of the town's industrial past and growth; providing water to power the town's three mills.

4.6.37 The leat provides a natural, wooded retreat serving as an important wildlife corridor and recreational destination. The well-used footpath on its eastern bank is connected to the lanes behind the high street by bridges.

4.6.38 This proposal seeks to reinstate a former crossing over the leat. Subject to landowner agreement it presents an opportunity for new and improved connections to the town centre.

Objectives

- To reinstate a former crossing over the leat.
- To seek opportunities for new and improved pedestrian and cycle links to the town centre.
- To achieve an enhanced setting to the leat.
- To enhance the use and enjoyment of the leat in association with the CCA Fields

Next Steps

4.6.39 Next steps will require:

- Survey and other preparatory work including health and safety.
- Preparation of a detailed design
- Liaison with landowners, stakeholders and other interested parties including the Environment Agency.



Figure 59 **Aerial imagery showing approximate location of former crossing ©Google Earth**

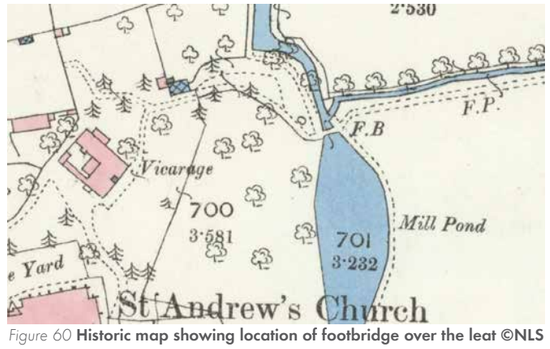


Figure 60 **Historic map showing location of footbridge over the leat ©NLS**



Figure 61 **Historic photo showing footbridge c1950s**

8 Old Cinema Site

Context

4.6.40 The former Regal cinema, located close to the Higher Bull Ring, opened in the early 1930's, with a seating capacity for some 350 people. It remained open until 1975 when the main frontage of the building was remodelled into two retail units. The only real visible evidence of its former use, is the wide opening on the frontage of the building, leading down an enclosed passageway to what would have been the auditorium. It is behind the two retail units on the frontage, that the former cinema building presents an opportunity site. Subject to landowner agreement it presents an opportunity for enhancement and more productive use.



Figure 62 **Location of the Cinema Site ©Google Earth**

Objective

- To seek opportunities in partnership with landowner agreement to bring forward development opportunities and enhancement proposals.

Next Step

4.6.41 The next step will require:

- Development options and feasibility.



5 Heritage Strategy

5.1 Introduction

5.1.1 Cullompton has a fascinating, diverse past - its history reflected in the great number of designated heritage assets in town. The centre of Cullompton was designated a conservation area in 1977, and within the conservation area there are over 50 listed buildings, including the Grade I St Andrews Church; the Grade II Trotts Almshouse and the Grade I Walronds. There are also several important unlisted buildings and features that make a significant contribution to the character and appearance of the town centre. Taking care of Cullompton's heritage will play a crucial part in the regeneration of the town. By protecting and improving Cullompton's old buildings, streets and historic landscape setting, Cullompton's identity will be strengthened; rooted in its history as a market town and as a place of work and business.

5.1.2 The Conservation Area Appraisal was adopted in 2003 as a Supplementary Planning Document and the Management Plan was published in 2009. These documents are currently being updated. In 2019 Historic England awarded funding following a successful Heritage Action Zone bid to support heritage-led regeneration projects in the town. This represents an invaluable opportunity for the town's heritage to be a catalyst for Cullompton to realise its former past as a vibrant, diverse and prosperous town. A key part of the masterplan's vision is that Cullompton's unique heritage will be celebrated and enhanced.

5.1.3 This part of the masterplan sets out a heritage strategy for Cullompton town centre. It develops the masterplan principles at Part 3 of this document into a strategy for the preservation and enhancement of the town's historic features. It sets out what makes Cullompton's heritage special and what challenges it currently faces. It explores the benefits heritage can bring to the town and the different organisations that can play their part in realising these benefits. It provides aims and actions for improving the historic environment and a strategy for implementing them.

5.2 Summary of significance

5.2.1 Over its long history Cullompton's fortunes have waxed and waned but its steady growth has resulted in an exceptionally well-preserved street pattern, with its medieval market spaces and squares still evident. Burgage plots are traceable through long narrow plots, emphasised by multiple lanes (courts) extending laterally on both sides of the High Street and Fore Street. Multiple fires over the centuries including an especially catastrophic fire in 1838 means that there are surprisingly few buildings from before the Victorian period. But those that do survive are of high quality and include the timber framed Manor House, and its Jacobean neighbour - the newly restored Walronds. The Parish Church of St Andrew's is one of the finest churches in Devon with an exceptionally rich interior.

5.2.2 Cullompton's key historic qualities are set out on the opposite page.

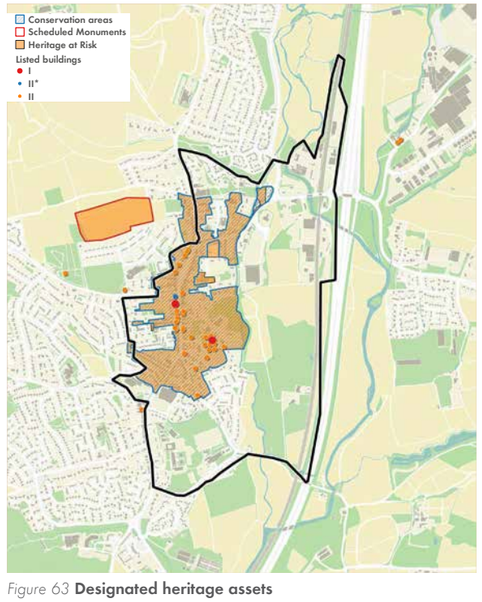


Figure 63 **Designated heritage assets**



COHERENT STREET PATTERN
A coherent street pattern of at least medieval origins with a tight urban grain.



RICH AND VARIED LANDSCAPE
A rich and varied landscape, stemming from buildings of different periods and the gently meandering line of the main street.



HISTORIC LANDSCAPE SETTING
Nestled in a valley with views to the surrounding countryside and Blackdown Hills AONB.



OUTSTANDING BUILDINGS
Some outstanding buildings especially St. Andrew's Church and the Walronds



ST. ANDREW'S TOWER
Landmark quality of St Andrew's tower with views to it from across Cullompton.



OTHER HISTORIC BUILDINGS
Other listed buildings and buildings of local interest, many of group value.



NETWORK OF YARDS AND PASSAGES
Interesting and important network of yards and passages, reflecting former burgage plots.



TRACES OF FORMER INDUSTRIES
Traces of Cullompton's former industries, including evidence of three mills on the Leat.



WEEKLY MARKET
Weekly market, still in use on the original livestock market site at the Upper Bullring.



19TH AND 20TH CENTURY SHOPFRONTS
Surviving 19th and early 20th century shopfronts.



INTIMATE AND WALKABLE
A compact town with an intimate feel, easy to get around by foot.



INDEPENDENT SHOPS
High number of independent retailers contributing to the town's distinctiveness.

Figure 64 **A summary of the key qualities of Cullompton's historic environment**

5.3 Local aspirations for heritage

5.3.1 Cullompton's heritage is considered by local people to be the town's best characteristic - its mix of historic buildings, the Bullring, the town's important involvement in the wool trade and its historic landscape setting all contribute to Cullompton's special character and identity. When testing the masterplan principles with local people in Spring 2020, the principles to 'repair historic buildings and setting' and 'find viable uses for empty historic buildings' were two of the five most strongly supported principles (90% either strongly agreed or agreed). Taking care of heritage is important to the people of Cullompton.

5.3.2 The heritage strategy is informed by the aspirations of local people, many of whom acknowledge the key role of heritage for the town's future. As part of the consultation on the masterplan in Spring 2020, local people were asked 'What are your priorities for making the most of Cullompton's heritage?'. There were 40 responses to the question, with 40% of responses relating to the restoration of historic buildings. The second most popular response related to showcasing Cullompton's history by providing more information in public spaces. Other responses included protecting and restoring other historic features, reducing traffic along the High Street and bringing vacant buildings back into use.





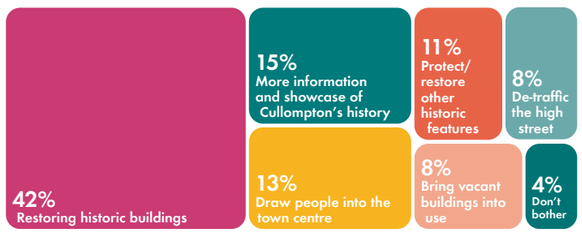






"Improve the look of Fore Street by smartening up those buildings and shop fronts which currently look so scruffy, and by putting in some greenery."

"Create a style guide for shop frontage to ensure buildings look good quality."



Answers to the question ' 'What are your priorities for making the most of Cullompton's heritage?'

"The mix of historic unspoilt buildings."

"Close to rural areas."

"History and the Main Street of ancient buildings and the history of the wool trade. Of course the people are lovely too."

"It has huge potential to be a beautiful high street, distinct as a town from the rural environment surrounding it."

"The church and the Tudor buildings."

"Old buildings, CCA fields, friendly people."

"The old buildings and the Bullring."

"The historic buildings are beautiful but need upkeep and preservation. Also very friendly feeling about the town."

"Bull Ring is a great market and meeting place."

"Walronds and Merchants house."

"That it's an old town."

Answers to the question 'What do you think is Cullompton's best characteristic?'

5.4 Strengths, weaknesses, opportunities and threats

The SWOT analysis below identifies the key strengths, weaknesses, opportunities and threats in relation to heritage in Cullompton.

STRENGTHS

- Strong historic identity with many heritage assets including several high status listed buildings in the heart of town
- Fore Street / High Street has a great number of historic buildings with group value and little infill development along it
- Survival of ancient street pattern and yards
- Proximity to Blackdown Hills AONB
- Large number of independent traders
- Regular farmers' market
- Strong and active community organisations including those interested in heritage e.g. Cullompton Walronds Preservation Trust
- Local people who care about heritage







WEAKNESSES

- Buildings in poor condition and poorly maintained
- Unsympathetic alterations and extensions to historic buildings, especially along Fore Street / High Street
- Use of inappropriate materials on historic buildings
- Vacant properties in need of investment and loss of key services e.g. high street banks / pharmacy
- Very limited leisure and retail offer - little to attract shoppers
- Impact of heavy through traffic on condition of historic buildings;
- Poor environment for pedestrians along Fore Street / High Street - narrow pavements and high traffic volumes
- Visual clutter (poles, signs, overhead wires)
- Some lanes and courts are in poor condition - bins clutter pavements and block access
- Lack of planting / greenery in places
- Poor frontage design







OPPORTUNITIES

- Identification as a Heritage Action Zone with associated funding for enhancement and regeneration.
- Planned residential expansion of Cullompton, bringing new demand and increased spending and an opportunity for heritage-led regeneration
- Construction of the relief road and associated reduction in traffic through the centre of the town.
- Other planned investments including the new railway station.
- Opportunity to transform the Higher Bullring into a high quality public space as well as opportunities to improve other public spaces
- Opportunities for an increase in public access into historic buildings, the restoration and repurposing of vacant buildings.
- Promoting the town's heritage including interpretation panels in historically significant locations.
- Covid-19 and a new focus on 'local' - working from home, shopping locally, importance of nearby green spaces, active travel etc.

THREATS

- Incremental alterations e.g. inappropriate repairs / redecoration eroding the historic character and appearance of the conservation area
- Lack of investment in the fabric of buildings - extra cost of restoring heritage buildings mean landlords are reluctant to invest
- Low landlord investments in shopfronts
- Changes in the nature of retail
- Possible Covid-19 harmful impacts on local businesses, residents and broader investment opportunities









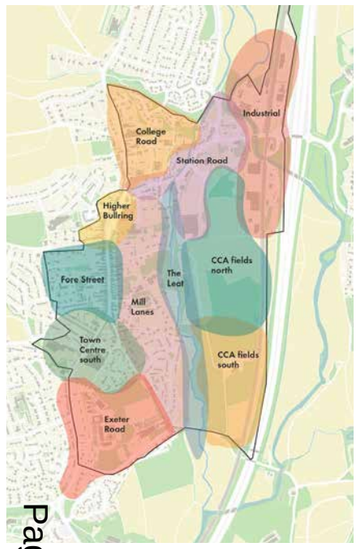




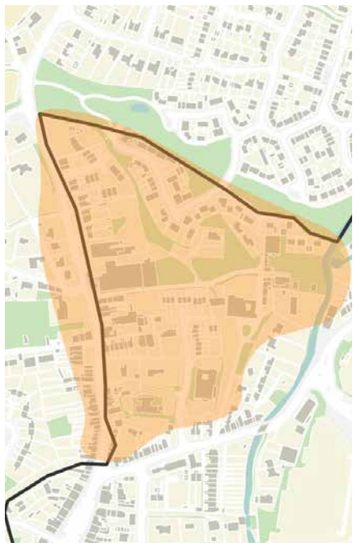
5.5 Character areas

5.5.1 Cullompton's character is diverse and extends beyond the conservation area and its designated heritage assets. To assist our understanding of heritage, the study area can be considered through several overlapping character areas. The boundaries are not definitive but have been drawn up on the basis of predominant land use, building type or historical associations.

5.5.2 To help inform the heritage strategy, we have considered what each area's key characteristics are, the main issues facing each area and the key objectives for heritage.



College Road







IMPORTANT CHARACTERISTICS

- Grade II Trotts Almshouses
- 19th century cottages and industry
- Historically Higher Street was the northern route out of town
- Almshouses prominent in views from the Bullring and Station Road
- Views towards St Andrew's Church

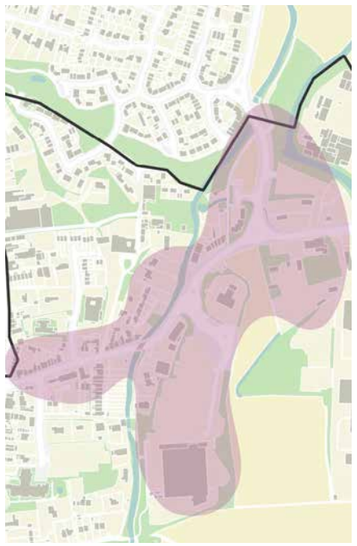
KEY ISSUES

- Traffic dominated environment along Willand Road
- Narrow pavements and few crossing points along this stretch
- Incremental changes to buildings - loss of historic features, proliferation of satellite dishes and other accretions

OBJECTIVES FOR HERITAGE

- To protect and enhance the Grade II listed almshouses and their setting
- To reduce the impact of through traffic
- To improve the pedestrian experience - introduce crossings and planting etc.

Station Road







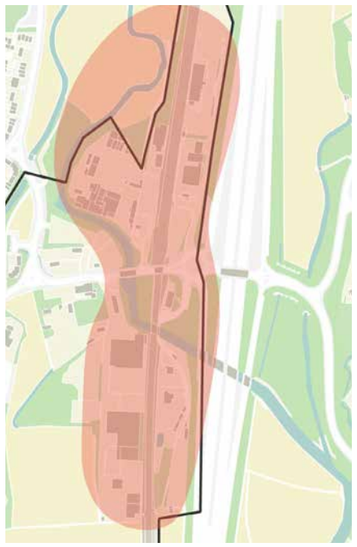
- Arrival point into Cullompton
- Historically important Weary Traveller pub
- Commercial area
- Improving pedestrian experience i.e more places to cross
- The leat is an important feature

- Traffic and highways dominated - poor pedestrian experience
- Access to the river limited and setting could be improved
- Visually prominent commercial buildings
- Large car parking areas

- To protect and enhance the Grade II listed almshouses and their setting
- To reduce the impact of through traffic
- To improve the pedestrian experience - introduce crossings and planting etc.

- Improving the arrival experience into town - role of historic buildings in strengthening identity of the town
- Improving pedestrian accessibility and experience i.e more places to cross
- Open up access and improve environment along the leat

Industry





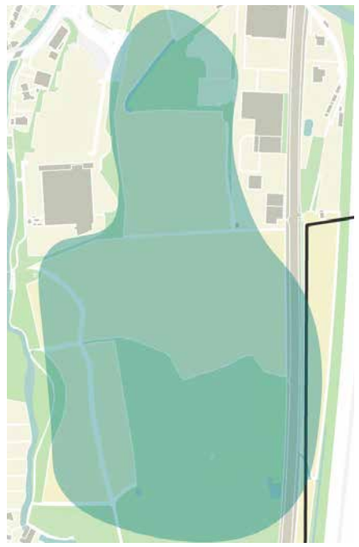


- Arrival point into Cullompton
- Mainly industrial and commercial uses alongside the railway line
- River Culm a key characteristic

- Disconnected from the heart of town
- Impact of junction 28 improvements and construction of relief road

- Reopening of railway station
- Retaining and enhancing historic industrial buildings and promoting mix of uses including industry
- Improving the arrival experience into town - role of historic buildings in strengthening identity of the town
- Improving pedestrian experience i.e more places to cross
- Opportunities for improved public access and environmental enhancements along the River Culm to be explored

CCA Fields North







- Open, green character
- Tree lined footpaths
- Informal and meadow like
- Views to the parish church and other parts of the town
- Maintained by The Cullompton Community Association

- Footpath surfacing
- Littering and dog fouling

- Capitalise on the construction of the relief road to raise the quality of the open space and connections to and from it

Higher Bullring





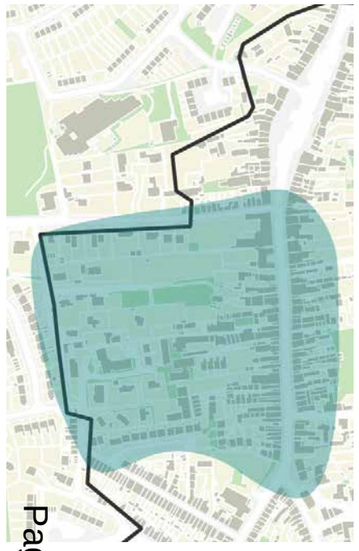


- Principal open space in the town centre
- Its widened form indicating its long history and function as a market place
- Trees make an important contribution
- Listed war memorial provide civic role
- Large, historic properties front the space including several listed buildings that retain their historic features / materials e.g windows

- Through traffic has a negative impact on historic fabric and environment
- Low quality public realm in places
- Loss of historic features and materials
- Potential vacancy issues

- Establish a new focal point for the town through the creation of a public space for events and other activities and to improve the setting of the historic buildings
- Review opportunities to repurpose and refurbish old buildings for new uses or to support existing uses better
- Seek to improve the pedestrian environment through planting, crossings and reduced traffic

Fore Street







IMPORTANT CHARACTERISTICS

- Main historic street through town
- Concentration of Cullompton's oldest and most notable buildings (most 19th C)
- Varied and eclectic architectural styles
- Historic lanes and courts leading off
- Listed buildings including Walronds and the Manor House Hotel

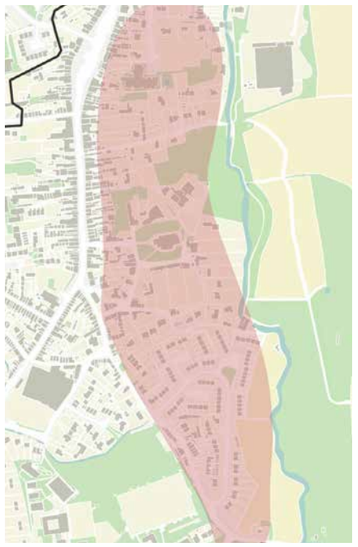
KEY ISSUES

- Impact of through traffic on condition of historic buildings
- Poor pedestrian environment - narrow / uneven pavements
- Unsympathetic alterations to buildings
- Vacant and neglected buildings
- Lack of greenery
- Shopfront signage detracts in places

OBJECTIVES FOR HERITAGE

- To bring vacant buildings into reuse
- To protect buildings from further deterioration and loss of original features
- To improve the appearance of buildings through shop-front improvement schemes
- Protect and reinstate original shopfronts

Mill Lanes





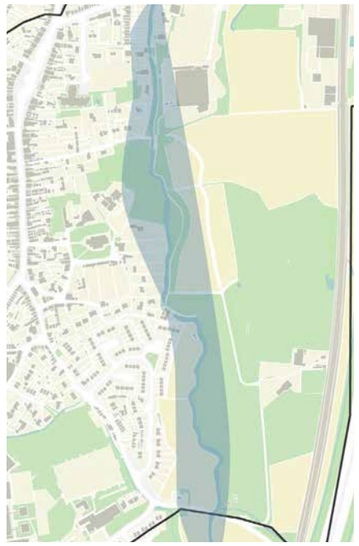


- Courts and lanes that thread from the west side of High Street and Fore Street
- High walls and curving streets
- St Andrew's Church and views to it
- Tranquil enclave around the parish church with its stone boundary walls and cluster of listed houses is particularly special

- Incremental changes and accretions

- To promote this area as a focal point for heritage in the town
- Review opportunities for an increase in public access into historic buildings
- To promote routes through to the leat from the town centre

The Leat







- Historic landscape feature important to the town's growth - stream provided water power for three mills
- Natural, wooded and enclosed feel
- Mature trees and planting on either side
- Well used footpath on its eastern bank connected by bridges to the lanes behind High Street

- Improved connections with the town
- Bank subsidence
- Upgrade / maintenance of bridges
- Littering and dog fouling

- Increase awareness of the Leat and the important role it has played in shaping Cullompton's heritage
- Improve accessibility along and connections to it from the town
- To increase wildlife benefits along it
- Review opportunities to ensure long term maintenance and management of the leat
- Review opportunities to reinstate heritage, including iron footbridge over Leat?

CCA Fields South





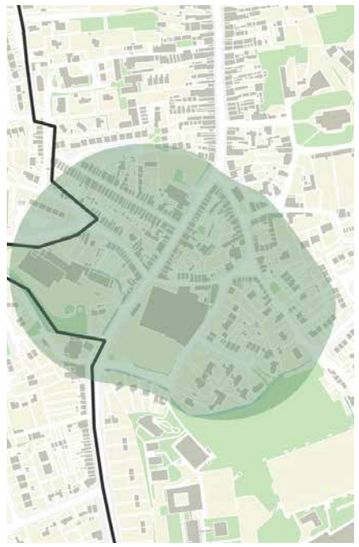


- Open and green character
- Views to the parish church and other parts of the town
- Sports pitches and enclosed children's play area
- Maintained by The Cullompton Community Association
- Tree lined footpaths

- Footpath surfacing
- Littering and dog fouling

- Capitalise on the construction of the relief road to raise the quality of the open space and connections to and from it

Town Centre South





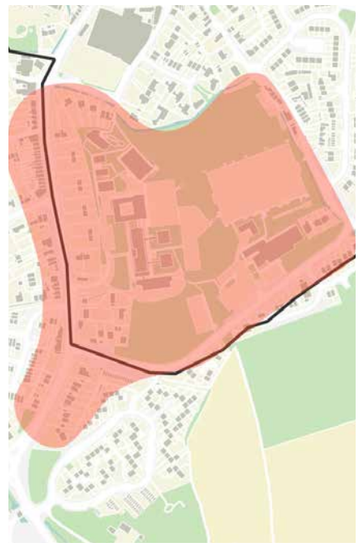


- Historic route through town
- Hayridge Centre a key community asset
- New Road a historically important terrace street of former mill workers cottages
- Cockpit Hill and Pound Square include several houses of interest as well as traces of industrial activity
- Views to the parish church

- Some cottages in poor condition - lack of maintenance / loss of features and materials / accretions e.g. satellite dishes
- Low quality infill development in places
- Traffic along Exeter Hill and cars / parking dominates in streets around

- To protect buildings from further deterioration and loss of original features
- To celebrate this area's history as former housing for mill workers

Exeter Road







- Architecturally diffuse area at southern edge of the conservation area
- Threshold to the town centre
- Includes Cullompton Community College and the sports centre
- Views to the parish church
- Green verges along Exeter Road

- Some houses in poor condition - poor maintenance / loss of features and materials / accretions e.g. satellite dishes

- Protect the historic properties in the area
- Improve the arrival experience from Exeter Road to the High Street

5.6 Benefits of heritage

5.6.1 There is a body of evidence that supports the case for investment in heritage. Recent findings have been summarised by Historic England. On average, £1 of public expenditure on heritage-led regeneration generates £1.60 additional economic activity over a ten-year period (Heritage Counts 2017). Furthermore, research shows that taking care of heritage also brings wider social, cultural, economic and environmental benefits for local communities:

"The historic environment provides a sense of authenticity, beauty and distinctiveness. This attracts people, businesses and investment, and can provide places with their competitive advantage. Using the historic environment as an asset, and giving it new life, has also been one of the cornerstones of the economic and social revival of our towns and cities" (Heritage Works, 2017).

Regeneration and sustainable growth

5.6.2 Taking care of Cullompton's heritage can help to secure investment from public, private and charitable sectors which will bring wider benefits to the town. Findings by Historic England show that for businesses, the historic environment is as important in deciding where to locate as road access (Heritage Counts, 2010). Investors can have confidence because historic assets are well integrated into the townscape and already highly valued. Promoting an active role for heritage in regeneration will help realise other cultural and economic benefits by reinforcing the sense of place and identity of Cullompton. Furthermore, the re-use of existing buildings is often the most sustainable way to develop (Heritage Works, 2013).

5.6.3 Heritage funding can be paired with existing resources and funding streams to boost the benefits of heritage-led regeneration. The recent funding awarded by Historic England as part of the High Streets Heritage Action Zone project is an opportunity for this.

Tourism

5.6.4 England's heritage attractions play a major role in generating millions of domestic day and overnight trips. 3/4 of adults in England visited a heritage site at least once in 2017/2018. 34% of domestic tourists stated being able to visit a historic building or monument as their 'sole reason' or a 'very important reason' why they took their domestic holiday or short break. This increases to two thirds for day visitors. (Heritage Counts 2019).

5.6.5 In 2015, tourists spent £101 million in Mid Devon supporting the local economy (Mid Devon Visitor Survey 2016). The district attracted approximately 212,000 staying visits and 1.59 million day visits. Results from the visitor survey (2016) reveal that most visitors intended to visit Tiverton (40%), whereas only 8% intended to visit Cullompton.

5.6.6 Positioned just off the M5, Cullompton is well placed to receive visitors en-route to the south west. There is a real opportunity to capitalise on its strategic location and diverse heritage to provide an enhanced cultural, shopping and recreational offer. This would be as a destination in its own right as well as to encourage those stopping en-route to spend more time in the town.

Shopping

Cullompton's heritage provides a fantastic opportunity to raise the town's retail profile and ranking amongst other nearby centres. Shopping is no longer just about the shops - people are looking for a broader shopping experience. Heritage and culture, a distinct sense of place, spaces to dwell and a diverse dining offer can all contribute to an enjoyable leisure and retail experience that entice people into town. A town focused on heritage will draw people in and encourage them to explore more and stay for longer.

Culture and community

5.6.7 Heritage is a key aspect of Cullompton's cultural calendar. The Walronds is a great example of a repurposed historic building, now used for community events and activities.

5.6.8 The ability to share and participate in heritage is an essential ingredient of community cohesion, helping to reinforce identity in Cullompton. Regeneration of the historic environment benefits individual assets, the wider area around them and the communities which value and associate with them.

Health and social well-being

5.6.9 Involvement and enjoyment of the historic environment benefits our health. Access to the historic parks, gardens and other open spaces has significant benefits to our physical and mental health. Research shows how natural views can lower blood pressure and stress and improvements to the built environment have been shown to improve mental well-being (Benefits of Heritage, HLF, 2012). Attentive and inclusive quality design influences social behaviour, and can help reduce crime.

Education and employment

5.6.10 The historic environment provides students with the opportunity to learn about local heritage first-hand. Teaching young people about heritage can help students to develop a broader range of skills e.g. research and analysis, critical thinking and design, which can be applied more widely to the arts, culture and sciences. Heritage can also provide opportunities for important skills training in heritage renovation as part of further education programmes, as well as local employment opportunities. This can help to embed a high skills base in the local community to support high quality building work.

5.7 Partnerships

5.7.1 Delivering the heritage strategy depends on successful partnership working to help to regenerate, conserve and promote the historic environment.

5.7.2 Key partners include:

- Devon County Council
- Mid Devon District Council
- Cullompton Town Council
- Cullompton Town Team
- Representatives from the local business community and community organisations including The Hayridge Centre, Cullompton Community Centre, The Farmers Market, Cullompton Community Association, St Andrew's Church and other places of worship
- Art and cultural organisations including Cullompton Arts House, Walronds Preservation Trust and Cullompton History Group
- Schools and further education including Willowbank Primary School, St Andrew's Primary School, Cullompton Community College, adult education e.g. Learn Devon at the Hayridge Centre, youth clubs and youth activity groups
- National and regional partners including Historic England, Natural England

5.7.3 The Cullompton Town Centre Regeneration Partnership Group has been set up to help deliver projects as part of the HAZ scheme. Many stakeholders listed above are included in the partnership and have contributed a range of cash and non-cash contributions to help deliver the scheme.

5.8 A Strategy for change

Overarching vision for heritage

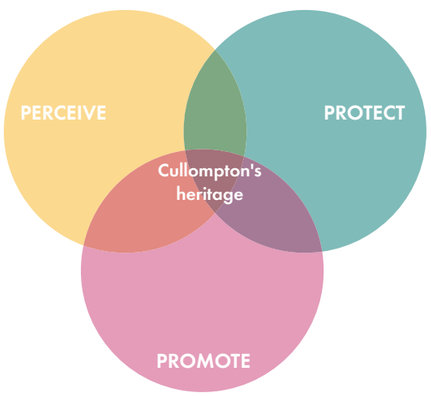
5.8.1 The vision for Cullompton's heritage is
To use the special qualities and historic character of Cullompton as the foundation for future change. To allow the town's heritage to shape a distinctive identity for the town - a place people are proud to call home and a welcoming place to visit.

Aims

5.8.2 The strategy sets out three aims that will help to realise the vision. These are to:

Perceive - gather information to better understand Cullompton's past, its unique qualities and the existing condition of its historic environment
Protect - take care of Cullompton's heritage to prevent further deterioration of its buildings and to bring assets off the 'at risk' register
- **Promote** - celebrating Cullompton's heritage and raising awareness through public realm enhancements, wayfaring strategies and promotional activities e.g. interpretation boards / online presence.

5.8.3 For each aim are a set of objectives and required actions. Underneath each objective is an indication of where in the town the objective applies to and whose responsibility it is. A sense of priority is also given to help inform delivery of the strategy.



Aim 1 - PERCEIVE

5.8.4 Cullompton's heritage has many layers. It is apparent through the 'seen' - the medieval street pattern, old buildings and historic materials and features. It is also glimpsed through the more hidden - street signs alluding to past activities or uses, the social history told through stories and old photographs, or the sense of place informed by the historic valley landscape.

5.8.5 Different people relate to, and appreciate history in different ways. Understanding this is essential for improving the historic environment. Cullompton's history is also always evolving - new stories are being told as the town responds to changing trends. Actions to manage Cullompton's heritage must be rooted in a thorough understanding of the town's history, the current condition of buildings, the challenges the town faces relating to heritage, and the contribution heritage can make to the local community, economy and environment. Managing Cullompton's heritage requires a strategic approach which is evidence-led.








Heritage assets in town

Objective A

Grow our understanding of Cullompton's unique past

5.8.6 The District Council is working proactively with Cullompton Town Council, voluntary groups and local residents to develop its understanding of Cullompton's past and to improve its evidence base for managing its heritage. Interested groups and individuals provide a vital resource for fieldwork and research, filling gaps in knowledge about topics such as vernacular buildings, archaeology, the town's cultural history and its past industries. Having a deeper and more nuanced understanding of the town's heritage will provide a sensitive and effective response to promoting Cullompton as a heritage and cultural destination. The Devon Heritage Centre and Town Hall contains a wealth of information including history books, old maps, photographs, registers and directories that provide a useful resource to grow understanding.

5.8.7 The project to record the history of the cloth trade in the town, as well as the town council's archive project to collect and document significant items from Cullompton's past are great actions already taken that demonstrate a proactiveness to explore the town's heritage. Similarly, the project to expand the oral histories library that allows individuals to learn about the past from long-standing residents of Cullompton and the project to add to the existing local history books that explain the importance of Cullompton's architectural and social heritage.

Key actions
- Pioneer a research project with local primary schools to investigate local history. This could be combined with the oral histories library - young people could interview older residents about their experiences.

Where? Town wide

Priority Medium

Objective B

Understand the role of heritage in town life and the challenges and opportunities it brings to different stakeholders

5.8.8 Integral to the strategy is developing our understanding of the role heritage currently plays in town life - the benefits, challenges and opportunities it brings to local residents, workers, students, business owners, landowners, community organisations and visitors. Establishing a baseline position will help to inform the management and promotion of Cullompton's heritage in the future.

Key actions
- Carry out a survey to understand how is heritage viewed and valued (including the perceived benefits, challenges and opportunities) by people who live, work and have a stake in the town. The survey should inform a review to identify potential opportunity for partnership working and co-operative solutions to any heritage challenges.

Where?
Town wide

Priority
Medium






Aim 2 - PROTECT

5.8.9 Cullompton's heritage is at risk. The conservation area is on Historic England's Heritage at Risk register and is deteriorating. Unsympathetic developments, poorly maintained buildings and inappropriate alterations and extensions are contributing to the decline of character in the conservation area. Much of the historic fabric is in a fragile condition and in need of investment. The traffic, as well as the erosion of character and appearance (including Permitted Development works and unauthorised works), and the decreasing vitality and viability (empty shops, changing shopping habits) are issues that continue to have a negative impact on the town.

5.8.10 There have been some clear conservation successes since 2009, especially the restoration of the Walronds and the rescue of the Merchant's House, both former buildings at risk. The garden at Walronds is now an enjoyable community resource. The Community Centre by the church and the Hayridge Centre have also been positive moves.

5.8.11 The second aim of the historic strategy seeks to build on these heritage successes, seeking to remove the conservation area, Roman fort and camp and historic buildings off the 'heritage at risk' register where there is the ability to do so. It also seeks to strengthen the protection for all designated and undesignated heritage assets in the town. To do this, a combination of up-to-date management guidance and on-the-ground interventions that prioritise the most vulnerable assets are necessary.

Objective C
Update and strengthen guidance to manage Cullompton's heritage

5.8.12 Appraisals of conservation areas are undertaken to ensure a positive management of change to the historic environment which is sustainable and which protects the special character of the conservation area. Local authorities are legally obliged to review their conservation areas from time to time and the Historic England Advice Note 1 (2016) underlines the importance of regular review of Conservation Area appraisals and management plans.

5.8.13 A review of the existing conservation area appraisal and management plan is currently being undertaken. It will include clear deliverable objectives to help ensure a sustainable future for Cullompton's heritage is delivered.

Key actions
- Review Local Assets Heritage Register and make recommendations for listing
- Review the Buildings at Risk register and seek to develop a strategy for individual buildings to ensure their removal from the register

Where?

Conservation area and its boundaries

Priority
High

Objective D
Bring vacant old buildings into use

5.8.14 The National Planning Policy Guidance (para 3) states that generally the risks of neglect and decay for historic buildings are best addressed through ensuring that they remain valued and in active use that is consistent with their conservation. This may require sympathetic changes from time to time. Whilst vacancy rates in Cullompton are lower than the national average (7% in August 2019), there are buildings at risk of further degradation because of their vacancy. The Council undertook a detailed inspection of all properties in Fore Street and found that 9% of residential properties were vacant. Buildings like the Old Tannery and the Post Office sorting office on Fore Street are examples of buildings that should be protected through reuse.

5.8.15 Bringing vacant buildings back into use, including encouraging homes above shops, can not only improve the historic fabric but also help to bring vibrancy and activity into the town and support evening uses.

Key actions
- Seek to bring vacant buildings back into use to provide new commercial and /or community space.
- Seek opportunities for a permanent venue for the Cullompton Arts House.
- Explore opportunities to fund community initiatives and pop-up shops that might temporarily enhance vacant units.
- Seek to encourage homes above shops through preparation of guidance, engagement with owners and identification of funding opportunities.

Where?

Fore Street, High Street

Priority
High

Objective E
Refurbish stand-out buildings

5.8.16 Refurbishing the town's most outstanding buildings is essential for protecting the historic integrity of the town and for allowing Cullompton's unique identity to shine through. Cullompton has 4 high status listed buildings, all of which are, or have been on the 'Heritage at Risk' register. There are a further 22 Grade II listed buildings in the HAZ area, many of which are in a bad state of repair.

5.8.17 The refurbishment of the Grade I listed Walronds and the creation of a public garden sets an example for how taking care of exceptional buildings can have wider benefits for the town. The building now provides a multifunctional space for a variety of different activities and uses and is a hub for the community.

Key actions
- Within the HAZ area set out a strategy for prioritising historic buildings for refurbishment. Action should be directed at buildings most 'at risk', those in poorest condition and with the potential to contribute to the town centre if refurbished.

Where?

Fore Street, High Street, Church Street

Priority
Medium

Objective F

Improve the condition of Cullompton's historic lanes and courts

5.8.18 A special feature of the town are the lanes, courts and passages leading off from the High Street / Fore Street. The court areas to the rear of the Fore Street buildings reflect the boundaries of the old burgage plots and are therefore important to the historic integrity of the town. They vary in their character - some are open, others run through a covered passage. Some are private and widen into courtyards flanked by residential or workshop units. Others are accessible to the public and provide intimate walking routes, connecting the centre of town with the CCA fields and the residential areas on either side.

5.8.19 They also vary in their condition - there is not a consistent palette of surfacing materials and some are cluttered by bins and modern traffic signage. Many of the residential properties along these routes are in need of maintenance. There is an opportunity to improve the environment of these lanes and to restore a consistent and sympathetic design to the entrance ways which value their historic significance.

Key actions

- Seek opportunities with key stakeholders including landowners and businesses to develop a public realm strategy that will consider surfacing, materials, signage, bin management, visual vistas and wayfinding.
- Explore opportunities to create new and refurbished homes and work spaces in the historic courts and lanes that radiate off the high street.

Where? Lanes and courts off Fore Street

Priority Medium

Objective G

Enhance Fore Street and improve the condition of its buildings

5.8.20 Cullompton has suffered over the years from heavy traffic that congests the centre of town. The traffic has worsened the condition of the historic properties that front Fore Street, causing structural and decorative damage. The heavy vehicles, noise and exhaust fumes detract from the general setting of the town and have worsened air quality. The construction of the relief road presents an opportunity to carry out works to enhance the environment for the pedestrian, cycle and business communities. In so doing, the town centre will become a more inclusive, healthier and safer environment.

5.8.21 It will also help to protect historic properties from further damage. The Council undertook an inspection of all properties in Fore Street and found that 38% were in poor condition due to damp, fire risk, poor repairs and hazardous stairs. The objective seeks to improve the condition of buildings by working with property owners and funding partners. Similarly, the grant scheme support through the Heritage Action Zone programme to support property owners along Fore Street to repair and refurbish buildings.

Key actions

- Seek to transform the character and function of the high street including a review of traffic flows and pavement widths following the construction of the Relief Road
- Undertake a detailed survey of the condition of all high and medium priority buildings

Where? Fore Street

Priority High

Objective H

Protect the Roman forts and camps at St. Andrew's Hill

5.8.22 Cullompton's heritage extends back to Roman times; the town was once home to two Roman forts which served as permanent bases for auxiliary units of the Roman Army. Remains of two Roman camps have also been recorded at St. Andrew's Hill. The Scheduled Monument is of national importance but is currently included on Historic England's Heritage at Risk register. The register states that the monument has extensive significant problems and its condition is declining. It is particularly vulnerable to arable plouging and needs protecting.

Key actions

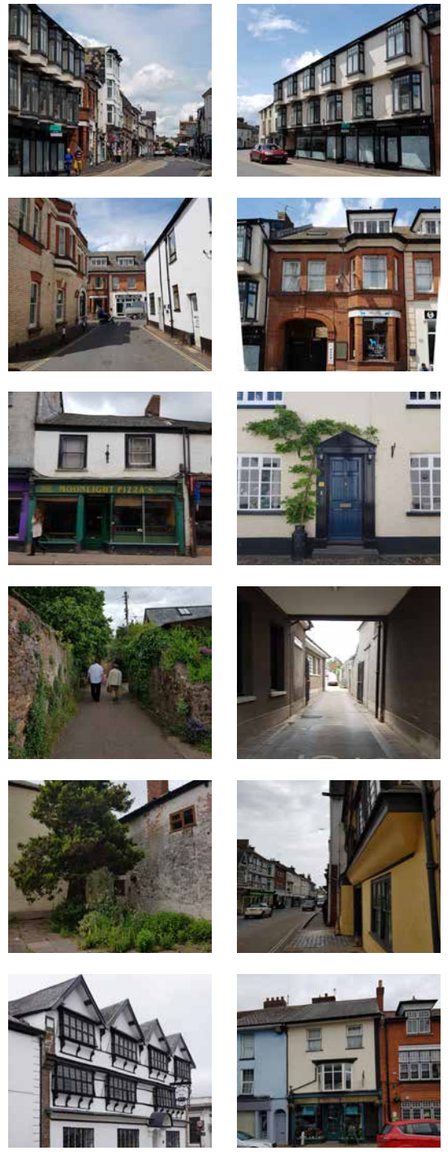
- Explore potential sources of grant aid to restore the condition of the Scheduled Monument whilst also delivering on other environmental objectives
- Explore the role of Historic England Management Agreements, Monument Management Schemes and Heritage Partnership Agreements in helping to improve the condition of the site

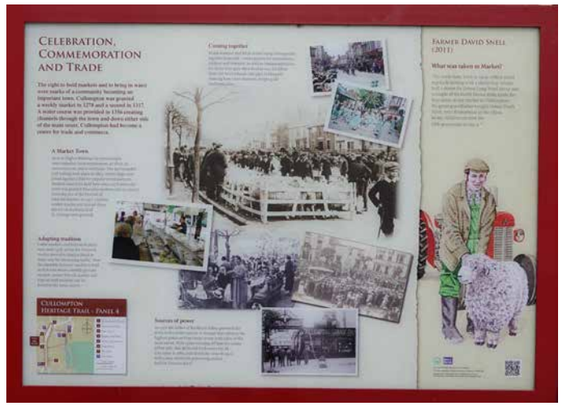
Where?

St. Andrew's Hill, northwest Cullompton

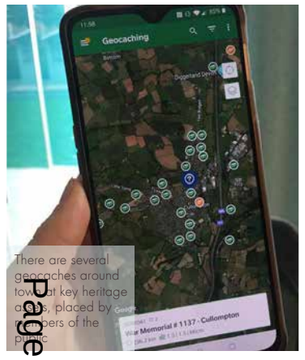
Priority

High

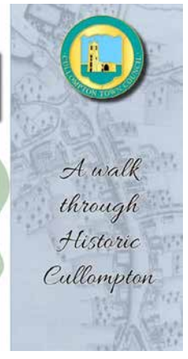




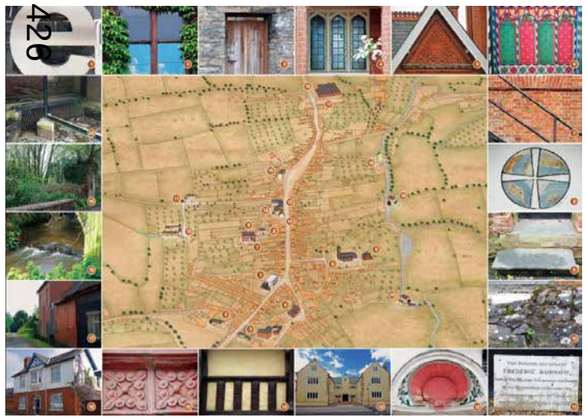


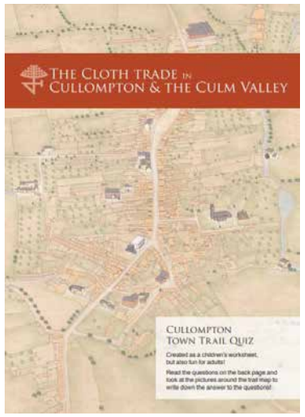


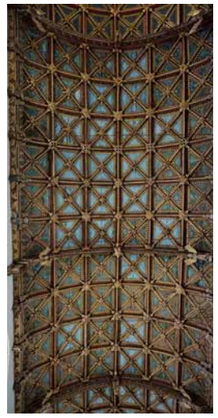














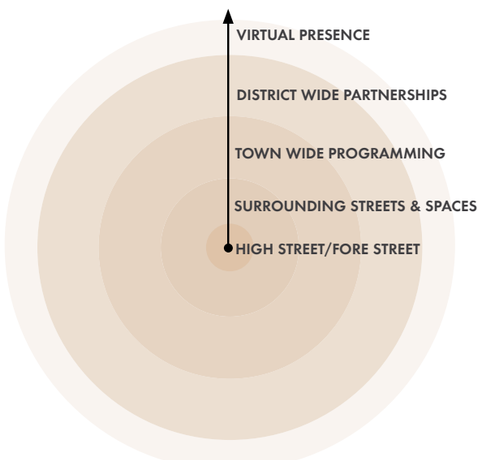


There is an opportunity to build on the successful projects and activities happening around Cullompton to promote its heritage and inform people about what's happening in town

Aim 3 - PROMOTE

5.8.23 The Nobel Prize winning economist, Robert Merton Solow said in 1987 that *"over the long term, places with strong, distinctive identities are more likely to prosper than places without them. Every place must identify its strongest, most distinctive features and develop them or run the risk of being all things to all persons and nothing special to any."* Promoting Cullompton's heritage will strengthen the local distinctiveness of the town, increase pride among residents and draw visitors in. The strategy seeks to celebrate heritage through improving the setting of heritage assets (e.g. public realm enhancements) in the town centre, increasing awareness of heritage in Cullompton's surrounding streets and spaces, and events and programming to raise the profile of the town's distinct heritage. The strategy also encourages strengthening links with other historic and cultural assets in the District.

5.8.24 The objectives build on what is already happening in the town. Cullompton has an established record of heritage projects. The project to record the history of the cloth trade culminated in the Culm Valley & Cullompton cloth trade heritage trail as well as the installation of heritage interpretation boards around the town which have proved popular and have made heritage more visible. The restoration of the Walronds has raised the profile of Cullompton's heritage.



Objective 1: Improve the setting and appearance of historic buildings along Fore Street and in the Bullring.

5.8.25 Enhancements to the public realm will help to create a high quality and attractive environment that is locally distinctive to Cullompton and which showcases the town centre's outstanding historic buildings along this key route.

Key actions

- Seek to commission design work and create a flexible public space at the Bullring for activities and events. A vision for the space should be developed in collaboration with local businesses and landowners and should identify and sustain the significance of the Bullring and the value of its public realm features where they contribute to the quality or identity of Cullompton. Enhancement works should respond positively to its historic context by considering aspects like surfacing, materials, street furniture and accessibility requirements.
- Seek to develop a public realm and movement strategy for Fore Street in consultation with key stakeholders.
- Offer a shop front improvement grant scheme for commercial properties in the conservation area.
- Offer a structural and historic reinstatement grant scheme for the restoration of historic features on those properties within Fore Street.
- Prepare shop front guidance.

Where?

Bullring, High Street, Fore Street

Priority

Medium

Objective J: Increase awareness of heritage in Cullompton's surrounding streets and spaces

5.8.26 This objective seeks to showcase the town's heritage at key points in the town centre which have a story to tell. Key buildings, community services, attractions, and public areas should be well signposted and easy to get to. New development should reveal the significance of heritage through improving the setting of old buildings or public realm enhancements.

Key actions

- Seek to prepare an updated set of interpretation panels for the town in consultation with local stakeholders. To include the leat, old mill buildings and the CCA fields as well as places with an important social history.
- Seek to establish a wayfinding, wayfaring and public art strategy to improve arrival points into the town.
- Explore opportunities for a tourist information centre in the town centre.
- Explore the opportunity to illuminate heritage assets either as a permanent feature or as part of a wider events
- Explore opportunities on-line such as the Geocaching app.
- Look at techniques to encourage visitors to 'stumble upon' hidden gems whilst learning more about the town's heritage
- Seek to create a marketing strategy (online and leaflets) which sets out an agreed and consistent message in consultation with stakeholders

Where? At historic sites and locations across the town and at arrival points into the town.

Priority Medium

Objective K: Raise the profile of Cullompton's distinct heritage through programming and events

5.8.27 The town already has a great reputation for holding successful spring and autumn festivals, celebrating artisan crafts, art and culture, local food and produce, as well as a variety of other events throughout the year. Historic buildings such as the Walronds open their house and gardens to celebrate these town events and organisations like the Farmer's Market help grow them. This is to both showcase what Cullompton and the Culm Valley has to offer as well as supporting local businesses and organisations. There is an opportunity to grow these events to highlight Cullompton's unique offer.

Key actions

- Continue to work with local businesses and community groups to expand the cultural programme of day and evening events focused on food and the arts
- Explore opportunities to open up historic assets to visitors as part of these events, or on a more regular basis
- Explore opportunities such a pop-up museum featuring some of the archival materials held at the town hall and else where
- Integrate relevant historical information into the marketing strategy (outlined in Objective J) to ensure the profile of Cullompton's distinct heritage is championed.

Where?

Town-wide

Priority

Low-Medium

Objective L: Strengthen links with other historic and cultural assets in the District

5.8.28 The town is nearby to some outstanding historic attractions, countryside and local heritage, including Killerton House, the Blackdown Hills AONB and Coldharbour Mill. Cullompton should look to strengthen its links with these assets, through partnerships and joined up working, as well as seeking opportunities to improve and promote walking and cycling connections to the countryside.

Key actions

- Explore possible partnerships with other organisations further afield such as Killerton House and Coldharbour Manor and coordinate District wide events, activities and learning
- Explore opportunities to create new links into the countryside on foot or by bike and to better promote Cullompton's setting within a historic and attractive natural landscape.
- Consider incorporating these elements into the marketing strategy outlined in Objective J.

Where?

District-wide

Priority

Low - Medium



Figure 65 **Connections to the countryside and nearby heritage attractions**

- **Protect St Andrew's Hill monument**
- **Fore Street building and public realm improvements**
- **Enhanced public space at Bullring & building improvements**
- **Stand out buildings - Grade I**
- **Stand out buildings - Grade II***
- **Other listed buildings**
- **Improve laneways:**
  - High priority for improvement (based on current condition and future potential)
  - Medium priority for improvement
  - Low priority for improvement
- **Repurposing vacant buildings**
- **Key areas for awareness raising**
- **Promoting links out to countryside and other historic assets**
- **Conservation area and HAZ zone**



Figure 66 **Zoom in of heritage strategy**

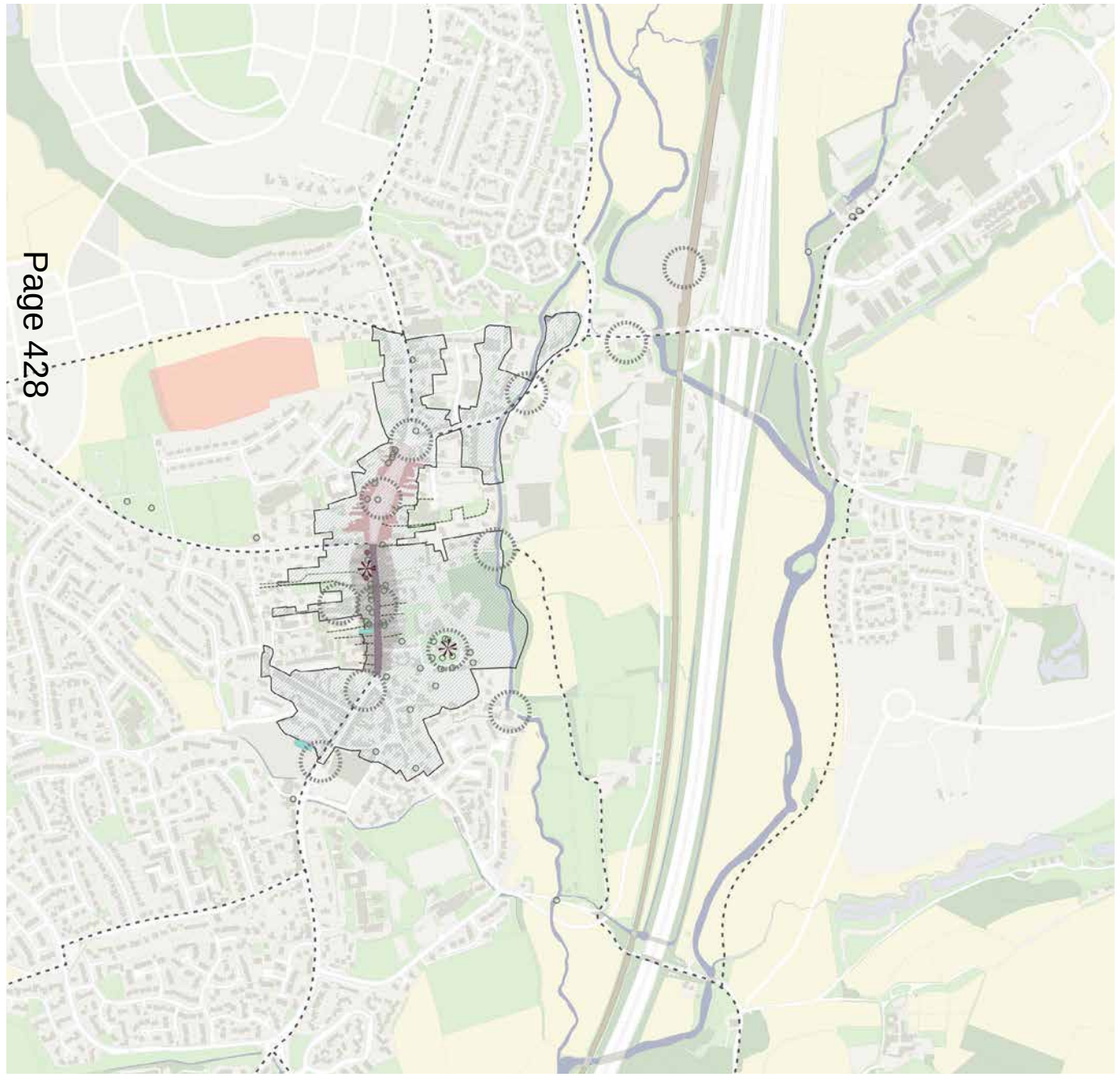


Figure 67 **Heritage Strategy**



Inside St Andrew's Church

6 Delivery, Monitoring and Review

6.9.1 The Cullompton Town Centre Masterplan provides a clear vision and set of objectives to guide the implementation of a set of key opportunity sites, public realm improvements and smaller scale projects which will work together to transform the town centre of Cullompton. The success of those projects will depend on continued partnership working to secure the delivery of high quality and sustainable interventions in a timely manner.

6.9.2 The masterplan has been structured such that individual projects can be implemented whilst recognising the importance of securing consistency in approach, quality and co-ordination between each project in accordance with this masterplan. This allows for a comprehensive approach to the delivery of development. It is important that these projects relate well and inform other strategic activities in the area such as Culm Garden Village and major infrastructure schemes.

6.9.3 A Delivery Action Plan will form an addendum to this masterplan and is currently under development. This would set out a time scale for interventions and delivery mechanisms.

6.9.4 The masterplan aims to set a basis for a high quality town centre and as such inform future planning applications. This will support a town centre that is underpinned by greener, healthier, connected and accessible green spaces, buildings and streets that seeks to lower the impact of carbon.

6.9.5 Monitoring will be an integral part of regeneration plans for the town. This will include monitoring of delivery of masterplan outputs and also tracking progress towards masterplan objectives. The delivery action plan will be subject to regular review in order to monitor progress towards critical success factors such as town centre footfall, vacancy rates along with quality review of heritage enhancements.



Photos around Cullompton

CULLY'S HIGHLIGHTS























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Allies and Morrison Urban Practitioners accepts no responsibility for comments made by members of the community which have been reflected in this report.

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Introductory Text to Delivery Plan Appendix 4

Cullompton Town Centre Masterplan.

Delivery Plan 2022 - 2027.

Foreward

The growth of Cullompton will require the town centre to play a pivotal role in driving forward and growing the local economy.

Town centres throughout the UK are facing significant challenges, including through the impact of the Covid-19 pandemic, the growth of online shopping, pressure from out of town centre supermarkets and reduced footfall. It is therefore crucial that the proposals set out in the masterplan are delivered to ensure the vitality and vibrancy of the town centre for the future.

This Delivery Plan identifies the priority projects that Mid Devon District Council is keen to see delivered to ensure the enhancement of the town centre over the next 5+ years. The Delivery Plan will be updated to ensure that key projects are progressing, that targets are being achieved and so that our plans and priorities remain relevant based on the most current information possible.

Mission Statement

The delivery of the Cullompton Town Centre Masterplan SPD 6 objectives, as set out in Chapter 3 of the Cullompton Town Centre Masterplan SPD, will ensure that the vision for Cullompton town centre is met; that the town centre is a vibrant and attractive destination where residents and visitors will wish to spend time, live and work. Delivery of the objectives will be sensitive to the town's historic character ensuring it will be developed in a sustainable way for the enjoyment of future generations. Alone or in combination the delivery of the objectives are key to the future of Cullompton as a successful town centre.

4 spatial strategies underpin the 6 objectives of the masterplan and are detailed in Chapter 4 of the Cullompton Town Centre Masterplan SPD. They are as follows:

- Transport and movement;
- Open space and public realm;
- Activity and land use; and
- The environment and sustainability.

Arising from the spatial strategies are a number of actions that focus on areas such as public realm, employment, finding your way around, the historic environment and green infrastructure. Also arising are the identification of 8 key opportunity sites. The actions and key opportunity sites both inform and ultimately deliver the targets set within the Delivery Plan.

Delivery Plan

Underpinning the Delivery Plan is a set of targets that will take place over a number of years. The targets will confirm what is intended to take place, when and how.

This Delivery Plan covers an initial 5 year period. Monitoring how the projects are progressing against targets will be undertaken although the main focus of monitoring is expected to be delivered and led by individual projects – for example the station project will report progress through its own governance and this can then be reflected within the Delivery Plan. This will avoid duplication of effort.

Delivery on the actions and key opportunity sites must conform to the provisions of the Adopted Mid Devon Local Plan 2013 - 2033, and any other adopted strategies or plans.

The Adopted Mid Devon Local Plan identifies Cullompton for meeting the district's long-term development needs. Cullompton is recognized as a key strategic market town and will become the principal focus of development for the district in the medium and long term in accordance with Policies S2 and S11 of the Adopted Local Plan.

The local plan defines the town centre boundary for Cullompton and encourages leisure uses, offices, new homes, attractive spaces and a balanced night time economy.

A project plan will be required prior to each action and key opportunity site coming forward. This will include the process that will be taken to deliver the project including securing funding, attraction of market interest and timescales for delivery.

Purpose
It is important that the Delivery Plan reflects the overarching aims and objectives of the Cullompton Town Centre Masterplan SPD and that the actions and key opportunity sites come forward in line with the ethos set out in the Masterplan.

The outputs of the Delivery Plan will be informed by the vision and objectives contained within the Masterplan.

The purpose of the Delivery Plan is to:

- Help capture and address identified issues relating to the town centre; and
- To take the actions and key opportunity sites, as set out in the Masterplan, ensuring they contribute towards addressing the identified issues.

The actions and key opportunity site targets are set out in the attached table.

Projects: Spatial Strategy

Timescale: S/T: 0- 12 months; M/T: 1-3 years; L/T: 3+ years

Public Realm: Lanes & Courtyards including Pocket Parks at the Methodist Church, Pound Square / front of Hayridge Centre & Community Centre Car Park					
Meeting Masterplan Objective: 1(2); 1(3); 1(5); 2(6); 2(7); 2(9); 3(12); 3(14); 4(16); 4(19); 4(20); 5(21) & 5(23); 6(28); 6(30) & 6(33) See Appendix 2 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Enhancement of the space(s) for enjoyment and use. Consistent palette of materials and street furniture. Enhancement of each space including planting, public seating and cycle parking. Designed to support local shops and services. Designed to enhance biodiversity including opportunities for rain water capture. Retention of the historic character of the space. Partnership working with the landowner & stakeholders to bring forward enhancement.	Explore funding opportunities. On-going liaison with landowners. Survey and other preparatory work including health and safety. Develop options and feasibility in consultation with the landowner(s) & stakeholders.	Delivery: Landowner & DCC. Lead promotor: Cullompton Town Council DCC & landowner	Public sector grant opportunities. Self-funding. S106 contributions	M/T	Enhanced public realm sensitive to the historic setting. Creation of high quality public space(s). Number of users. Increased economic prosperity. Increased visitors and footfall. Increased dwell times.
Public Realm: Town Centre Gateway Treatments at Station Road & Exeter Road / Meadow Lane.					
Meeting Masterplan Objective: 1(5); 1(7); 1(9) & 3(11) See Appendix 2 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Enhanced sense of arrival & celebration of Cullompton as a destination. High quality & improved wayfinding. Consistent palette of materials and street furniture. Sensitive to Cullompton's historic character.	• Liaison with landowners. • Survey and other preparatory work. • Develop options and feasibility in consultation.	Delivery: DCC Lead promotor: DCC in consultation with Cullompton Town Council & MDDC.	S106 contributions Public sector grant opportunities.	S/T – M/T.	Enhanced public realm sensitive to the historic setting. Increased economic prosperity. Increased visitors and footfall.

Partnership working with stakeholders to bring forward enhancement.					
Digital Connectivity					
Meeting Masterplan Objective: 1(5); 2(8) & 2(9) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Delivery of digital maturity within the business / retail community in the form of skills, knowledge and technology. Promotion of Ecommerce. Partnership working with stakeholders to bring forward improvements. Occupation of vacant units.	Survey and other preparatory work Develop options and feasibility in consultation. Liaison with landowners. Seek synergies with the SPF and REPF programmes to support delivery.	Delivery: MDDC & shop proprietors. Lead Promotor: MDDC.	Public sector grant opportunities. – SPF and REPF may support this initiative.	S/T – M/T.	Occupation of vacant units. Increased economic prosperity. Increased no. of visitors and footfall.
Co-working space					
Meeting Masterplan Objective: 1(5); 2(6); 2(8) & 2(9 See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Providing opportunity for a mix of uses supporting start-up & existing businesses, local shops and services. Partnership working with stakeholders to bring forward improvements. Improved occupation and enhancement of town centre property(ies).	Review funding opportunities – especially focused on the SPF and REPF where provision has been made to support such initiatives. Survey and other preparatory work. Develop options and feasibility in consultation with landowners and stakeholders.	Delivery: various partners. Lead Promotor: MDDC	Public sector grant opportunities. Self-funding. SPF / REPF.	S/T – M/T	Occupation of vacant units. Increased economic prosperity. Increased no. of visitors and footfall.
Wayfinding: Signage Strategy					
Meeting Masterplan Objective: 1(4); 1(5); 2(7); 2(9); 3(11b); 3(12); 3(14); 4(19); 4(20); 5(21); 6(30) &6(33) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
High quality & improved wayfinding. Celebration of Cullompton as a historic & thriving destination (inc. information boards). Consistent palette of materials and street furniture.	Review funding opportunities Survey and other preparatory work. Develop options and feasibility in consultation with landowners and stakeholders.	Delivery: Cullompton Town Council & MDDC in consultation with the Town Team & DCC.	Public sector grant opportunities. S106 contributions. SPF / REPF.	S/T – M/T	Enhanced public realm sensitive to the historic setting.

Sensitive to Cullompton's historic character. Partnership working with stakeholders to bring forward enhancement.		Lead Promotor: MDDC / Cullompton Town Council.			
Raise the profile of Cullompton's Distinct Heritage Through Programming and Events					
Meeting Masterplan Objective: 1(5); 2(7); 2(10); 3(11b); 3(12); 3(13); 3(14); 5(23); 5(24) & 5(26) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Celebration of Cullompton as a historic & thriving destination. Partnership working with stakeholders to bring forward events, understanding & local pride.	Develop a year round cycle of events in collaboration with stakeholders inc a 'Roman event' based on archaeological digs recently undertaken.	Delivery: various partners (including MDDC, Cullompton Town Council, Cullompton Town Team, The Walronds & Creative Cullompton). Lead promotor: Cullompton Town Team and the Cultural Team in consultation with MDDC.	Public sector grant opportunities. Inc. Love your Town Centre. SPF / REPF.	S/T	Regular cycle of events. Increased no. of visitors, footfall & dwell time. Increased economic prosperity.
Strengthen Links with other Historic and Cultural Assets in the District					
Meeting Masterplan Objective: 1(5); 2(7); 2(10); 3(11b) & 3(12) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Celebration of Cullompton as a historic & thriving destination. Partnership working with stakeholders to bring forward events, understanding & local pride both within Cullompton and nearby destinations. An expanded and broaden scope for The Cloth Trail.	Make contact with nearby ventures including Killerton House, Coldharbour Mill and others for shared promotion.	Delivery: various partners (including MDDC, Cullompton Town Council, Walronds & Creative Cullompton). Lead promotor: Cullompton Town Team.	Public sector grant opportunities.	S/T – M/T	Regular cycle of events / collaboration. Increased no. of visitors, footfall & dwell time. Increased economic prosperity.

Projects: Key Opportunity Sites

Timescale: S/T: 0- 12 months; M/T: 1-3 years; L/T: 3+ years

Alexandria Industrial Estate					
Meeting Masterplan Objective: 2(9); 3(11a); 4(20); 6(27); 6(28); 6(31) & 6(33) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
• Enhance the sense of arrival to / from the new railway station. • Advancement of the station site as a mobility hub facilitating interchange between different forms of travel including rail / bus / cycle and walking. • Regeneration of the industrial estate complimentary to the railway station. • Improve walking / cycling connections Station Road. • Opportunity for a station square and shop. • Electric bike, scooter &/or car hire. • Public realm improvements • Enriched relationship with River Culm.	Commission a Masterplan for Alex. Business Park & the Railway Station to incorporate the following: Review flood risk. Liaison with landowner(s). Draft design & layout of public realm and complementary land uses in response to emerging railway plans. Detailed review of cycle / pedestrian links. Public transport enhancement options. Enhance vehicular, cycling and walking access including investigation of options to Millennium Way. Review of visual, public realm and wildlife benefits adjacent to the River Culm.	Delivery: Land owner (in consultation with MDDC, DCC & Network Rail). Lead promotor: MDDC	Public sector grant opportunities. Self-funding. S106 contributions.	S/T – M/T	Number of users. Creation of high quality public space. New mix of leisure, residential, community and commercial development. Increased economic prosperity.

Railway Station					
Meeting Masterplan Objective: 1(5); 2(9); 3(11a); 6(27); 6(28); 6(31) & 6(33) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Incorporation of parking / electric vehicle charging for all future forms of mobility. Improve walking / cycling connections between the railway station, the town centre and its hinterlands. Public realm improvements including tree planting, public seating, cycle parking, space for station drop-off / pick-up.	Draft design & layout of public realm in response to emerging railway plans (M/T). Detailed review of cycle & pedestrian links. Liaison with landowner(s).	Delivery of station: Network Rail Delivery of station supporting infrastructure: Network Rail with Landowners, MDDC & DCC Lead Promotor: MDDC	Restoring your railway funding DFT. Levelling Up Fund. S106 contributions.	Medium term	Number of users. Creation of high quality public space. Footfall between station and town centre. Increased economic prosperity.

Tannery Site					
Meeting Masterplan Objective: 1(1); 1(2); 1(3); 1(5); 2(6); 2(8b); 3(11a); 4(18); 4(20); 5(25) & 6(33) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Delivery of a mixed use development; supporting local shops and services. Creation of active frontages, by means of main entrances on to Crow Green and Exeter Hill to enhance the sense of arrival into the town centre. Review opportunities for alternative forms of development such as zero carbon development. Retain the historic antiques building. Rehome the soft play and storage facilities. Enhance the water course for visual and wildlife benefits whilst integrating walking / cycling routes. Public realm improvements.	Review flood risk. Liaison with landowners. Detailed review of walking & cycling improvements. Review of visual, public realm and wildlife benefits adjacent to the waterway. Review the relocation / rehoming of existing uses as required.	Delivery: Land owner (in consultation with MDDC, & DCC). Lead promotor: MDDC	Grant opportunities. Self-funding.	Long term.	New mix of leisure, residential, community and commercial development(s). An enhanced high quality arrival point to the town centre. Improved public realm. Increased economic prosperity. Increased town centre footfall.

Higher Bullring					
Meeting Masterplan Objective: 1(5); 2(7); 3(11b); 3(12); 3(13); 3(14); 4(17); 4(20); 5(21); 5(23); 5(24); 6(28); 6(31) & 6(33) See Appendix 2 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Enhancement of the space for use by a variety of activities. Comprehensive re-design of the space as a larger, level, shared use area. Carriage way narrowing & widening of footways for improved pedestrian environment. Reconfigured parking. Consistent palette of materials and street furniture. De-cluttering. Retention and improved setting for the war memorial. Enhanced sense of arrival to the town centre. Retention of the historic character of the space. Public realm improvements including planting, public seating and cycle parking. Re-defined drop-off of deliveries. Improved way finding including signage. Improved pedestrian environment at side roads – prioritising pedestrians over turning traffic	Progress the emerging detailed design of the Higher Bullring. Continued liaison with landowner(s), stakeholders and other interested parties.	Delivery: MDDC, Historic England & DCC Lead Promotor: MDDC	HAZ (Historic England / DCC / MDDC / CTC)	Short term.	An enhanced high quality arrival point to the town centre. Improved public realm. Increased economic prosperity. Increased town centre footfall.

Improvements to Cycling Between the Proposed New Rail Station & the Town Centre					
Meeting Masterplan Objective: 1(5); 2(9); 3(11a); 4(16); 4(18); 4(20); 5(21); 5(23); 6(27); 6(28); 6(31); 6(32) & 6(33) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Improved cycle crossings north and south of Station Road. Installation of signage and tactile paving where missing at junctions. Integration of the CCA pedestrian & cycleways into the proposals at Station Road. Provision of appropriate signage.	Await outcome of LUF. Delivery. HAZ project is promoting inclusion of cycling infrastructure within the revised Higher Bullring public realm scheme.	Delivery: DCC & Landowner (in consultation with MDDC, Cullompton Town Council). Lead promotor: DCC / MDDC.	Levelling up fund. S106 contributions.	Medium term.	Clear and continuous cycle ways between the new railway station and town centre. Increased number of non-vehicular trips.

Fore Street					
Meeting Masterplan Objective: 1(2); 1(5); 2(7); 2(9); 3(12); 3(13); 3(14); 3(15); 4(16); 4(19); 4(20); 5(21); 5(23); 6(28); 6(29); 6(30); 6(31) & 6(33) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Rebalance the streetscape for the pedestrians and cyclists. To reclaim space for pedestrians and cyclists thereby creating an environment that supports local businesses. Consistent palette of materials and street furniture. Consolidation and decluttering of the High Street of street furniture. Integrate cycle provision along the High Street. Retain public transport including bus stops. Review short term parking & deliveries. Improved pedestrian environment at side roads – prioritising pedestrians over turning traffic.	Detailed traffic analysis and modelling including the impact of Cullompton Relief Road. Detailed survey of utilities and other underground features. Preparation of detailed design. Liaison with landowners, stakeholders and other interested parties.	Delivery: DCC (in consultation with landowners, MDDC, Historic England, Cullompton Town Council & Culm Valley in Business). Lead promotor: DCC	Grant opportunities. S106 contributions. Historic England funding opportunities.	Medium term.	An enhanced high quality town centre public realm. Increased economic prosperity. Reduced number of vacant properties. Increased town centre footfall. New mix of leisure, residential, community and commercial development.

Leat Footbridge					
Meeting Masterplan Objective: 1(2); 1(3); 1(4); 1(5); 2(7); 2(9); 4(19); 4(20); 5(21); 5(23); 6(28); 6(30); 6(31) & 6(33) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
To reinstate the former crossing over the leat. To seek opportunities for new and improved pedestrian and cycle links to the town centre. An enhanced setting to the leat. Enhanced use and enjoyment of the leat in association with the CCA fields. Enhanced awareness of the historic importance of the leat.	Survey and other preparatory work including health and safety. Preparation of detailed design. Liaison with landowners, stakeholders and other interested parties.	Delivery: DCC & landowner (in consultation with MDDC, Historic England, Cullompton Town Council, Environment Agency, Cullompton Community Association). Lead Promotor: DCC / MDDC.	Grant opportunities. S106 contributions. Historic England funding opportunities. Self-funding.	Medium term.	Achievement of a new additional crossing. Enhanced public realm sensitive to the historic setting and biodiversity. Increased town centre footfall.

The Old Cinema Site					
Meeting Masterplan Objective: 1(2); 1(5); 2(6); 2(7); 2(8b); 3(12); 3(14) & 5(21) See Appendix 1 for Full List of Objectives					
Key features	**Next Steps**	**Lead partner**	**Funding**	**Priority**	**Measure of success**
Seek opportunities in partnership with the landowner to bring forward development opportunities &/or enhancement. Providing opportunity for a mix of uses supporting local shops and services. Review opportunities for introducing alternative forms of development / repair / maintenance such as zero carbon.	Liaison with the landowner. Survey and other preparatory work including health and safety. Develop options and feasibility in consultation with the landowner.	Delivery: Landowner Lead promotor: MDDC / CTC.	Public sector grant opportunities. Self-funding.	Medium to long term.	• Bringing a larger town centre building / site into active use. • Enhanced public realm sensitive to the historic setting. • Increased town centre footfall. • Increased economic prosperity. • New mix of leisure, residential, community and commercial development.

APPENDIX 2: Masterplan Objectives

Masterplan Objective (No)	Objective
1.	**Cullompton's distinctive historic buildings and landscape should be enhanced and restored.**
1(1)	Find viable uses for empty historic buildings including more and improved residential accommodation in the town centre.
1(2)	Seek to improve the appearance and setting of the historic buildings through the planning process and through on-going repair and maintenance by private individuals.
1(3)	Protect, enhance and create key views, green spaces and waterways with consideration of their biodiversity and amenity roles. Seek to provide more green spaces.
1(4)	Enhance the attractiveness, use and public enjoyment pf the CCA fields following the delivery of the relief road.
1(5)	Increasing Cullompton's attractiveness as a place to work, visit and enjoy
2.	**Cullompton's centre should rediscover its historic role as a place of work.**
2(6)	Seek out the potential of vacant and under used sites and buildings in the town centre to complement the existing employment offer and enhance town centre vitality. This could provide different types of work space that meet today's needs.
2(7)	Celebrate the town's history and how it can contribute to Cullompton's identity and future offer. Potential opportunities exist to create a unique offer.
2(8a) 2(8b)	Enhance infrastructure to meet the needs of business including WiFi connectivity and speed with consideration of deliveries and servicing. Secure productive use of historic buildings through occupation that meets modern day requirements.
2(9)	Improve the town centre's attractiveness and offer to those working in Cullompton's peripheral employment areas including its accessibility via improvements to physical links.
2(10)	Forge connection between businesses and nearby higher educational institutions.
3.	**An enticing experience for visitors will aim to draw people into Cullompton's town centre.**
3(11a) 3(11b)	Transform the 'gateway' into the town centre to create a positive first impression. Encourage holiday-makers en-route to the south west to venture beyond the M5 service station.
3(12)	Raise the profile and make use of Cullompton's main attractions, historic buildings, courts lanes and open spaces.
3(13)	Strengthen Cullompton as a food and drink destination promoting its café's, restaurants and Farmer's Market and forging links with producers in the local area.
3(14)	Enhance the retail, leisure, food and drink offer within an improved historic environment to encourage visits and dwell time.
3(15)	A holistic view of the town centre's parking provision and on-going requirements.
4.	**Cullompton's spaces should be reclaimed and redesigned to support a vibrant community life.**
4(16)	Alleviate traffic along the high street and redesign the space creating a better pedestrian and cycle environment.
4(17)	Establish the Bullring as the town's primary outdoor civic space framed by historic buildings enabling flexible use by the community.
4(18)	Upgrade the approaches to the town centre including the leat pathon Station Road and on Exeter Road in the area of the Hayridge.
4(19)	Assess opportunities to bring the historic courts and passageways off Fore Street in to use with signage, surfacing and lighting improvements.
4(20)	Link new developments through a network of attractive spaces enhancing connectivity to the town centre and reinforcing its purpose.
5.	**Cullompton should be a sustainable toen for its growing community: with homes, education, community and recreational facilities.**
5(21)	Make it easy for all new resident to shop locally and identify with Cullompton as their home town.
5(22)	Support Cullompton's schools outside the planning system to encourage opportunities for life-long learning.
5(23)	Ensure recreational outdoor space and leisure facilities support healthy living and social interaction for all.
5(24)	Support and expand Cullompton's popular street markets to cater for a growing community.
5(25)	Provide new homes in the town centre to increase vitality, footfall and spend.
5(26)	Explore the potential for the communiyy and voluntary sector to forge partnerships to support community services.
6.	**It will be easy to move around on foot, on bicycle, by bus and by train.**
6(27)	Create high quality pedestrian and cycle links to the proposed train station, Culm Garden Village and other planned development.
6(28)	Give more space and priority to people getting around on foot, cycle and by bus in Cullompton, including between the town centre and the proposed train station.
6(29)	Encourage uses which are reliant on large delivery vehicles to relocate from the historic core where possible. Consider how servicing and delivery needs can be accommodated within an enhanced town centre pedestrian environment.
6(30)	Improve links between Fore Street and the CCA fields.
6(31)	Address points of conflict between road traffic, cyclists and pedestrians where possible.
6(32)	Establish strategic cycle links between Cullompton and Willand with improved cycle access to Exeter.
6(33)	Improve signage to encourage exploration around the town by foot and cycle.

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Draft Mid Devon Cullompton Town Centre Masterplan

Strategic Environmental Assessment Screening Report

December 2022

1.0 Cullompton Town Centre Masterplan Supplementary Planning Document (SPD)

Purpose, scope and content

1.1 The Cullompton Town Centre Masterplan SPD will set out the relationship between Mid Devon District Council (MDDC) planning policy and guidance whilst identifying its purpose as bridging the gap between high level policy aspirations and delivery on the ground. This is to ensure that the development achieves high quality design and sense of place in a coordinated manner.

1.2 The Draft Cullompton Town Centre Masterplan SPD is set out in 6 Chapters. A brief description of each part is provided below:

Introduction:	Sets out the role of the Masterplan, project process and engagement undertaken
Context:	Sets out the context of the town with a summary of issues and opportunities
Vision & Objectives:	Sets out emerging themes and objectives within a spatial framework
Masterplan:	Provides an overview with a review of specific topic areas
Heritage Strategy:	Sets out Cullompton's historic significance with a review of public realm improvements, governance and delivery
Delivery Guidance	Provides a review of the interdependencies, phasing and funding opportunities

Relationship with the National Planning Policy

1.3 The National Planning Policy Framework (2019), in Chapter 7 'Ensuring the vitality of town centres' sets out that *"Planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation"* (paragraph 85, NPPF). Policy S11, Cullompton of the Adopted Mid Devon Local Plan 2013-2033 is consistent with the National Planning Policy Framework. It identifies Cullompton as a fast growing market town with a strategic role in the hierarchy of settlements in Mid Devon. Cullompton is identified as an area for growth, being well located and supported by infrastructure and facilities. Policy S11 is consistent with the National Planning Policy Framework; outlining opportunities by existing or planned investment in infrastructure, the town's economic potential and the scope for net environmental gains. The Cullompton Town Centre Masterplan SPD will guide town centre development opportunities to ensure the community has sufficient access to services and employment opportunities as well as setting out clear expectations for the quality of development.

Relationship with the Mid Devon Local Plan

1.4 The Mid Devon Local Plan 2013-2033 was adopted July 2020. It was examined by an Inspector appointed by the Planning Inspectorate and was subject to main modifications.

1.5 Applications for development must be determined in accordance with the Development Plan unless material considerations indicate otherwise as required by section 38(6) of the Town

and Country Planning Act 1990 (as amended).

1.6 Local Plan Policy S11, Cullompton, will provide the policy baseline for the more detailed guidance included in Cullompton Town Centre Masterplan SPD:

> ***Policy S11***
> ***Cullompton***
> **Cullompton will develop as a fast growing market town with a strategic role in the hierarchy of settlements in Mid Devon. The town will become the strategic focus of new development reflecting its accessibility, economic potential and environmental capacity. This strategy will improve access to housing through urban extensions and expanded employment opportunities. There will be significant improvements to the town's infrastructure and connectivity, including the reopening of the railway station, and improved services for its population and nearby rural areas. Proposals will provide for approximately 3,930 dwellings, of which 1,100 will be affordable, and 73,500 gross square metres of commercial floor space over the plan period.**
>
> **The Council will guide high quality development and other investment to:**
>
> **a) Make any necessary strategic mitigations to maintain highway capacity, safety, integrity, and sustainability including the M5 and local highway network in conjunction with current and relevant infrastructure plans;**
> **b) Promote further public transport improvements within Cullompton and to other urban centres (particularly Tiverton and Exeter) and improved access to the rail network by the reopening of Cullompton Railway Station;**
> **c) Continue measures to support the implementation of the Cullompton Air Quality Action Plan including the construction of new highway links to relieve the town centre and enhanced walking and cycling opportunities around the town;**
> **d) Manage the town centre so that economic regeneration and heritage reinforce each other by promoting new homes, shops, leisure, offices and other key town centre uses which are well designed and contribute to vitality and viability;**
> **e) Provide community infrastructure such as education and enhanced open space to support new development proposals;**
> **f) Enhance the tourism and visitor role of the town and surrounding area; and**
> **g) Support measures to reduce flood risk within Cullompton and make provision for green infrastructure.**

1.7 During the preparation of the Cullompton Town Centre Masterplan the Council has also applied the following policies from the Adopted Mid Devon Local Plan 2013-2033 in addition to policy S11:

- S1 - sustainable development priorities
- S2 - amount and distribution of development
- S6 employment
- S7 town centres
- S9 environment

- DM1 high quality design
- DM14 town centre development
- DM15 development outside town centres, and
- DM25 development affecting heritage assets.

1.8 The Adopted Mid Devon Local Plan 2013 – 2033 has been subject to a Sustainability Appraisal (SA), which has incorporated a Strategic Environmental Assessment (SEA). The Local Plan Review has also been subject to a Habitat Regulations Assessment.

Status of the Cullompton Town Centre Masterplan SPD

1.8 The Cullompton Town Centre Masterplan SPD will be adopted by the Council as a Supplementary Planning Document. The SPD will not be part of the development plan and does not introduce new planning policies into the development plan. However, it will be capable of being a material consideration in determining planning applications.

2.0 SEA and SEA Screening

Strategic Environmental Assessment

2.1 The requirement for a Strategic Environmental Assessment (SEA) arises from the European Directive 2001/42/EC "on the assessment of the effects of certain plans and programmes on the environment" (hereafter referred to as the SEA Directive). This has been transposed into English law by the Environmental Assessment of Plans and Programmes Regulations 2004 as updated (referred to as the 'SEA Regulations'). This legislation places an obligation on local authorities to undertake SEA on any plan or programme prepared for town and country planning or land use purposes and which sets the framework for future development consent of certain projects.

Screening

2.2 The 2008 Planning Act has removed the requirement to undertake a Sustainability Appraisal (SA) for an SPD. However, this has not replaced the requirement to establish whether an SPD requires Strategic Environmental Assessment (SEA). SEA is required in some limited situations where a Supplementary Planning Document (SPD) could have significant environmental effects.

2.3 In order to establish whether SEA is required the fundamental consideration is whether the document is likely to have 'significant environmental effects'. This is done through a screening assessment. If the screening assessment indicates that there could be significant effects, an SEA is needed.

2.4 A Practical Guide to the SEA Directive was published by the Department of the Environment, Office of the Deputy Prime Minister (2005). This sets out practical guidance on applying the SEA Directive on the assessment of the effects of certain plans and programmes on the environment. The practical guidance includes a flow chart (figure 2) which illustrates the process for screening a planning document to establish whether a full SEA is needed.

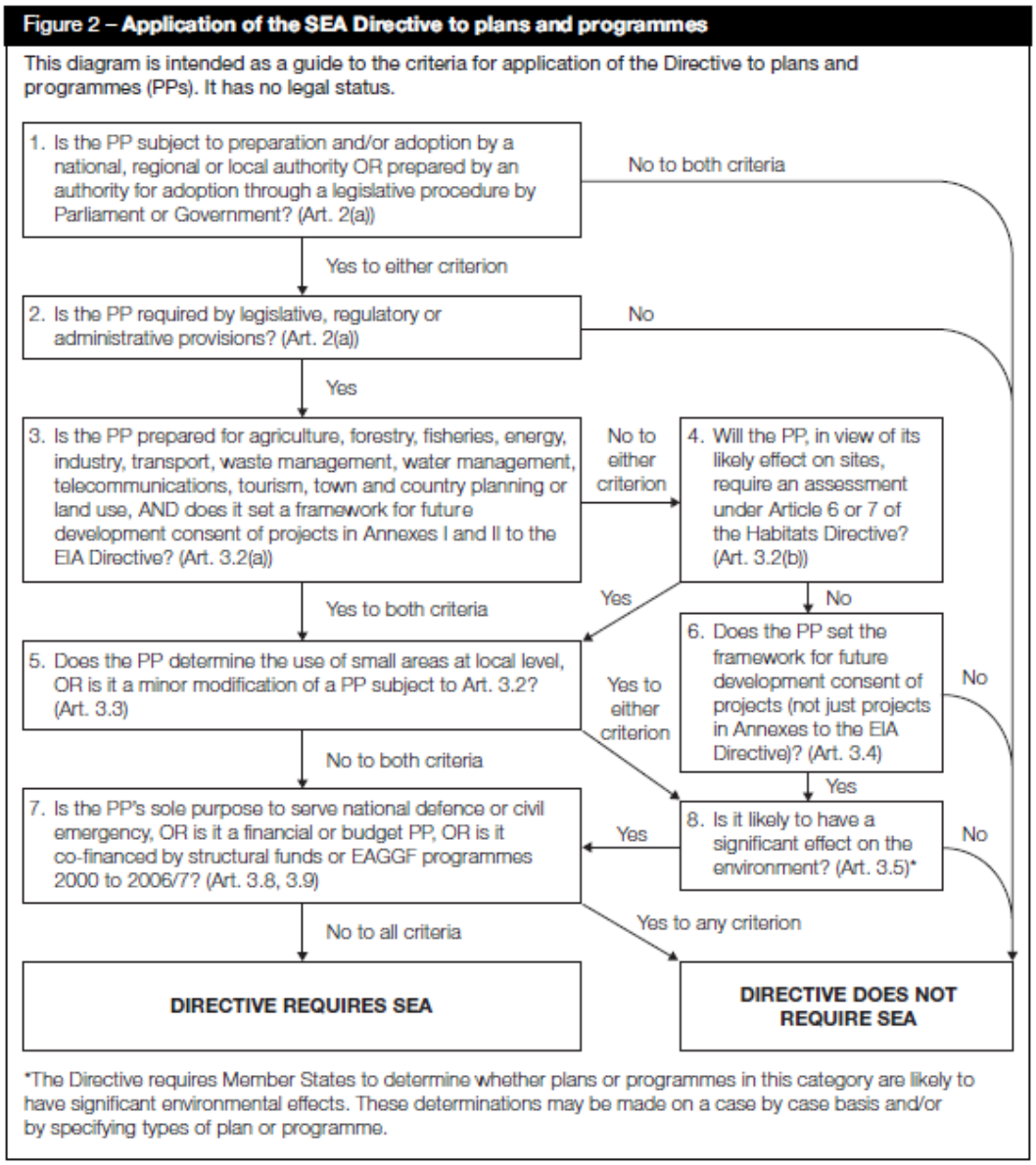


Diagram 1: Application of the SEA Direct to plans and programmes (Figure 2 extracted from 'A practical guide to the Strategic Environmental Assessment Directive')

2.5 Table 1 below sets out the Council's response to the above questions in order to clearly assess whether there is a requirement for the Cullompton Town Centre Masterplan SPD to be subject a full SEA.

2.6 Table 2 provides the Council's assessment of likely significant effects of the Cullompton Town Centre Masterplan SPD on the environment, in accordance with the screening report process in Table 1.

Table 1: Screening of the Cullompton Town Centre Masterplan SPD

Stage	Y/N	Reason
1. Is the SPD subject to preparation and/or adoption by a national, regional or local authority OR prepared by an authority for adoption through a legislative procedure by Parliament or Government? (Art.2(a))	Y	The preparation and adoption of the SPD is allowed under the Town and Country Planning Act 1990. The process in preparing the SPD is in accordance with the Town and Country Planning (Local Planning) Regulations 2012. **Go to STAGE 2**
2. Is the SPD required by legislative, regulatory or administrative provisions? (Art.2(a))	Y	Although the SPD is not a requirement under the provisions of the Town and Country Planning Act 1990, if adopted it will add further detail to the policies in the Local Plan and will be a material consideration in planning decisions. It is therefore important that the screening process is precautionary and considers whether it is likely to have significant environment effects and hence whether SEA is required under the Directive. **Go to STAGE 3.**
3. Is the SPD prepared for agriculture, forestry, fisheries, energy, industry, transport, waste management, water management, telecommunications, tourism, town and country planning or land use, AND does it set a framework for future development consent of projects in Annexes I and II to the EIA Directive? (Art. 3.2(a))	Y	The SPD has been prepared for the purposes of town and country planning. It supplements policies in the Adopted Mid Devon Local Plan 2013-2033 by providing detailed guidance as to how these policies are interpreted. The area covered is more than 5 hectares and the masterplan will be used in the development of dwellings, employment and other major developments. Although the Cullompton Town Centre Masterplan and Delivery Plan does not create new policy or identfty specific sites for development. **Go to STAGE 5**
4. Will the SPD, in view of this likely effect on sites require an assessment under Article 6 or 7 of the Habitats Directive? (Art.3.2(b))	**Not Applicable** The SPD has been subject to a separate Habitat Regulations Assessment screening which has concluded the SPD is not likely to have significant adverse effects on the integrity of Habitats sites, either alone or in-combination with other plans or projects and further 'Appropriate Assessment' is not required.	
5. Does the SPD determine the use of small areas at local level, OR is it a	Y	'The SPD will be material consideration in planning applications for new developments. It

	minor modification of a plan or programme subject to Art 3.2? (Art.3.3)		provides detailed guidance to adopted Local Plan policy (minor modification).' **Go to STAGE 8**
6.	Does the SPD set the framework for future development consent of projects (not just projects in Annexes to the EIA Directive)? (Art. 3.4)	**Not applicable**	
7.	Is the SPD's sole purpose to serve national defence or civil emergency, OR is it a financial or budget plan or programme, OR is it co-financed by structural funds or EAGGF programmes 2000 to 2006/7? (Art. 3.8, 3.9)	**Not applicable**	
8.	Is it likely to have a significant effect on the environment? (Art. 3.4)	N	See Part 2, assessment of the likely significant effects on the environment. This concludes that the SPD is unlikely to have a significant effect on the Environment. **DIRECTIVE DOES NOT REQUIRE SEA** of the SPD

Table 2: Determining the likely significance of effects of the Cullompton Town Centre Masterplan SPD on the environment

Criteria specified schedule 1 SEA Regulations	Likely significant environmental effect (Y/N)	Reason
1. The characteristics of plans and programmes, having regard, in particular, to -		
a) The degree to which the SPD sets a framework for projects and other activities, either with regard to the location, nature, size and operating conditions or by allocating resources;	N	The SPD, if adopted will help implement Policy S11 Cullompton of the Adopted Mid Devon Local Plan 2013-2033 and contribute to the framework for future development consent. The Local Plan has been subject to Sustainability Appraisal (SA) and therefore SEA.
b) The degree to which the SPD influences other plans and programmes including those in a hierarchy;	N	The SPD is in conformity with the National Planning Policy Framework and Adopted Mid Devon Local Plan 2013-2033 policies. The SPD will not significantly influence other plans and programmes, it supplements the Local Plan which has been subject to SA and therefore SEA.
c) The relevance of the SPD for the integration of environmental considerations in particular with	N	The SPD will help the integration of environmental considerations with a view to promoting sustainable

a view to promoting sustainable development;		development as part of the development proposals. This includes enhancement of the Cullompton Community Association fields, retaining and enhancing existing habitats whilst strengthening links to the town centre and public rights of way beyond the town.
d) Environmental problems relevant to the SPD; and	N	The environmental problems are consistent with those typically found in Mid Devon, these include air quality, flood risk, noise and biodiversity. Planning policy in relation to these environmental problems is principally established through the National Planning Policy Framework and the Adopted Mid Devon Local Plan 2013-2033. However, it is expected that the SPD will provide specific guidance on how net gains can be achieved through long term management and maintenance and the creation of new 'green spaces'.
e) The relevance of the SPD for the implementation of Community legislation on the environment (for example, plans and programmes linked to waste management or water protection)	N	The SPD is not directly relevant to the implementation of European legislation including the Water Framework Directive.
2. Characteristics of the effects and of the area likely to be affected, having regard, in particular, to -		
a) The probability, duration, frequency and reversibility of the effects;	N	The SPD seeks to ensure development is of an appropriate scale, suitably designed with consideration of the impact on amenity, character of area and environmental impact. Therefore positive social and environmental impacts are predicted. Long-term significant adverse effects are not anticipated.
b) The cumulative nature of the effects;	N	The SPD is in conformity with the strategic policies of the Adopted Mid Devon Local Plan 2013-2033. It is intended that the effects will have a positive cumulative effect in the area

		enhancing biodiversity, achieving ecological net gain and sense of well-being for future residents.
c) The transboundary nature of the effects	N	There are not expected to be any significant trans-boundary effects. The SPD seeks to provide good practice in ensuring Cullompton can realise its full potential as a sustainable commercial hub for an expanding town.
d) The risks to human health or the environment (for example, due to accidents);	N	The SPD is likely to have a positive impact on human health by encouraging high quality accommodation and development. There are no significant risks to human health.
e) The magnitude and spatial extent of the effects (geographical area and size of the population likely to be affected);	N	The SPD applies to the Cullompton Town Centre with the impacts likely to be felt by those residing in Cullompton and the rural hinterland of which the town centre serves.
f) The value and vulnerability of the area likely to be affected due to – (i) Special nature characteristics or cultural heritage; (ii) Exceeded environmental quality standards or limit values; or (iii) Intensive land-use	N	Cullompton Town Centre has a number of heritage assets. These are covered by other policies in the Local Plan and specific legislation. The SPD seeks a positive approach to maintain, improve and enhance the distinctive historic buildings and landscape setting of these assets through careful consideration of landscape and settlement form. The SPD seeks to guide development in keeping with the principles of national, regional and local strategic policy and seek to prevent over intensive development.
g) The effects on areas or landscapes which have a recognised natural, Community or international protection status.	N	The SPD seeks to retain and enhance those areas of community and local priority importance.

3.0 Conclusions

3.1 This SEA screening has identified that the Draft Cullompton Town Centre Masterplan SPD is unlikely to have significant effects on the environment.

3.2 The SEA screening has also found that there is no requirement for the Cullompton Town Centre Masterplan SPD to be subject to a full SEA.

4.0 Next steps

4.1 This screening opinion will be subject to consultation with the three designated consultation bodies – Historic England, Natural England, and the Environment Agency.

4.2 The screening opinion will be published alongside the Draft Cullompton Town Centre Masterplan SPD and will be subject to a stage 2 public consultation.

Draft Mid Devon Cullompton Town Centre Masterplan

Habitat Regulations Assessment Screening Report

December 2022

1.0 Cullompton Town Centre Masterplan Supplementary Planning Document

Purpose, scope and content

1.1 The Cullompton Town Centre Masterplan will set out the relationship between Mid Devon District Council (MDDC) planning policy and guidance whilst identifying its purpose as bridging the gap between high level policy aspirations and delivery on the ground. This is to ensure that future investment supports and regenerates Cullompton town centre in a co-ordinated manner.

1.2 The Draft Cullompton Town Centre Masterplan is set out in 6 Chapters. A brief description of each part is provided below:

Introduction:	Sets out the role of the Masterplan, project process and engagement undertaken
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Delivery Guidance	Provides a review of the interdependencies, phasing and funding opportunities

Relationship with the National Planning Policy

1.3 The National Planning Policy Framework (2019), in Chapter 7 'Ensuring the vitality of town centres' sets out that *"Planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation"* (paragraph 85, NPPF). Policy S11, Cullompton of the Adopted Mid Devon Local Plan 2013-2033 is consistent with the National Planning Policy Framework. It identifies Cullompton as a fast growing market town with a strategic role in the hierarchy of settlements in Mid Devon. Cullompton is identified as an area for growth, being well located and supported by infrastructure and facilities. Policy S11 is consistent with the National Planning Policy Framework; outlining opportunities by existing or planned investment in infrastructure, the town's economic potential and the scope for net environmental gains. The Cullompton Town Centre Masterplan will guide town centre development opportunities to ensure the community has sufficient access to services and employment opportunities as well as setting out clear expectations for the quality of development.

Relationship with the Mid Devon Local Plan

1.4 The Mid Devon Local Plan 2013-2033 was adopted July 2020. It was examined by an Inspector appointed by the Planning Inspectorate and was subject to main modifications.

1.5 Applications for development must be determined in accordance with the Development Plan unless material considerations indicate otherwise as required by section 38(6) of the Town and Country Planning Act 1990 (as amended).

1.6 Local Plan Policy S11, Cullompton, provides the policy baseline for the more detailed guidance included in Cullompton Town Centre Masterplan:

Policy S11

Cullompton

Cullompton will develop as a fast growing market town with a strategic role in the hierarchy of settlements in Mid Devon. The town will become the strategic focus of new development reflecting its accessibility, economic potential and environmental capacity. This strategy will improve access to housing through urban extensions and expanded employment opportunities. There will be significant improvements to the town's infrastructure and connectivity, including the reopening of the railway station, and improved services for its population and nearby rural areas. Proposals will provide for approximately 3,930 dwellings, of which 1,100 will be affordable, and 73,500 gross square metres of commercial floor space over the plan period.

The Council will guide high quality development and other investment to:

a) Make any necessary strategic mitigations to maintain highway capacity, safety, integrity, and sustainability including the M5 and local highway network in conjunction with current and relevant infrastructure plans;
b) Promote further public transport improvements within Cullompton and to other urban centres (particularly Tiverton and Exeter) and improved access to the rail network by the reopening of Cullompton Railway Station;
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e) Provide community infrastructure such as education and enhanced open space to support new development proposals;
f) Enhance the tourism and visitor role of the town and surrounding area; and
g) Support measures to reduce flood risk within Cullompton and make provision for green infrastructure.

1.7 During the preparation of the Cullompton Town Centre Masterplan the Council has also applied the following policies from the Adopted Mid Devon Local Plan 2013-2033 in addition to policy S11:

- S1 - sustainable development priorities
- S2 - amount and distribution of development
- S6 employment
- S7 town centres
- S9 environment
- DM1 high quality design
- DM14 town centre development
- DM15 development outside town centres, and

- DM25 development affecting heritage assets.

1.8 The Adopted Mid Devon Local Plan 2013 – 2033 has been subject to a Sustainability Appraisal (SA), which has incorporated a Strategic Environmental Assessment (SEA). It has also been subject to a Habitat Regulations Assessment. Both the HRA and SEA of the Adopted Mid Devon Local Plan concluded that the policies within the Adopted Mid Devon Local Plan will not have adverse effects on the integrity of European sites (Habitats sites), either alone or in-combination with other plans or projects.

Status of the Cullompton Town Centre Masterplan

1.9 The Cullompton Town Centre Masterplan will not be part of the development plan and does not introduce new planning policies into the development plan. It will, however, be capable of being a material consideration in determining planning applications.

2.0 Habitat Regulations Assessment

Habitat Regulations Assessment

2.1 A Habitat Regulations Assessment (HRA) refers to one of the several distinct stages of Assessment. These must be undertaken in accordance with the Conservation of Habitats and Species Regulations 2017 (as amended) and the Conservation of Offshore Marine Habitats and Species Regulations 2017 (as amended) to determine whether a plan or project may affect the protected features of a European site ('habitats site') identified under these regulations before deciding whether to undertake, permit or authorise it.

Screening

2.2 All plans and projects which are not directly connected with, or necessary for, the conservation management of a habitat site, require consideration of whether the plan or project is likely to have significant effects on that site. This consideration is typically referred to as the 'Habitats Regulations Assessment screening' and should take into account the potential effects both of the plan/project itself and in combination with other plans or projects.

2.3 Where the potential for likely significant effects cannot be excluded, an appropriate assessment of the implications of the plan or project for that site, in view of the site's conservation objectives must be undertaken. A plan or project may be agreed but only after having ruled out adverse effects on the integrity of the habitats site. Where an adverse effect on the site's integrity cannot be ruled out, and where there are no alternative solutions, the plan or project can only proceed if there are imperative reasons of over-riding public interest and if the necessary compensatory measures can be secured.

2.4 In April 2018, the Court of Justice of the European Union delivered its judgement in Case C-323/17 People Over Wind & Peter Sweetman v Coillte Teoranta ('People over Wind'). The judgment clarified that making screening decisions as part of the HRA and for the purposes of deciding whether an appropriate assessment is required, mitigation measures cannot be taken into account. Mitigation measures intended to avoid or reduce the harmful effects of a plan or project, can only be taken into account at the appropriate assessment stage.

2.5 The Cullompton Town Centre Masterplan has been 'screened' for the purposes of the Habitat Regulations Assessment (HRA) to assess whether it may affect the protected features of a 'habitats site' identified under the Conservation of Habitats and Species Regulations 2017 as amended and the Conservation of Offshore Marine Habitats and Species Regulations 2017 (as amended).

3.0 Habitats site

3.1 A Habitats site refers to any site which would be included within the definition at regulation 8 of the Conservation of Habitats and Species Regulations 2017 for the purpose of those regulations, including candidate Special Areas of Conservation, Sites of Community Importance, Special Areas of Conservation, Special Protection Areas and any relevant Marine Sites.

3.2 There are no Habitats sites within Mid Devon although there are 11 such sites within 10km (Table 1); the closest being the Culm Grasslands SAC which lies immediately adjacent to the north western boundary of Mid Devon District.

Table 1: Habitats Sites within 10km of Mid Devon District

Special Areas of Conservation (SACs)	Special Protection Areas (SPAs)	Ramsar Sites
• East Devon Pebblebed Heaths • Culm Grasslands • South Dartmoor Woods • Holme Moor and Clean Moore • Dartmoor • Exmoor Heaths • Quants • Exmoor and Quantock Oakwoods	• Exe Estuary • East Devon Heaths	• Exe Estuary

3.3 In addition to these 11 sites, Natural England wrote to the Council on 30th March 2021 to advise on matters regarding development in relation to the Somerset Levels and Moors Ramsar Site, which it has pointed out will affect a very small part of Mid Devon district that falls within its catchment area. An indicative map for the catchment includes parts of the parishes of Clayhanger, Hockworthy, Holcombe Rogus and Culmstock and it is understood that Natural England is refining this map. The Somerset Levels and Moors are designated as a Special Protection Area (SPA) under the Habitat Regulations 2017 and listed as a Ramsar Site under the Ramsar Convention. While the SPA is designated for its international waterbird communities, the Ramsar site is designated for its internationally important features including the floristic and invertebrate diversity and species of its ditches, which is shared as a designated feature of the underpinning Sites of Special Scientific Interest (SSSIs). Natural England has advised that in light of the unfavourable condition of the Somerset Levels and Moors Ramsar site, before determining a planning application that may give rise to additional phosphates within the catchment, competent

authorities should undertake a Habitats Regulations Assessment proceeding to an appropriate assessment where a likely significant effect cannot be ruled out, even where the development contains pollution mitigation provisions. The development types affected include: additional residential units and commercial development; infrastructure that supports agricultural intensification; anaerobic digesters; and other developments that result in additional phosphates in the Somerset Levels and Moors catchment.

Potential Impacts on Habitats Site

3.4 There are a number of categories that can affect Habitats Sites which include:

- Physical Loss
- Physical Damage
- Non-physical disturbance
- Water table/availability
- Toxic contamination
- Non-toxic contamination
- Biological disturbance

4.0 Adopted Mid Devon Local Plan 2013 – 2033 HRA

4.1 As the competent authority under The Conservation of Habitats and Species Regulations (2010) (now 2017 as amended) Mid Devon District Council was required to assess the Adopted Mid Devon Local Plan 2013-2033 as part of the HRA process.

4.2 A full HRA Report for the Adopted Mid Devon Local Plan 2013-2033 was undertaken in March 2015 (updated as an HRA Addenda (August 2016), updated again December 2016 and again October 2019). The full HRA Report for the Mid Devon Local Plan 2013-2033 concluded that the Adopted Local Plan is not likely to have adverse effects on the integrity of European sites (referred to in this report as Habitats sites) either alone or in combination with other plans or projects. Main Modification to Policy S11 Cullompton during the Mid Devon Local Plan Review was found not to change the HRA findings that were reported as unlikely.

5.0 Cullompton Town Centre Masterplan HRA Screening

5.1 When taking into account the Mid Devon Local Plan Review 2013-2033 HRA screening, likely significant effects for the Cullompton Town Centre Masterplan on European Sites remain uncertain - relevant policies in the Adopted Mid Devon Local Plan being Policy S11 Cullompton, S1 sustainable development priorities, S2 amount and distribution of development, S6 employment, S7 town centres, S9 environment, DM1 high quality design, DM14 town centre development, DM15 development outside town centres, and DM25 development affecting heritage assets. The uncertainty remains even though the HRA for the Adopted Mid Devon Local Plan concluded that it is not likely to have adverse effects on the integrity of a European site (referred to in this report as a Habitat sites). This is also regardless that a number of policies in the Adopted Mid Devon Local Plan mitigate the potential impact of development at Cullompton; this because mitigation cannot be taken into account at the screening stage in-line with People Over Wind & Peter Sweetman v Coillte Teoranta C-323/17 Case. Whilst the Cullompton Town Centre Masterplan does not introduce new policies or proposals outside the scope of the Adopted Local Plan and

Cullompton town centre is located some distance from the nearest European sites, the Cullompton Town Centre Masterplan in-combination with other allocations identified in the Adopted Local Plan, in and around Cullompton, would result in fairly large-scale development which could affect European sites through increased pressure for recreation space and increased vehicle traffic with associated air quality. Non-physical disturbance from development (e.g. noise, vibration and light pollution) would not be expected as a result of development at Cullompton, due to the distance from European sites. However for the reason of potential impact identified through recreation pressure and air quality, in-line with the Local Plan Review HRA, it is not entirely possible to rule out with the possibility of some likely significant effects. Therefore an Appropriate Assessment has been undertaken as set out below.

6.0 Appropriate Assessment

6.1 The Adoption of the Mid Devon Local Plan 2013- 2033 has been subject to an HRA Appropriate Assessment and concluded that it will not have adverse effects on the integrity of European sites (Habitats sites), either alone or in-combination with other plans or projects.

6.2 The Cullompton Town Centre Masterplan does not introduce new policies or proposals outside the scope of the Adopted Mid Devon Local Plan 2013-2033. The Cullompton Town Centre Masterplan does not result in development itself but seeks to guide development in the masterplan study area. For the above reasons, the findings and results of the HRA for the Adopted Mid Devon Local Plan 2013-2033 are applicable for the Appropriate Assessment of the Cullompton Town Centre Masterplan .

Recreation Pressure

6.3 In considering the identified possible impact of increased pressure for recreation space, many of the European sites around Mid Devon are vulnerable to the effects of erosion/trampling from recreation (e.g. heathland habitats) and several sites include birds and other qualifying species that could be affected by disturbance, in particular the sites to the south of Mid Devon (Exe Estuary SPA and Ramsar Site, East Devon Pebblebed Heaths SAC and East Devon Heaths SPA).

6.4 However, the distance of most European sites around Mid Devon from the District, and in particular the locations that will be the main focus of development (Tiverton, Crediton and Cullompton) means that a significant increase in day-to-day visitor numbers at any of the European sites for activities such as dog walking is not considered likely.

6.5 While there may still be some increase in visits to sites such as Dartmoor SAC, South Dartmoor Woods SAC and the East Devon Heaths SAC which are known to be popular visitor destinations, there are a wide range of mitigation measures already in place. These include, for example, the Dartmoor National Park Management Plan and the South East Devon European Site Mitigation Strategy that should help to avoid adverse effects. In addition, policies within the Adopted Mid Devon Local Plan 2013-2033 will help to ensure that green infrastructure is included within development sites.

6.6 In October 2019 a HRA Addendum presented an assessment of the proposed Main Modifications raised by the Planning Inspector during the independent examination of the Mid Devon Local Plan (2013-2033). It concluded that the HRA for the Mid Devon Local Plan remain, that the Local Plan (taking into account the Proposed Main Modifications) was not likely to have adverse effects on the integrity of European sites (referred to in this report as Habitats sites), either alone or in-combination with other plans or projects. The Main Modifications included CU11 Cullompton of the Adopted Mid Devon Local Plan 2013-2033. The HRA addendum found that the proposed Main Modifications to Policy CU11 did not change the HRA findings.

6.7 Therefore, it is concluded that the Cullompton Town Centre Masterplan proposals, alone or in-combination with other plans and proposals will not have an adverse effect on the integrity of European sites as a result of increased recreation pressure.

Vehicle Traffic

6.8 Air pollution from traffic is most likely to affect European sites which have plant, soil and water habitats amongst their qualifying features but some qualifying animal species may also be directly affected, or indirectly affected by deterioration in habitat. Therefore, where European sites do not include species that are vulnerable to these impacts amongst their qualifying features, air pollution-related effects can be ruled out. The qualifying heathland habitats of the Culm Grassland SAC are known to be vulnerable to the effects of air pollution and due to its proximity to a strategic road (A361), it was identified in the HRA for the Adopted Mid Devon Local Plan 2013-2033 as having the potential to be affected by air pollution as a result of proposals in the Adopted Mid Devon Local Plan 2013-2033.

6.9 Nitrogen dioxides (NOx) are considered to be the key pollutants from traffic emissions. Deposition of nitrogen compounds may lead to both soil and freshwater acidification, and NOx can cause eutrophication of soils and water.

6.10 For the Culm Grasslands SAC, in considering the identified possible impact of increased vehicle traffic, the Adopted Local Plan 2013-2033 Appropriate Assessment included a transport model used to obtain traffic data for assessment year of 2033 i.e. the end of the Adopted Local Plan period, when all of the development in the Local Plan would likely to be completed and occupied, and the traffic impacts will be greatest. The Appropriate Assessment of air pollution effects on the Culm Grasslands SAC found that the combination of Local Plan allocations would increase NOx levels immediately adjacent to the A361, over the plan period. However, the effects would be very localised within the SAC. A negligible increase in nutrient nitrogen and acid nitrogen deposition would occur from the Adopted Mid Devon Local Plan 2013-2033, although critical loads for these are already being exceeded and will continue to do so in 2022, despite expected decreases in background concentrations. The most appropriate mitigation for the effects of air pollution at the Culm Grasslands SAC is to target agricultural sources of nitrogen (which is outside the remit of the Local Plan), although improvements to vehicle emissions nationally, and sustainable transport initiatives, for example those encouraged in the Adopted Local Plan, will also contribute to the mitigation of impacts on the SAC's qualifying features. It was concluded that the Adopted Mid Devon Local Plan 2013-2033 proposals would not have an adverse effect on the integrity of the Culm Grasslands SAC.

6.11 In October 2019 a HRA Addendum presented an assessment of the proposed Main Modifications to the Mid Devon Local Plan 2013-2033 raised by the Planning Inspector. It concluded that the HRA for the Mid Devon Local Plan remained, that the Adopted Mid Devon Local Plan 2013-2033 was not likely to have adverse effects on the integrity of European sites (referred to in this report as Habitats sites), either alone or in-combination with other plans or projects. These proposed Main Modifications include the proposed Main Modifications to the Adopted Mid Devon Local Plan 2013-2033 Policy S11 Cullompton, S1 sustainable development priorities, S2 amount and distribution of development, S6 employment, S7 town centres, S9 environment, DM1 high quality design, DM14 town centre development, DM15 development outside town centres and DM25 development affecting heritage assets. The HRA addendum found that the proposed Main Modifications to Policy CU11 did not change the HRA findings previously reported.

6.12 Therefore, it is concluded that the Cullompton Town Centre Masterplan proposals, alone or in-combination with other plans and proposals will not have an adverse effect on the integrity of European sites as a result of increased vehicle traffic.

Appropriate Assessment Conclusion

6.13 The Appropriate Assessment considered in detail the potential impact identified at the HRA screening stage i.e. recreation pressure and increased vehicle traffic. From these findings it is concluded that the Cullompton Town Centre Masterplan proposals, alone or in-combination with other plans and proposals will not have an adverse effect on the integrity of European sites.

7.0 Conclusion

7.1 This screening report has identified that the Cullompton Town Centre Masterplan is not likely to have significant adverse effects on the integrity of Habitats sites, either alone or in-combination with other plans or projects and further 'Appropriate Assessment' is not required.

8.0 Next steps

8.1 This screening opinion will be subject to consultation with the three designated consultation bodies – Historic England, Natural England, and the Environment Agency.

8.2 The screening opinion will be published alongside the Draft Cullompton Town Centre Masterplan at Stage 2 of the public consultation. It has previously been taken through Stage 1 public consultations as endorsed by the MDDC Statement of Community Involvement.

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Equality Impact Assessment (EqIA)

Appendix 8

Version 1.0 – 09/12/2022

Date of assessment	09/12/2022
Lead Officer	Christie McCombe
Department	Economic Development
Scope of Assessment	The Cullompton Town Centre Masterplan SPD and Delivery Plan will provide a clear strategy to ensure that Cullompton town centre meets its full potential as an attractive, thriving, vibrant place with a strong economic function, now and into the future.
Brief Outline of the Policy or Service	The MDDC Corporate Plan 2020-2024 sets out the District Council's ambition to support and drive forward sustainable and prosperous communities and economy over a period of time. The Cullompton Town Centre Masterplan SPD and Delivery Plan will provide a strategy for Cullompton town centre to support this ambition.
Main users / beneficiaries	The Cullompton Town Centre Masterplan SPD and Delivery Plan has been produced in accordance with the Council's Statement of Community Involvement and has been subject to two stages of public consultation. The users and beneficiaries of the document will be: • Residents of Cullompton; • Businesses of Cullompton; • Those who visit Cullompton for business or leisure from outside the town or District; • Town Council; District and County Council & associated delivery bodies.
Information about users, research or other evidence	The District Council has committed to the production of a Town Centre Masterplan SPD and Delivery Plan; agreeing a budget for the engagement of consultants in 2019 to undertake research and develop a draft masterplan for the town centre. The document will enhance the economic prospects of the town including its look and user experience. A consultant contract for Town Centre Masterplan SPD and Delivery Plan was awarded in July 2019. Consultants were engaged and work commenced on the Draft Masterplan SPD and Delivery Plan in 2019. The draft Masterplan SPD has been produced in the context of strategic projects planned in and around Cullompton including the NW Urban Extension, the

	proposed Culm Garden Village, the Cullompton Relief Road, Cullompton Railway Station, Heritage Action Zone project and updated Conservation Area Assessment and Management Plan. Also within the Policy Context of the (now) Adopted Mid Devon Local Plan 2013-2033; the (now) Adopted Cullompton Neighbourhood Plan, the Mid Devon Climate Emergency Declaration, national and local census and market statistics. Multiple meetings have been held with Cullompton Town Council, stakeholders, the District and County Council to discuss the town; its constraints and opportunities as a means to scope the content of the Draft Masterplan SPD. A stage I public consultation was undertaken during 2020 and a Stage II public consultation during 2021. The Draft Masterplan SPD was presented to PPAG during November 2021.
Stakeholder involvement and consultation	Multiple meetings have been held with Cullompton Town Council, stakeholders (including local residents and businesses), the District and County Council. Feedback from consultation events have been taken into consideration when making any changes to the masterplan document.
Equality Issues identified	The masterplan should not see any one group or individual treated less favourably. As a public sector organisation we uphold the best interests of the community including all policies and legislations regarding equality and diversity. All Officers and consultants involved in its production are required to work to company codes of conduct. They will be methodical and inclusive in their approach to all actions from initiation to adoption of the Masterplan SPD and Delivery Plan. The outcomes of the Masterplan SPD and Delivery Plan will not adversely affect any vulnerable users and will not create a negative impact on any protected group.
	Impact on Protected Groups
Age	All the public consultation has been undertaken to allow accessibility for all. This has included on-line and in-person consultation events with opportunity to submit comments electronically, by paper or in discussion with an MDDC Officer. All public consultation venues have been accessible to any age group. The District Council has welcomed and embraced positive consultation engagements throughout the production of the Masterplan SPD and Delivery Plan process. The Masterplan SPD and Delivery Plan seeks to deliver positive impacts for all protected groups through the enhancement of the look, user experience, vitality and vibrancy of the town centre providing an enhanced business community and leisure experience in Cullompton.
Disability	The Masterplan SPD and Delivery Plan will not result in a negative impact on any individual due to disability. Enhancement of the public realm, business and leisure experience in the town centre will provide an improved user experience.
Gender	The Masterplan SPD and Delivery Plan will not result in a negative impact on any individual due to gender. The Masterplan SPD and Delivery plan is not focused towards any one user group; instead seeking to deliver an enhanced town centre for all.
Marital status, family circumstances or caring responsibilities	The Masterplan SPD and Delivery Plan will not result in a negative impact on any individual due to marital status, family or caring circumstances or responsibilities. The Masterplan SPD and Delivery plan is not focused towards any one user group; instead seeking to deliver an enhanced town centre for all.
Race / Ethnicity	The Masterplan SPD and Delivery Plan will not result in a negative impact on any individual due to race or ethnicity. The Masterplan SPD and Delivery plan is not

	focused towards any one user group; instead seeking to deliver an enhanced town centre for all.	
Religion / Belief	The Masterplan SPD and Delivery Plan will not result in a negative impact on any individual due to religion or belief. The Masterplan SPD and Delivery plan is not focused towards any one user group; instead seeking to deliver an enhanced town centre for all.	
Sexual Orientation	The Masterplan SPD and Delivery Plan will not result in a negative impact on any individual due to sexual orientation. The Masterplan SPD and Delivery plan is not focused towards any one user group; instead seeking to deliver an enhanced town centre for all.	
Other	N/A	
Issues and Recommendations	**Issue**	**Recommendations**
	Poor accessibility around the town & with the proposed re-opening of the Railway Station.	**Enhanced pedestrian / cycle ways including along Station Road, the CCA Fields, Alexandria Industrial Estate, The Tannery Site, the Iron Bridge leat crossing and enhanced public realm including Higher Bull Ring & Fore Street.**
	Air Quality	**Delivery of the Cullompton Relief Road facilitating the enhancement of Fore street.**
	Poor number of town centre uses, services and facilities	**Enhancement of the historic environment and buildings including the public realm, the provision of grants through the Historic Action Zone to revitalise the town centre for employment & leisure uses & activities.**
	Climate Change	**Enhanced biodiversity (pocket parks), sustainable modes of transport and carbon neutral means of construction.**
Overall Recommendation	This assessment has indicated that the Cullompton Town Centre Masterplan SPD and Delivery Plan will have a minimal impact on protected user groups. An alteration to the masterplan is not proposed as recommendations are identified and included within the Draft Masterplan SPD and Delivery Plan to provide mitigation where issues are arising. There will be no significant alteration to the Draft Masterplan SPD as a result of this EqIA. Should any negative impacts appear during the course of Adopting the Masterplan SPD and Delivery Plan the District Council will reduce or remove the impact where possible. The Masterplan SPD & Delivery Plan is being produced to enhance & maintain Cullompton as a viable and vibrant market town.	
Approved by	Signed off by service manager or head of service	
Approval date		

Action Plan	Based on your recommendations, what actions need to be taken as a result of the EqIA to mitigate the negative effects on different groups as a result of the proposal? Fill in the Action Plan overleaf identifying the lead officer, milestones and completion dates.

Review	The Delivery Plan will be updated to ensure strategies and key projects are progressing, that targets are being achieved and to ensure plans and priorities

	remain relevant. This provides opportunity to monitor and review their impact on protected user groups.
Review Date	This EqIA will be reviewed concurrently with the Delivery Plan.

Equality Impact Assessment Action Plan						
Issues identified and groups affected	Actions to be taken	Timescales of actions	Who is responsible for delivery	Intended outcomes	Performance measures	Reference to service or other plans

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Agenda Item

CABINET
7th February 2023

TIVERTON TOWN CENTRE MASTERPLAN SUPPLEMENTARY PLANNING DOCUMENT AND DELIVERY PLAN

Cabinet Member	**Cllr R Chesterton, Cabinet Member for Planning and Economic Regeneration.**
Responsible Officer	**Mr R Marsh, Director of Place.**

Reason for the Report: Members will be aware that this authority has previously undertaken work with regard to regeneration and investment masterplanning for Tiverton town centre. This report seeks to provide an update to Members with recommendations in association with work being undertaken by the Coastal and Market Towns Initiative, Shared Prosperity Fund and Rural England Prosperity Fund.

RECOMMENDATION:

1. **That the report is noted;**
2. **That Members recommend to Cabinet:**
   i) A budget of up to £60k is set aside from the Brown Field Register Fund (up to £35k) and Custom and Self Build Burdens Fund (up to £25k) for the completion of the Draft Masterplan SPD and accompanying Delivery Plan;
   ii) That Officer's commence the process to engage consultants to complete the Tiverton Town Centre Masterplan SPD and Delivery Plan process including commissioning assessments as required; and that
   iii) The timetable for the adoption of the Tiverton Town Centre Masterplan and Delivery Plan be agreed.

Financial Implications: On 2nd April 2015, Cabinet resolved to approve the appointment of consultants to complete a Tiverton Town Centre Masterplan and Investment Programme, with a suggested budget of £40,000.

The Draft Tiverton Town Centre Masterplan SPD and Delivery Plan (Draft Masterplan SPD) was accordingly progressed with completion of a Stage 1 Public Consultation.

In April 2022 the Government launched the UK Shared Prosperity Fund (SPF) to reduce inequalities and support economic development and community cohesion. Mid Devon was allocated £1,064,159 of funding over a three year period. In September 2022 the Government launched the Rural England Prosperity Fund (REPF) to build on and complement the SPF. Mid Devon was allocated £817,672 through the REPF to support capital projects for small businesses and community infrastructure over a two year period. (April 2023 – Mar 2025). The definition of 'rural' in the REPF allows funding to be applied across the whole district; including within the town centre of Tiverton.

In the Autumn of 2021, Tiverton was identified as a town that would benefit from support in its future growth through the Coastal and Market Towns Initiative (The Urban Renewal Programme). This Urban Renewal Programme is able to provide funds towards strategic and 'quick-win' projects. The Draft Masterplan SPD cannot be funded through the Urban Renewal Programme but a strategic and/or small number of quick-win projects can be.

Any amends required to the Draft Masterplan SPD, arising as a result of the SPF, the REPF, the Urban Renewal Programme or other inputs, will need to be managed and financed through the existing budget allocated for the completion of the Draft Masterplan SPD. Amends to the Draft Masterplan SPD are expected to include any strategic and quick win

projects, associated text, graphical and formatting updates. These to have been informed by assessments commissioned as a result of the projects emerging through the Draft Masterplan SPD (e.g transport, viability).

The financial implications in the delivery of the regeneration projects identified within the Draft Masterplan SPD will need further consideration in light of service budget and whether they can be managed and delivered in house or will require further work to be commissioned externally. Once particular projects are developed these will be subject to financial costings and to Cabinet consideration and approval. Funding for these projects is likely to involve a range of public and private sector investment.

No other financial implications are anticipated at this time.

Budget and Policy Framework:
The purpose of the Draft Masterplan SPD is to have schemes identified to support the regeneration and future development of Tiverton town centre. With the support of a Delivery Plan that will sit alongside the masterplan and, in time, a business case for each of the Masterplan schemes, this will ensure each scheme will be in a state of readiness for future external funding opportunities as and when they occur. However, this report relates to strategy formulation which is currently budgeted for. No other budgetary implications are anticipated at this time.

The Policy Framework consists of both statutory documents that have to be adopted or approved by the Council, as well as locally determined policies and strategies that form an integral part of the decision making process. Once adopted, the Tiverton Town Centre Masterplan and Delivery Plan would have Supplementary Planning Document (SPD) status and be a material consideration for planning decision making purposes. No direct impacts on the policy framework are anticipated at this time.

Legal Implications: The process for preparing and adopting the Draft Masterplan SPD will need to comply with the Town and Country Planning (Local Planning) (England) Regulations 2012 and the Council's Statement of Community Involvement. Whilst the Draft Masterplan SPD will not form part of the Development Plan, it will be a material consideration in the determination of planning applications relating to the town centre.

The Delivery Plan will include a target set of key milestones / completion dates. These will be kept under review and will be reported back to Members as appropriate, dependent upon the project.

There are no legal implications arising from this information report.

Risk Assessment: Failure to support the regeneration of Tiverton town centre would in itself lead to deterioration in commercial activity, a less vibrant centre, less coordinated development and uncertainty over essential infrastructure; this being recognised by the SPF, the REPF and the Urban Renewal Programme. The Draft Masterplan SPD will be focused on mitigating risk to aid regeneration.
Previous work commissioned by Devon County Council (DCC) and undertaken by Hardisty Jones Associates has previously identified Tiverton as the 8th most vulnerable town (on a combined vulnerability matrix) within the County. Intervention to support the continued economic prosperity of the town is therefore necessary.

As projects arising from the Draft Masterplan SPD are developed an assessment of risk will be undertaken as part of project development.

Equality Impact Assessment: Equality issues continue to be considered as part of the ongoing preparation of the Draft Masterplan SPD. An equality impact assessment will be made available at the time of consultation.

Relationship to Corporate Plan: The Draft Masterplan SPD will provide guidance on the planning and delivery of development within Tiverton town centre. It will contribute towards the delivery of the 4 key priorities that relate directly to the Corporate Plan 2020-24 including housing delivery, caring for the environment, supporting a thriving economy and local communities.

Impact on Climate Change: The Draft Masterplan SPD and projects therein will provide a valuable opportunity to put the Council's commitment to the Climate Change declaration at the heart of recovery and investment plans. Opportunities exist to encourage sustainable travel options, exploration of low carbon construction and tree planting. On a more fundamental level revitalising Tiverton town centre and encouraging local residents to 'buy local' and undertake trips by more sustainable means including walking and cycling will assist in reducing the area's carbon emissions.

1.0 BACKGROUND

1.1 Work on the Draft Masterplan SPD commenced in 2017. The intention of the masterplan was to set a basis for enhancing the economic prospects of the town including the look and environment of the town centre. Its scope was broader than a purely spatial plan; to include wider issues such as the role and function of the town centre, Tiverton's identity and its unique selling points.

1.2 Initial public consultation on the Draft Masterplan SPD was carried out between 30th April and 10th June 2018. Its purpose was to inform the scope of the contents of the masterplan and shape the draft document for future consultation. The material included a number of suggestions for key town wide initiatives and options for development. A summary of consultation feedback was presented to Cabinet on the 22nd November 2018 including the emerging themes from the public consultation.

1.3 The results of the initial public consultation then proceeded to inform the developing Draft Masterplan SPD and quick-win proposals including the Pannier Market / Fore Street proposal which was paused following concerns raised by Tiverton Town Council in recognition that the opportunities in this location could receive further consideration through the wider masterplanning process.

1.4 An update report was presented to Cabinet on the 6th August 2020 setting out the process to develop a long term town centre plan which would include a range of outputs including prioritisation of strategic interventions and also, crucially, short term interventions that could make a meaningful and lasting contribution towards town centre regeneration. This was followed by a presentation to Members at Informal Cabinet on the 22nd December 2020 with a broad description and outline of key intervention sites (that had an emphasis towards Mid Devon District Council assets) including a prioritised action and delivery plan for each site. The same list of projects was then presented at a Ward Member Briefing on the 8th January 2021, a Town Council Briefing on the 13th January 2021 and a Tiverton Town Centre Partnership meeting on the 27th January 2021. The summary of key findings (Table 1) and summary update of key projects for inclusion in the Draft Masterplan SPD (including some new and amended projects, Table 2) was presented at Cabinet on 13th May 2021.

2.0 INTRODUCTION

2.1 Since the masterplanning work commenced there have been a number of changes on the ground including the construction and opening of the Premier Inn, the refurbishment of the multi storey car park, an overhaul of the pedestrian signage (soon to be installed), as well as strategic commitments through the Adopted Mid Devon Local Plan 2013-2030 and climate change declaration that will put climate issues at the heart of the town centre's role, function and regeneration. Furthermore Tiverton, as with all towns, has been affected by the pandemic and there is a need to be mindful of this in the development of future plans.

2.2 Town centre regeneration has arguably never had more significance. In response to this a number of funding opportunities have been made available through various funding programmes.

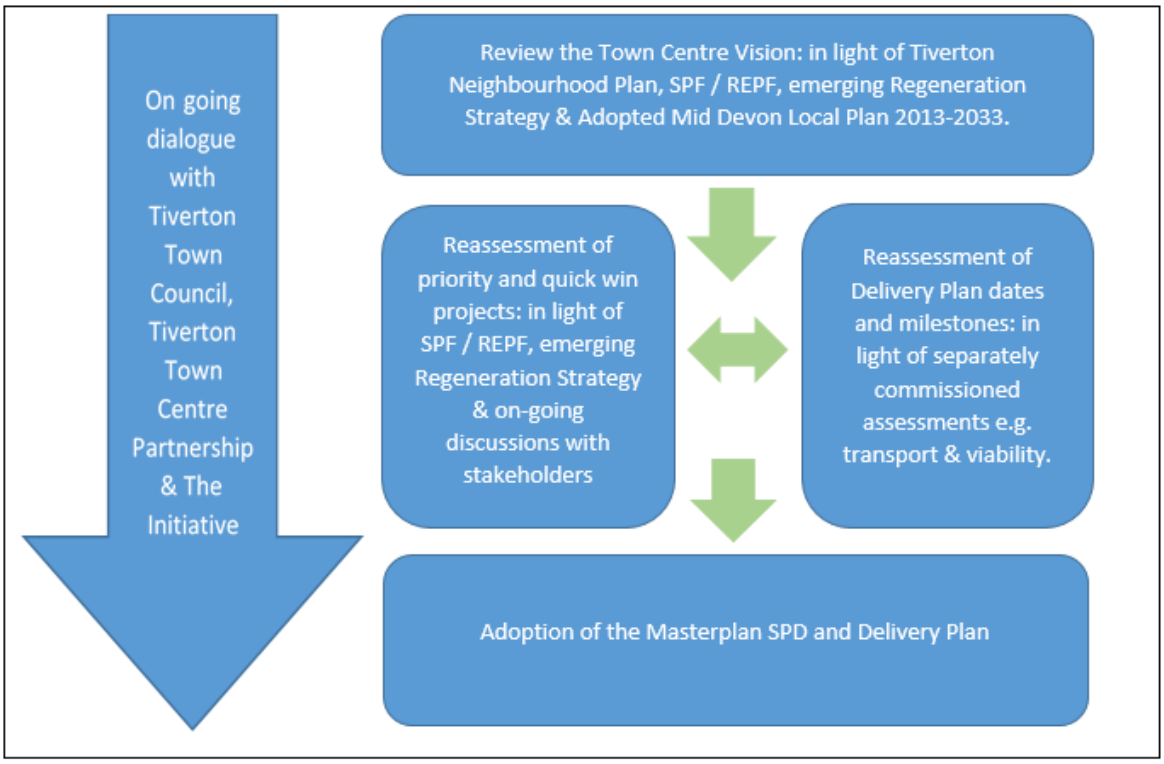
2.3 Mid Devon has been awarded £1,064,159 over a three year period under the SPF. This is to support economic development and community cohesion, subject to the approval of a locally agreed Investment Plan. The SPF will be the main funding mechanism for local economic interventions over the next three years, with the SPF Investment Plan identifying project priorities. In addition to this Mid Devon has been allocated £817,672 through the REPF to support small business and community infrastructure capital projects over a two year period (April 2023 – Mar 2025). Together they will form the strategic framework for local investment (See Economy PDG Report, 10th November 2022).

2.4 In addition to the SPF and REPF is the Urban Renewal Programme; a programme of funding secured by Devon County Council and introduced previously at Economy PDG. Tiverton has been identified as a town that would benefit from its support. The Urban Renewal Programme recognises that good practice in town centre regeneration is driven by a strong local governance structure made up of local stakeholders (local businesses, education providers, the District and County Authorities) to deliver change through a locally formulated and widely owned vision for the town.

2.5 An advisory group (including 2 MDDC Councillors) relating to Tiverton was established in 2022 in order to consider matters relating to the town – including how to support the continued economic prosperity and growth of the town whilst also addressing existing structural economic challenges. From the work, potential 'quick win' opportunities were identified which would allow the Town Council the opportunity to deliver initiatives to support the town centre in the short term, whilst medium and long term issues were identified which are to be logically considered and progressed through the masterplanning work which is the subject of this report.

2.6 The Masterplan SPD will build upon the issues identified in the Coastal and Market towns work by identifying a wider range of strategic and quick-win projects that will be developed into a state of readiness within the Masterplan SPD and Delivery Plan, so that future funding opportunities can be seized, as and when they arise. In so doing, the Masterplan SPD will also be required to build upon the SPF and REPF Investment Plan and inform and support the specific projects which are to be progressed and delivered.

2.7 A brief summary of the actions to update the Draft Masterplan SPD are set out below:



3 Draft Tiverton Town Centre Masterplan SPD and Delivery Plan.

3.1 The Officer report to Cabinet on 6th August 2020 provides detail about the role of the Draft Masterplan SPD, the form that it should take and work required. The details in that report continue to remain relevant including:

- the suite documents required:
  a) Tiverton Town Centre Regeneration Masterplan SPD;
  b) Tiverton Town Centre Regeneration Delivery plan (including priority actions);
  c) Public Realm Strategy and Facilities Plan;
  d) Concept plans for proposed development sites;
  e) High level viability for each proposed development site;
  f) Regeneration and Vitality Strategy;
  g) Branding and Marketing; and
  h) Tiverton Town multimodal and movement study.
- A review of the town centre vision to ensure climate change and other regeneration aspects are adequately reflected;
- The emerging key themes and any updates or additions as required;
- The geographical area; and
- Prioritisation and identification of quick win projects.

3.2 Future reporting of this work will formally be through the Planning Policy Advisory Group and Cabinet with regular updates being provided to the Economy Policy Development Group throughout the coming months.

3.3 Below is an indication of work required for the completion of the Draft Masterplan SPD and Delivery Plan comprising a list of projects, including those arising through the SPF, REPF and the Urban Renewal Programme. Also, critically, an indication of key milestones for its adoption.

Review of the Town Centre Vision

3.4 Visioning took place as part of the first stage of the masterplanning work. The Adopted Neighbourhood Plan has since set out a comprehensive vision and set of objectives for the town. The objectives are strongly focused towards physical issues (characteristic of a Neighbourhood Plan) with less emphasis on learning and skills, business incubation, innovation and growth or the visitor economy. A review of the Draft Masterplan SPD vision is required to reflect the Neighbourhood Plan, SPF, Urban Renewal Regeneration Strategy and more general economic events and updates.

Project Updates and Additions

3.5 The Cabinet Report of 2020 set out the emerging themes for inclusion in the Draft Masterplan SPD. Projects arising from those themes will form the structure of the Delivery Plan. The priority projects are those that will directly contribute to meeting the objectives of the SPF / REPF and Urban Renewal Regeneration Strategy and in supporting the Neighbourhood plan. They will lead directly to strategic economic benefits including the regeneration of land and buildings for the delivery of new and safeguarded economic activity, jobs and public realm. Quick win projects are not those that are strategically important across the wider area; they will be unique to Tiverton to support its vitality. Both however, will align with the principles of the Draft Masterplan SPD.

3.6 The geographic area for the town centre masterplan has been given full consideration previously and there is no intention to make changes at this point in time. Prioritisation of projects within that geographic area will be informed by a number of issues including the extent of Council land ownership, third party land owner willingness to deliver development and / or land assembly. Quick win projects need to consider the longevity of their benefits.

3.7 All priority and quick win projects will be developed closely between Officers, Cabinet and Ward Members, with input from the Town Council, the Tiverton Town Centre Partnership Group and other stakeholders. This will involve both informal discussions with partner organisations as well as formal opportunities to respond as part of the consultation on the Draft Masterplan SPD.

3.8 A summary update of key projects for inclusion in the Draft Masterplan SPD, including projects identified through the SPF / REPF and the Urban Renewal Programme are set out in **Appendix 1.**

Engagement of Consultants

3.9 Amends will be required to the Draft Masterplan SPD and Delivery Plan to reflect the SPF, the REPF, the Urban Renewal programme or other inputs. It is expected that this will result in text, graphical and formatting updates. Importantly, it is expected that the projects arising through the Draft Masterplan SPD will need to be informed by independently commissioned assessments. These will include, for example, transport and viability assessments. It will ensure that projects arising are in a state of readiness to seize funding opportunities as they arise.

Delivery Plan

3.10 The Delivery Plan will sit alongside the Draft Masterplan SPD as an addendum. It will list the priority and quick win projects with a set of key milestones and completion dates. These will be kept under review and will be reported back to Members on an annual basis.

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3.11 In appraising the Delivery Plan ongoing engagement with private land owners to better understand the extent of their ambitions will also be undertaken; this with the aim to achieve a comprehensive and meaningful regeneration of Tiverton town centre.

3.12 A provisional timetable for the next stages in the production of the masterplan is set out as follows:

Action	**Date**
Landowner meetings (private sites)	On-going
Review of MDDC assets inc. consultation with Informal Cabinet	Feb 2023 / March 2023
Engage Consultants	March / April 2023
Finalisation of draft masterplan inc. assessment as required	June / July 2023
Committee Approval (for Stage 2 consultation)	Summer 2023
Stage 2 Public Consultation	Autumn 2023
Adoption	Winter 2023

4.0 Economy Policy Development Group (Economy PDG)

4.1 The Economy PDG considered this report at the meeting on 12th January 2023. Members of Economy PDG discussed the following:

- Current assets within the district such as Palmerston Woods;
- Attention needing to be paid to the current list of projects such as Market Walk; &
- A hope that the masterplanning exercise would be complete by the end of 2023 as stated within the timescale of the presentation.

Economy PDG supported the recommendations as set out in this report.

4.0 Conclusion

4.1 It is envisaged that the Draft Masterplan SPD will be available for consideration at the Cabinet's meeting in June / July 2023. This will be following the engagement of consultants, a full and detailed review of the Draft Masterplan SPD including specialist assessments as required to ensure that the projects identified within it are worked up into a state of readiness should funding opportunities become available. The Draft Masterplan SPD will progress through a Stage 2 public consultation for adoption towards the end of 2023. In parallel with this work stream, Officers seek authority to identify and undertake informal discussions with private landowners to understand their aspirations and willingness to identify sites, not in Council ownership, within the Draft Masterplan SPD. Future reporting of this work will formally be through the Planning Policy Advisory Group and Cabinet with regular updates being provided to the Economy Policy Development Group throughout the coming months.

Contact for more information	Christie McCombe, Area Planning Officer cmccombe@middevon.gov.uk
Background Papers	Cabinet: 2nd April 2015; 28th September 2017, 8th March 2018, 22nd November 2018; 6th August 2020; 13th May 2021.

	Economy PDG: 10th Nov 2022; 12th Jan 2023.
Circulation of the Report	Councillor Richard Chesterton Cabinet Member for Planning & Regeneration; Leadership Team

Appendix 1: Summary Update of Key Projects for Inclusion in the Draft Masterplan SPD.

Town Centre Environment and Vitality

Timescale: S/T: 0- 12 months; M/T: 1-3 years; L/T: 3+ years

Project Description	Lead Stakeholder(s)	Potential benefit	Strategic (S) or Quick Win (QW) Project?	Potential Source of Funding	Timescale
Phoenix Lane Redevelopment Inc Link to Pannier Market, Memorial Garden / Bus Station / Becks Square / Multi Storey Car Park.	MDDC DCC Land owner(s)	Redevelopment & regeneration of under-used land & buildings to include delivery of town centre living accommodation. Enhanced sense of arrival to the town. Enhanced economic activity, vitality & viability. Encourage better use & footfall in the town centre reducing the need to travel. Creation of outdoor events space. Enhanced public realm. Enhanced visibility / connectivity with the Pannier Market. Opportunity for phased delivery.	S	Public (funding bid) Private	M/T
Cinema	Land owner(s) MDDC	Regeneration for enhanced economic activity	S	Private Public (funding bid)	M/T

		Enhanced vitality & viability in the town centre. Encourage better use & footfall in the town centre reducing the need to travel.			
West Exe South Car Park	MDDC TTC	Regeneration for enhanced economic activity &/or enhanced vitality & viability. Regeneration of under-used land & buildings. Enhanced streetscape. Enhanced frontage on the riverside. Opportunity for phased delivery	S	Public (funding bid)	S/T
Riverside Circular Route (West Exe – Palmerstone Park Woods - West Exe South Car Park	MDDC Landowners	Extended Tiverton town trial. Enhanced pedestrian links. Visitor attraction. Enhancement of the flood defences. Opportunity for improved lighting. Health & wellbeing benefits. Opportunity for phased delivery.	QW	Public (funding bid)	M/T
Market Walk	MDDC	Redevelopment & regeneration of under-used land & buildings. Enhanced economic activity, vitality & viability. Encourage better use & footfall in the town centre reducing the need to travel. Supports Neighbourhood Plan for a dementia friendly town centre. Enhanced public realm.	S	Public (funding bid)	M/T

		Opportunity for phased delivery.			
Pannier Market	MDDC	Regeneration of under-used buildings (inc Pig Pens & units). Enhanced economic activity benefitting vitality & footfall reducing the need to travel. Integration of uses in the wider Pannier Market / Market Walk area.	QW	Public (funding bid)	S/T – M/T
Town centre signage	MDDC DCC	Enhanced public realm. Supports health & wellbeing. Enhanced legibility. Supports the visitor economy.	QW	S106 contributions.	S/T
Town centre seating	TTC MDDC DCC	Enhanced public realm. Supports health & wellbeing. Enhanced legibility. Supports the visitor economy.	QW	S106 contributions.	S/T
Town centre pocket park / greening	TTC MDDC DCC	Enhanced public realm. Supports declaration on climate crisis. Supports health & wellbeing. Enhanced legibility. Enhanced town centre biodiversity.	QW	Public (funding bid). S106 contributions.	S/T – M/T
River Exe Hydro Project	MDDC Landowner(s) Environment Agency	Renewable energy generation. Reduced carbon emissions. Supports ambitions to be carbon neutral by 2025. Potential for enhanced use & activity on the River frontage.	S	Public (funding bid)	M/T

Pop up tenants & events in empty commercial units	TTC Town Centre Manager	Brings empty units into use. Improves vitality and footfall in the town centre reducing the need to travel. Supports new starter businesses.	QW	Coastal and Market Towns Initiative.	ST
Town Centre Tourist trail	TTC Town Centre Manager	Potential for enhanced use & activity in lesser visited areas. Supports health & wellbeing. Enhanced public realm. Supports the visitor economy. Enhanced economic activity. Supports active travel.	QW	Coastal and Market Towns Initiative if economic benefits can be confirmed. Public (funding bid) S106 contributions.	ST
Shop front Enhancement scheme	MDDC	Improves public realm. Enhances vitality and footfall in the town centre reducing the need to travel. Supports a conservation area at risk. Supports the visitor economy. Supports a town centre USP	QW	Public. SPF – Love your town centre.	S/T on-going
Town Centre events	Town centre Manager Market Manager MDDC TTC	Engages with local residents to use the town centre. Enhances sense of pride in place. Supports the visitor economy. Enhanced economic activity. Potential for enhanced use & activity in lesser visited areas.	S	Public (funding bid)	S/T on-going

Employment, Education and Training

Project Description	Lead Stakeholder(s)	Potential benefit	Strategic (S) or Quick Win (QW) Project?	Potential Source of Funding	Timescale
Tiverton High School & TCAT	DCC Tiverton High School TCAT MDDC	Enhancing the educational experience to support life-long learning. Civic pride & focal point to the local community. Redevelopment &/or regeneration of under-used buildings.	S	Public S106 contributions	M/T
Innovation centre (Facilitated support provided on-site e.g training, mentoring: developing ideas and concepts of business models & products, access to advanced technologies e.g printers). *	Petroc / MDDC Landowner(s) TTC	Greater knowledge sharing between individuals & local businesses. Raised awareness within the local employment market of local employment opportunities. Redevelopment &/or regeneration of under-used buildings. Increased employment opportunities in the town centre reducing the need to travel. Enhanced economic activity, vitality & viability.	S	Community Renewal Funding. SPF.	M/T
Incubator or Co-operative Work Space (Flexible work space for the juvenile businesses – providing a level of	Petroc / MDDC TTC	Greater knowledge sharing. Raised awareness of local employment opportunities. Redevelopment &/or regeneration of under-used buildings.	S	SPF.	M/T

support for those businesses between start-up & becoming established). *		Increased employment opportunities reducing the need to travel. Enhanced economic activity, vitality & viability.			
Work Hub (flexible work space in town centre)*	MDDC Town centre manager Petroc Landowner(s) Local businesses	Greater knowledge sharing between individuals & local businesses. Raised awareness within the local employment market of local employment opportunities. Redevelopment &/or regeneration of under-used buildings. Increased employment opportunities in the town centre. Enhanced economic activity, vitality & viability.	S	SPF.	M/T
Promotion of local adult learning including amongst local residents	Petroc Local business sector?	Increased skills to support access to local jobs opportunities. Supports retention of local businesses. Skilled workforce = enhanced spending opportunities = enhanced economic activity in the town centre.	S	SPF.	M/T
Adult learning pop-up events	Town centre manager Petroc Landowner(s) Local businesses TTC	Increased skills to support access to local jobs opportunities. Supports retention of local businesses. Skilled workforce = enhanced spending opportunities = enhanced	QW	SPF.	M/T

		economic activity in the town centre.			

*Note. 3 projects identified yet each intertwined. Each is seeking to support and nurture business development from infancy (Innovation centre) to adolescence (incubator / co-operative work space) to maturity (work hub).

Travel, Accessibility and Transport

Project Description	Lead Stakeholder(s)	Potential benefit	Strategic (S) or Quick Win (QW) Project?	Potential Source of Funding	Timescale
Phoenix Lane Mobility Hub inc car clubs, e.bike and e.scooter hire, electric shuttle buses.	MDDC DCC TTC Town centre manager	Reduced carbon emissions. Supports ambitions to be carbon neutral by 2025. Enhanced active travel. Supports health & wellbeing. Enhanced connectivity inc between TIV PW Station & town centre. Supports the visitor economy.	S	?	S/T – L/T
Pedestrian / cycle route(s) & facilities. inc new & improved routes, lock ups & e-charging.	MDDC DCC TTC Land owner(s)	Supports declaration on climate crisis. Supports health & wellbeing. Enhanced public realm. Supports the visitor economy. Enhanced economic activity benefitting vitality & reducing the need to travel by car.	QW	Public (funding bid) S106 contributions	S/T-M/T
Pedestrianisation of Fore Street during specific periods of the day	MDDC DCC	Enhanced public realm. Enhanced economic activity benefitting vitality & reducing the need to travel by car. Supports the visitor economy. Supports declaration on climate crisis.	S	Public (funding bid) S106 contributions. C&MT Initiative. SPF?	M/T

Housing and Accommodation

Project Description	Lead Stakeholder(s)	Potential benefit	Strategic (S) or Quick Win (QW) Project?	Potential Source of Funding	Timescale
Use of upper floors for residential use.	MDDC Landowner(s)	Redevelopment & regeneration of under-used land & buildings. Supports a conservation area at risk. Enhanced economic activity, vitality & viability. Increased supply of housing reducing the need for green field sites.	S	Public (funding bid). Landowner(s)	M/T

Communication

Project Description	Lead Stakeholder(s)	Potential benefit	Strategic (S) or Quick Win (QW) Project?	Potential Source of Funding	Timescale
Town centre app.	TTC Town Centre Manager	Improved knowledge of local events, history, community, sense of pride in place. Supports local businesses & visitor attractions. Enhanced economic activity, vitality & viability.	QW	Public (funding bid). C&MT initiative. SPF.	S/T
Town Centre brand	TTC Town Centre Manager MDDC	Opportunity to promote Tiverton with a USP. Supports local businesses & visitor attractions. Enhanced economic activity, vitality & viability.	QW	Public (funding bid). C&MT initiative. SPF.	M/T
Town Centre Web Site	Town Centre Manager MDDC	Opportunity to promote Tiverton with a USP. Supports local businesses & visitor attractions. Enhanced economic activity, vitality & viability.	QW	Public (funding bid). C&MT initiative.	M/T

CABINET **AGENDA ITEM**
7 FEBRUARY 2022

EAST CULLOMPTON MASTERPLAN SPD

Cabinet Member Cllr Richard Chesterton
Responsible Officer Richard Marsh, Director of Place

Reason for Report: To inform members of the outcome of the public consultation and to consider the draft masterplan that has subsequently been produced taking these comments into account, and to seek a recommendation to Council to adopt the revised East Masterplan Supplementary Planning Document (SPD).

RECOMMENDATION:

1. **That Members note the comments received at the Stage 2 public consultation (Appendix 1) and proposed changes set out in Appendix 2.**

2. **That the Cabinet recommend to Council that the Masterplan Supplementary Planning Document for East Cullompton (Appendix 3), which incorporates changes made following the Stage 2 public consultation, be adopted.**

3. **That delegated authority be given to the Director of Place to amend and finalise the document to reflect any agreed changes following Planning Policy Advisory Group and Cabinet meetings.**

Financial Implications: The consultant contract was awarded following a procurement process. The cost of the contract is funded through Homes England capacity funding. There will be no financial implications arising from adoption of the document as it adds detail to existing planning policies only.

Budget and Policy Framework: The budget for the production of the SPD utilises Homes England capacity funding (see Financial Implications).

The Mid Devon Local Plan 2013-2033 requires strategic allocations to have an adopted Masterplan SPD in place before planning permission can be granted. Once adopted, the revised and updated Masterplan would have Supplementary Planning Document status and will be a material consideration for planning decision making purposes in relation to the East Cullompton allocation.

Legal Implications: The process for preparing and adopting the draft Masterplan SPD is in compliance with the Town and Country Planning (Local Planning) (England) Regulations 2012 and the Council's Statement of Community Involvement.

Risk Assessment: Policy sets out that masterplanning should take place before applications are submitted. Delay in adoption of the Masterplan SPD could in turn delay the delivery of housing on the site as well as affect the confidence of land owners to promote their land. Adoption of the masterplan will provide greater planning certainty and assist the site coming forward for delivery.

If the Masterplan SPD is not adopted, the Council may become vulnerable to planning applications being submitted which do not accord with the Council's aspirations for the East Cullompton and could lead to uncoordinated development which would not meet the Council's quality aspirations.

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

Impact on Climate Change: The draft Masterplan SPD has regard to climate change within the confines of adopted planning policy. A Supplementary Planning Document cannot introduce new policies, or expand on existing adopted policy, but the SPD does expect developers to follow the guidance set out within the document when assessing the carbon impacts of their proposals.

Relationship to Corporate Plan: The draft Masterplan SPD will provide guidance on the planning and delivery of a strategic site for Mid Devon. The draft Masterplan SPD directly relates to all four Corporate Plan 2020-24 priorities: Homes, Environment, Economy and Community.

1.0 INTRODUCTION

1.1 A draft Masterplan SPD for East Cullompton was approved for consultation at the 9 August 2022 Cabinet meeting and public consultation took place between 21 September and 1 November 2022. The consultation included 6 staffed events at Cullompton Farmers' Market, The Walronds, Cullompton, Cullompton Tesco, Kentisbeare Village Hall (x 2) and Willand Village Hall. There were also display boards at The Hayridge, Cullompton and Kentisbeare Village Hall, and a dedicated consultation website. The consultation was advertised by letter, press release, posters and on social media.

2.0 CONSULTATION RESPONSES

2.1 There were 6,928 website visits during the consultation period, most directed from a search engine, the Culm Garden Village website, Facebook or QR codes.

2.2 A total of 207 people attended the staffed events.

2.3 A total of 52 people commented via the consultation website. In addition, 20 emailed public responses and 2 completed paper questionnaires were received, as well as 7 responses from landowners/promoters.

2.4 Consultation responses were also received from Cullompton Town Council, Kentisbeare Parish Council and Bradninch Town Council, Devon County Council, Historic England, Network Rail, Lead Local Flood Authority, Natural England, National Grid, National Highways, Sport England, Environment Agency and Blackdown Hills AONB.

2.5 Details of all responses received are included in **Appendix 1**.

2.6 Some of the responses related to issues that are outside of the scope of the SPD, the focus of which is to add detail to existing Local Plan policies. These

responses included comments on the wider garden village proposals that will be subject to consideration in the Council's emerging Local Plan, and changes to the triggers for infrastructure delivery that are either set out in Local Plan policies, or subject to parallel workstreams.

2.7 Where the responses relate to detail in the SPD, the document has been amended to reflect these responses wherever this would improve the document and better reflect consultee requirements and aspirations. Where changes have not been made, these decisions have been justified. **Appendix 2** is a summary table of changes requested with commentary on whether or not the changes have been made.

2.8 The revised Masterplan SPD document following public consultation is attached at **Appendix 3**.

3.0 REVISIONS TO DRAFT MASTERPLAN SPD FOLLOWING CONSULTATION

3.1 The following key revisions have been made to the draft Masterplan SPD as a result of the consultation. Please also see the table at **Appendix 2** for full details of the changes made and not made.

3.2 A373 Honiton Road. Following advice from Devon County Council Highway Authority, references to a 20mph speed limit along Honiton Road have been deleted as this is not achievable for an A road. The SPD retains the need for further technical work to be carried out and the emphasis on the need for design solutions to slow speeds.

3.3 Town Centre Relief Road. The text has been updated to reflect the policy position that the TCRR must be delivered before occupation of new homes within the urban extension. This is subject to any changes arising from the Junction 28 capacity modelling currently being carried out by Devon County Council and any further technical work agreed by Devon County Council to demonstrate higher or lower capacities.

3.4 Road network. Link to Kingsmill Industrial Estate added and text updated to clarify that streets could take a different alignment to those shown in the Masterplan, subject to preferred junction location.

3.5 Active travel. Approach to delivery of active travel crossings between East Cullompton and Cullompton clarified. Infrastructure delivery table amended to include delivery of active travel in early phases and in line with capacity improvements to J28.

3.6 Primary school. Text amended to include flexibility on location of primary school to north or south of Honiton Road and addition of requirement for safe school access and appropriate space for drop off away from primary streets.

3.7 Healthcare. Text added to expand on potential uses within community hub and multi-use community building, including a health hub. Officers are in discussion with the NHS about healthcare provision within East Cullompton.

3.8 Fordmore Farm community hub. Text clarified to explain why Fordmore will be principal centre, that it will expand to provide broader range of uses including further retail and community space, that it will be accessible (via primary street and active travel) and that it would have potential to expand further if proposals for the wider garden village proceed. Further explanation added on what community hubs should contain and that some residential will be permitted within community hubs where it does not detract from intended character or limit community hub functions.

3.9 Commercial area. Text changed from 'integrating employment' to 'integrating commercial' to make it clearer that appropriate retail will be permitted in the commercial area. The text already refers to appropriately scaled retail being provided in this area. This is to allow larger scale retail uses where these are not appropriate within the community hubs.

3.10 Sports and leisure. Text amended to confirm size of space at Fordmore Farm is sufficient to provide a multi-pitch hub rather than individual pitches but final location of sports pitches to be confirmed through planning applications. SPD makes specific reference to sports being provided in accordance with MDDC's Playing Pitch Strategy. Reference to community buildings to include catering for a range of indoor sports and activities.

3.11 Green space. Text expanded on green space uses, including allotments and what can be included within the community greens and green corridors. Community growing space such as orchards in community greens and traditional allotment sites provided separately within strategic GI. Changes made to make clearer the requirement that detailed proposals demonstrate an appropriate building and landscape treatment to rural edge.

3.12 Fords. Following representation from the Environment Agency, text has been amended so that fords are not prioritised, but the aspiration for some fords to be included as crossings to remain to reflect the placemaking principle of celebrating water, with the requirement for alternative routes to be available and signage to ensure safety.

3.13 Self-build. Additional text on self-build added as guidance for developers.

3.14 Pylons. Text changed to include a 10m green corridor above any undergrounded electricity lines and wording added that where powerlines are undergrounded, they do not have to follow the existing overhead line which could allow better accommodation of easements.

3.15 Heritage. Maps to be changed to refer to indicative settings of heritage assets with further assessment required for planning applications. SPD strengthened to specify further work required by developers prior to their layouts being set. Text changes made to archaeological assessment.

3.16 Biodiversity net gain. Wording changed so that the off-site BNG can be delivered in suitable areas that provide accessible greenspace for the allocation or adjacent to the allocation boundary. Text changed to expand the explanation of the country park.

3.17 Country park. This is outside the area for the East Cullompton Masterplan SPD but could start to be delivered through off-site biodiversity net gain and sports facilities.

3.18 Process. Process diagram not sufficiently clear on where Design Code and Phasing and Infrastructure Delivery Plan fit within the planning process. The diagram has been updated and the approach to both these documents clarified. Both documents will need to be agreed developed and agreed with landowners / developers. The text on the Design Code within the body of the SPD has been updated and expanded to clarify the strategic nature of this document. Appendix 1 setting out the Design Code contents has been deleted.

4.0 PLANNING POLICY ADVISORY GROUP

4.0 A draft of this Cabinet report and Appendices, including the revised Masterplan SPD, was taken to Planning Policy Advisory Group (PPAG) on 17 January 2022. PPAG approved the draft East Cullompton Masterplan SPD to be taken to Cabinet on 7 February 2023 with no amendments.

4.0 HRA/SEA SCREENING

4.1 A Habitat Regulations Assessment (HRA) and Strategic Environmental Assessment (SEA) is required in accordance with Regulations and Directives on any plan or programme prepared for town and country planning or land use purposes and which sets the framework for future development consent of certain projects. Planning Practice Guidance states that SPDs do not require a sustainability appraisal but may in exceptional circumstances require a strategic environmental assessment if they are likely to have significant environmental effects that have not already have been assessed during the preparation of the Local Plan. Officers do not consider that the East Cullompton Masterplan SPD would have significant environmental effects that were not identified during preparation of the Local Plan.

4.2 However, for completeness, HRA and SEA reports were prepared as part of the public consultation material. The screening reports indicate that the draft Masterplan SPD is ‘unlikely to have significant effects on the environment’ not already assessed through the preparation of the Local Plan.

4.1 Historic England has commented that the draft SPD does identify the risk of harm to heritage assets. However, given the small number of heritage assets concerned, they consider that undertaking a full SEA would be a disproportionate task to ensure the protection of the heritage assets. A reasonable alternative would be a discrete study that focused on the small number of affected assets. A thorough and focused study would obviate the need for a full SEA.

4.2 An initial heritage assessment was undertaken to inform the SPD and the SPD identifies areas where there is a risk of harm to heritage assets and requires that as planning applications come forward, developers will be expected to fully consider the impacts on these heritage assets including through the submission of a heritage chapter in their accompanying Environmental Statement. Officers

are continuing to engage with Historic England to ensure the ongoing approach to heritage is robust, but do not consider that a full SEA is necessary.

4.3 Natural England has commented that based on the information provided, they concur that there are unlikely to be significant environmental effects from the proposed SPD that have not already been assessed within the Sustainability Appraisal of the adopted Mid Devon Local Plan 2013 - 2033.

4.4 In relation to the HRA screening, whilst Natural England agrees that it is likely that the SPD will not have an adverse effect on the integrity of European sites, they would advise that the reasons for reaching this conclusion should include consideration of whether the SPD provides the design framework needed to ensure that all the mitigation measures identified as necessary in the Local Plan HRA will be fully incorporated into the development. The HRA identifies that provision of green space and protection and enhancement of biodiversity sites are likely to mitigate impacts on European sites. The SPD makes provision for both provision of amenity green space habitats and includes a requirement for developers to demonstrate biodiversity net gain. Further assessment will be required by developers through Environmental Impact Assessments to be submitted with planning applications.

5.0 CONCLUSION

5.1 An analysis of the consultation responses has been undertaken and amendments made the draft Masterplan SPD. Once adopted, the revised Masterplan SPD will provide an updated framework to guide development in a coordinated and comprehensive manner and will have full weight in decision making as a material planning consideration.

APPENDICES

Appendix 1: Consultation responses
Appendix 2: Summary table of changes requested with commentary on whether or not the changes have been made
Appendix 3: Revised draft East Cullompton Masterplan SPD

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Background Papers Cabinet report 9 August 2022
Agenda for Cabinet on Tuesday, 9th August, 2022, 10.00 am - MIDDEVON.GOV.UK

Background documents on the Culm Garden Village website
Home | Culm Garden Village

Circulation of the Report	Councillor Richard Chesterton, Cabinet Member for Planning & Regeneration

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Appendix 1 - Answers to survey questions

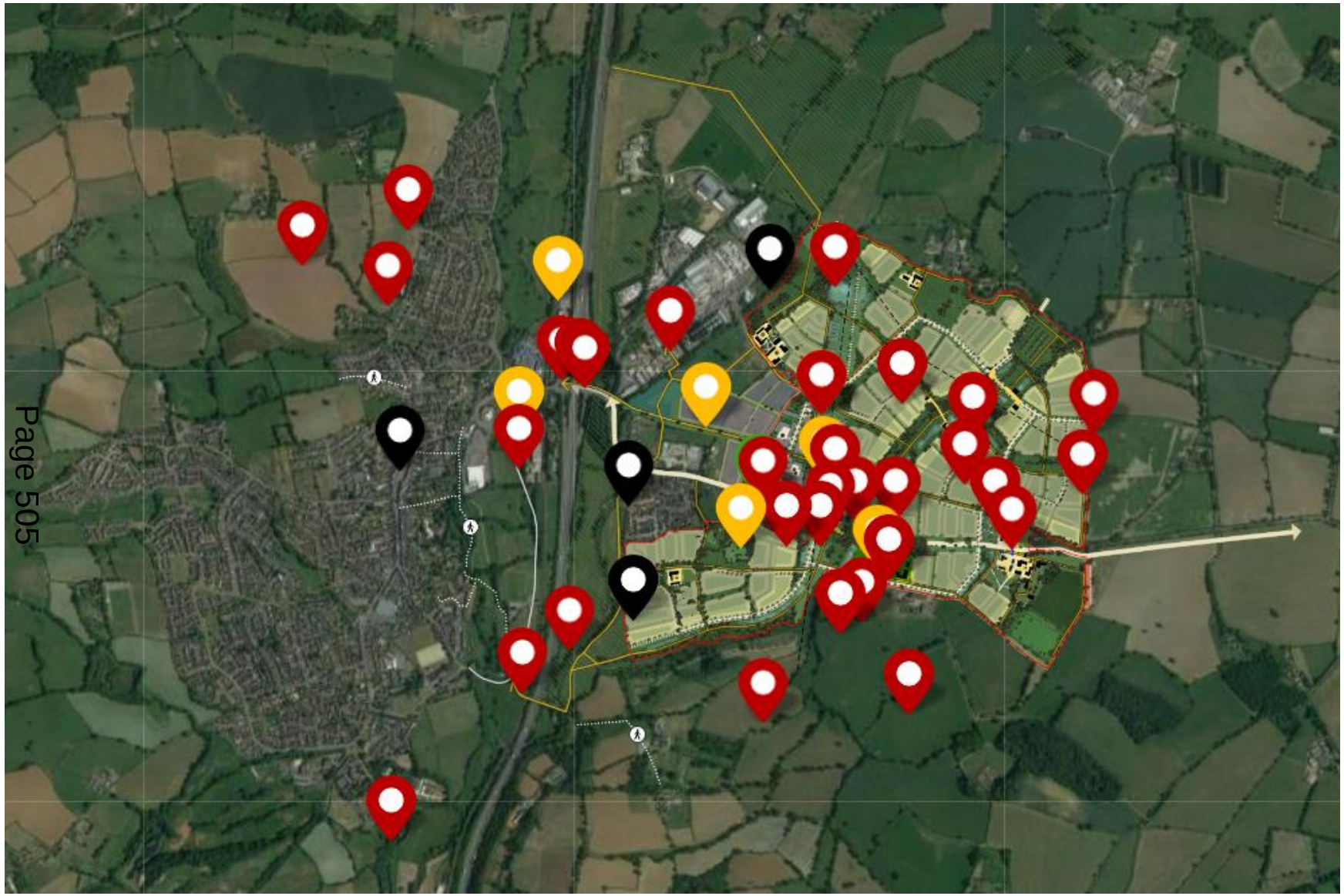
Category	Question	Transport	General Development	Facilities	GI/BI/Landscape/Sustainability	Flooding
Planning for a different future	What are your views on the opportunities and challenges that the Masterplan is seeking to respond to?	I have no issue at all with the general idea of this as I fully understand the need for new homes and work opportunities. As a resident of Culm Lea, I do however, have a problem with the additional traffic that this will create along Honiton Road towards the motorway which even now, if often queued way past Mole Valley. I therefore want to know what is going to happen around junction 28 to prevent the whole of Cullompton being totally gridlocked	Unless its for local people only , then it is a complete con trick. Saving the environment by building more housing ? I think that is the thickest statement for a long time! And what is Mid Devon District Council doing getting involved when the area is under the jurisdiction of East Devon District Council?	Sustainability. All new buildings, regardless of who will own it, should be net zero for their whole life which includes being run by renewable energy. Facilities should be designed to complement Cullompton's existing facilities which serve the existing residents. It's short sighted to remove these so currently happy residents move out to better places. A hardstanding multi-use pitch would be good. We don't have anywhere kids can learn to ride their bikes, rollerblading, basketball etc. The skate park gets too busy for everyone.	For ancient or veteran trees (including those on the woodland boundary), the buffer zone should be at least 15 times larger than the diameter of the tree. The buffer zone should be 5 metres from the edge of the tree's canopy if that area is larger than 15 times the tree's diameter. This will create a minimum root protection area. Where assessment shows other impacts are likely to extend beyond this distance, the proposal is likely to need a larger buffer zone.	Point 3 is critical but the major issues will be a] surface water run-off from the massively increased paved areas - how will development mitigate against combined sewers being overloaded? b] have the Sud's schemes been definitively costed and who will manage the maintenance of these schemes once the development work has been created? c] has the high water table across the development site been fully recognized? d] has modelling been done to ensure that East Cullompton development doesn't create any "backing-up" issues for villages upstream (notably Kentisbeare where there was a flood event in 2012? Points 4 and 5 are well made and hopefully the Connecting the Culm project will ensure that high quality nature-based solutions will be at the forefront of planning to ensure that flood-risk is properly mitigates across the whole development site but also in the River Ken.
		All these changes would require a major change to the road network of the area. The main Honiton Road which runs through this site was not considered adequate for a recycle centre back in 2013, there is now more traffic flow and congestion on this road and the development is being allowed to start prior to any upgrade work to the road network. This will result in even more congestion particularly at J28 of the M5, with no promise of the road improvements actually being undertaken. The plan to start the development around the Fordmore Farm development will encourage more traffic along the main Honiton route along with construction traffic - how is this planned on being dealt with?	I think the key challenge that the plan needs to respond to is building a community that actually works, and sadly I can't see that at the moment. On the one hand it is meant to be part of Cullompton, and yet with the railway, motorway & river in between this simply will not happen. At the same time the larger "new town" is being built without a central focus, and is in danger of just being urban sprawl extension. The absence of a clear focus/centre does not mean that people will go into Cullompton, but will simply drive into Exeter (or wherever they are working). As yet this village/town/extension doesn't know what it is, and being planned in two stages does not help.	Secondary Schools - I've seen in a couple of the new housing developments primary schools will be built but the secondary school is already over prescribed and where will these primary children go once, they are old enough? We already drive to Willand because the schools in Cullompton were over prescribed. Dentists - we haven't been able to get an appointment in over a year that's only going to get worse. Infrastructure - Personally I find it really hard to believe we've just been moved to three weekly refuse collections to 'aid recycling and reducing carbon foot print' more like we're putting in over 2k in houses and can't afford to collect anymore waste. If it really was about recycling, you'd collect it weekly like they do in West Devon where we moved back from in January. It would be nice to see a new recycling centre in the East Cullompton development where people could recycle cardboard, plastic, metal etc. Overall I'd like to see the reinstatement of the railway and expansion of motorway junction prior to any more developments along with the provision of a new secondary school and green spaces where you can actually walk the dogs off lead and the kids can play. We keep hearing about the jobs and great things the town will get from these developments but as far as I can see we get nothing. No new services, entertainment or resources are being provided for existing residents just ugly large developments of more houses for people to live in and to commute out of a dire boring commuter town with no real community.	Your comments on 'movement of water on the site' 'utilising water courses' is quite comical. Have you seen the state of the local river in Cullompton? It is polluted and horrible. There is a real opportunity to build something which actually responds to the climate emergency and decreasing wildlife but this will take real guts to do. Every house would need to have renewable energy. Large areas around the site should be rewilded. Houses built using sustainable materials. Unfortunately most of these projects only care about making money and not achieving these things.	
		I have concerns about the general infrastructure of the town and its current inability to fully support residents needs let alone adding more large developments. The motorway junctions - these cannot already support the growing traffic coming into what is a commuter town. Cullompton has excellent links to Exeter, Taunton and Bristol being on the M5 corridor. We live in Head Weir and have already seen a significant increase in traffic at peak times in the AM and PM where the cars queue well down Millennium Way and up into town and across the motorway bridge which makes it a nightmare to drive in and out of the town. The railway station could certainly relieve some of this but the need for expansion to the slip ways is inevitable. Sometimes you can queue for over 30 minutes just to get down the hill past the Weary Traveller.	Loss of a small semi-rural town - we were attracted to Cullompton because it was a small, quiet mid Devon town. It will no longer have that nice small communal atmosphere, it's already been over developed, and it feels like we're living in a monopoly board under the thumb of a thirsty development tycoon. So many natural habitats have been destroyed leaving the wildlife with only flood plains to live on and the landscape blighted by ugly new builds that aren't fit for purpose.	Horn Road is within Kentisbeare Parish. Sports facilities should be within Cullompton. The boundary of Kentisbeare Parish should be respected as per S14 of the Local Plan. The 20 minute principle is quoted but then not built into the plan- location of schools, commercial hub, social and care facilities.	There must be a green buffer zone to Kentisbeare to ensure is maintains its identity as a village.	
		Point 2 is critical but the delay to the "ring road" through the CCA fields and the lack of detailed costings (and options) for J28 make the whole connectivity piece incredibly difficult. Hopefully there will be more than one foot-crossing point in the scheme and hopefully one crossing which is pedestrian only.	I believe that this is a great plan for future generations. My family have lived in and around Kentisbeare for at least 7 generations. I have seen much change over the years as has my dad and grandad. The transport links to Kentisbeare are not great and with the plans to include better links it would be so much better for the older generation who can no longer drive and also the younger generation who have not yet learnt to drive. The employment opportunities for young people would then also be greater and the social opportunities for the older generation increased. Unfortunately you will come up against those who have moved into the village from away who suddenly don't like change. Most of those houses they have moved into were not original to the village and have been built over the last 50 years so without that development they would've had nowhere to buy (this includes my own house which was once the site of the milking parlour where my dad had his first job. As a true local person we have to welcome developments and change not for us but for our children and those that follow.	Point 7 seems to allude to the development of the Fordmore site as a community mixed-use hub - this suggests a very strong developer-led bias - why would a significant community hub be sited at the east extremity of the proposed development? The current proposed "community hub" features look particularly weak in the current edition of the masterplan. Point 8 seems aspirational but difficult to deliver as the employment designated land in East Cullompton will inevitably become the focus for employment within the community of East Cullompton (the M5 and J28 being natural barriers).	Point 12 suggests the "need" for a water park (in what is already a rural area has somehow already been established and will therefore take effect - how has the "need" been determined?	
		I would agree with a lot of the opportunities listed, but feel that this is going to be a very expensive development in which developers are going to have to fund large parts of the infrastructure. Infrastructure, in particular the Cullompton Town Centre Relief, changes to junction 28 and Honiton Road need to be addressed before any large scale development takes place. How will Mid Devon District Council get developers to fund infrastructure before large scale housing? If the costs are too high for developers will want change the housing density and cut corners on the environmental issues to make their profits.	I still think there are a number of "issues" with the updated masterplan and sometimes the constant re-iteration of an aspiration won't necessarily result in that aspiration coming into effect. For instance IF the East Cullompton development goes ahead I do NOT feel that there is a good chance of Cullompton and East Cullompton becoming one community and the M5 is a massive barrier to that aspiration. Indeed I think that in years to come East Cullompton is more likely to become like Cranbrook and people will be asking for a new town council for East Cullompton - and the long term projection of housing that might be built will only serve to reinforce this point.	Point 13 seems to go against the idea of creating community - surely the sports pitches should be in the centre of the community not at the eastern extremity - this suggests they are "placed" at the eastern extremity so further future development will surround them? Do the sports pitches encroach into Kentisbeare parish and if they do then the "green buffer" promise is at best being diluted and probably ignored?	The adopted plan did not include any reference to a sports club 'to the east of Horn Road'. This goes over the Kentisbeare Parish boundary and residents have already made clear their opposition to any encroachment into the parish. A desire not to have 'a hard edge' to the end of the proposed Garden village should not include a blurring of boundaries and properly rural areas need to be preserved. Assurances were previously given that there would be a buffer area which would remain as agricultural land.	
			Cullompton and any development East of Cullompton will never be one community - they are separated by a substantial river, an incredibly busy motorway and a high speed railway. Any redevelopment of the motorway junction and road network is already estimated as costing 100's of millions of pounds - this is not a responsible or acceptable use of public money - it will also add a huge amount onto the cost of every house. If by emphasising the movement of water through the site you mean - this is important because you are proposing to build on a flood plain - then this should be viewed as a massive no.. not an opportunity! If this is not what the question means then I have no idea what you mean. There is not meant to be development east of Horn Road, it is totally wrong - ignoring the views of the residents and breaking all trust with them - by proposing sports clubs in the area.	I assume the challenge will be to provide housing for local people however due to its proximity to M5 more people will relocate to the area already over populated for the amenities available. Our hospitals, doctors and dentists are already full to capacity who will provide healthcare with employees already leaving the profession due to low salaries etc.		
			Local homes for local families, not a second home owned place - our countryside is not for that.			
Priorities for growing Cullompton	What are your thoughts on the idea of encouraging more people to walk, cycle and use public transport and providing day to day services and facilities as part of a 20 minute place?	Yes I totally agree but in the winter, walking and cycling are never going to be a feasible option for most people and public transport is ridiculously expensive and again, in winter, it's not much fun hanging around for buses.	Building 2,00 Homes ie extra 6,000 people will not help people walk cycle and use public transport. If you want set up a new cycle track then go ahead but without the extra homes.	The current schooling is already struggling to cope with the existing local population. This new development will definitely need a new primary school to absorb the extra demand. Also, the College Surgery in Cullompton is at capacity. What are the plans for expanding the local medical and dental services?	The Woodland Trust is supportive of sustainable travel. However, it is important that the routes chosen for these networks do not harm irreplaceable habitat or woodland creation sites.	
		After building the inner relief road please pedestrianise Fore Street except for buses and make it one way and re open the railway station with room on trains for bikes.	It's a nice idea... but I don't think it will draw people into Cullompton. People may walk within East Cullompton, but I fear will drive into "old" Cullompton, if they come in at all.	I currently live in Nightingale Lawns and have things within a 20 minute walk. Yet soon I will have to drive to access things like the rugby club so it's all hypocritical. Lots of positive publicity but overall for the people from all of Cullompton, there will be no reduction in travelling time to access facilities. Just new houses near facilities and old ones losing them. Yet the new houses are still too far away from the high street so no-one will have everything now.	Great, please reduce development on the floodplain and above net biodiversity gain + recovery	
		A 20 min cycle is quite far. Encouraging more people to cycle and walk is a must but it must be combined with infrastructure which is fit for purpose. Pavements along quiet roads which are nice to walk on, cycle lanes where the cyclist has priority over cars, undercover storage for bikes at key locations.	20 minutes in principle but not in the plan. Covering agricultural land with houses does not 'reverse the decline in wildlife'. Building 5000 houses does not satisfy 'One urgent priority is the need to move away from places that rely so heavily on people out-commuting by private car each day. It stimulates it!	Admirable, you just have to ensure adequate facilities are provided		
		Encouraging less reliance on the car would be a good thing if public transport was provided and an affordable cost, the reduction in the size of roads will create the same issues of inability for buses, ambulances, emergency vehicles etc to access the site, as seen on numerous developments in the area.	As residents within the delightful village of ' Kentisbeare' we currently enjoy the well-being factor favouring walking cycling, good air quality, low night-time light pollution and surrounding farmland. We do not need a few minutes walk to a park or greenspace with water course as existing natural habitats offer contact with nature. Existing lanes and public footpaths already characterise this area. Protection of the vegetation and local habitats will not be possible if there are to be thousands of additional homes/work units/ schools. Increase in human habitation will impact on the transport pollution, noise and crime levels within the area.	The concept of 20 minute place is a good aspiration - developing the infrastructure so that people don't use the A377 is absolutely crucial. However the current construct seems to have very peripheral community hub designations so where will the "heart" of East Cullompton actually be as Mole Valley and the designated employment space seem to be geographically central but very unlikely to deliver community "heart"		
		It's a great idea in principle but not so practical when you have young children that can't walk far or people with disabilities that may need access to a car/ specialist transport. I would still need a car to commute to places of work but I would walk around town but again if I need to do a full supermarket shop lugging it home isn't practical or if I was to buy something heavy and cumbersome and had to transport it home	I think it is a marketing gimmick - most of the facilities being planned on the edge of the housing development the chances of residents walking or cycling is very remote - any public transport will take many years - the station we are told will have no parking but will be a considerable distance for most residents - and we are told trains only running every couple of hours.			
		Anything that encourages using public transportation and alternatives to cars is very welcome Considering how busy the M5 is currently, I can't see that people won't have the choice but to walk/cycle however the Honiton Road will also be over stretched so safe I don't think so! Public transport how long will it take to open a station at Cullompton and is it really viable?	Excellent idea. But not easy to get to the railway station from the garden village. The development should be located on the west side of the motorway adjacent to the railway station at junction 27, and use the east side of junction 27 for industrial. From there, people could easily walk and cycle to parkway. It's not too late to change the plan!			

Category	Question	Transport	General Development	Facilities	GI/BI/Landscape/Sustainability	Flooding
Priorities for growing Cullompton	Do you agree with the current vision and key principles set out under Planet, People and Place?	I don't necessarily believe that treating Cullompton and East Cullompton as one place will necessarily reduce out commuting or reduce carbon emissions. People will travel out of the area to seek, high skilled, high paid jobs if they cannot be found or developed in Cullompton. On the upside if Cullompton becomes a destination town people will travel in. Village scale for housing, yes, but don't like the idea of compact (could be interpreted as high density).	I think much of it sounds good on paper, making it a reality is a different matter! I expect Cranbrook sounded good on paper!! I see little as yet to foster any sense of community? Are you in conversation with the local church, as they are key community builders?	I agree with the principles but Cullompton shouldn't be developed to the detriment of existing residents. Losing the cricket club and rugby club to the new development in East Cullompton is pointless when they're so well established. There are plenty of houses available nearby should people wish to live near them.	I agree we need more housing, but the infrastructure needs to grow with it. The planet and nature needs to be taken into account to, I agree. Please, please, can all the new housing have solar panels fitted as they are been built? I honestly cannot understand why this is not been done as standard on ALL new housing built in the UK. This alone would get us to Carbon Zero so much quicker.	This site also has a high tendency to flood which will only increase as our climate warms.
			No, when you are prioritising building on green field sites, I could never consider it Planet first, it's more like Pawning the Planet for Profit.	Build a sense of community and sense of belonging around existing activities and uses and around the new village centres. Make them pedestrian-friendly and keep them largely traffic-free. There are no village centres. A village is perhaps 1,000-2,000 people with a hub of shop(s), school, religious buildings, social meeting premises. Where are they all?	I fail to understand how developing this quantity of green field land will encourage and sustain wildlife, with the removal of trees, hedgerows and open quiet spaces, not to mention the removal of vegetation, flowers and berries. I would also like to see developers providing solar panels to ALL buildings as standard practice along with the highest standards of house insulation etc.	Transform water management and habitat creation in this part of the Culm Valley to reduce flooding, increase biodiversity and to make water and wildlife central to day-to-day life in East Cullompton. Not demonstrated by the plan. Wildlife will be driven away and the only water in day to day life will be flooding.
			The principles are fine but are not delivered by the plan. It is a case of window dressing and hiding the true nature of the plan. Regard Cullompton and East Cullompton as one place, make them interdependent and mutually supportive. This will strengthen the local economy, making the town more resilient. It will reduce out-commuting, reduce carbon emissions, improve air quality and reduce noise and dust. The plan is far larger than Old Cullompton with less facilities. Neither the existing or the new show any scope for interdependency. Offer choice and make better homes and workplaces that are flexible and adaptable for changing lifestyles. Build sociable streets and rural lanes that encourage neighbourliness, outdoor living and outdoor play. Make sure everyone is within a few minutes walk of a park or a greenspace or the opportunity to follow or cross a watercourse. This is not supported in the plan. Make it compact and village-scale, combining well-crafted buildings and spaces that are pedestrian-friendly. Make it safe by reducing traffic speeds to 20mph or lower. Bring the scale of infrastructure down with narrower streets and spaces, something more in keeping with a village character. Bring the rural character of East Cullompton alive by incorporating existing rural tracks, the hedgerows and the mature Oak trees that characterise this area. Make the active travel and bus routes between East Cullompton and the town into green lanes that are rural in character. The A373? A Green Lane. Celebrate the presence of water and the crossing of, or the following of, watercourses part of the experience of daily life, such as the route to school or the workplace, or the journey to and from the new station or to the local shops. Nice prose, eloquent dream but really?		I think the principles described in Planet, People and Place are all very laudable but my confidence in these principles actually being delivered is extremely low. Will all housing units be EPC A rated, will developers be mandated to fit Solar PV, solar thermal and ASHP or GSHP in every house unit? Will building regulations be changed to ensure that developers deliver this climate critical change to how houses are being built? Combine locally-sourced clean energy with reduced energy demand and energy- efficient, durable and adaptable buildings. Where is this locally sourced energy coming from? Protect natural resources, including existing vegetation and local soils and local habitats. Reconnect and strengthen local landscapes and increase woodland cover. You cannot protect what you destroy only the margins that are left. Use innovative and modern methods of construction to minimise waste and reduce pollution. Improve human health and well-being by favouring walking and cycling over other modes, improving air and water quality and improving contact with nature. Favouring is a human choice not something you can plot. Building footpaths not roads makes it happen. How does being in the middle of 5000 houses improve contact with nature? One finds natures where humans have not developed.	
			In the current United Kingdom climate, whereupon the cost of living is rising and the availability of numerous food products being affected by trade prices, surely it is more important to retain our farmland (especially in counties/farming areas like Devon) and think about growing more of our own produce to help people, place and planet. Focusing on the town of Cullompton and looking at ways forward to improve the High Street trade should be the first priority before considering the removal of farmland for the possible influx of thousands of additional people! One reason Devon is such a successful tourist focused county is because of the rural areas that attract people during their recreational pursuits, which will be in question should more built up areas evolve mirroring the downfall of some other counties.		Not sure that I could see much evidence, oh yeas some solar panels - however, who cares about our planet let alone country? Our reservoirs are at an all time low - gas and electricity in short supply, yes earth/air heat pumps will aid this crisis but hardly affordable, home prices will be high and with current mortgage rates once again raises the question who will buy these properties. I agree but am concerned that they will not be fully met. The planet section needs to be more radical.	
			No - to all of them - the development will be deeply damaging to the planet and the people in this area of Mid Devon - "Protect natural resources, including existing vegetation and local soils and local habitats. Reconnect and strengthen local landscapes and increase woodland cover." - by building 5000 houses???? That is not possible ! This is not a village it is a town - and it will bring to the area at least 10,000 people and nearly as many cars - the pollution and disruption caused by this can in no way be seen as helping health. Most of these new residents will have to travel to work - it is the wrong development in the wrong place and totally wrong for the planet.			
			It is exactly that, a vision. Like all visions it seeks to create something new and 'wonderful'. Phrases like 'celebrating the presence of water' ignores the realities of rural mud and the other joys of country living. What will be created will be a form of 'sanitised' country living with artificial 'village centres' where actual 'contact with nature' may or may not be a part of daily life. All very admirable.			
East Cullompton Masterplan	What are your views on the masterplan for East Cullompton and the locations of development, open spaces, streets and facilities that are shown?	You still have one major arterial road? How will a huge back up of Honiton Road traffic go?	Complete and Utter Madness . East Devon will end up looking like the West Midlands.	Where are the promised sports facilities within this development?	Preserve the green farmland to the east to create a natural and embedded agricultural buffer zone	
		NONE of this should be built until the traffic issues are resolved. New houses are already being built on the other side of the motorway, and how the roads are going to cope is anyone's guess. I believe there should be a complete moratorium on any new houses until the motorway junction is sorted, the town centre bypass is built, and the railway station reopened.	Initially, Kentisbeare Parish Council boundary had the likelihood of a green buffer zone to limit building lines. However, it would appear that the prospect of a school and other facilities is now encroaching within the boundary and extending up to Dead Lane Cross. How are the Council allowed to extend within the boundary?	The development looks good but it should be additional to the existing facilities in Cullompton and not replacing them. People should be encouraged to be outdoors in all weathers. We need more facilities suitable for use through the winter e.g. hard standing playgrounds/multi use pitches, undercover picnic areas and seating etc.	It's an outrage that so much green space is being given over to housing developments when there is a desperate need to protect against loss of habitat. Over 60 percent of the UK's wildlife biodiversity has been lost and its because of developments like this. This is just propaganda and buzz words designed to lull the public into the weak belief that this is somehow environmentally friendly and not destroying countless eco-systems.	
		How will the additional traffic be managed? A new motorway junction is required under Local Plan Policy but it is impossible to see how this will be afforded for such a small number of houses and Highways England has confirmed it would not fund under RIS because it's not providing a strategic benefit but just supporting the CGV housing estate. Is a garden village actually a garden village if it can only be made to work by such heavy reliance non the motorway? Where is employment development in EC and CGV going to go? Over 80% of working people currently commute out and without significant employment development at Cullompton an even higher percentage will need to commute out - by car, as you can't walk or cycle down the M5 and the alternative routes are largely unsafe for cyclists or people on linked trips taking their children to school and carrying on to work. When is the modelling work showing what is needed going to be publicly available? Rumours are circling that MDDC is trying to achieve what they need by shifting people out of their cars but this is totally unrealistic given how reliant the existing settlement at Cullompton is on private car travel. Highways England have been banging on about needing assessment and significant funding to cope with the predicted traffic but this does not seem to be acknowledged or accepted by MDDC. When are we going to have proper commitment to delivery the road improvements that they say will be needed?	Move it all to the west side of Junction 27 before it's too late.	The primary school has been allocated a space next to the main road this is a dangerous area for young children to be especially early in the morning at commuting time. It will also cause more congestion at drop off and pick up times along an already over used road. There is no allocation for a secondary school is this going to be added in an expansion program to an already large development? I can see no allocation for a doctors surgery or dentist, there are currently not enough of these services in Cullompton and the surrounding areas how is this to be addressed?		
		Road crossings, are they footbridges? The A373 is already experiencing serious overloading and needs careful consideration.	I don't have the internet, so only saw the plans and can't say that they were that enlightening except that this masterplan is eating up all of our lovely countryside. The reason people like to visit our lovely country. Do we really need this 'master plan' - I think not.	Primary school location not at the centre of community		
		No planned expansion of the motorway junctions is also a poor oversight and Stagecoach can't even provide buses to Exeter anymore so are they really going to cover these new routes?	It all looks great. A good balance of areas. As long as the housing development has adequate parking for at least two vehicles per house.	My overall view of this development is that East Cullompton will become a separate community from the existing town of Cullompton and all the connectivity promised will NOT deliver a single community or growth for the existing town. With respect to the current masterplan the main weakness is the lack of a real community hub at the centre of the proposed development with 3 small hubs being in peripheral locations.		
		Primary school is off Honiton Road which will increase traffic and congestion along Honiton Road as will the primary and secondary streets exiting onto Honiton Road. The location of the school is not central to the development and will not encourage those living further away to walk. They will use a car.		I am sorry to be negative again - but the attached map is almost impossible to decipher - all I can see is that the mixed community hubs appear to be on the edge of the proposed development which is a strange place to put a hub! Aren't hubs usually in the middle??? Could you explain please!		

Category	Question	Transport	General Development	Facilities	GI/BI/Landscape/Sustainability	Flooding
Activity & Landscape	Do you agree with the approach of the masterplan to seek to build on activities already taking place including an expansion around Fordmore Farm for the principal community hub?	Again, where will all the extra Cullompton bound traffic go?	The local community especially the Kentisbeare community have already specified the need for a buffer zone between Horn Road and Dead Lane; by pushing development of a community hub that far down the Honiton Road, the boundaries further east of the development will encroach on the Kentisbeare parish. Community wishes should be respected once they have been sought.	You're not building on activities already taking place, you're moving the activities from Cullompton into this new development e.g. cricket and rugby. There is no improvement overall. In fact, it will be worse for many people. It's a waste of money to just move things already in Cullompton. Money should he spent on the things we need but don't have or need more of e.g. places to go in bad weather, primary and secondary schools, NHS dentists, WiFi hotspots, homeless shelter etc. Not sure, just labelling it as a community hub doesn't really explain its benefits, a lot of these places are built then sit empty because the public don't use them. It would be good to have open playing fields and premises that charities can use to host events and community projects such as fetes and book fairs.		
		No, I feel that the location for a school (s) is dangerous due to proximity to the particular Honiton to Cullompton Road.	If the street view picture above is an illustration of the type of buildings that will be put there they are totally out of keeping with a rural settlement, the area looks soulless, yet another development of modern buildings with no variety in features. I like the idea of the green spaces within the streets but who is going to maintain them in times of more and more Council spending cuts are residents going to have to pay a maintenance charge to keep the area look at its best?	That depends hugely in what else is going to go in there (as yet this seems very vague?). Will there be some form of shared community centre/facility? Shared with school, possibly health, possibly church? What will make it the centre? How will the Honiton Road be managed there?		
		Fordmore Farm is at the extreme edge of the plan, its access to the A373 is an accident waiting to happen without serious remodelling so no I disagree.	It would seem that the family ownership of 'Fordmore Farm' has already been forward planning with the anticipation of thousands of homes. Infrastructure on Honiton Road is and will struggle with the extension of their business. Not least thinking about the properties nearby that must be feeling the increase in traffic noise/pollution.	There is a farm shop at junction 27 already. Fordmore Farm is on the very edge of the development and on the busy A373 - is new not yet established - wrong place		
			No - I do not agree that the expansion around Fordmore Farm as the principal community hub is a good idea. This is at the eastern fringe of the proposed development and it smacks of two issues: a] this development is being developer led (by key land holders) - not community led and b] if Fordmore is developed then there is already a strong assumption that there will be further future development to the east and eventually Kentisbeare will be "lost" as an independent and thriving village (just look at what Cranbrook has done to its surrounding area)!	Once again, the question is access. The sure what the community hub includes - who will use it. Agree on seeking to build on activities already taking place but don't agree that Fordmore Farm should be a principal community hub as it's not central to the main housing development.		
				Impressed by the 'foresight' of those who bought Fordmore Farm.		
				Fordmore Farm is the wrong place. It is at the corner of the planned development, never to be a hub Initial development should as close to where existing facilities are as possible, that is close to Cullompton. This should also help unify the two areas		
	What are your views on the way the masterplan proposes to deliver green and open spaces across the site and the emphasis on including water a key feature?		Realistically, the landscape already offers immense 'well-being' to existing locals and the masterplan is just a way of trying to describe the already beautiful landscape in a different way! Green spaces exist but the difference will be that there will be 'brick built spaces attached to smaller green zones'.	Green and open are good but adequate facilities must be there too. Water feature is 'nice and fanciful' but irrelevant and costly to maintain	The country park is 'potential'. It probably won't happen so shouldn't be included when considering green and open spaces. As long as houses, buildings etc have enough parking and roads are straight and easy to cross, it will be lovely to visit. You can't walk far in Cullompton without coming across a stream. That's nothing new or special. Where is the renewable energy? Where is the innovation to be a sustainable development?	
			Do you know I think it's all pie in the sky and at the end of the day greed. That would appear to be the way the world sadly is.		This is an excellent aspiration. The Woodland Trust encourages councils to require new developments to have 30% tree cover. Existing trees should be retained wherever possible. Water is an important habitat, but ecology should be looked at holistically, and trees provide important shade to water for invertebrates and fish. Wildflowers and Trees are important for many invertebrates which support other biodiversity and pollination.	
			None of it has any substance so hard to comment.		I think that you would need to make the green space larger to make up for the style of housing planned	
					The green spaces are all at the perimeter of what looks like a huge housing estate. No view on the water. These need to be more than just "the only way to use floodplain and land under pylons" which it feels like they are at the moment? This is at minimal cost to constructors who cannot use this land anyway.	
					No. It would be nice to see the inclusion of some allotments or community gardens or orchards where people could grow their own food to sustain their families rather than relying on imported goods from the supermarket. Better dog walking parks could also be provided as public safe green spaces where dogs can be walked safely. More hedges and mature trees could be saved and included. what protections will there be to ensure these aren't wiped out in future expansions? The more open space the better how ever I do suspect that the green spaces will be areas that can't be built on and the waterways will be the flood prevention areas and rivers unless I am just being cynical.	
					Outdoor space is so important and brings communities together.	
					The planning of green and open spaces is good but the proposal for a country water park in what is already a pretty rural area looks a bit weird. If the emphasis is on flood mitigation then this should be honestly portrayed. Has a demand study been undertaken for the proposed water park? Will this inevitably attract significant visitor numbers and put strain on the minor roads in the proposed country park area? Including water seems sensible, given the amount of it in the area. Likewise green spaces.	
					Really good, blue health (Exeter uni) has been proven	
Mobility, placemaking and other	Do you agree with how the SPD proposes to approach transport and mobility including crossing of the M5, local streets, changes to Honiton Road, public transport and emphasising active travel options?	NO NO NO, if the required changes to the only route across the motorway and junction 28 improvements are left until after all these houses are built, it will never be done!! Improvements to Honiton Road towards Fordmore will be pointless if you still have the total bottleneck approaching junction 28. Any further development is dependent on a new J28 extension, as outlined by the inspector, therefore it is fanciful to be pursuing these options until the precise nature of this junction has been agreed.	It seems foolish to start building without having first sorted some of the major infrastructure questions? The danger is you end up with another Swallow way (complete disaster!) Public transport and active routes may be desired, but are they realistic? Too many houses are built with not enough parking space (to encourage other means of travel), and all it results in is too many cars parked in dangerous places! There needs to be a balance of ideals and realism. Maybe the planners need to be forced to live in the new community! To ensure they don't just produce something great in theory and then just walk away!	Using the Fordmore Farm area as a site of development at the edge of the area will encourage too much development down the Honiton Road, the main community hub should be in the centre of the development not at the edge.		
		Great idea but would be better to improve the existing Cullompton area. We have just lost our bus service to Exeter and now need to walk to the main road to catch it. Not a problem for us but it will be for many people. Why can't the money be split so the existing parts of Cullompton and the new areas can all be like this plan? No doubt the reality will be like the new part of Swallow Way/Kingfisher Reach. Cars parked all over the sides of the road and difficult to cross in places with poor visibility and kerbs strangely high sometimes.	At west junction 27 there would be no need to cross the M5.			
		It is difficult to tell at this stage. The cycling routes need to be planned with public consultation. Bike lanes are often poorly planned and will be essential in encouraging sustainable travel. How long would it take for people to cross the M5 by foot? Is this actually realistic?	I think the planners have fallen into the trap of trying to rejuvenate Cullompton by building a new town next to it. The town council certainly wants this. If the objective is to create more housing and a true garden village, then Cullompton is the wrong location. It's so ironic that JN 27 just up the road is crying out for it.			
		Honiton Road is not a suitable place for development of this kind and would need significant updating before the plan should even be considered. Public transport staffing would also make the public transport plans not viable. There aren't enough public transport staff in more suburban towns and cities let alone in this proposed area.				
		I feel that the road network needs to be improved prior to any construction.				
		No the Junct 28 access has yet to be decided is vague and its the most important access. Many people will commute out of the town, its vital to put provisions in for that. Who will pay for the maintenance of these cycle routes and new roads when Mid Devon Council can't even afford to upkeep the existing ones they have?				
		Expansion of Junction 27, with the train service, petrol station already in situ would make more sense instead of changes to the Honiton Road. References to enhancing public transport and enhancing travel options sounds great, but realistically people enjoy the benefit of privacy, comfort, accessibility of their own vehicles especially in the current climate with covid19.				
		The key issues are and will remain as: 1 the Cullompton Relief road, 2 The J28 amendments to enable good traffic flows at ALL times, 3 the major improvements needed to A377 through the whole proposed development (but equally importantly further to the east and right through to Dulverton as a minimum). If these are NOT delivered East Cullompton simply will not work				
		Agree extra crossings and access to M5 required for both cars and pedestrian travel. Public transport needs to be cost effective, reliable and convenient. If there is good and effective public transport. I don't see the need for car clubs.				

Category	Question	Transport	General Development	Facilities	GI/BI/Landscape/Sustainability	Flooding
Mobility, placemaking and other	Do you agree with how the SPD proposes to approach transport and mobility including crossing of the M5, local streets, changes to Honiton Road, public transport and emphasising active travel options?	Given that the proposal is to turn what is currently a rural, agricultural area into a semi-urban (suburban?) area, the approach to transport seems sensible. A lot will depend on the way J28 is dealt with. It should definitely allow for increased access northwards as well as southwards; the original proposals did not appear to allow for this.				
		The crossing the M5 is as it is now, inadequate. Changes to Honiton Road are vague and stop abruptly at Fordmore Farm, leaving traffic beyond that point in an even worse state. Increased traffic will flow towards Honiton as well, even without the obvious deadlock that will grow at J28 There is only so much you can do to provide access to the M5, widen the Honiton Road, considering the huge amount of extra transport- not only cars but delivery lorries etc. Do you feel it is satisfactory Cullompton as a town will cease to exist. Once accident/ incident on the M5 will totally bring Devon to a standstill.				
	What are your views on the placemaking aspirations and design requirements which will seek to shape the type of place that East Cullompton will become?	No issues with the development, just the roads	Focus on ways to encourage people to visit Cullompton town centre and improve the business aspect of the town to appreciate in the way Honiton is so highly regarded. Use the un-occupied premises within the town for business and residential purposes. I don't understand what 'place making aspirations' means. The design requirements look fine within the boundaries but more consideration needs to be given to the areas that exist outside of the immediate boundary areas.	I think the current masterplan is "skewed" with no heart to the proposed development and this has been replaced by the idea of 3 small community hub areas the most significant of which is on the eastern fringe (Fordmore) and suggestions that sports pitches should be developed on the eastern fringe as well - why are the sports pitches and the community hub not being centred around the proposed site for the school?	I don't really understand this question as you are using strange language choices. It would be great to make this an eco development showcasing the regions commitment to net zero with the majority of houses having solar panels and renewable energy. It would also be good to have space allocated to self builds as this allows people to build houses shaped around their needs not those of big developers.	
		Having the road through the developments with the school is not a safe placing	Placemaking' is a term I had not heard of until reading this document. CNU (Congress for the New Urbanism), whose mission is to champion 'walkable urbanism', defines it as, "the process of creating quality places that people want to live, work, play, and learn in. Great. Some of us felt that we had found that place in the existing rural environment and that it did not need re-making. Given that it apparently is to be re-made the aspirations sound suitably aspirational. Shame you won't listen to existing residents.		Why is it a potential country park? Surely with significant new builds the country park is more than essential not potential. The green space hub towards Cullompton side is not large enough	
		I am not sure that Mobility hubs will be successful in a rural setting where public transport is limited to non-existent.	A lot of this sounds good... but!... Nothing higher that 3 stories please			
	Do you have any other comments regarding the East Cullompton Masterplan SPD?	Train station is ESSENTIAL	The sustainability of people, planet and place beyond the immediate boundaries of the plan needs to be borne in mind; placing such an emphasis on development at the boundaries is going to impede on existing sustained communities. The proposal to include 'a minimum of 10 gypsy sites' seems unviable. Is this the entire gypsy population of Devon? How many homes per site?	Existing facilities should be maintained for existing residents. New facilities should be added to cater for increased number of residents.	Development should be lower carbon, buildings should use renewable energy sources, more thought for enjoying these spaces in bad weather and looking after under privileged people e.g. homeless shelter, halfway house etc.	
		I think the train station is the only sensible option of the whole plan	Should be scrapped. Assess the exact requirement for the needs of local people of East Devon only and build accordingly 200 to 300 at most.	To me it still lacks a centre, and is housing rather than a community.		
			In a time where people can't even afford to heat their own houses is it really the time to be building new unaffordable housing? What guarantees will there be to ensure that the local housing needs are met prior to new people migrating to the town? Many of our friends and family can't make it onto the property ladder as they can't secure mortgages or afford to live so why build houses when they are still forced to live with older family members and can never hope to buy one? Our old house was subject to a covenant that ensured that only people who have lived in Devon for at least three years could purchase it which gave us our first chance to get on the ladder when we were pipped to the post for so many other properties, if there is to be development at least let it benefit local people directly.	What infrastructure will be put in place, before the housing, nurseries, schools, doctors, surgeries, dentists, hospitals. Where will be all the recycling-refuse be deposits, hopefully these will be all taken into consideration before the masses arrive.		
			Building more houses/works units/ schools etc is not progress! It keeps the building industry in business provides short-term job options but does have a long term effect on the existing residents within an area, who have already chosen to live in a place that does not have a large town, city population.			
			As previously. This is a development for future generations and I welcome it.			
			I have a very strong view that NO further development east of the motorway should take place until the Cullompton relief road and J28 are properly sorted out and delivered			
	What are your thoughts on how Section 5.6 of the Masterplan SPD sets out an overall approach to the timing and delivery of the development and its related facilities and infrastructure. Do you agree with the early phases forming around proposed community hubs?	Cannot see how the development will work before the road network is improved	As previously stated this development is dependent upon the road network and upgrade and no development should take place until this has been resolved. The real need in the community is affordable housing for people on low incomes this needs to be a priority over community hubs that won't be used until the development is nearing completion. But you're not listening to the community of Cullompton. It's just all so hypocritical.	No - the community hubs are far to far from the core of the proposed development and are instead at the boundaries.		
		Again... I believe nothing should be done until the motorway junction is sorted and bypass built. Then the plan needs to be clear that this is part of the Garden Village... so it's a proper full plan, NOT two different things	Hopefully it will never be built. Yes, need to make sure that this is not a building site for the next 10 years.	The community hubs - ford more farm shop is currently the right size for the roadside it is situated at. A		
		Infrastructure needs attention first and not the likelihood of some properties being built before the Honiton Road is re-landscaped.	Infrastructure before housing development.	No, no more houses should be built in Cullompton till we start to see some of this new infrastructure - e.g. schools, dentists, doctors first then your community hubs.		
				I do not agree with the early phases forming around the proposed community hubs as I strongly believe that although Fordmore is a good site it is NOT central to the development and it strongly suggests that there will be further development to the east. The focus should be on delivering community assets (sports fields, community buildings, shops, doctors etc.) around the proposed school and more at the heart of the proposed community. I accept that there will be development at some stage but the current SPD is full of poor compromises which strongly suggest that the developers and land holders have the "whip hand" and the community is not being listened to		
				I don't really understand why it would be helpful to start development near to a farm shop on a busy A road?? - I presume this is because it suits the land owner and the developer. - It will certainly not allow the residents to walk to school, doctor or supermarket.. and I am sure it will be many years before anyone will sensibly consider cycling on the A373.		
				Early phases around proposed community hubs would appear to make sense. However, the questions which arise are who would actually run these (until there is a fully-fledged community) and what would they contain?		
Question or query			Why has the East Cullompton Extension been allowed to cross over into the Parish Of Kentisbeare. If the unwanted extension is going to happen it should remain within the Cullompton boundary.		During the recent building of the Persimmon Housing development on Willand Road, I witnessed the sad felling of an ancient oak tree (over 250 years old). Can you give an assurance that trees over 30 years old will be preserved and if not how many trees over 30 years old will be felled to make way for the new development?	
			Is the East of Cullompton development dependent on the town centre relief road? ie if the relief road cannot be built for whatever reason, does this mean the East of Cullompton development (and the Garden Village) cannot be built?			

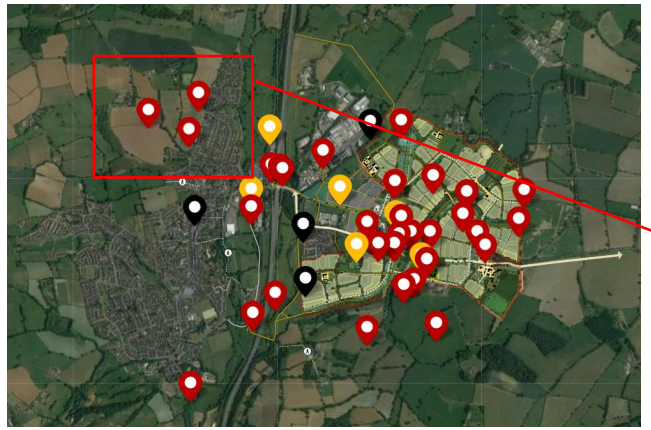
Appendix 1 Interactive map comments



✓ Something I like

✓ Something I want to see improved

✓ An idea





Town centre, fore Street

Where is this?

Town centre, fore Street

Your comment or suggestion:

We have all the houses being built but no mention of a relief road for Cullompton town , it only takes one vehicle to stop in the town and within minutes you have a standstill, this still needs to be address asap

5 people like this

Town Centre but comment here to reinforce other comment

Where is this?

Town Centre but comment here to reinforce other comment

Your comment or suggestion:

Not just one vehicle to stop but one to be parked there all day. Because traffic can pass n the other carriageway there is no obstruction according to the Police

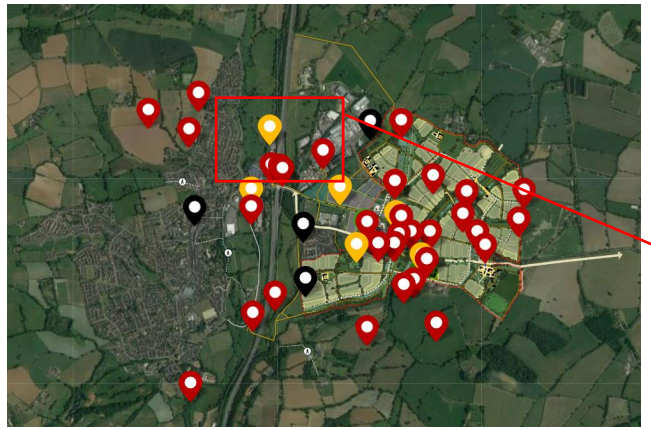
Nobody has liked this yet

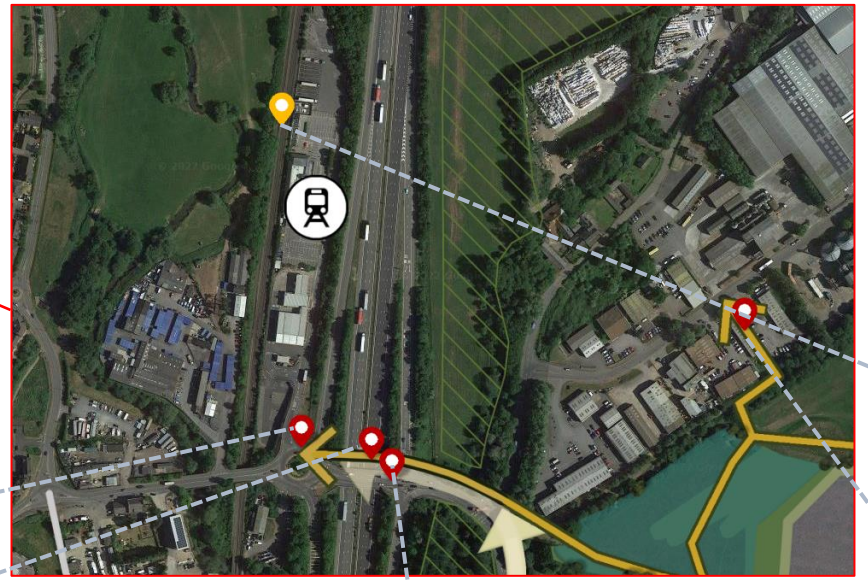
Comment

Your comment or suggestion:

What about allowing these houses. That's more than 2000 houses in Cullompton. No justification for allowing another green field sites to be bricked over

5 people like this





New railway station site

Where is this?

New railway station site

Your comment or suggestion:

I read in the local media yesterday that the new railway stations gone from 2023 to 2025 for being developed. This is far too late. With over 2k in houses in North cully being built and the 5k in the east you'll need the railway ASAP. Cullompton always been a commuter down people are going to be attracted to the M5 corridor not the sense of community. It's vital to have more sustainable transport options for all these people

Nobody has liked this yet

M5 Junction 28

Where is this?

M5 Junction 28

Your comment or suggestion:

The lack of hard commitment to constain development until adequate infrastructure is in place is depressing. No hard commitment that I can see about the Link Road, and the reference to what Network Rail may or may not do re the Station is pitiful. With events to date, its difficult to have confidence that adequate constraints/conditions will be exercised on the developers. I have worked across the UK on significant infrastructure projects over the last 40 years and have seen what effective planning controls can leverage from Developers so why so lack-lustre here?

1 person likes this

J28

Where is this?

J28

Your comment or suggestion:

What will be done to improve this junction? With all the added traffic, from the new houses that will be created, this junction will be unable to cope with rush hour traffic and commuters. Traffic already backs up at peak times everyday at this junction and through to town. Will the road improvements be prioritised and put in place before the bulk of the construction work takes place?

1 person likes this

Kingsmill industrial estate

Where is this?

Kingsmill industrial estate

Your comment or suggestion:

What is this? Is the plan to demolish the existing industrial estate to make a new road?

Nobody has liked this yet

Cullompton Train Station

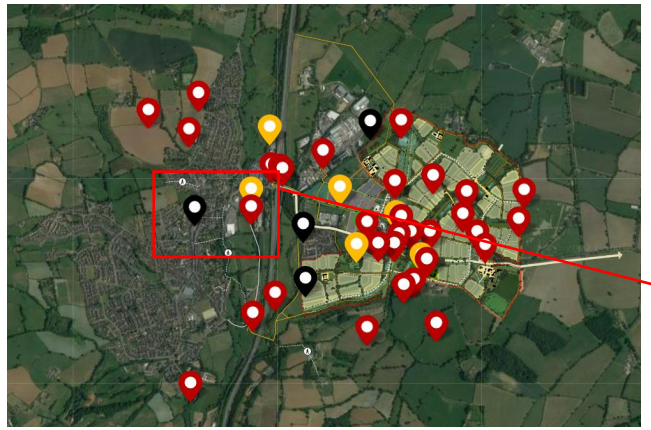
Where is this?

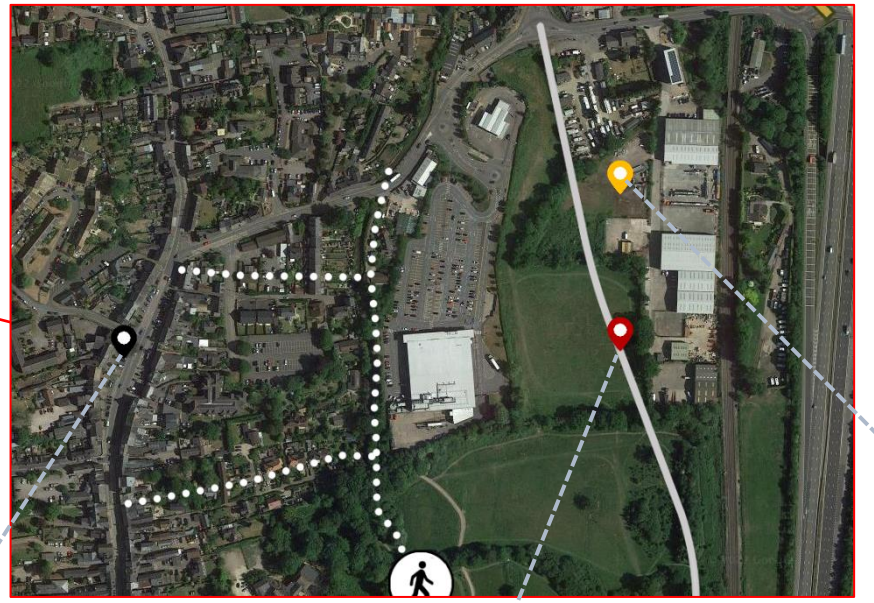
Cullompton Train Station

Your comment or suggestion:

Reopening of Cullompton train station is vital as part of this development. This should be completed before the houses are finished and should also include a cycle network so that people can get safely to the train station on bike. A CHEAP car park should also be included in the train station to encourage people to use the train rather than driving in to Exeter or Taunton.

3 people like this





Higher Bullring Cullompton

Where is this?

Higher Bullring Cullompton

Your comment or suggestion:

All the people that live in East Cullompton or are part of the Garden Village will not be able to easily park when they drive to Cullompton About 10 spaces are being removed from the Higher Bullring to "improve" the area for bigger events for more people to attend. Not Sure where any on of them will park

1 person likes this

Inner Relief Road (via CCA fields)

Where is this?

Inner Relief Road (via CCA fields)

Your comment or suggestion:

No obvious comment linking this long overdue development to the SPD. At Kentisbeare presentation it was stated that the Inner Relief Road (via CCA Fields) had to be completed BEFORE the Garden Village was STARTED. Recommend that it be clearly stated in the SPD that the Inner Relief Road be completed BEFORE the Garden Village is started. Indeed a section for such preconditions be added to the SPD document.

7 people like this

Cullompton Inner Relief road and Cullompton railway station.

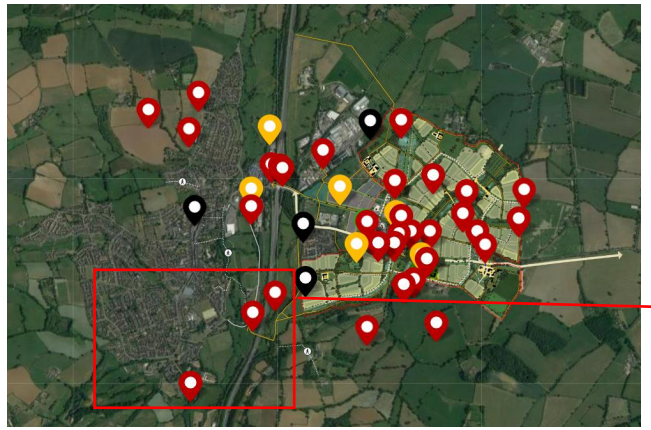
Where is this?

Cullompton Inner Relief road and Cullompton railway station.

Your comment or suggestion:

I feel that the Cullompton inner relief road needs to be completed and the Cullompton railway station re opened (should never have closed in 1960s) before any houses are built in the Cullompton Garden Village. Please please look first at the infrastructure.

3 people like this





B3181 to Exeter

Where is this?

B3181 to Exeter

Your comment or suggestion:

There should be plans for this route to Exeter to be accessible without going through Cullompton town centre. There is already too much traffic in the town centre as it is.

Nobody has liked this yet

Southern end of Inner Relief Road

Where is this?

Southern end of Inner Relief Road

Your comment or suggestion:

No obvious provision for the possibility of linking the southern end of the Inner Relief Road (through CCA fields) to the relief road shown by Jenny Clifford when presenting the Garden Village running to the south of Honiton Road starting just east of the last house in Honiton Road and running close behind the existing houses to S Cullompton

Clearly if both roads are implemented then it would be COST EFFECTIVE to arrange for the intersection to be implemented at the same time. This should be a condition not an afterthought.

3 people like this

Motorway junction

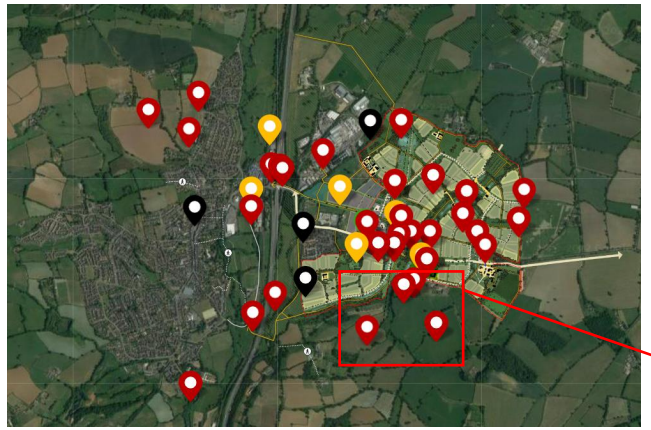
Where is this?

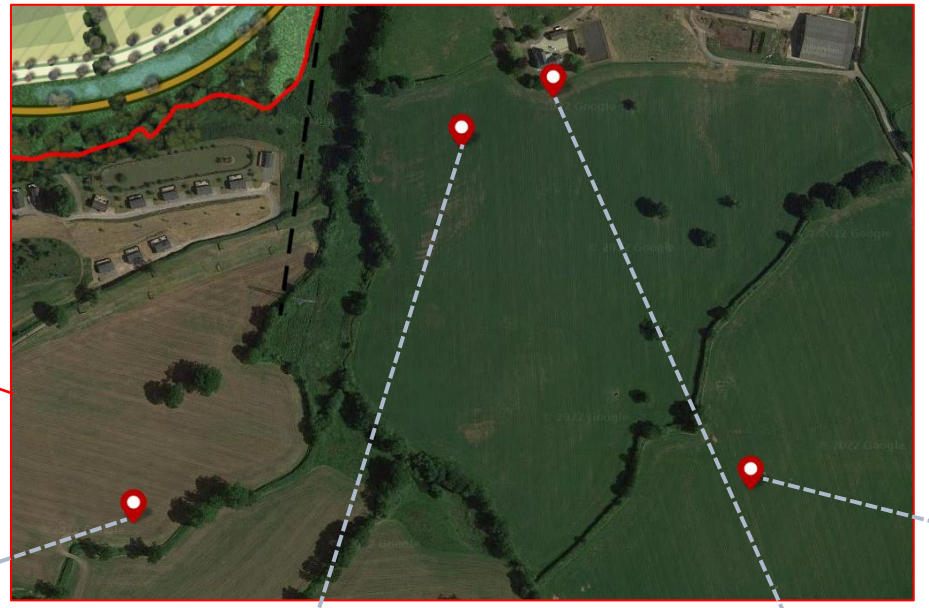
Motorway junction

Your comment or suggestion:

There is no way this motorway junction is going to cope with the amount ov traffic these hosing developments are going to generate. The motorway closed today and as usual the town bottle necked within minutes. The relief roads must be built before any more developments. Traffic congestion is not going to contribute to your eco plan. Also the bridge as a pedestrian is a nightmare to cross due to the volume of traffic and lack of crossings. That needs to be taken into consideration if you are expecting people to walk and use green corridors

Nobody has liked this yet





Comment on the whole plan

Where is this?

Comment on the whole plan

Your comment or suggestion:

Developments as big as this will only be successful long term if the infrastructure is properly designed and executed. Main areas where cost is not happily accepted by the developers are drainage, sewage and flood prevention. It is important that these aspects are properly sized, even oversized, based on the prediction of further expansion. Do not see and real assurance that this will be the case.

1 person likes this

This development is too big, too many house too fast

Where is this?

This development is too big, too many house too fast

Your comment or suggestion:

We've already had 2k odd in houses going in right now into North cullompton. The works at Mill Gardens already cut our Internet off for a month and the college practice is on a generator again because their cables been cut...again. the houses going in at the blood site made that road a nightmare to navigate with them developing entrances on to the main road at the same time as Mill Gardens. It's too much disruption to local residents and wildlife at once. These developments need to be staged over years not months. It's too much and the towns existing community are going to suffer as well as the wildlife. Its awful, kind if regretting moving back here to be honest

Nobody has liked this yet

Aller Barton

Where is this?

Aller Barton

Your comment or suggestion:

How can you build a housing estate right up to a large working dairy farm? Not only will it be rife with people wandering into the farm creating a theft risk but there's also issues from a health and safety perspective. It's completely brainless.

5 people like this

The Whole Plan

Where is this?

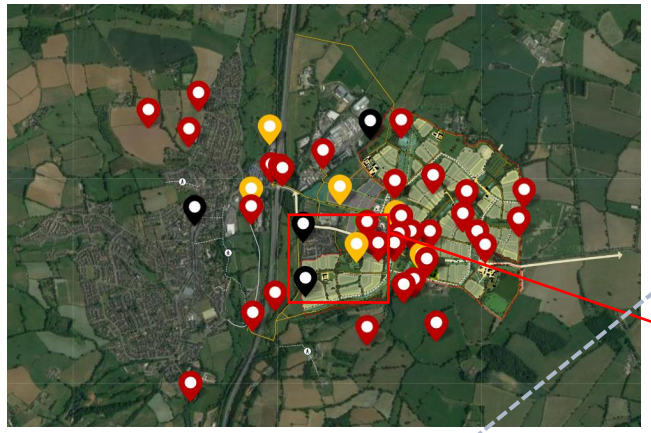
The Whole Plan

Your comment or suggestion:

Having selected the tag to read the comment I am unable to select the "like button". No wonder there are no "likes" for any of the comments - smacks of a stacked deck!!!

Side note: I can select the other buttons in the bottom row (for example Facebook)

1 person likes this





Cummings Nursery Site

Where is this?

Cummings Nursery Site

Your comment or suggestion:

Is this temporarily closed meaning it will reopen again? With so much money being made from development a little extra on getting the right information on the map may help.

Nobody has liked this yet

Comment

Your comment or suggestion:

Isn't this area subject to flooding?

2 people like this

Comment

Your comment or suggestion:

Is access via Greenhouse Gardens to be permitted for delivery of bulding materials and general building work? Access direct to building site from Honiton road (A373) would be preferred option by majority of residents.

Nobody has liked this yet

Honiton Road (A373)

Where is this?

Honiton Road (A373)

Your comment or suggestion:

Buried in the planning is a bit on the need for changes to Honiton Road. No detailed plans are evident but it proposes the use of 20mph speed restrictions. Just wondering how this will be enforced. The road currently has a 30mph limit but many motorists blatantly flout this limit. On the rare occasion we have speed cameras the traffic flows very slow compared to the norm. Are we still having the Garden Village relief road that was planned to run from A373 (between last house and farm entrance) that runs south of the existing houses to south Cullompton? This will reduce load on the road.

Nobody has liked this yet

Honiton Road (A373)

Where is this?

Honiton Road (A373)

Your comment or suggestion:

Clearly the existing plans show that unless the southern relief road discussed when the Garden Village was first mooted (or a northern relief road as suggested at the Kentisbeare presentation) is implemented the traffic on Honiton Road will substantially increase. All of the houses at the eastern end of Honiton Road have individual direct vehicular access onto Honiton Road. For these houses it is already difficult to get onto the road, especially if turning right). Given the failure of other traffic schemes to limit traffic speed in Cullompton (for example High Street, Silver Street in Willand, Tiverton Road) it is questionable that any traffic calming scheme will work. This is especially true if it is remembered that Highways may impose other restrictions on this road which is classed as an A road.

2 people like this

Field just south of 29 Honiton Road (last house)

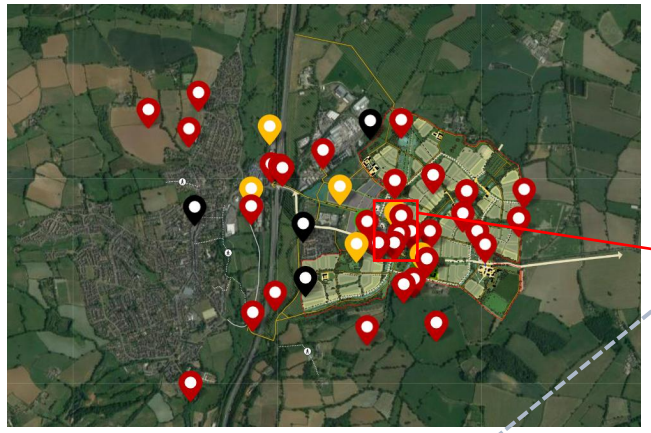
Where is this?

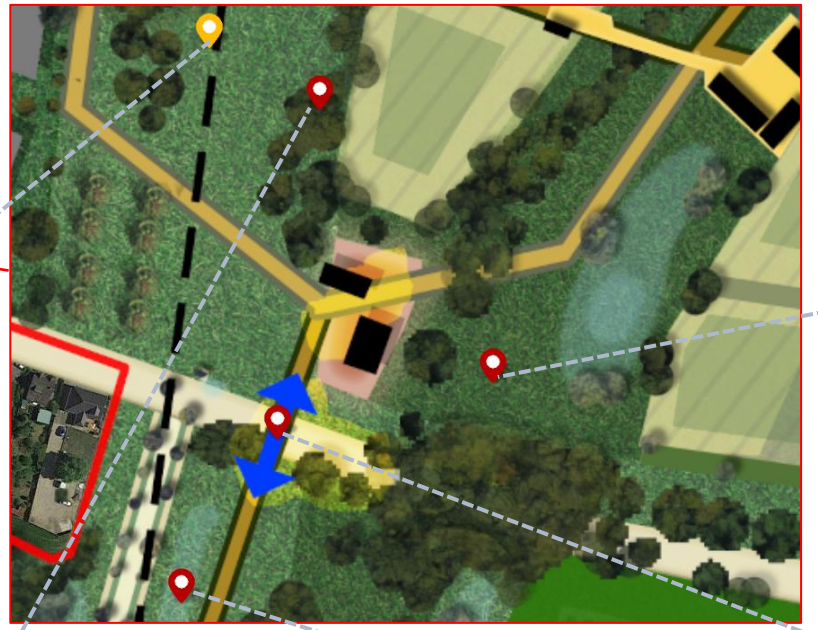
Field just south of 29 Honiton Road (last house)

Your comment or suggestion:

When the Garden Village was first presented by Jenny Clifford there was a relief road linking the A373 starting just east of the last house in Honiton Road and running to the north of the road shown in this presentation. It just clipped the corner of the field behind 25 - 27 Honiton Road. There is no reserved area for this item that was voted on in the previous presentation. If I understand the plan correctly the area is designated for housing. For some not a significant change but quite relevant for those living in Honiton Road.
If this significant modification from the original plan what other "adjustments" have been sneaked into the plan?

Nobody has liked this yet





Any land you don't build on

Where is this?

Any land you don't build on

Your comment or suggestion:

Would be great to allocate some land for allotments that people could use to grow their own fruit and veg locally to reduce the amount of miles our food travels and to become more self sustainable. There are limited existing allotments with lengthy waiting lists and not all of lush have the garden space needed to have a veg patch

Nobody has liked this yet

Relief rd

Where is this?

Relief rd

Your comment or suggestion:

Where's the new relief road
This council should get its priority's right
Before making big plans

4 people like this

Between last house in Honiton Road and Farm entrance

Where is this?

Between last house in Honiton Road and Farm entrance

Your comment or suggestion:

Some time ago it was determined that there would be a relief road that linked Honiton Road (about where the 40mph sign is) around the southern side of the houses and linking up to existing roads in the southern end of town. This would then allow the Garden Village traffic that wanted to go to S Cullompton (for example Aldi or Bradnich) to avoid the M5 bridge. Has this relief road been cancelled thus forcing all traffic along the existing road (A373/Honiton Road) to add to the chaos at the M5 Junction?

Nobody has liked this yet

Blue Double Headed Arrow across Honiton Road

Where is this?

Blue Double Headed Arrow across Honiton Road

Your comment or suggestion:

What is this? Not detailed in the key for the illustration

2 people like this

Zones for nature, ecosystem services, enjoyment, water catchment management etc

Where is this?

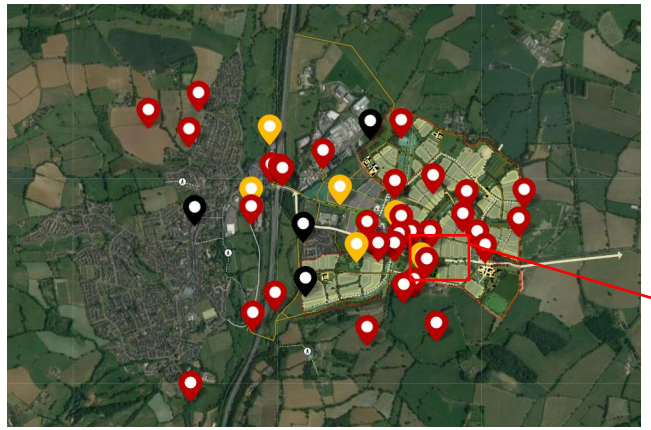
Zones for nature, ecosystem services, enjoyment, water catchment management etc.

Your comment or suggestion:

At first glance there seems to be a few broad green spaces / corridors reserved within the Masterplan map. However, I am curious about why broad corridors are missing / weak in other areas e.g. southern end. Please seek to improve?

I wonder how the layout was informed by ecological evidence and recommendations - plus, on the other hand the (emerging) Nature Recovery Strategy would help inform opportunities for habitat enhancement. Stakeholders need to understand this aspect. Also there is an argument to optimise NOW because the nature gains can't be put back in at a later stage. Bear in mind the baseline landscape was perhaps not ideal - so there are potentially opportunities not identified (some species/groups and habitats would not be found in the surveys).

2 people like this





School - are you going to put in a secondary school?

Where is this?

School - are you going to put in a secondary school?

Your comment or suggestion:

Cullompton secondary school has struggled for years with the space it has left to expand. We barely had room for all our years when I was there over 15 years ago. Could the secondary school be relocated to this site with new facilities that can accommodate the growing student population?

Nobody has liked this yet

A school next to an 'A' road

Where is this?

A school next to an 'A' road

Your comment or suggestion:

It looks like a blundells road problem in the making!

3 people like this

just off Honiton Road close to Primary School site.

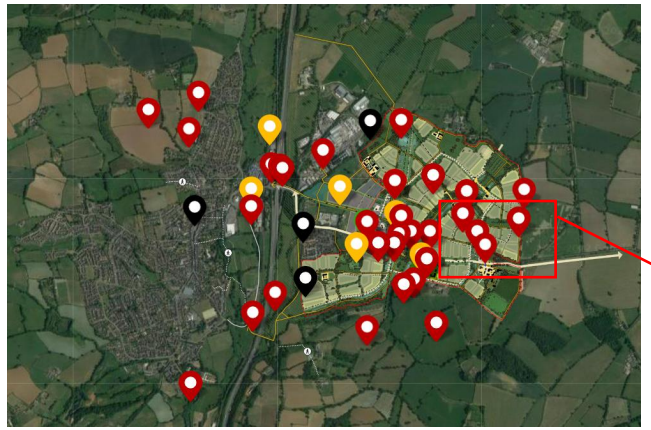
Where is this?

just off Honiton Road close to Primary School site.

Your comment or suggestion:

East Cullompton needs some food shops. Suggest a large supermarket goes in this location, ASda or Morrisons, also East Cullompton needs a new food pub for the very large community. Pub should be built in early stages of construction, so should supermarket. East Cullompton also needs other retail, eg, halfords, screw fix, homebase, shoe fare, currys, superdrug, The Works or WH Smith stationers. If there is no retail in East Cullompton it will just turn into a commuter village and ecveryone will get in their cars and drive to Taunton or Exeter. So the point of the GV beinbg a cycle friendly zone will be lost. Cullompton High street is very small and all the shop units are very small, so big new retail will not detract from High Street but make East Cullompton a destination point.

Nobody has liked this yet





Comment

Your comment or suggestion:

I saw in the FAQs that there is a requirement that at least 28% of the new homes built must be affordable, 28% is a pathetically small proportion of the new homes to be allocated to affordable housing, I hope that this can be increased in the final plan. Also will this affordable housing be shared ownership only? What will the fees be? A lot of the time shared ownership is just as unaffordable due to the extra monthly costs of rent, ground and service charges. Will this affordable housing be ring-fenced for local buyers, with a connection to the area?

1 person likes this

Who's going to pay for these 'green landscaping places' to be maintained?

Where is this?

Who's going to pay for these 'green landscaping places' to be maintained?

Your comment or suggestion:

Will this site be subject to maintenance fees on top of council tax? Personally these kind of schemes but me off buying new builds, its like paying rent for the land your house is built on which for people who already struggle to get on the housing ladder is off putting. Especially when there is no regulation on these charges and they can just be upped whenever the developers like with no cap. We've recently moved back here and it was so hard to find a house free of this entrapment. If the council wants to grant permission for large housing developments they need to pay for their maintenance. Its like buying a pet then expecting the breeder to pay for its lifelong care when you're thr registered owner. They need to take some accountability and foot the bill.

Nobody has liked this yet

A373 crossings for pedestrians

Where is this?

A373 crossings for pedestrians

Your comment or suggestion:

I hope these are bridges to accommodate safe access across the busy A road as the plan is to make every where accessible within 20 walking or cycling minutes.

1 person likes this

The entire perimeter of the proposals

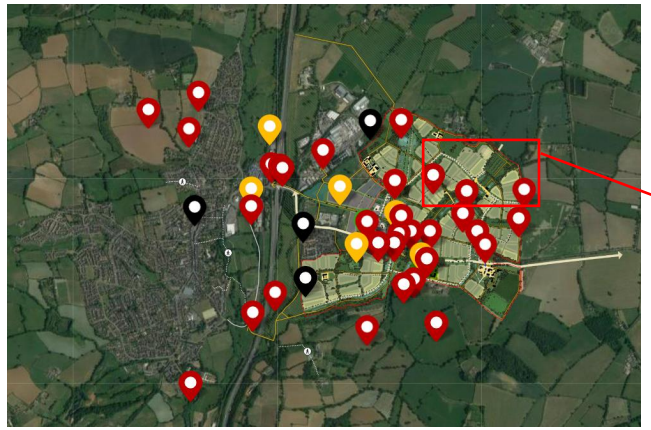
Where is this?

The entire perimeter of the proposals

Your comment or suggestion:

A large part of the perimeter of this masterplan is a perimeter road with housing behind. There is no feathering of the masterplan out into green lungs, or softening down into parks or recreational areas needed by this scale of housing. What this does point to is further and further expansion in the future, bolting on more housing and desecrating farmland and existing habitats. Put a softer, greener edge to this masterplan so that the abruptness of the buildings is contained, don't use perimeter roads and provide evidence of the curtailment to the future expansion further outwards; or be truthful about the intention for this masterplan to be part of an even greater, even worse addition to an already disjointed, problematic unsuccesful small town. Fix the existing town problems/connection, use brownfield land first and provide a measured masterplan solution. This is none of those things.

7 people like this





Comment

Your comment or suggestion:

Will any of this new housing actually be affordable for local people like myself? All of the recent new developments created in and around Cullompton have focused on "luxury" 3,4 and 5 bed homes that are vastly more expensive than the average budget of local people. These new homes seem to be intended to house people from outside the local area, putting more pressure on our already over stretched local services and infrastructure. Please focus on providing the housing that is actually needed by local people who have grown up in this area first.

1 person likes this

Comment

Your comment or suggestion:

Will these new homes have adequate parking? I understand that the plan is that every part of the development will be accessible via walking/cycling, however, people living here will still most likely need a car/vehicle to commute to and from work or to get to Exeter and Taunton etc.

1 person likes this

Eastern boundary

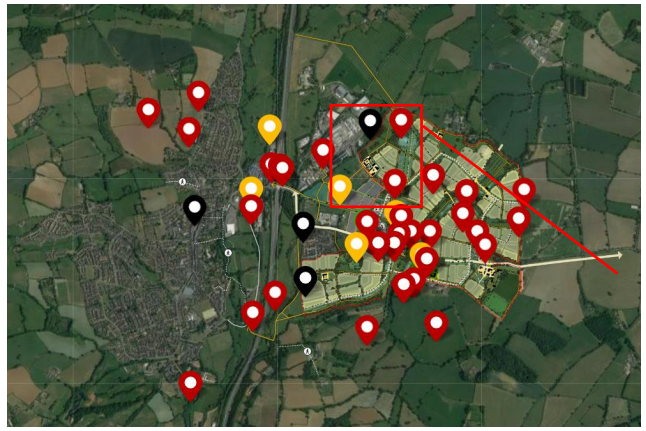
Where is this?

Eastern boundary

Your comment or suggestion:

Not entirely sure this will be the boundary and the pledge not to encroach onto Kentisbeare Parish will be broken intentionally.

2 people like this





Are these reservoirs or admitting you know the area will flood?

Where is this?

Are these reservoirs or admitting you know the area will flood?

Your comment or suggestion:

Have you reached out to southwest water to discuss future water supply for these vast developments? Considering most our local reservoirs are still at 20 % shouldn't we be focusing on reducing the strain on our water resources until a planned action has been implemented?

A new road from Kingsmill Lane behind East Cullompton jopining Honoiton Road with a roundabout in th Aller Barton area.

Where is this?

A new road from Kingsmill Lane behind East Cullompton jopining Honoiton Road with a roundabout in th Aller Barton area.

Your comment or suggestion:

Honiton Road is a very busy A road. Making it a 20mph zone is crazy if there is not an alternative route for large HGVs and other routes. So build a new Road from Kingsmill Lane up behind the back of Est Cullompton connecting to Honiton Road by a roundabout in the area of Aller Barton. This would take all the heavy traffic off the exsting Honiton Road. WHEN THERE IS A NEW ROAD TO TAKE HEAVY TRAFFIC AND ONLY WHEN THAT IS BUILT AND OPEN COULD THE EXSTING HONITON ROAD BECOME A 20MPH ROAD.

Nobody has liked this yet

Yellow line parallel to Honiton Road

Where is this?

Yellow line parallel to Honiton Road

Your comment or suggestion:

This route is still an outline plan. There is plenty of scope for making this route a bespoke alternative to Honiton Road rather than trying to modify Honiton Road. For example ensure that all vehicular access is via service roads and not directly onto the road

1 person likes this

The Culm Garden Village

Where is this?

The Culm Garden Village

Your comment or suggestion:

May be someone could show the original outline of the Culm Garden Village on the same map so that we can see how it fits into what is now being called East Cullompton. I think the whole area for East Cullompton is Much bigger than the Culm Village and people will be confused and think it inly refers to the same area as it is not being shown as different.

Nobody has liked this yet

Fordmore farm shop this is due to be expanded

Where is this?

Fordmore farm shop this is due to be expanded

Your comment or suggestion:

A problem. Even when fully expanded Fordmore farm shop will never be able to provide the range of goods such as a supermarket like Asda or Morrisons. Therefore there should be plans in East Cullompton to bring in a new large supermarket store.

Nobody has liked this yet

Appendix 1 Public consultation email responses

Transport	General Development	Infrastructure	Principle/Questions/Other	Wider Garden Village	Flooding	Env/GI/BI/Landscape	Facilities	Affordable Housing
There should be no further building in Cullompton at all until the relief road is built. This applies to all sites east and west. Cullompton town centre will die completely unless the relief road is built in the next few years	The effect of the plan should not detract from the viability and prosperity of Cullompton Town. It should also not have a detrimental effect on the rural nature of smaller communities nearby.	Increased demand placed on health and social care in the area. Have the GP practices/RDEH and local hospitals/ambulance services agreed that they can absorb the rising numbers of patients?	It is imperative that the village boundary is preserved as well as the appearance and character, although it appears on the map that the development proposal already encroaches into the Parish. The area on Kentisbeare side of the development should remain as agricultural land. Why the need for green spaces when there is prime agricultural land already. Why a garden village when there are tiny or no gardens?	Moving to the wider issue and 'potential areas of consideration' the map shows this passing over the boundary of Kentisbeare Parish, passing Horn Road and reaching Dead Lane. Many representations have been made that the development should be kept out of the Parish of Kentisbeare and that a natural gap be maintained at the Cullompton edge of the development (Buffer Zone) to preserve the nature and character of historic Parish. The scope is looking at putting large school(s) and sports facilities within Kentisbeare. Policy S14 of the local plan specifically protects the Parish (and other similar parishes) from development that does not preserve and where possibly enhance the character, appearance and biodiversity of the countryside…Policies will permit agricultural and other appropriate rural uses.		The use of high-grade agricultural land for housing. Open spaces are integrated into the plan but the rural nature of the east side of Cullompton will be lost forever.	Fordmore Farm is seen as a central hub for the Garden Village providing retail and other services. As mentioned above, the current access onto the A373 is poor. I would also like to question the effect on Cullompton shops and services of this 'out of town' development. Have the retailers in Cullompton been asked their views?	I do understand the pressure to provide more accommodation in the Southwest. BUT this should be affordable and include social housing with a firm commitment from any developers. They should be held accountable for promises that are made.
Extra traffic generated by even a small development feeding into the A373 from the M5 to Honiton. This is a very poor, narrow, and bendy road with the pinch point at the Junction 28 M5. Developing the Fordmore complex will compound the problems. Are there plans to have a filter system (like the entrance to Mole Valley Farmers) to reduce congestion as the complex grows?	East Cullompton and Cullompton being regarded as one: The East proposal significantly overshadows the old town in scale. There is nothing in the plan to make them interdependent. The lack of employment will stimulate out-commuting, increase carbon emissions and by its very existence will damage existing air quality, noise and dust.	I am led to believe from various conversations that the main infrastructure, relief road, motorway junction, new flood defences and station alone will cost in excess of £150 million pounds. That ignores upgrade to the A373 which is already struggling. All these and more are necessary even for the 2,500 houses- that is £60,000 extra cost per dwelling- is there no better way for MDDC to add houses to the district? What is the rational for 5,000 houses- I have not seen any. Is it imply to spread this enormous cost out reducing it to £30,000 per house.	There is a huge mental health crisis in this country. This vast development with cramped and a lack of affordable housing (whatever that actually means) and with houses built before schools and health care it is a disaster in the making. People need space.	Page 51 of the SPD includes the statement that 'surrounding villages remain clearly separate from Cullompton in terms of identity and village setting'. Page 39 states the requirement of a 'green buffer with Kentisbeare' as a key finding from the Stage 1 consultation. However the map on Page 6 contradicts this by referring to it as a 'Potential Area of Consideration' which offers no guarantee that the area will be preserved from development.		Increase Biodiversity? Wildlife exists throughout the chosen area, from rabbits, deer, foxes and badgers to bats, owls, buzzards. That ignores the other fauna and flora that inhabit the fields, ditches and hedgerows that has evolved over centuries in harmony with man. Protect natural resources? You cannot protect what you destroy with concrete, tarmac, houses etc.	Other facilities seem likely to follow according to the East Cullompton Masterplan. As well as depleting Cullompton of leisure activities the relocation will affect the nature of nearby rural communities.	
Junction 28 is a major obstacle to the development east of the motorway. Apparently over 20 options are on the table!! NOTHING must happen until the Junction is improved AND the work completed. With the current economic position in the UK guaranteed funding could be hard to find.	And as for thinking of it as part of Cullompton joined together by the River Culm. It is not joined but divided by it, by the railway line and by the motor way that cuts through it. A footbridge or two, the little lane at Old Hill and the A373 are not going to unite the development with the town so acknowledge that and design accordingly.	Our second concern is infrastructure which has also previously been raised through consultation and discussion. This development should be planned and constructed responsibly. No development on this scale should be carried out without substantial infrastructure being delivered first. It is unthinkable to consider a development of this size without addressing this initially – we have many concerns, but in particular we would like to highlight the A373 as a major concern.	Yet again we are being asked our views on the expansion of Cullompton only for you to ignore them. With the relocation of Cullompton Cricket Club the Council has already broken its promise not to build within the parish of Kentisbeare, and that all community hubs should be within a 20 minute walk. The local community no longer trusts you to serve on our behalf. It has been proved time and time again that the Council has no control over the developers, so we all know that more than 1100 houses will be built before any improvements to Junction 28 are carried out and that a net zero loss of hedgerows within the marked area is a load of bull excrement. NO to 5000 houses on the east side of Cullompton.	We have two main concerns; the first of these being the green buffer zone between Horn Road and Dead Lane, which has repeatedly been referred to through consultation and various discussions including via the Parish Council. We respectfully ask that MDDC respect the wishes and concerns of the local community who have identified this area as an area of particular importance to them that should be protected to ensure that it cannot be developed. It should consist of perhaps tree planting and some walkways only.		We remain concerned at the potential for unavoidable damage to biodiversity and local landscape throughout the lifetime of this project.	If building starts at Fordmore before the M5 J28 is sorted and major improvements to the A373 are carried out, there will be terrible bottlenecks and accidents with unthinkable consequences for Kentisbeare which will be a rat run. With homes what about health care and school provision as these are already over subscribed as it is.	
Cullompton Town Centre currently is very deprived and despite best efforts appears to be in decline. The relocation of the Cricket Club from the town is a big mistake as residents will no longer have ease of access to the ground. They will have to travel by road to get to the new site (Kentisbeare Seconds?) – again the A373 will be affected / pollution increased.	To have a soft edge to the development and 'feather' it into open countryside begin that in Cullompton Parish and preserve the agricultural land that runs from the Parish boundary across Horn Road and Dead Lane to the village itself. There is significant wildlife, including deer, rabbits etc and historic biodiversity here that can blend with the new artificial edge of the proposed development.	Further development East of Cullompton requires underpinning by an infrastructure that is in place before any building commences. The current economic problems do not bode well for firm commitments for funding.	Really concerned to see from the recent Master Plan that you have now almost doubled the original footprint for the village and now included within the "potential area of consideration for wider Garden Village and Country Park" our property and other listed buildings not to mention wildlife areas that are of importance. I do not understand how a Council can railroad rules in terms of listed buildings and what assurances do we have in terms of a new build village being built in areas of importance with wildlife and listed buildings?	I would, whilst writing, like to reiterate strongly the view held by a majority in Kentisbeare and by our Parish Council that we do not wish the Kentisbeare Parish boundary to be breached. All development should remain on the Cullompton side of Horn Road, including the 'relocated' sports club.		Climate Emergency – we are in a time of crisis and unprecedented climate emergency – we are hurtling towards a future that if we do not change our ways will mean devastation for our world – how can we allow this to happen to our children and grandchildren – Preventing this and protecting our planet and all its inhabitants must be the very first consideration taken into account for every decision we make as a district, a community and as individuals – It is irresponsible beyond belief not to, and hopefully will soon be illegal too.	I just want the timing done correctly. Facilities and infrastructure first, development later. Fordmore is not a community hub. It is a private money making venture and should not be considered a focus at that end of the development.	

Transport	General Development	Infrastructure	Principle/Questions/Other	Wider Garden Village	Flooding	Env/GI/BI/Landscape	Facilities	Affordable Housing
Currently there is a dire lack of public transport to and from Cullompton for the existing villages along the A373. Are there guarantees that there will be a frequent and regular bus service to support the development of East Cullompton with the Town and proposed railway station. Is there a firm commitment from the bus companies?		I continue to have major concerns about the viability of any large-scale development to the East of Cullompton. These are mainly related to the infrastructure required to support it.	I have lived happily in Kentisbeare for 30 years and it is so important to myself and other people in Kentisbeare to keep our village as it is and not have such a large number of houses built so close to Kentisbeare. I have taught at the school, helped at youth club, led a Sunday school for many years and now am a church and choir member. I dearly hope you will consider so many reasons for not building such a large development. The traffic going towards Cullompton and the motorway is already very heavy and frustrating. In addition flooding is already a real problem and with climate change and large scale building causing a quicker run off it can only get worse.	The Kentisbeare Parish boundary should be recognised and kept. The plans to build 5000 houses wipes out acres of prime agricultural land. Why? The Terminology 'Garden Village' is a contradiction in terms. I have looked up the definition of the word 'Garden'. A piece of ground adjoining a house in which flowers, grass and shrubs may be grown. A village definition is ' A group of houses and associated buildings, larger than a hamlet and smaller than a town, situated in a rural area'. What Mid Devon is wanting to do, is creating A TOWN.		During the recent building of the Persimmon Housing development on Willand Road, I witnessed the sad felling of an ancient oak tree (over 250 years old). Can you give an assurance that trees over 30 years old will be preserved and if not how many trees over 30 years old will be felled to make way for the new development?	Building a sense of community..., make it compact and village like.... 2500 houses is a significant town- a Cullompton for 10 years ago, Although Cullompton High St has struggled the town still boasts several Churches, 7+pubs, many cafes, restaurants and social clubs, 2 Doctors surgeries, 2 chemists, butchers and several convenience stores, Library, sports clubs, 2 supermarkets, schools and nurseries and more Hairdressers than I can count. To create a community you need all these things. They need to be accessible and designed to generate an identity. The plan does not does this- 2 small commercial hubs is poor thought. It is a town you are planning not a village so design accordingly.	
Do not allow the proposed amount of development until this junction on M5 is sorted or a new junction built with the finance guaranteed for same.			Every year costs rise and projects go unfunded-eg Relief road- and the project keeps gets bigger. It seems to have its own life, continually growing and getting further and further out of reach as costs rise. Surely it is time for a major rethink, especially as the country is virtually bankrupt.	I have to say that we are extremely disappointed that the plans now potentially involve developing across the Kentisbeare village boundary up to Dead lane. The consultant that was present repeated that they will only go up to dead lane if they need to and at the end of the day it's only an idea at this stage. Given that MDDC previously reassured villagers that they would not develop past the village boundary this reassurance appears not to be worth the paper that it is written on. My wife and I oppose these latest plans and MDDC should return to the original promise of any development to the east of Cullompton would be kept outside of Kentisbeare Parish and that the green buffer zone be placed to ensure that the village remains a village and no developments should encroach on it.			Please consider placing the school & sports facilities at the heart of the east Cullompton development so that car travel is minimised outside of the development. I whole heartedly support the vision of making this new community sustainable with services but the school needs to be placed further towards Cullompton in the heart of the housing development, perhaps where local shops are planned	
Expecting people to walk or cycle is just not going to happen. Public transport is already unreliable with strikes as long as the unions have a say and always will be, so people will still rely on cars. To say otherwise is ideological at best. Cullompton railway station is a waste of money. Where will people leave cars in order to use to train?			There are still aspects that require a major degree of further attention, to name just two – flooding and infrastructure.	My main concern with the consultation is the new blurred zone of 'potential area for consideration' which directly crosses the parish of Kentisbeare boundary. I feel most residents of Kentisbeare would agree that this proposal threatens our rural way of life. MDDC have previously assured us of a green buffer zone in line with your rural areas policy. I feel this new proposal would contradict this previous assurance. 'all-through school' buildings with sports facilities, in my mind, do not constitute a green buffer zone, as substantial buildings, which are not agricultural will need to be erected. A large scale school will bring huge amounts of traffic, again contravening the very fabric of rural living. This also is not a development that will enhance the character, appearance or biodiversity of Kentisbeare village which is a contradiction to your rural areas policy. Also, this was not in the original adopted plan which again threatens trust between Kentisbeare residents and MDDC.				
The planning document should have a section that summaries the key conditions one of which is the need to complete the Relief Road first. The document and the presentation at Kentisbeare indicated that it was planned to slow the traffic on Honiton Road (A373). This A road is presumably to a greater or lesser extent subject to the rules from the Highways Authority not just MDDC so the options are very restricted. Currently it is quite common to see speeding cars along the road and not unusual to see overtaking taking place. With such flagrant breaking of the legislation you wonder if simple road markings (alligator marks, red road surface, repeater discs) will be heeded. One comment made was that the road appearance/width suggested that it was a fast road. Only physical restraints like "sleeping policeman" or chicanes are likely to work. Cullompton High Street has 20mph limit where the road is narrow but clearly this limit is often ignored.			It is not acceptable to plan developments that require millions of pounds spent on the increased use of motor vehicles. For this proposal to go ahead MDDC are spending £800K purely on a feasibility study to look at possibilities for increased traffic! Future M5 junctions are looking at costing over £100 million pounds! The Cullompton relief road is now being costed at £30K plus! This is not an acceptable use of vast sums of public money in these times of climate emergency. Our country and indeed our county are at breaking point financially – this is irresponsible beyond belief.	Why has the East Cullompton Extension been allowed to cross over into the Parish of Kentisbeare. If the unwanted extension is going to happen it should remain within the Cullompton boundary.				

Transport	General Development	Infrastructure	Principle/Questions/Other	Wider Garden Village	Flooding	Env/GI/BI/Landscape	Facilities	Affordable Housing
A relief road starting just east of 29 Honiton Road and went close behind the houses to get to what was described as a south facing half junction with M5 to allow residents to easily go to Exeter. This relief road has been erased from the plan and the only place on this revision of the plans where such as road can be placed is significantly to the south of the original route. Please consider reinstating the original routing. Mention was made at Kentisbeare of the possibility of a similar relief road but to the north. A detailed traffic survey needs to be done to show if the traffic from the Garden Village will go to Exeter or Taunton.			It is not acceptable to build on flood plains – this becomes even more important as the climate crisis hits. It is not acceptable to build acres of housing estates on agricultural land that is and will be desperately needed to grow crops and graze animals. It is not acceptable to build houses in areas where residents need to use cars to travel to work. It is not acceptable to allow development to be decided and influenced by the profit aspirations of landowners and developers. It has never been acceptable to ignore the needs of existing residents (of all species) and their communities when planning future development. Yet this plan proposed by Mid Devon District Council is based on doing all of the above. Surely Mid Devon District Council have a duty of care to their residents – surely they have a basic and unavoidable responsibility to 'do no harm'.					
Favouring walking and cycling, how do you propose to do that? There is nothing in the plan to stimulate that. It is a human choice how to travel and regrettably the majority will choose vehicles over effort every time unless you make the development traffic free - which you are clearly not			From the very first suggestion of development East of Cullompton the needs and views of the rural residents in the area have been ignored –Policy S14 in the local plan – under the heading Development – promised to 'preserve and where possible enhance the character, appearance and the biodiversity of the countryside'.. Polices will 'permit agricultural and other appropriate rural uses'. – Kentisbeare is particularly named as one of the areas given this protection and assurance. However at the very first point in the process this was ignored – with permission given to Cullompton Cricket Club to be relocated within the parish of Kentisbeare and continues to be ignored with 'potential areas of consideration' reaching well into the heart of the parish – None of this is in the adopted plan and all of it goes against the overriding view of the residents that a Green Buffer area would exist on the Cullompton side of the Parish boundary and that development should be kept outside of the parish.					
The Railway Station would be good, but if the plan (as I was told at the Kentisbeare pop-up) is for a Metro linking Tiverton, Wellington, Cullompton and Exeter every 2 hours it is not going to contribute much to the carbon footprint of Old Cullompton, evolving Cullompton and East Cullompton.			IF – we cannot stop the initial development East of Cullompton – then we can and should demand that you STOP! Stop at the parish boundary between Cullompton and Kentisbeare – respect our community and leave a buffer zone on the Cullompton side of the boundary. Stop breaking your commitment to preserve our community and environment. START respecting our communities, our environment and our children.					
The thought of 5000 houses being built off the A373 is quite frightening. The A373 as we all know, is a very poor 'A' road which should in fact be a 'B'. So why would anybody want to consider building this amount of houses off it. As and when any form of building might take place on the A373, it is in evitable, there will be traffic lights involved. The A373, especially at peak hours gets very clogged up particularly near the M5 junction. With traffic lights on this road, this traffic problem would get very much worse. To avoid the traffic lights, motorists are going to take to the narrow lanes nearby to get to their destinations. It is highly likely that they will drive faster than they should and accidents are inevitable. The whole concept has not been thought through properly by Mid Devon Planning Dept and members of the Council.			I wish to object in the strongest possible terms to the above application relating to the development land for the Culm Garden Village - In particular, on the land that is within Kentisbeare Parish Boundary. You are already utilising over 700 acres of rural land to build the new Culm Garden Village, so the idea of allowing you to allocate a further 170 acres of "all through school" is both against what was promised and undemocratic. Any proposed schools, for the new Culm Village, should be sited within your originally proposed landbank and not merely "sneaking" it into Kentisbeare Parish.					

Transport	General Development	Infrastructure	Principle/Questions/Other	Wider Garden Village	Flooding	Env/GI/BI/Landscape	Facilities	Affordable Housing
Will you (can you) please give assurance to occupants of Greenhouse Gardens, that the road passing through Greenhouse Gardens will NOT be used for access to the building site? Also, that this road should be barred to the contractors. The road is already insufficient for current needs, let alone perhaps 100 additional cars using the road for parking during the day, and perhaps overnight. Access to the building site should be via the road leading directly to the site from the A373, and building work should not even be started until improvement of the A373/J27 of M5 access is improved. If this request is ignored, not only will the brick road leading into Greenhouse Gardens be destroyed through overuse by heavy delivery vehicles, but the safety of children playing outside their homes will become an unsafe area.								

Appendix 1 Summary of landowner/promoter representations

General	Section 1 Introduction	Section 2 Vision	Section 3 Influences	Section 4 Understanding the Place	Section 5 Masterplan Framework	Section 6 Growing East Cullompton	Appendix 1 Design Code
					Mixed use community hub at Fordmore Farm supported. SPD not clear whether residential can be included in community hubs - green box on page 87 refers to retirement services but not clear if this means retirement living. Requirement to either add residential to community hubs or remove private housing area of Fordmore Farm from the community hub (preferred approach).		
					Landowner intends to develop area of community hub north of Honiton Road for commercial/employment use. SPD does not reflect the consented development at Fordmore Farm (21/00349/FULL) (Class E development, agricultural style warehouse type buildings) or align completely with landowner aspirations. Some of the green space might need to be used for community/retail uses in order to provide sufficient community uses to meet the needs of the allocation. Further discussion on what can be provided requested.		
Good document overall. More optioneering could have been included, especially as masterplan deviates from the first consultation draft. However, SPD sufficiently flexible.	Page 7 – clearer if 'profound change' bullet points retitled as 'profound change, evolving public policy and guidance'.	'Village scale' must cognisant of scale and function and be clear that this is a larger village – functional offering must support growing population.		Section 4.4 Natural capital. Findings from flood modelling can be used when planning the wider concept area – boundaries of built zones have scope to change.	Section 5.1 Page 84 – land outside allocation to east of Fordmore shown on map (and all section 5 plans) – error?	Section 6.1 Useful context but is rightly heavily caveated as being part of a separate statutory process. The text caveats the plans as one way of growing East Cullompton, but the text appears to identify some emerging preferred outcomes.	A core part of the proposed strategic design code is a "site wide framework plan to provide the 'regulating plan' to structure the design code". A site-wide 'regulating' status would be valid if the site had already been subject to a suite of outline applications, and where suites of parameter plans were approved.
	SPD should list background reports that it relies on.	20mph requirement goes beyond a principle and should refer to the aim/objective of safer streets. Key roads may need to be higher speeds – to be proven at application stage that principle is met.		Section 4.6 Heritage Grade I listed Wood Barton should be shown as a significant listed building.	Note that accompanies the identification of 72ha for housing in the SPD cross refers to the assumption that 7ha of this is assumed to be released by the grounding of the 132KV transmission lines. 16ha affected by the 440kv powerlines does not have a note to accompany this figure - could usefully explain that this area enables another 16ha of green infrastructure. Reasonable to advise that some commercial could come forward in this space. Constrained land to the south of the powerlines is not as much as has been assumed, and that there are developable areas beyond the 30m buffer and the hedge line. Calculations show that only 160 homes might be released. Flexibility should be retained (viability).	The future of the Horn Road and Dead Lane area should still be an open consideration. There remain 4 fields south of the consented cricket club that could be developed for housing whilst maintaining a more than adequate visual and perceptual buffer for Kentisbeare. It may be the case, as indicated on the plans, that the fields immediately east of Horn Road have secondary school or sports hub potential. However, it is unreasonable to suggest that the only other future of this land is as 'yet more' country park land, if it is not needed/selected for a secondary school or sports hub.	It appears that there are two objectives; 1. To ensure that the big picture framework masterplanning exercise for the allocation is suitability shaped and that there will be several outline applications presented over a number of years. 2. To ensure that detailed design (post outline application design) for reserved matters approval achieves a minimum consistent quality standard, with the 'bar' at a high level. We think the SPD already achieves the first objective. SPDs can go further and that introduce a strategic level of coding with the SPD (better described as strong/firm guidance).
				Section 4.7 Utilities Moving power lines is at the landowners' expense. Suggest wording: "The land over which the lines pass within the site benefits from 'lift and shift' clause over the route easement. This enables the landowner (at their cost) to alter the path of the power lines if an alternative route is available". Aspiration of the SPD to ground the 132KV lines - these may remain in situ. The SPD might consider an easement for this eventuality (a Plan B), based on examples elsewhere.	Page 82 (not 84) 8ha shown for community hubs – should exclude green space which should be greyed out on land budget plan. GI might increase as a consequence. Fordmore north and south would decrease to 2ha in tune with local plan requirement for local centre. Page 82 shows existing residential land excluded from community hubs, page 84 includes. Unless land explicitly identified as being available it should not be included.	Land promoter supports the achievement of country park land. It is a fundamental objective of an expanded Cullompton, but the spatial coverage of park land seems to keep growing. The Council must consider what quantum is actually justifiable in planning policy. The masterplan may benefit from the need to achieve biodiversity net gain credits as a driver to justify greater levels of country park land.	Land promoter is willing to scope out a potential approach with the Council that can be shown to genuinely add meaningful benefit to the preparation and determination of outline applications (beyond what is already in the SPD). If strategic coding is 'adopted/approved' before applications are approved, we suggest that the word 'regulatory or regulating' is not used for any of the structuring plans within that material. The SPD already moves to drive forward a common approach, but there 'may' be room for some further targeted material to guide outline applications.
				Sections 4.9 & 4.10 Listed buildings – should refer to 'indicative risk of moderate or high harm' – evidence refers only to a risk.	Section 5.2 Outer hubs not needed to meet local plan target for local centre but could help meet other local plan commercial use targets.	An emerging educational strategy is referenced that refers to an all-through school and two other primary school locations, one of which will be paired with a secondary school. At this stage all reasonable options need to be kept on the table.	Placemaking Framework Plan on page 115 of the SPD. This identifies blueways, blueway crossing points, blueway edges, primary streets, the eastern loop, powerline edges and Honiton Road. Perhaps these present the most useful focus for pre-application strategic coding (or further guidance). The mixed-use hubs need no more than what is already in the SPD is needed to shape the approach in these areas before outline approval. Most of Fordmore Farm is already permitted/ built/under construction.

General	Section 1 Introduction	Section 2 Vision	Section 3 Influences	Section 4 Understanding the Place	Section 5 Masterplan Framework	Section 6 Growing East Cullompton	Appendix 1 Design Code
				Additional zoomed in plans should be presented to show only the allocation area.	Justification for school site not strong – between road and farmyard. Other options could be included – local plan allows for 2 sites.	Elsewhere in the SPD a northern active travel link across the M5 is caveated as being something that can be considered should there be a northern vehicular junction. The same caveat might usefully appear in this section.	SPD provides flexibility for alternative activity zones. SPD could acknowledge any options presented through consultation phase. Given that the SPD is not a fixed plan, scope for strategic 'coding' and outline application work to run in parallel. Pre-application non regulatory coding 'type' guidance could present options so as not to pre-empt final development management decisions.
					Commercial area in right place, strong east-west cycle route good. Less understood is primary road through commercial area (not attractive gateway). Better to skirt western edge of residential land. Not clear how amount of land to meet 32ksqm employment floorspace has been calculated. Light industrial would yield 22,750-26,000 sqm. 'E' uses may increase the density. Useful for background evidence of the SPD to document the assumptions used to justify the size of the commercial area. Local Plan - 1ha of employment land per 500 occupations (just over 5ha). How is this reconciled with the 6.5ha figure in the SPD?	The character areas plan identifies a water meadows character area. The SFRA Q1000 model results identify that EA flood maps are coarse and challengeable. It may be the case that when new flood risk data is applied to masterplanning the garden village, the build zones in the character areas are capable of expansion, drawing them closer together and generating a tighter character area and more housing. There may be other drivers (ecological) but that is another layer of consideration based on choices of where to create BNG credits and where and how much country park land is delivered.	Would like more detail on the overall process that involves any stepped approach to coding. See a role for any such coding to become formalised once land has achieved outline approval. Some adjustment may be needed to reflect approved parameter plans. We see this taking place as part of further, more detailed coding for those areas that have achieved outline approval.
					Section 5.3 Eastern loop better referred to as outer loop (not all east). Text should reference country park is not a local plan requirement. Green box oversteps in referring to BNG being delivered adjacent to boundary and must achieve landscape enhancement. Section 5.4 Welcome apparent recognition, in the green box, that a northern active travel route across the M5 is likely to only be something that is considered where it could be delivered with a new northern junction. Green box on page 109 references junction '30' rather than '28'.		There are some strategic design issues where coding (strategic or otherwise) will not be the tool that delivers a coherent masterplanning approach. The IDP processes have a role to play and will involve strategic engineering strategies that go beyond what coding can achieve. Specific drainage strategies for application areas have to demonstrate that these can operate within a wider system. The location and capacity of early phase junctions are only likely to be deemed suitable if they are capable of enabling the overall superstructure and later phases of the allocation to come forward. Likewise, the garden village will at least be a material consideration when decisions are made.
					The street hierarchy plan on page 108 is indicative but introduces yellow dashed lines to indicate potential secondary streets. Lack of any reference to the use of Saunders Way as part of the vehicular mobility strategy. The road should connect into the main street of East Cullompton and that this should be referenced as an option in the SPD. Active Travel can be provided as part of a strategy that enables vehicular connectivity.		
					SPD is to rely on a modified Honiton Road as the long term primary east-west route. Relying on Honiton Road and a rural community hub as the main centre for 2,500 and up to 5,000 homes is a fundamental big picture urban design strategy. A more northerly diversion of the Honiton Road for east-west movement linked to a more 'street based', urban local centre typology has received little visible exploration. Need to be assured that the junction solutions that are proposed on the key east-west route sufficient to serve more than just the first phases of development.		
					Section 5.5 The requirement for front gardens and bike storage within the green box on page 11 overly prescriptive. Storage can be provided in back gardens and not all houses need a front garden. Reference in the parking section of the green box to street design out of place. Is 'unmistakable' over the top? This should be left to the detailed design stage.		

General	Section 1 Introduction	Section 2 Vision	Section 3 Influences	Section 4 Understanding the Place	Section 5 Masterplan Framework	Section 6 Growing East Cullompton	Appendix 1 Design Code
					Section 5.6 (page 122) advises that "a strategic design code for the whole allocation site [or strategically important parts of the site] be prepared prior to detailed planning applications. The Planning and Design Process Flow Diagram identifies that detailed design follows the approval of outline applications (OPAs) and that it requires compliance with the SPD, OPA principles design coding. On this basis, the SPD identifies that the 'detailed design' stage is a process that follows the approval of parameter plans at outline stage.		
					A single strategic site could generate several outline applications. An outline approval could generate several reserved matters applications from different applicants. Regulating codes can bridge a gap between approved EIA parameter plans and the detailed design of each sub-area that has achieved outline approval. It is this detailed design which the strategic design code seeks to shape. Such coding would be secured through the use of a planning condition. However, the process diagram places a site-specific strategic coding stage before the approval of outline applications, and their parameter plans. The SPD as a whole is therefore suggestive of a multi-stage coding process. Does the reader rely on the words or the diagram?		
					The Planning and Design Process Diagram presents the achievement of an agreed phasing and delivery plan before planning applications are submitted. Whilst we do not have an issue with such a document, the only valid sign-off process for 'agreement' is determination of the planning application. In circumstances where there is to be a single application, or a suite of applications at the same time, covering the whole allocation, the phasing and delivery strategy would need to be presented in full. However, a phased planning application strategy, across several years, is likely and this will lead to various levels of detail being available/presentable for various parts of the site at different times. It would not be reasonable to refuse an early phase application on the basis that a full IDP has not been presented for later phases. The test should be whether the phase applied for is policy compliant in delivering the infrastructure and place-making that is required, and that it does not prevent or inhibit later phases from doing the same.		
					We envisage an initial strategy that is site-wide but perhaps to various degrees of resolution. Later phases may not be able to completely pin down the approach, and indeed there may be options or implications from the selected solution to Junction 28 of the M5. It may also be the case that agreement on 'who goes first' is not reached between the prospective early phase developers prior to applications being submitted. The commercial reality is that there is limited immediate term junction capacity and there may be a commercial inability for one developer to simply yield that capacity to another.		
					Page 133 refers to a strategic SUDS system. The schedule refers to a high-level drainage strategy having already been developed. It is not known whether spatial aspects of SUDS strategy within the masterplan has any justification behind it, regarding the locations of the basins that are shown, nor to what extent the strategy is based on land control and phasing. The Culm Garden Village website identifies that a strategic flood risk assessment is forthcoming. It will be important to understand the degree of work that has already been undertaken. The schedule refers to the strategic design coding process to explore these matters. This not the right place to consider these matters, and a discrete engineering assessment is needed based on the land use budget of the SPD and emerging planning application processes.		

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	Section 1.1 Table 6 of the Local Plan sets out a housing trajectory for the district. The Local Plan relies upon housing completions starting in 2023/2024 (50 homes). It is late 2022, and this SPD has yet to be finalised/adopted, and no planning permissions have been granted, it is evident that first housing completions will not realistically take place in 2023/24. None of the provisions of the SPD should unnecessarily delay development, are proportionate, and have appropriate regard to land ownerships.	Section 2.1 No reference Policy CU11 (East Cullompton Carbon Reduction and Air Quality). It gives the appearance that it is creating new policy by way of an SPD. Should be reference to Policy CU11 in this section.	Section 3.2 Seems to suggest that a 'Carbon Reduction and Low Emission Strategy' for the whole allocation area is required. Not identified in the 'Planning and Design Process Diagram' . Unclear as to the intention / expectations in this regard. Is a site-wide strategy produced by the Council proposed or are individual strategies to be produced by developers to demonstrate compliance with Policy CU11? The former will unnecessarily delay development whereby the latter will ensure compliance with Policy CU11 whilst allowing development to come forward (consistent with the broad phasing identified later in the SPD). The SPD would benefit from clarity in this regard.	Section 4.9 The 'Combined Constraints Plan' on page 76 combines the constraints identified in the SPD. It shows lack of constraints in the south-western part of the allocation. This supports the indication in the SPD that this area should form part of a first phase of development. It also shows that this area can be delivered as a more discrete part of the wider allocation, without impacting upon or being complicated by some of the issues that affect some other parts of the wider allocation.	Section 5.1 Given the numerous land ownerships within the masterplan area, and the fact that development will come forward in phases through separate planning applications, support the requirement for a 'Compliance Statement'. It is important to have regard to the type of application being submitted (outline or detailed), and the scale of development proposed.		
	Section 1.2 Support the approach, which seeks to ensure that the masterplan concept is designed to work with the variety of potential solutions currently being considered. Support the clarity provided to the effect that any references within the SPD to the wider potential 'Culm Garden Village' are commentary only.		Section 3.5 Whilst there is a key role for the Local Plan and this SPD in shaping the development, the need for developers to rely upon one another should be reduced as far as is possible, consistent with delivering high quality development. Such an approach will avoid unnecessary commercial complications that could delay / prevent delivery.	Section 4.10 The 'Opportunities Plan' on page 78 includes a variety of numbered elements which are explained in the text of page 79. However, it also includes various graphical symbols which do not seem to be explained. Suggest a key is added such that the opportunities it identifies can be properly understood.	Section 5.2 We support the 'East Cullompton Activity Framework' plan on page 84. The key for this plan does not identify what is meant specifically by the thicker and thinner black lines. They seem to represent main and potential secondary roads but this is not clear – amending the key would be helpful.		
	Section 1.3 In the 'Planning and Design Process Flow Diagram', both the 'Delivery and Phasing Plan' and the 'Strategic Design Code' are shown as being produced prior to any outline planning applications. We question the extent to which a site-wide Strategic Design Code needs to be in place prior to any outline permissions within the area being granted – given that the majority of any 'coding' will presumably relate to matters more appropriately addressed at reserved matters stage (materials etc…). There are also likely to be parts of the masterplan concept that are more strategic and more sensitive (and therefore more in need of design-coding) whilst other parts will be less so. The delivery of housing in these less sensitive / less strategic parts of the allocation area should not be delayed unnecessarily by the need for a design code for the whole of the allocation area.				School site page 89 Support the provision of a new school consistent with Policy CU10 of the adopted Local Plan. We note the reference (from Policy CU12 of the Local Plan) to seeking to ensure that serviced land for this school is provided prior to the first occupation. A literal application of Policy CU12 would serve only to unnecessarily complicate and delay development. Whilst the land for the school forms part of the identified Phases 1 and 2 of development on the plan at page 124 of the SPD, it is in a different ownership to other elements of Phases 1 and 2. It would not be appropriate, necessary or desirable to delay residential development elsewhere within Phases 1 and 2 pending a transfer of land for a school from another landowner to the Council, and could also create the potential for commercial issues between landowners which may serve only to undermine the early delivery of development. Accordingly, whilst this SPD cannot change adopted Local Plan policy, we consider that the SPD should not repeat this requirement from the Local Plan, and that the application of Policy CU12 in due course should be done carefully as development proposals emerge within the wider allocation area.		

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	An outline application for a limited number of new homes within the area identified as Phase 1 of the East Cullompton development may not require the full 'Phasing and Delivery Plan' to be in place prior to an outline permission being granted. The SPD should clarify that the flow chart identifies the general theoretical / strategic approach, but that the way in which development is delivered will also need to have regard to practical issues and ensure that any strategic matters such as a design code / delivery plan) are proportionate.				Powerlines (p93) We do not object to the reference in the SPD to exploring the potential to underground the overhead pylons. However, such works would also be extremely costly. A final decision in this regard should be made at a later stage when there is greater clarity on the costs and benefits.		
					Community Greens (p102) There is no key for the plan. We assume that the potential Greens are denoted by the dark green shading on the plan but this is not clear (the same applies for the lighter green shading which we assume is showing general green infrastructure). The size of these greens should be considered as part of future planning applications to ensure that they fulfil their identified functions but do not utilise land that may be more efficiently put to other uses.		
					Biodiversity Net Gain (p105) Agree with the requirement for developers to demonstrate a net gain in biodiversity. We note that the SPD identifies that the masterplan framework as a whole may raise questions as to its ability to deliver a biodiversity net gain within its boundaries. It should be noted that some areas of the allocation offer significant potential to secure biodiversity net gain. We are unclear why the SPD requires that such offsite solutions should be 'adjacent to the East Cullompton allocation boundary'. We are not aware that this is a requirement of any national or local level policy approach and we do not consider that it is necessary or appropriate to be so prescriptive.		
					Section 5.4 – Mobility Mobility hubs are not defined on this plan or in this part of the SPD (they are addressed later in the document). Beneficial to clarify and cross-reference as appropriate.		
					Street Hierarchy (p110) The plan does not include a key and accordingly, it is not clear what is meant by the various lines and arrows. A new road is proposed to run south (and then west) from Honiton Road, which would provide access to the proposed land parcels south of Honiton Road and south of the Greenhouse Gardens development. We do not object to this in principle but important to recognise that the masterplan is strategic in nature and that the Council does not intend this to define the precise location and extent of elements of the plan, which will instead be defined through planning outline and detailed applications. For example, it may be that more detailed work demonstrates that this access from Honiton Road is or can be taken from a different location.		
					Question the rationale (from both an urban design and cost perspective) of having this proposed access road running adjacent to the southern edge of these development parcels. Advantageous for this to be a development road. As this is effectively a dead end for vehicles, this change would not undermine any other aspect of the wider masterplan concept in terms of street hierarchy. Furthermore, it will allow the creation of a street running through these development parcels, whilst also reduce the relative infrastructure costs.		

General	Section 1 Introduction	Section 2 Vision	Section 3 Influences	Section 4 Understanding the Place	Section 5 Masterplan Framework	Section 6 Growing East Cullompton	Appendix 1 Design Code
					Section 5.6 Matters of delivery and phasing are the most crucial considerations. The masterplan must have regard not just to design aspirations but also the reality on the ground given the aspirations / requirements of the various landowners / developers within the masterplan area. Failure to do so will mean that the masterplan is ultimately not delivered (or not delivered in a timely way).		
					The introductory paragraph should stress that phasing and delivery considerations will only seek to bind the various landowners together to the extent that it is necessary do so in order to deliver infrastructure in a fair and timely way. The aspiration should be to ensure the delivery of development on a landowner by landowner basis, with communal elements requiring joint working / funding reduced to a minimum. Clearly, some elements need to be considered holistically but an approach to keep this to a minimum will simplify the development process.		
					We agree that the proposed Phasing and Delivery Plan is going to be a crucial document and should have regard to the need to achieve the build out rates needed to deliver the site allocation in the Local Plan.		
					Within the draft Masterplan document the site identified as a Commercial Area includes an allowance for a Care Home, a Retirement Complex, appropriately scaled retail uses, offices, a Hotel and leisure uses. An overlapping of these uses would provide for circa 32,000 sqm of development floorspace. Such flexibility in respect of land uses is welcomed. Support for the details set out within the draft Masterplan document as they relate to this land ownership. Consideration be given to including an element of residential use within this area which could include an element of live / work units together with specific reference to stand alone employment space.		
						Support the aspirations for a Country Park having the potential to provide an 'outstanding asset' for both existing and future residents. However, it will require collaborative working with developers to ensure its delivery. Ensuring that it is delivered at an early stage so that it is available as occupations progress and the population of the town increases, is an imperative.	
						The realities of delivery and the release of the necessary land necessitate a quantum of accompanying development. An allocation of circa 250 units on part of the land area that is identified as a potential Country Park is likely to be a minimum prerequisite for the delivery. Growen Estates object to the Masterplan Framework in its current iteration since it since fails to reflect the prerequisites for delivery of a substantial community asset. They would be pleased to work with the Council to agree an alternative approach incorporating a quantum of housing that will enable the delivery of the Country Park at an early stage.	

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The SPD is overall welcomed as a critical component of delivering the allocation, providing clarity for developers and local communities. Landowner wishes to see the SPD advanced and set out a range of suggestions within these representations as to how the role of the SPD can be further clarified and strengthened to deliver the local plan objectives for the allocation, with a focus on facilitating the phased delivery of the allocation.	The work on low/zero carbon is identified as in parallel, and therefore presents uncertainty on application and given the change in standard tying back to the policy requirements of CU5. Clarification has been sought from the Council on interpretation of this. Request for all background evidence and inputs to be fully listed and published to aid in interpretation of the SPD.	While supported in principle the SPD would benefit from tempering this with an acknowledgment of the site's location adjacent to the M5 and proposals for a new railway station that would inherently be reliant on out-commuting to be viable. It is noted that the fundamentals of junction capacity have been a consideration from inception. The framing of the motorway, railway and river as 'perceived' as an alternative interpretation to clear 'real' barriers is unhelpful.	The balance of priorities within the SPD should reflect that bus provision is a policy requirement.	Within the earlier phases of development this will inherently be linked with the need to address the motorway junction capacity at J28 of the M5 arising from the allocation, with this currently forming the most direct route to Cullompton from the allocation for active travel users. It is therefore likely unfeasible to segregate active travel connectivity from motorway capacity discussions. Requiring delivery of active travel as a 'priority' with respect to phasing release of development across the allocation will imperil early release of phases of the allocation.	The clarity on the flexibility of the masterplan as an image is welcomed. It is agreed that the nature of such allocations/developments require evolution in response to detailed matters that only arise through the course of applications. It is noted that this approach has very limited reproduction elsewhere, which in the context of the wider ambitions being set may lead to competing interpretations/expectations from those involved with the allocation process. The text however goes on to then use this flexibility to seemingly justify the more regulatory role of the 'green box' text as 'requirements'. As set out above these would benefit from either greater flexibility or a two tier structure for broader 'objectives/aims' and more tightly defined 'requirements'.	While this does not have allocated status within the Local Plan, it does have endorsement through the made Neighbourhood Plan. The natural evolution of the SPD to the wider Culm Garden Village extent is therefore a critical component of future proofing the SPD. We would re-emphasise the stated position earlier with regard to sports provision, with the Culm Garden Village expanded masterplan furthering the distribution of such facilities. The extension of this and transition into wider green infrastructure, while logical amongst the established woodland to the south east of the Danescroft parcel, at the extent shown leads to not well resolved development parcels, which will be at risk of isolation with limited ability to connect into the wider development.	It is considered that the approach to the SWDC is not well realised, lacking in clarity and purpose, likely duplicating other actions necessary in realising the delivery of the allocation. There is no policy obligation under the adopted policies for such a document. The request would on its surface not be defensible as part of any planning application process. It is not clear when such a document would be required, with the suggestion that this be before an outline application is made but with no means to refuse to validate and assess an application without such a document, and the flow diagram allowing multiple interpretations. There is no clarity on how such a collaborative document should be prepared. There is no clarity on how such a document would be engaged with by key contributors.
Highlights the need for the SPD to focus on facilitating delivery to ensure one of the core objectives of the local plan to deliver on future housing ambitions is met.	Details for railway station and motorway junction solutions to be resolved, with modelling work to be completed that will clarify road capacity. This presents uncertainty in delivery of the SPD, resulting in a need for flexibility in approaches.	It is considered that the flow from vision through to requirements is not fully realised. The structure would also benefit from either a softening of the framing of the green boxes as 'requirements' to 'objectives/aims' or a two-tier format, setting out broader 'objectives/aims' from the more detailed 'requirements'. It is apparent that much of these 'requirements' will be subject to detailed design work taking account of competing inputs, including from statutory consultees, and it remains unclear how much input these consultees have had at this stage. This is evidenced for example in the commentary above on the desire for fords. The SPD also makes clear in section 3.7 that much work is being run in parallel making some of the 'requirements' lacking in certainty at this stage and emphasising the need for flexibility. The SPD would benefit from a clear mechanism/format to reflect the uncertainties and flexibility needed to respond to such areas.	No objection is held to the principle of encouraging accessibility and the benefits of 20-minutes places are well recognised. The 20-Minute Place is supported as an objective. The SPD would benefit from clearly framing the interpretation of the 20-Minute Place. The provision of services within the East Cullompton allocation is to be defined by the infrastructure requirements set by policy and statutory consultees. This will likely limit the ability for true self-containment within the 20-Minute Place approach.		Interaction between Commercial Areas and Mixed use Community hub is not clear with reference that these have overlapping uses. It is unclear whether these built forms include curtilage areas, such as parking. The total land budget from these inputs does not meet 160ha.	It is considered that the distribution of development would benefit from further housing close by the principle mixed-use community hub of the allocation that will serve to reinforce the demand and use of these facilities encouraging self-containment through the 20-Minute Place principles.	The interchanging of the framing as a SWDC or Strategic Design Code, with a specific direction to either the whole site or strategically important parts is confused. With regards to the suggested content it is considered that much of this will be addressed in other areas of work associated with applications or the allocation. For example, the SPD presents key principles and a site wide masterplan framework, which the Appendix 1 content effectively reproduces. This inherently infers that the SWDC acts as either an opportunity to evolve the masterplan SPD, in which case this should be made clear, or runs the risk of competing with it. While the SWDC motive may be to encourage settlement of some of these cross-cutting elements to speed application processing, the previous commentary on procedural risks associated with this delaying initial phased release of the allocation and in so doing delaying progression of the allocation as a whole are real and likely risks. Overall, it is felt that the envisaged content should be directed either to that within the SPD, as part of outline application submissions, or to Area Design Codes linked to individual parcels that could evolve from outline permissions that could be secured prior to reserved matters as is common on strategic allocations.
It is considered that the SPD should not set out defined phasing areas given the relative uncertainties surrounding the parallel work and this should be informed by the SPD text and advanced through the PDP process. The PDP should not be predicated on a comprehensive approach before a single outline application to enable phased delivery. The representations set out an alternative approach that addresses the PDP as a process with multiple stages that will evolve to reflect the phased released of the allocation under the parallel work.	The text should acknowledge the close proximity of job opportunities, highway improvements and railway station proposals along with the proposed growth as a response to the existing degree of out-commuting and lack of selfcontainment, as set out in discussion of the 20-Minute Place principles.		The Carbon Neutral 2030 ambitions are recognised. This principle is expanded upon in section 3.2 of the SPD. The policy obligation within the adopted plan Policy CU11 is to "minimise the overall carbon footprint of the development". A carbon neutral scheme is therefore not required by policy and it recognised that the framing is of a requirement to 'minimise carbon' with the processes set out supporting application of this policy requirement.		It is noted that the indicative sketch of community uses omits the consented employment units at Newland Farm. The open space/community hub uses are unclear with play, orchard and woodland/ecology/blue infrastructure areas south east of Newland Farm all within the defined mixed use community hub and arguably duplicating the role of the 'community green' further south-east within the masterplan. While the flexible nature of the masterplan is acknowledged and welcomed the deviation between such imagery and that proposed raises confusion on expectations/ambitions for this space. The image also indicates the segregation of the defined Community Green from the mixed use hub than its integration. Refer to previous commentary on this matter about existing nature of the Newlands Farm complex/consented expansion. Inclusive mobility needs require disabled parking close to facilities. Presume this is allowed for within framing as 'main parking'.		

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Beyond the phasing/delivery implications, the policy rationale and duplication with other considerations/ processes are such that the approach to the Site Wide Design Code is challenged. Landowner encourages that the SPD and outline applications can facilitate much of the deliverable ambitions set out for this document, with design codes secured under outline planning permissions.					Further opportunities for incorporating mixed use will be explored. Framing as 'opportunities' reinforces proposal for two tier structure to green box text. These 'opportunities' will be framed by competing interests, such as vegetation retention of hedgerow and woodland adjacent to Honiton Road. Preference for "co-located or close by" to provide flexibility on delivery for retirement, healthcare and aged services cluster.		
					Feedback from the County Education Authority presents no objection to a location north of, but close to, Honiton Road. A preferable alternative for the school location is suggested based on fulfilling the SPD objectives.		
					Flexibility should be afforded to the suggestion of residential densities towards the edges of the community relating to the future Culm Garden Village expansion of the allocation.		
					Inclusion of Blueways within amenity green space would benefit from clarifying if any constraints on this (e.g. flood risk zone) and where overlap with other areas of strategic green infrastructure apply. The sketch of the community hub shows orchards rather than allotments. This infers that allotments could extent to other edible landscapes and clarity is sought in this regard. The scope and format of 'teenage facilities' is not defined. Does this include MUGA, skate park, etc.		
					The role of the Eastern Loop route to the masterplan vision appears poorly realised. This would act principally as a leisure route providing indirect routes in place of active travel desire lines. The interaction with the countryside would be inherently limited by the predominant definition of the allocation edged by hedgerow boundaries. The Danescroft interest extends just short of the eastern extent of the allocation north of Honition Road, and excludes the land immediately south of Honiton Road. This will likely imperil delivery with early phases connecting across the northern and southern Danescroft parcel. Future connectivity can be catered for in this circumstance.		
					Biodiversity Net Gain compliance is prescribed by the Environment Act 2021 and subsequent regulations. Compliance with this cannot be prescribed to adjacent land only as a result.		
					Para 3.102 of the Local Plan states "The Council recognises that the high infrastructure costs of this site will not solely be funded by the development. As has been the case on other strategic sized sites, the Council will work with its partners and the development industry to secure external funding to ensure the delivery of the necessary infrastructure." This text should be reflected in the SPD to prevent false expectations of full funding.		
					The approach to the assessment of traffic impact as described in the SPD is subject to agreement from National Highways and the Highway Authority. Unclear whether this text has been agreed to by these key consultees to ensure a safe and functional highway network.		
					Reference to central, southern and northern active travel crossing of the M5, but with only 2 shown and 'potential' future crossing to north part of CGV. Scope of provision of typical active travel sections will be subject to detailed considerations of LTN1/20 and capacity for delivery within adopted highway width and balancing vegetation retention to areas such as Honiton Road. Design of primary street network for first phase as shown in the SPD to M5 improvements is not applicable, given this presumes retained use of Honiton Road.		

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					Annotation shows 'mobility hub' within a building. This does not appear to correlate with wider description of facilities.		
					The approach to build on the Newland Farm complex is endorsed. From project inception this was identified as a logical approach given its range of uses, future consented expansion plans that would further diversify the complex's offer and its location centrally within what would be the logical early phase(s) of the allocation. Comments set out an alternative approach to the community green location as well as concerns about the response to distribute sports provision across the allocation and the focus on fords as part of the emphasis on water.		
					It is highly likely that the combination of the Town Centre Relief Road, Junction 28 improvements, active travel connections and new railway station will require external funding sources in addition to development contributions to ensure a viable development across the allocation, be this with regard to forward funding for phased release or in totality. These are fundamental components to delivery of the scheme and it is not apparent that considerations has been given to how these may come forward with development to ensure a deliverable allocation.		
					Linked to this, and as has been set out earlier, is considered that flexibility in timing of delivery of active travel connections across the M5 corridor is crucial given the opportunity for limited release before M5 junction improvements (with the capacity yet to be defined) combined with the need for these junction improvements to facilitate active travel connection across the M5. While clearly the current arrangement is not ideal for pedestrian and cyclists, given the distances involved opportunities for further emphasis on public transport connectivity, particularly for earlier phases, should be facilitated to enable phased release.		
					There are a number of relevant considerations related to setting out a co-ordinated design scheme is sought for Honiton Road to secure this as a 'street'/'place' and acknowledgement of the variety of inputs is encouraged and proactive working with developers to secure an optimal outcome to these various interests. The focus on a range of car parking solutions is welcomed, but the emphasis should place less emphasis on 'strategic provision' for parking as a preferred strategy to enable flexibility in approach to be informed by the Highway Authority as applications progress and the delivery of electric vehicle charging.		
					While Landowner is broadly supportive of the need for such a document, it is considered that a fully realised Site Wide PDP before any outline applications be advanced is unrealistic and would serve to counter one of its ambitions to "Achieve the build-out rates needed to deliver the site allocation in the Local Plan". Danescroft therefore envisage the PDP as a focused process that will set out a multi-stage approach. This reflects the intention for the PDP to be annually reviewed and have stewardship. This would be based on identifying all infrastructure requirements across the allocation as a whole, before elaborating on these for the initial phases limited by the M5 junction capacity.		
					The M5 junction capacity and associated works to overcome this constraint are likely to prove a key milestone in the delivery of the allocation. So much so that a PDP that determines detailed wider infrastructure delivery before any outline application can be advanced would inherently delay all development within the allocation until this core and complex consideration is essentially fully resolved. It is considered that a detailed phasing proposition at this stage is pre-determinative of key inputs and considerations and is best directed through the surrounding text and the PDP process.		

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Appendix 1 Table of interactive map consultation responses

Transport	General Development	Questions/Other	Flooding	GI/BI/Landscape	Facilities	Affordable Housing
We have all the houses being built but no mention of a relief road for Cullompton town , it only takes one vehicle to stop in the town and within minutes you have a standstill, this still needs to be addressed asap	What about allowing these houses. That's more than 2000 houses in Cullompton. No justification for allowing another green field site to be bricked over	Having selected the tag to read the comment I am unable to select the "like button". No wonder there are no "likes" for any of the comments - smacks of a stacked deck!!! Side note: I can select the other buttons in the bottom row (for example Facebook)	Isn't this area subject to flooding?	Would be great to allocate some land for allotments that people could use to grow their own fruit and veg locally to reduce the amount of miles our food travels and to become more self sustainable. There are limited existing allotments with lengthy waiting lists and not all of lush have the garden space needed to have a veg patch	Cullompton secondary school has struggled for years with the space it has left to expand. We barely had room for all our years when I was there over 15 years ago. Could the secondary school be relocated to this site with new facilities that can accommodate the growing student population?	I saw in the FAQs that there is a requirement that at least 28% of the new homes built must be affordable, 28% is a pathetically small proportion of the new homes to be allocated to affordable housing, I hope that this can be increased in the final plan. Also will this affordable housing be shared ownership only? What will the fees be? A lot of the time shared ownership is just as unaffordable due to the extra monthly costs of rent, ground and service charges. Will this affordable housing be ring-fenced for local buyers, with a connection to the area?
5 LIKES	5 LIKES	1 LIKE	2 LIKES	0 LIKES	0 LIKES	1 LIKE
Not just one vehicle to stop but one to be parked there all day. Because traffic can pass in the other carriageway there is no obstruction according to the Police	Developments as big as this will only be successful long term if the infrastructure is properly designed and executed. Main areas where cost is not happily accepted by the developers are drainage, sewage and flood prevention. It is important that these aspects are properly sized, even oversized, based on the prediction of further expansion. Do not see and real assurance that this will be the case.	What is this? Is the plan to demolish the existing industrial estate to make a new road?	Are these reservoirs or admitting you know the area will flood? Have you reached out to southwest water to discuss future water supply for these vast developments? Considering most our local reservoirs are still at 20% shouldn't we be focusing on reducing the strain on our water resources until a planned action has been implemented?	At first glance there seems to be a few broad green spaces / corridors reserved within the Masterplan map. However, I am curious about why broad corridors are missing / weak in other areas e.g. southern end. Please seek to improve. I wonder how the layout was informed by ecological evidence and recommendations - plus, on the other hand the (emerging) Nature Recovery Strategy would help inform opportunities for habitat enhancement. Stakeholders need to understand this aspect. Also there is an argument to optimise NOW because the nature gains can't be put back in at a later stage. Bear in mind the baseline landscape was perhaps not ideal - so there are potentially opportunities not identified (some species/groups and habitats would not be found in the surveys).	East Cullompton needs some food shops. Suggest a large supermarket goes in this location, Asda or Morrisons, also East Cullompton needs a new food pub for the very large community. Pub should be built in early stages of construction, so should supermarket. East Cullompton also needs other retail, eg, Halfords, Screwfix, Homebase, Shoe Fare, Currys, Superdrug, The Works or WH Smith stationers. If there is no retail in East Cullompton it will just turn into a commuter village and everyone will get in their cars and drive to Taunton or Exeter. So the point of the GV being a cycle friendly zone will be lost. Cullompton High street is very small and all the shop units are very small, so big new retail will not detract from High Street but make East Cullompton a destination point.	Will any of this new housing actually be affordable for local people like myself? All of the recent new developments created in and around Cullompton have focused on "luxury" 3,4 and 5 bed homes that are vastly more expensive than the average budget of local people. These new homes seem to be intended to house people from outside the local area, putting more pressure on our already over stretched local services and infrastructure. Please focus on providing the housing that is actually needed by local people who have grown up in this area first.
0 LIKES	1 LIKE	0 LIKES		2 LIKES	0 LIKES	1 LIKE
Reopening of Cullompton train station is vital as part of this development. This should be completed before the houses are finished and should also include a cycle network so that people can get safely to the train station on bike. A cheap car park should also be included in the train station to encourage people to use the train rather than driving in to Exeter or Taunton.	We've already had 2k odd in houses going in right now into north Cullompton. The works at Mill Gardens already cut our Internet off for a month and the college practice is on a generator again because their cables been cut...again. The houses going in at the Bloor site made that road a nightmare to navigate with them developing entrances on to the main road at the same time as Mill Gardens. It's too much disruption to local residents and wildlife at once. These developments need to be staged over years not months. It's too much and the towns existing community are going to suffer as well as the wildlife. Its awful, kind of regretting moving back here to be honest	Is this temporarily closed meaning it will reopen again? With so much money being made from development a little extra on getting the right information on the map may help.		Green landscaping places - Will this site be subject to maintenance fees on top of council tax? Personally these kind of schemes but me off buying new builds, its like paying rent for the land your house is built on which for people who already struggle to get on the housing ladder is off putting. Especially when there is no regulation on these charges and they can just be upped whenever the developers like with no cap. We've recently moved back here and it was so hard to find a house free of this entrapment. If the council wants to grant permission for large housing developments they need to pay for their maintenance. Its like buying a pet then expecting the breeder to pay for its lifelong care when you're their registered owner. They need to take some accountability and foot the bill.	A problem. Even when fully expanded Fordmore farm shop will never be able to provide the range of goods such as a supermarket like Asda or Morrisons. Therefore there should be plans in East Cullompton to bring in a new large supermarket store.	
3 LIKES	0 LIKES	0 LIKES		0 LIKES	0 LIKES	
The lack of hard commitment to constrain development until adequate infrastructure is in place is depressing. No hard commitment that I can see about the Link Road, and the reference to what Network Rail may or may not do re the Station is pitiful. With events to date, its difficult to have confidence that adequate constraints/conditions will be exercised on the developers. I have worked across the UK on significant infrastructure projects over the last 40 years and have seen what effective planning controls can leverage from Developers so why so lack-lustre here?	How can you build a housing estate right up to a large working dairy farm? Not only will it be rife with people wandering into the farm creating a theft risk but there's also issues from a health and safety perspective. It's completely brainless.	What is this? Not detailed in the key for the illustration (blue arrow)				
1 LIKE	5 LIKES	2 LIKES				
I read in the local media yesterday that the new railway station's gone from 2023 to 2025 for being developed. This is far too late. With over 2k in houses in north cully being built and the 5k in the east you'll need the railway ASAP. Cullompton always been a commuter town - people are going to be attracted to the M5 corridor not the sense of community. It's vital to have more sustainable transport options for all these people	A large part of the perimeter of this masterplan is a perimeter road with housing behind. There is no feathering of the masterplan out into green lungs, or softening down into parks or recreational areas needed by this scale of housing. What this does point to is further and further expansion in the future, bolting on more housing and desecrating farmland and existing habitats. Put a softer, greener edge to this masterplan so that the abruptness of the buildings is contained, don't use perimeter roads and provide evidence of the curtailment to the future expansion further outwards; or be truthful about the intention for this masterplan to be part of an even greater, even worse addition to an already disjointed, problematic unsuccessful small town. Fix the existing town problems/connection, use brownfield land first and provide a measured masterplan solution. This is none of those things.	Maybe someone could show the original outline of the Culm Garden Village on the same map so that we can see how it fits into what is now being called East Cullompton. I think the whole area for East Cullompton is much bigger than the Culm Village and people will be confused and think it only refers to the same area as it is not being shown as different.				
0 LIKES	7 LIKES	0 LIKES				
There is no way this motorway junction is going to cope with the amount of traffic these housing developments are going to generate. The motorway closed today and as usual the town bottle necked within minutes. The relief roads must be built before any more developments. Traffic congestion is not going to contribute to your eco plan. Also the bridge as a pedestrian is a nightmare to cross due to the volume of traffic and lack of crossings. That needs to be taken into consideration if you are expecting people to walk and use green corridors	Not entirely sure this will be the boundary and the pledge not to encroach onto Kentisbeare Parish will be broken intentionally.					
0 LIKES	2 LIKES					
What will be done to improve this junction? With all the added traffic, from the new houses that will be created, this junction will be unable to cope with rush hour traffic and commuters. Traffic already backs up at peak times everyday at this junction and through the town. Will the road improvements be prioritised and put in place before the bulk of the construction work takes place?						
1 LIKE						
All the people that live in East Cullompton or are part of the Garden Village will not be able to easily park when they drive to Cullompton About 10 spaces are being removed from the Higher Bullring to "improve" the area for bigger events for more people to attend. Not sure where any of them will park						
1 LIKE						
I feel that the Cullompton inner relief road needs to be completed and the Cullompton railway station re opened (should never have closed in 1960s) before any houses are built in the Cullompton Garden Village. Please please look first at the infrastructure.						
3 LIKES						

Transport	General Development	Questions/Other	Flooding	GI/BI/Landscape	Facilities	Affordable Housing
No obvious comment linking this long overdue development to the SPD. At Kentisbeare presentation it was stated that the Inner Relief Road (via CCA Fields) had to be completed BEFORE the Garden Village was STARTED. Recommend that it be clearly stated in the SPD that the Inner Relief Road be completed BEFORE the Garden Village is started. Indeed a section for such preconditions be added to the SPD document.						
7 LIKES						
No obvious provision for the possibility of linking the southern end of the Inner Relief Road (through CCA fields) to the relief road shown by Jenny Clifford when presenting the Garden Village running to the south of Honiton Road starting just east of the last house in Honiton Road and running close behind the existing houses to S Cullompton. Clearly if both roads are implemented then it would be COST EFFECTIVE to arrange for the intersection to be implemented at the same time. This should be a condition not an afterthought.						
3 LIKES						
There should be plans for this route to Exeter to be accessible without going through Cullompton town centre. There is already too much traffic in the town centre as it is.						
0 LIKES						
Is access via Greenhouse Gardens to be permitted for delivery of building materials and general building work? Access direct to building site from Honiton road (A373) would be preferred option by majority of residents.						
0 LIKES						
Clearly the existing plans show that unless the southern relief road discussed when the Garden Village was first mooted (or a northern relief road as suggested at the Kentisbeare presentation) is implemented the traffic on Honiton Road will substantially increase. All of the houses at the eastern end of Honiton Road have individual direct vehicular access onto Honiton Road. For these houses it is already difficult to get onto the road, especially if turning right. Given the failure of other traffic schemes to limit traffic speed in Cullompton (for example High Street, Silver Street in Willand, Tiverton Road) it is questionable that any traffic calming scheme will work. This is especially true if it is remembered that Highways may impose other restrictions on this road which is classed as an A road.						
2 LIKES						
Buried in the planning is a bit on the need for changes to Honiton Road. No detailed plans are evident but it proposes the use of 20mph speed restrictions. Just wondering how this will be enforced. The road currently has a 30mph limit but many motorists blatantly flout this limit. On the rare occasion we have speed cameras the traffic flows very slow compared to the norm. Are we still having the Garden Village relief road that was planned to run from A373 (between last house and farm entrance) that runs south of the existing houses to south Cullompton? This will reduce load on the road.						
0 LIKES						
When the Garden Village was first presented there was a relief road linking the A373 starting just east of the last house in Honiton Road and running to the north of the road shown in this presentation. It just clipped the corner of the field behind 25 - 27 Honiton Road. There is no reserved area for this item that was voted on in the previous presentation. If I understand the plan correctly the area is designated for housing. For some not a significant change but quite relevant for those living in Honiton Road. If this significant modification from the original plan what other "adjustments" have been sneaked into the plan?						
0 LIKES						
Where's the new relief road? This council should get its priorities right before making big plans						
4 LIKES						
Some time ago it was determined that there would be a relief road that linked Honiton Road (about where the 40mph sign is) around the southern side of the houses and linking up to existing roads in the southern end of town. This would then allow the Garden Village traffic that wanted to go to S Cullompton (for example Aldi or Bradnich) to avoid the M5 bridge. Has this relief road been cancelled thus forcing all traffic along the existing road (A373/Honiton Road) to add to the chaos at the M5 Junction?						
0 LIKES						
It looks like a Blundells Road problem in the making!						
3 LIKES						
I hope there are bridges to accommodate safe access across the busy A road as the plan is to make every where accessible within 20 walking or cycling minutes.						
1 LIKE						
Will these new homes have adequate parking? I understand that the plan is that every part of the development will be accessible via walking/cycling, however, people living here will still most likely need a car/vehicle to commute to and from work or to get to Exeter and Taunton etc.						
I LIKE						
This route is still an outline plan. There is plenty of scope for making this route a bespoke alternative to Honiton Road rather than trying to modify Honiton Road. For example ensure that all vehicular access is via service roads and not directly onto the road						
1 LIKE						
Honiton Road is a very busy A road. Making it a 20mph zone is crazy if there is not an alternative route for large HGVs and other routes. So build a new road from Kingsmill Lane up behind the back of East Cullompton connecting to Honiton Road by a roundabout in the area of Aller Barton. This would take all the heavy traffic off the existing Honiton Road. When there is a new road to take heavy traffic and only when that is built and open could the existing Honiton Road become a 20mph road.						
0 LIKES						

Appendix 2 Summary of changes

Topic	Comment	Changes made
Infrastructure	Substantial infrastructure needed first. East Cullompton will benefit from a 'Site Wide Phasing and Delivery Plan document'. The document should benefit from sufficient weight in the planning process, clearly outlining requirements and delivery mechanisms, to ensure that the development achieves appropriate phasing in terms of housing, education and employment. SPD text should reflect Local Plan that development will require some external funding.	Infrastructure requirements and delivery trigggers set out within policy. The SPD requires a site wide infrastructure delivery plan to be agreed, mechanisms for delivery to be set out within this process. The infrastructure delivery section includes references to the need for external funding and some additional text added for clarity.
Honiton Road	A373 is a major concern; major improvements needed. Outcomes from the Junction 28 mitigation option work need to inform the policy approach for the role and function of Honiton Road. This includes decisions regarding priority and speed limits. Honiton Road is an A road so downgrading this and reducing the speed limit are unlikely to be achievable. Crossings of this road are going to be important given this road passes through the middle of the development but the strategic nature of the road cannot be lost. 20mph requirement goes beyond a principle and should refer to the aim/objective of safer streets. Key roads (Honiton Road) may need to be higher speeds – to be proven at application stage that principle is met.	The SPD requires careful consideration of the treatment of Honiton Road to provide a safe environment for people and to continue to function as an A road. Detailed design of Honiton Road to be included in the infrastructure delivery plan requirements. The SPD references the need for further technical design and assessment of the approach to Honiton Road. Reference to a 20mph speed restriction removed but left emphasis on the need for design solutions to slow speeds retained.
J28	Improvements to the motorway junction should be carried out first; the allowance of 500 houses before delivery of junction improvements now seems too high. It should be clarified that the 'required after first 500 homes completed' is subject to the prior delivery of the Town Centre Relief Road. National Highways require confidence that a proposed scheme adequately mitigates the SRN impacts of development at Cullompton and provides safe and suitable facilities to accommodate increased active	The SPD reflects existing policy requirements for improvements to J28. Text added to reflect requirement for TCRR. Further work on J28 improvements and modelling of the capacity of the junction is being carried out through separate workstreams.
Town Centre Relief Road	SPD should make it clear that the TCRR needs to be delivered first. Query whether the 'Delivered by 2023' timetable is realistic	SPD to be updated to reflect delivery timescale.
Street hierarchy	Lack of any reference to the use of Saunders Way as part of the vehicular mobility strategy. The road should connect into the main street of East Cullompton and that this should be referenced as an option in the SPD. A new road is proposed to run south (and then west) from Honiton Road. important to recognise that the masterplan is strategic in nature and does not intend this to define the precise location which will instead be defined through planning outline and detailed applications.	Masterplan amended to show link into Kingsmill. Text added to clarify that streets could take a different alignment subject to preferred junction location.
Sustainable transport	Sustainable transport options should be delivered early to promote step change in behaviour. J28 capacity improvements still required for car borne movements.	Infrastructure requirements and delivery trigggers set out within policy. The SPD requires a site wide infrastructure delivery plan to be agreed.
Active travel	Pedestrian and cycle routes should have signage. Active travel improvements are funded by developer contributions/ linked to public funding projects – further thought is required regarding costs and likelihood of funding mechanism achieving delivery. Reference to central, southern and northern active travel crossing of the M5, but with only 2 shown and 'potential' future crossing to north part of CGV. Flexibility in timing of delivery of active travel connections across the M5 corridor is crucial given the opportunity for limited release before M5 junction improvements combined with the need for these junction improvements to facilitate active travel connection across the M5. The footway connection along Honiton Road is not complete and some areas are on private land. The whole length would need upgrading to a pedestrian/cycle footway and it is questionable whether this should be next to the busy A373 or whether a completely segregated route elsewhere should be provided instead.	SPD to refer to the need for signage. Further work being carried out on sustainable travel through separate workstream. The SPD requires a site wide infrastruture delivery plan to be agreed. No change to SPD - mobility plan shows 3 crossings. Approach to delivery of active travel crossings clarified. Infrastructure delivery table amended to include delivery of active travel in early phases and in line with capacity improvements to J28.
Mobility hubs	Not clear on what the mobility hub is; not sure it will be successful in a rural community.	Additional text added to expand information on mobility hubs. Further work being carried out on mobility hubs through separate workstream.

Topic	Comment	Changes made
Primary school	Location not safe due to proximity to Honiton Road; school needs to be at the heart of the development. The primary school is next to the main road. This is a dangerous area for young children. It will also cause more congestion at drop off and pick up times along an already over used road. Whilst this SPD cannot change adopted Local Plan policy, we consider that the SPD should not repeat this requirement from the Local Plan for the school to be delivered in phases 1 and 2.	SPD requires traffic calming and safe crossing points. Text amended to include flexibility on location of primary school to north of Honiton Road and addition of requirement for safe school access and appropriate space for drop off away from primary streets. No change to SPD wording for delivery of school - policy requirement.
Healthcare	No allocation for doctor or dentist.	Text added to expand on potential uses within community hub and multi-use community building. MDDC in discussions with NHS.
20 minute neighbourhood	The SPD could be clearer in defining the 'twenty-minute place' approach to ensure meaningful achievement of this principle.	Commentary added about application of 20 min neighbourhood at local scale and context
Community hubs: location	Wrong location for community hub: too far east - assumption of further development to the east. Fordmore should not be the principal community hub. Not central to the allocation; does not deliver a 'heart' to the development. Encourages too much development along the Honiton Road. Should be co-located with school and healthcare.	Text clarified to explain why Fordmore will be principal centre, and that it will expand to provide broader range of uses including further retail and community space, that it will be accessible (via primary street and active travel) and that it would have potential to expand further if proposals for the GV proceed. Honiton Road requires active frontages in order to reduce the speed limit. SPD to include flexibilty on school location, however, current location provides safe walking to community hub.
Community hubs: uses	Small community hubs do not provide required facilities for the number of houses. Need for an indoor meeting/activity space to cater for a range of activities. Potential for one of the designated 'play areas' to be focussed at teenagers and explore whether there is demand for skate park, free-running/parkour equipment. SPD not clear whether residential can be included in community hubs - green box on page 87 refers to retirement services but not clear if this means retirement living. Community hubs should exclude green space. Fordmore north and south would decrease to 2ha in tune with local plan requirement for local centre.	SPD to provide further explanation on what community hubs should contain. Reference to community buildings to include catering for a range of indoor sports and activities and potential for a health hub. Specific reference to teenage play to be included. SPD changed include allowance for some residential where it does not detract from intended character or limit community hub functions. No change proposed to exclude green space. Some public / open space to be delivered as part of bespoke community hub typology. Larger area also required to allow residential uses and some land covered by existing uses. Requirement added for clear governance to be set out in developer proposals.
Commercial uses	Fordmore Farm will not be able to provide larger retail / supermarket that is needed. Suggest a large supermarket, a new food pub, other retail to make East Cullompton a destination. Size of industrial units and type of industry needs to be carefully considered - shortfall of micro and small units making start-up business difficult. SPD does not reflect the consented development at Fordmore Farm (21/00349/FULL) (Class E development, agricultural style warehouse type buildings). Commercial area in right place, strong east-west cycle route good. Less understood is primary road through commercial area (not attractive gateway). Not clear how amount of land to meet 32ksqm employment floorspace has been calculated. Interaction between commercial areas and mixed use community hub is not clear with reference that these have overlapping uses. It is unclear whether these built forms include curtilage areas, such as parking. The total land budget from these inputs does not meet 160ha.	SPD includes retail within the commercial area as well as within the community hubs, and sets out appropriate uses for commercial areas. Text changed from 'integrating employment' to 'integrating commercial' – text already refers to appropriately scaled retail being provided in this area. SPD updated to reflect consented development. No change to primary route through commercial area which should be designed to be attractive – not industrial area. Further explanation on commercial land calculation provided.
Sports facilities	Not clear where sports facilities are going to be within the allocation. 3G sports pitch needed in Cullompton area. In order to provide a flexible, sustainable site which could accommodate a variety of pitch sizes and sports, a site of four hectares is recommended, which includes provision of a clubhouse/changing facilities.	Text amended to confirm size of space at Fordmore Farm is sufficient to provide a multi-pitch hub rather than individual pitches but final location of sports pitches to be confirmed. SPD to make specific reference to sports being provided in accordance with MDDC's Playing Pitch Strategy. 3G pitch is not a specific policy requirement but is required in the Cullompton area by the Playing Pitch Strategy.

Topic	Comment	Changes made
Green space	Not enough and all at the edges - larger green space needed on Cullompton side. Better dog walking parks. Feather into the edges of the development; more trees and hedges included; include allotments. Keep element of flat multi-use informal space outside pitch layouts to encourage 'free-play' for children & families. Unclear which areas will have the space to function as parkland and nature reserve rather than just as functional travel corridors. It would be useful if the SPD could include a map to show the preferred locations for the 6ha of amenity green space; the public parkland; and the nature reserve. Eastern Loop would act principally as a leisure route providing indirect routes in place of active travel desire lines. The interaction with the countryside would be inherently limited by the predominant definition of the allocation edged by hedgerow boundaries.	Text expanded on green space uses, including allotments and what can be included within the community greens and green corridors. Community growing space such as orchards in community greens and traditional allotment sites provided separately within strategic GI. Changes made to make clearer requirement that detailed proposals demonstrate an appropriate building and landscape treatment to rural edge. Eastern Loop is not a formal road but active travel route Community greens allow for free play.
Fords	Fords should not be prioritised. Implications for flows and water quality.	Text amended but aspiration for fords as crossings to remain to provide place making connections with water.
Climate change	Houses should be net zero with renewable energy. Climate change adaptation could be addressed more explicitly in the sub-section on Natural Capital. Further emphasis should be put on the phrase 'reduce carbon emissions'. The NPPF uses the phrase 'contribute to radical reductions in greenhouse gas emissions'. Strong digital connectivity should be included in the table as a Substitute Approach to achieve reduced carbon emissions.	SPD sets out net zero/renewable energy expectations from developers within existing policy framework. Natural Capital section expanded to add requirements under 'enhancing the landscape structure' for planting to demonstrate climate resilience and biosecurity. Change to carbon emissions and digital connectivity text made.
Air quality	Although air quality assessments are required, they will need to be monitored at regular intervals through the construction phases and afterwards.	Change to text made.
Density	Flexibility should be afforded to residential densities towards the edges of the community.	Density expressed is an average. Text amended to reflect treatment of rural edges.
Drainage	Permeable paving could be used as well as rain gardens, swale, filter trenches.	Permeable paving added to text.
Residential	Affordable homes should be a mixture of rents and purchase options. Other housing options should be considered such as co-living accommodation blocks and adaptable homes. Wheelchair accessible homes should be included within the housing designs to be fully inclusive and giving options for a range of clients. The design of homes needs to consider the pavement space and access to homes for people with mobility vehicles. The requirement for front gardens and bike storage overly prescriptive. Storage can be provided in back gardens and not all houses need a front garden.	No change required. Policy sets housing requirements which will be dealt with at planning application stage. Reference to access added. Change made to separate out requirement for front gardens and storage of bikes.
Self build	Space should be allocated to self build.	This is a policy requirement and is set out in the SPD. Additional text added on custom and self-build added.
Parking	Less emphasis on 'strategic provision' for parking as a preferred strategy to enable flexibility in approach as applications progress and the delivery of electric vehicle charging.	No change. The SPD provides for flexiblity.
Waste	Could be expanded to ensure waste is minimised and considered during the design and layout of a development. Include reference to Devon Waste Plan.	Changes made.
Power lines	Concerns raised regarding the potential implications of the draft masterplan for National Grid's strategically important 132kV line. National Grid do not support undergrounding. A 10m wide corridor of open ground would be required above the undergrounded cables. Moving power lines is at the landowners' expense. Suggest wording: "The land over which the lines pass within the site benefits from 'lift and shift' clause over the route easement. This enables the landowner (at their cost) to alter the path of the power lines if an alternative route is available". 16ha affected by the 440kv powerlines does not have a note to accompany this figure - could usefully explain that this area enables another 16ha of green infrastructure. Reasonable to advise that some commercial could come forward in the 440kv powerline corridor.	SPD refers to aspiration for undergrounding but further work needed. SPD to be updated to reflect 10m corridor. Wording added that where powerlines are undergrounded, they do not have to follow the existing overhead line which could allow better accommodation of easements. Wording on lift and shift clause amended. Note regarding the 16ha area and that commercial could be appropriate as mix of uses if included sensitively.

Topic	Comment	Changes made
Heritage	Settings of heritage assets on maps indicate risk of harm but further work needed; no robust evidence base and justification for, or mitigation of, any harm to the heritage assets, or their settings. Archaeological investigation will need to be used to identify opportunities to positively influence the detail of design/layout as planning applications come forward, as well as to inform mitigation for the loss of any undesignated archaeological assets. Grade I listed Wood Barton should be shown as a significant listed building.	Maps to be changed to refer to indicative settings of heritage assets with further assessment required for planning applications. SPD to specify further work required by developers prior to their layouts being set. Text changes made to archaeological assessment. Wood Barton already shown but annotation added.
Biodiversity net gain	It is disappointing to note that the SPD is seeking offsite delivery of BNG, as onsite delivery is Natural England's preferred approach. Text should reference country park is not a local plan requirement. SPD oversteps in referring to BNG being delivered adjacent to boundary and must achieve landscape enhancement.	SPD changed to reflect onsite delivery first. Wording changed so that the off-site BNG can be delivered in suitable areas that provide accessible greenspace for the allocation as well as adjacent to the allocation boundary.
Country Park	Not clear what this is or when it is likely to be delivered; need for a water park not established.	Text changed to expand the explanation of the country park. This is outside the area for the East Cullompton SPD but could start to be delivered through off-site biodiversity net gain and sports facilities.
Proximity to Kentisbeare/need for a green buffer	Wider garden village section shows development encroaching within Kentisbeare Parish.	No change to SPD. SPD is clear that the plans in Section 6 are indicative and the wider garden village is subject to the Local Plan process. Comments on Section 6 to be reported to policy team.
Sports clubs and all-through school	Sports facilities and all-through school shown along Horn Road should be in Cullompton and not in Kentisbeare Parish.	No change to SPD. Cricket club already has planning permission. This area is outside the East Cullompton SPD area and plans in Section 6 are indicative.
Potential wider area for garden village	Area shown for wider garden village includes listed buildings and areas of wildlife importance.	No change to SPD. SPD is clear that the plans in Section 6 are indicative and the wider garden village is subject to the Local Plan process. Comments on Section 6 to be reported to policy team.
Two-stage masterplanning process	The two-stage nature of the process: detailed approval of the allocation and an outline of thoughts about the longer term possibilities. One consequence is that facilities that are only required for a larger garden village may well be located outside the central area. More detailed planning should be undertaken before the East Cullompton Masterplan is signed off.	No change to SPD. The SPD can only focus on allocated land and unless/until further land is allocated, boundaries are not known and the whole area cannot be masterplanned.
Green boxes within SPD	These would benefit from either greater flexibility or a two tier structure for broader 'objectives/aims' and more tightly defined 'requirements'.	Text added to allow appropriate flexibility.
Process	Process diagram not clear on where Design Code and Phasing and Infrastructure Delivery Plan fit within the planning process. Approach to these documents needs further consideration and clarification.	Diagram updated and approach clarified. Both documents will need to be agreed with landowners / developers.
Design code	Further consideration needed on what a strategic design code should contain and how it works through the planning process. Appendix 1 needs further consideration. Design code not the right place to consider site-wide SUDS. Needs further technical work through planning application process.	Further work needed with landowners/developers to scope out strategic design code. Reference in SPD text changed and Appendix 1 removed. Site wide SUDS strategy removed. Strategic drainage requirements are incorporated into SPD, although treatment of SUDS retained within Design Code requirements. Further work needed for planning applications.
Corrections	References should be to National Highways not Highways England. On Page 109, Junction 28 rather than Junction 30. Clearer if 'profound change' bullet points retitled as 'profound change, evolving public policy and guidance'. Land outside allocation to east of Fordmore shown on all section 5 plans should be removed. 'East Cullompton Activity Framework' page 84. The key does not identify what is meant specifically by the thicker and thinner black lines. Key to community greens on plans is not clear.	Changes made
Evidence base	SPD should list background reports that it relies on.	No change. Unnecessary as these are published on the website as available.



East Cullompton Masterplan

Supplementary Planning Document

January 2023

Mid Devon DISTRICT COUNCIL

Culm Garden Village

This Supplementary Planning Document has been prepared by LDA Design on behalf of Mid Devon District Council with contributions from:

Vectos: Transport
City Science: Carbon Reduction Strategy
BSG Ecology: Ecology
Environment Systems: Ecosystem Services
WSP: Flooding and Drainage
BE Group: Employment and Skills

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East Cullompton Masterplan SPD

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East Cullompton Masterplan SPD

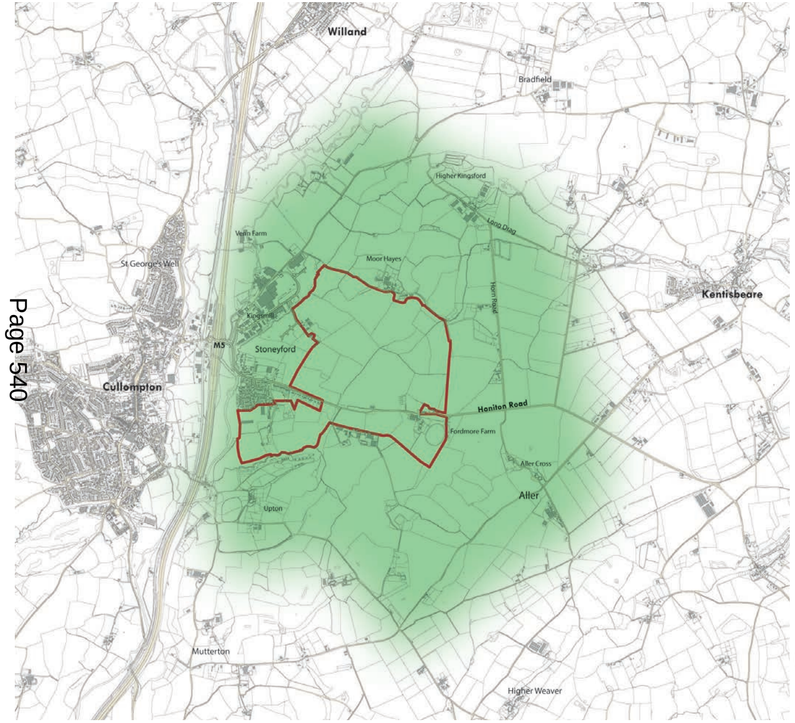
SECTION ONE

INTRODUCTION

Background

Location

Scope and Purpose of the SPD



East Cullompton allocation area and potential area of consideration for wider Garden Village and Country Park

East Cullompton Masterplan SPD

1.1 Background

This Supplementary Planning Document (SPD) has been prepared to support the development of the allocated land east of Cullompton and the M5 (East Cullompton) to provide around 1750 homes plus at least another 850 post 2033, community and commercial facilities, public open space and general landscape and biodiversity enhancements. This SPD has been prepared on behalf of Mid Devon District Council.

This document provides guidance about how East Cullompton should be designed, developed and delivered in accordance with the sites allocation under Policy CU7 and in accordance with other relevant policies of the Mid Devon Local Plan.

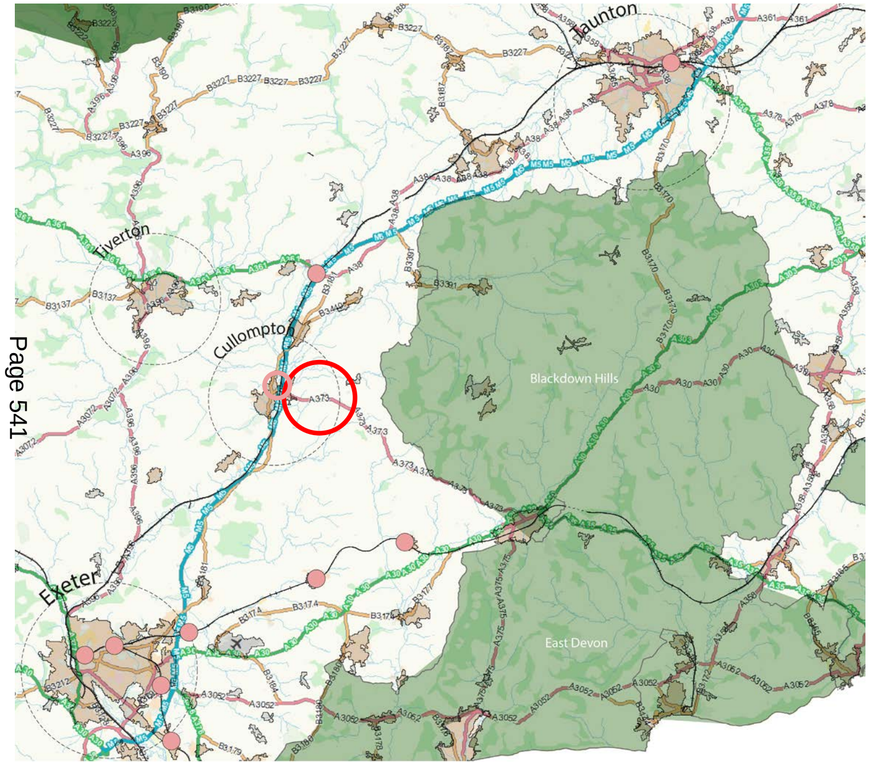
Whilst this document must work within the scope of the existing allocation and build upon the relevant East Cullompton policies within the Mid Devon Local Plan and Stage 1 SPD, it is clear that this document is also prepared during a period of profound change and evolving policy and guidance, namely:

- The urgent need to respond to the climate emergency and Mid Devon District Council's aspiration to become carbon neutral by 2030;
- The changes to the way we live and work as a result of the global pandemic;
- UK Government's future plans for the delivery of Culm Garden Village, one of 14 areas awarded Garden Village status in 2017 with the potential to deliver up to 5,000 new homes through the expansion and growth of East Cullompton;
- The introduction of the Environment Bill 2021 which supports nature recovery and biodiversity net gain;
- To embed principles for designing the built environment to improve health and wellbeing, having regard to best practice guidance such as Building for a Healthy Life.

This SPD will set design and delivery requirements for all future planning applications in East Cullompton to ensure that:

- Development aligns with requirements in Policy CU11 to minimise the carbon footprint of the development and meet Mid Devon District Council's aspirations to deliver Net Zero by 2030;
- It will follow the Garden Community Principles set out by the Town and Country Planning Association;
- It will follow the guidance set out in the National Model Design Code;
- It follows the principle that the future growth of Cullompton is about the creation of one place, where East Cullompton and a future Garden Village will form integral parts of a more self-supporting and self reliant Cullompton in the future;
- It will be fully capable of growing and expanding into and forming part of a future Culm Garden Village;
- Phasing and delivery will be designed from the outset and at every subsequent stage in its development, to create place and support and encourage new ways of living and working;
- Transport, energy or other Infrastructure is designed to serve East Cullompton but also forms part of a bigger connected network to allow for integration and connection with a future Garden Village and the wider town;
- At every stage in its development, the existing and the newly created landscapes into which East Cullompton is embedded will deliver a wide range of benefits from biodiversity net gain to high quality greenspaces to successful water management and flood attenuation.

This document is informed by extensive contextual analysis, technical survey work and local consultation that has been undertaken by the Council and its partners in relation to the East Cullompton allocation.



Approximate site location

Proposed Railway Station

N

Strategic Location of East Cullompton

East Cullompton Masterplan SPD

1.2 Location and overview of the opportunity

Located in the Culm Valley of Mid Devon, Cullompton is centred on level ground on the western valley side of the River Culm. The Town has grown from this centre but is largely still contained within the valley sides. The name Cullompton is likely to be derived from the Celtic river name cwlwn ('looped' or 'winding' river) and –ton, suggesting an important early estate centre. The town has a varied character reflecting almost 2000 years of historical development. Cullompton will continue to develop as a fast growing market town and will be the principal focus of development for the district in the medium to long term in accordance with the development strategy set out in the Local Plan.

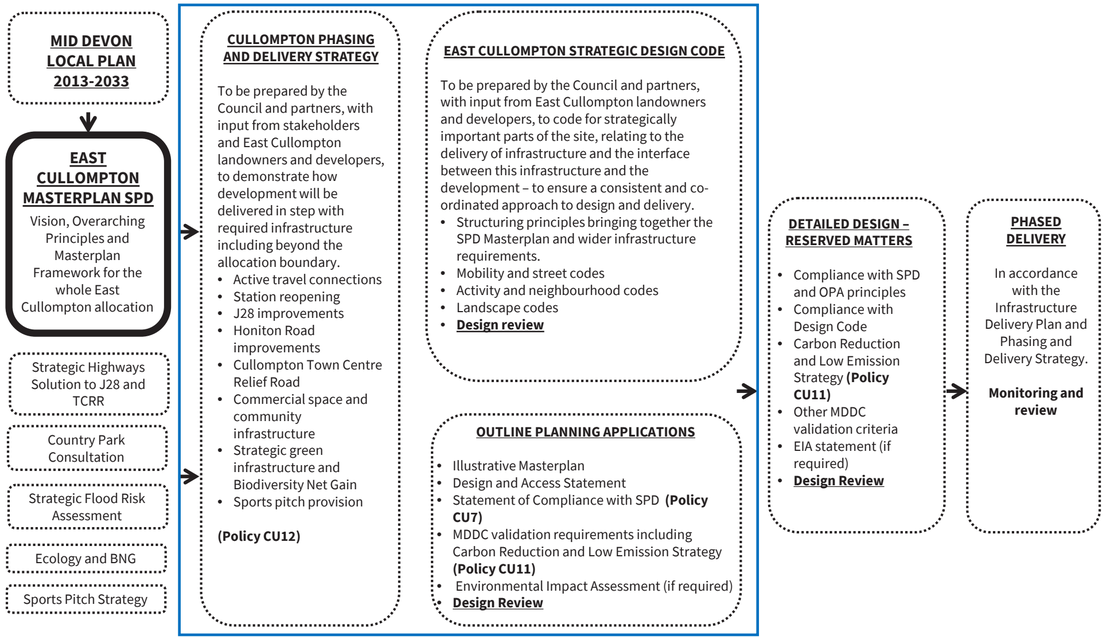
Cullompton is well located strategically within the south west. It is situated 11 miles north of Exeter and about 20 miles south west of Taunton. The M5 motorway runs close to the east side of the Town Centre. The B3181 runs through the centre of the town and links Exeter and Willand. The mainline railway runs alongside the motorway to the east. There is an existing station at Tiverton Parkway and there is a commitment from the Council in the Mid Devon Local Plan to re-open the train station at Cullompton. Highways improvements including Town Centre relief road and junction improvements are also planned in addition to the reopening of the railway station to improve the area's accessibility credentials. With work still underway on the preferred solution to address capacity issues at Junction 28 of the M5, this SPD has been designed to work with a number of solutions currently being considered.

New and existing residents will be in close proximity to job opportunities within Cullompton and also at Willand, Tiverton and Exeter. Future employment provision is expected to be centred around the Kingsmill industrial estate and within East Cullompton. The combination of highways improvements and a new railway station and the strategic growth of the town provides an opportunity to significantly raise the profile of Cullompton within the wider area. The major growth of the town will provide the opportunity to revitalise the town centre through additional investment, traffic and transport improvements. The growth of the town and proposed improvements will provide a significant boost to its vitality and viability, providing a more attractive environment.

The Wider Culm Garden Village Opportunity

This document provides comprehensive guidance in relation to the East Cullompton site allocation, as defined in the adopted Mid Devon Local Plan. However, reference is made to the wider Culm Garden Village opportunity. Culm Garden Village is one of only 14 areas initially awarded Garden Village Status by the Government in January 2017, with the potential to deliver up to 5,000 sustainable new homes in a country park landscape, with jobs, community facilities and transport, all integrated as part of the growth of Cullompton.

This SPD for the East Cullompton Allocation has been developed alongside the preparation of a Masterplan Framework which considers the wider Culm Garden Village opportunity. This has been done to ensure plans for East Cullompton could be successfully expanded into the wider Garden Village should that project come forward. The opportunities set out for the wider Garden Village are intended to provide a commentary only, further work will be required to define any proposals definitively and will be explored through the new Local Plan for Mid Devon 2023-2043 including opportunity for further community engagement.



NB: Work within the blue box can be progressed in parallel but the Phasing and Delivery Strategy and Strategic Design Code are to be complete before determination of planning applications.

Planning and Design Process Flow Diagram: The role of the SPD in relation to the Local Plan and the planning application process

1.3 Scope and purpose of the SPD

The Mid Devon District Council Local Plan allocates land to east of Cullompton and the M5 for the development of 2,600 new homes (1750 plus at least another 850 post 2033) alongside other commercial and community uses over the period to 2033 and beyond. The East Cullompton SPD supplements the adopted Local Plan policy for the area and has also been prepared in accordance with national planning policies and following a statutory consultation process. The SPD will form an important material consideration in the determination of subsequent planning applications for development of the site.

A Framework Masterplan for the wider Culm Garden Village opportunity has also been prepared and enclosed with this SPD. The East Cullompton Masterplan SPD reflects the principles and concepts of the wider Garden Village opportunity to ensure that East Cullompton could grow successfully and holistically in the future should the Garden Village project progress.

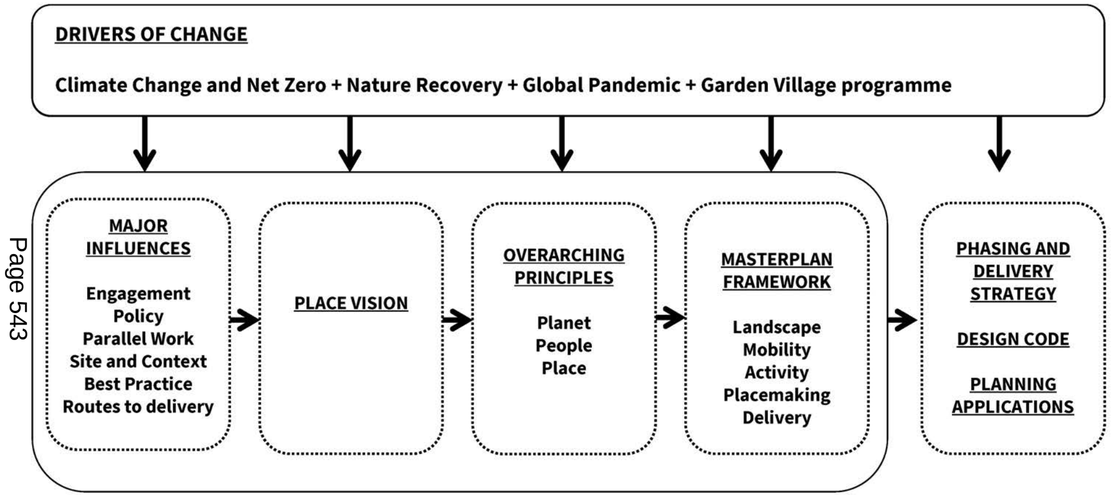
However the East Cullompton Masterplan has been planned as a cohesive place in its own right within the emerging allocation area and statutory policy context. The SPD sets the requirements for the East Cullompton Allocation only. Any proposals for the wider Garden Village will be subject to separate Local Plan and planning application processes and have been included in this SPD as indicative context for future growth only.

The Masterplan SPD sets a vision and overarching principles for the new development of East Cullompton. It also provides detail to supplement the strategic development plan policies for the site by setting specific design requirements. The Masterplan Framework identifies the major land uses and infrastructure to be accommodated and broad principles relating to phasing and delivery to ensure a comprehensive approach.

The masterplan SPD is strategic in nature and does not intend to define the precise location and extent of elements of the plan, this will be defined through planning applications and work to agree the detailed phasing and delivery strategy. The requirements set by the SPD for East Cullompton are highlighted in a green text box. Developers are expected to demonstrate in future applications through a Statement of Compliance how these requirements have been met as well as how plans will support the Vision and Overarching Principles in Section 2.

More detailed work will need to be undertaken following the SPD. The Planning and Design Process Flow Diagram illustrates where the SPD sits in the planning process and the further phases of work that will be required for the design and delivery of comprehensive development. These include a more detailed Phasing and Delivery Strategy and a Strategic Design Code. Section 5 of the SPD sets these processes out further.

Planning for the outcomes we need



SPD PROCESS

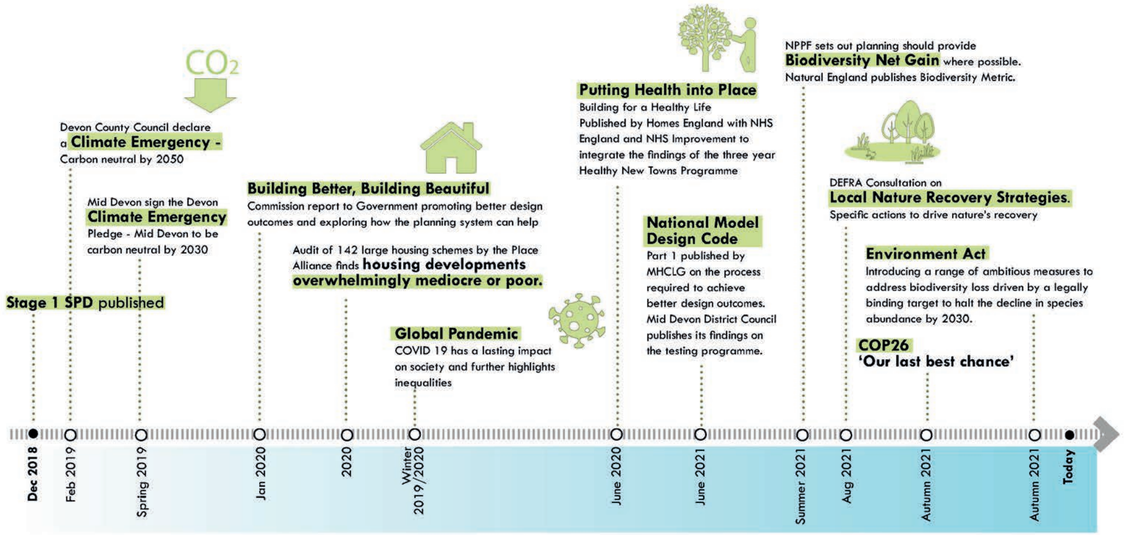
Flow diagram illustrating the design process taken to the preparation of the SPD where major drivers of change such as climate change and nature recovery are seen as cross cutting themes which must guide every stage of the process. The SPD stages shown on the left indicate how the Masterplan Framework has been driven by a clear Place Vision and Overarching Principles which have in turn been defined by an appreciation of the major influences such as policy context, local engagement, routes to delivery and site characteristics.

SECTION TWO

VISION

Planet People and Place – A vision for East Cullompton, a future Garden Village and the whole town

Overarching Principles



Timeline of major influences that have emerged since the consultation on the Stage 1 SPD.

2.1 Planet People and Place – A vision for East Cullompton, a future Garden Village and the whole town

Much has changed since 2018 and the subsequent work undertaken on Stage 1 of the East Cullompton SPD. The pandemic in 2020 changed the way we live and work and in this period, Mid Devon District Council has declared a climate emergency, setting out the aspiration to become Carbon Neutral by 2030. In November 2021 at COP26 151 countries submitted new climate plans to limit global temperature rise to 1.5 degrees C and to cut global emissions in half by the end of this decade.

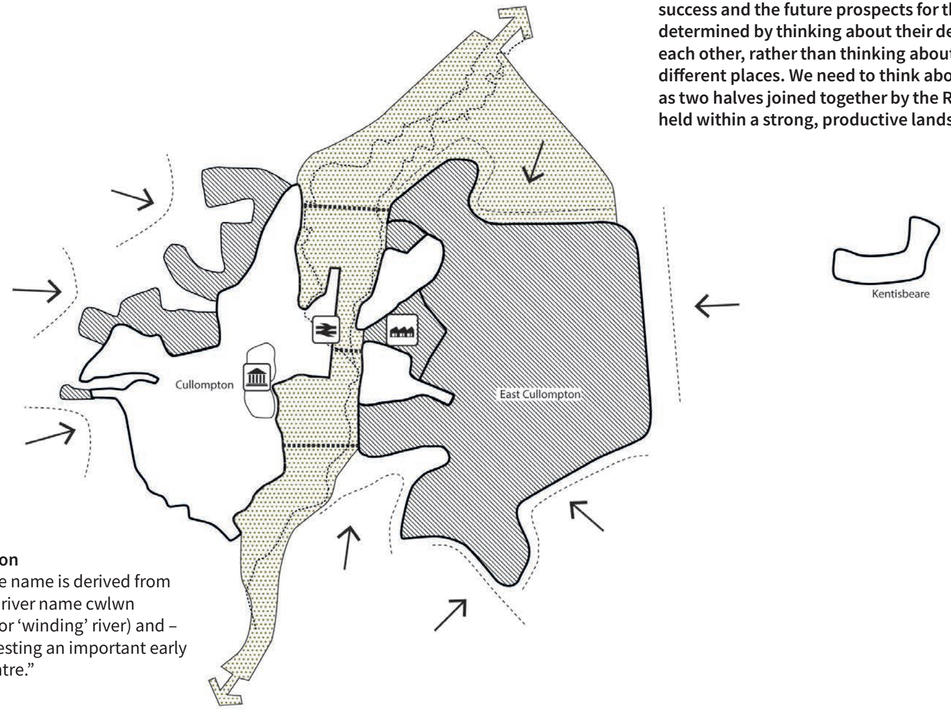
If we are to meet these targets then we need to make radical changes to the way we plan for development and growth. This SPD for East Cullompton and the wider Culm Garden Village masterplan framework that accompanies it marks the beginning of a new era. The typical patterns of development and "business as usual" solutions that we have all become accustomed to will fail to cut carbon and prevent us from adapting to new ways of living and working. From now on, we have to plan differently for a Net Zero future with the right balance of prescription and flexibility, with the express aim of delivering a Net Zero outcome, while creating a great place to live and work, all set within a healthy and bountiful Devon landscape and place that belongs to Cullompton.

This SPD is specifically about East Cullompton but the wider message is about the growth and development of Cullompton itself. The town has over 2000 years of history and its cycles of success and decline, growth and retreat, have reflected the massive shifts in social and economic change whether that was the wool trade or the arrival of the railway. In the first part of the 21st century growth on the scale envisaged here has been driven by the success of the Exeter City Region and although this is still largely the case, we need to shift our focus away from growth that perpetuates behaviours like out-commuting by private car or the continued physical separation of the home from the workplace or place of study and plan for a more circular economy. The growth of Cullompton to the east must be more resilient into the future, more self-supporting and interdependent with existing parts of the town.

The world is changing fast. East Cullompton can play a huge part in helping Cullompton become more self-supporting and resilient in the face of the climate emergency by offering greater choice and opportunity for its future residents in terms of how and where they work, choice of homes, place to learn and train, healthy living, greater access to the rich Devon landscape surrounding Cullompton and nature recovery and thriving. It can look to address some of the bigger challenges we face too like energy self-sufficiency, providing opportunities for local food growing and supply and harnessing the waters of the Culm and its tributaries for the benefit of nature and flood management.

East Cullompton is at the centre of what could become, in time, Culm Garden Village and must embrace Garden Village principles, including new approaches to how places like this are managed

East Cullompton can embrace Garden Village principles to feel different from Cullompton, but its success and the future prospects for the town will be determined by thinking about their dependence on each other, rather than thinking about them as two different places. We need to think about Cullompton as two halves joined together by the River Culm and held within a strong, productive landscape.



Cullompton
"The place name is derived from the Celtic river name cwlwn ('looped' or 'winding' river) and –ton, suggesting an important early estate centre."

Conceptual plan or 'mental map' of Cullompton in the future

East Cullompton Masterplan SPD

and governed over time. East Cullompton will feel quite different from Cullompton but its success and the future prospects for the whole town including a future Garden Village will be determined by their interdependence on each other. We must think of them as one place rather than two different places.

The river, the railway and motorway might be regarded barriers for now, either real or perceived, but that must change over time and the development to the east must not only be seen as supporting the town centre and the existing communities and neighbourhoods in Cullompton but that it must also offer new facilities, new choices and new experiences to the east of the town, for the benefit of the whole town.

The mental map of a future Cullompton will change with expansion to the east, forming the shape of a butterfly with the historic form of the town and the River Culm at its centre. The analogy of the chrysalis gradually emerging as a butterfly in the future is quite a good way of thinking about future growth and the identity of Cullompton as a whole as it grows and evolves.

In the Stage 1 SPD there were nine principles set out for East Cullompton and they all remain important and are still highly relevant but there is an urgent need in the face of the climate emergency to strengthen the messages and to set out a vision for East Cullompton that is not only clear about what we must deliver but also be mindful and alive to how it connects to a changing town and how it might evolve and grow into the future Garden Village.

We have simplified and reinforced these principles under the headings of Planet, People and Place. Everything we do in relation to the masterplan framework for East Cullompton must keep these three driving principles in perfect balance and go on to demonstrate how we deliver the step changes required through practical and deliverable planning requirements and through good design at every stage.



Illustration of how East Cullompton could be developed following the overarching principles

East Cullompton Masterplan SPD

2.2 Overarching Principles

By putting Planet, People and Place right at the forefront of the vision for East Cullompton, the development principles can deliver the outcomes we want to see, namely:

Planet

Regard Cullompton and East Cullompton as one place, make them interdependent and mutually supportive. This will strengthen the local economy, making the town more resilient. It will reduce out-commuting, reduce carbon emissions, improve air quality and reduce noise and dust.

Transform water management and habitat creation in this part of the Culm Valley to reduce flooding, increase biodiversity and to make water and wildlife central to day-to-day life in East Cullompton.

Combine locally-sourced clean energy with reduced energy demand and energy-efficient, durable and adaptable buildings.

Protect natural resources, including existing vegetation and local soils and local habitats. Reconnect and strengthen local landscapes and increase woodland cover.

Use innovative and modern methods of construction to minimise waste and reduce pollution. To ensure waste from development can be minimised and to reduce inert material exported off site.

People

Improve human health and well-being by favouring walking and cycling over other modes, improving air and water quality and improving contact with nature.

Build a sense of community and sense of belonging around existing activities and uses and around the new community centres. Make them pedestrian-friendly and keep them largely traffic-free.

Offer choice and make better homes and workplaces that are flexible and adaptable for changing lifestyles.

Build sociable streets and rural lanes that encourage neighbourliness, outdoor living and outdoor play.

Make sure everyone is within a few minutes walk of a park or a greenspace or the opportunity to follow or cross a watercourse.

Place

Make it a compact and village-scale, combining well-crafted buildings and spaces that are pedestrian-friendly. Make the neighbourhoods safe by reducing traffic speeds and the dominance of cars.

Bring the scale of infrastructure down with narrower streets and spaces, something more in keeping with a village character.

Bring the rural character of East Cullompton alive by incorporating existing rural tracks, the hedgerows and the mature Oak trees that characterise this area.

Make the active travel and bus routes between East Cullompton and the town into green lanes that are rural in character.

Celebrate the presence of water and the crossing of, or the following of, watercourses part of the experience of daily life, such as the route to school or the workplace, or the journey to and from the new station or to the local shops.



East Cullompton Masterplan SPD

SECTION THREE

INFLUENCES

Policy Context

Carbon Principles

20 Minute Place

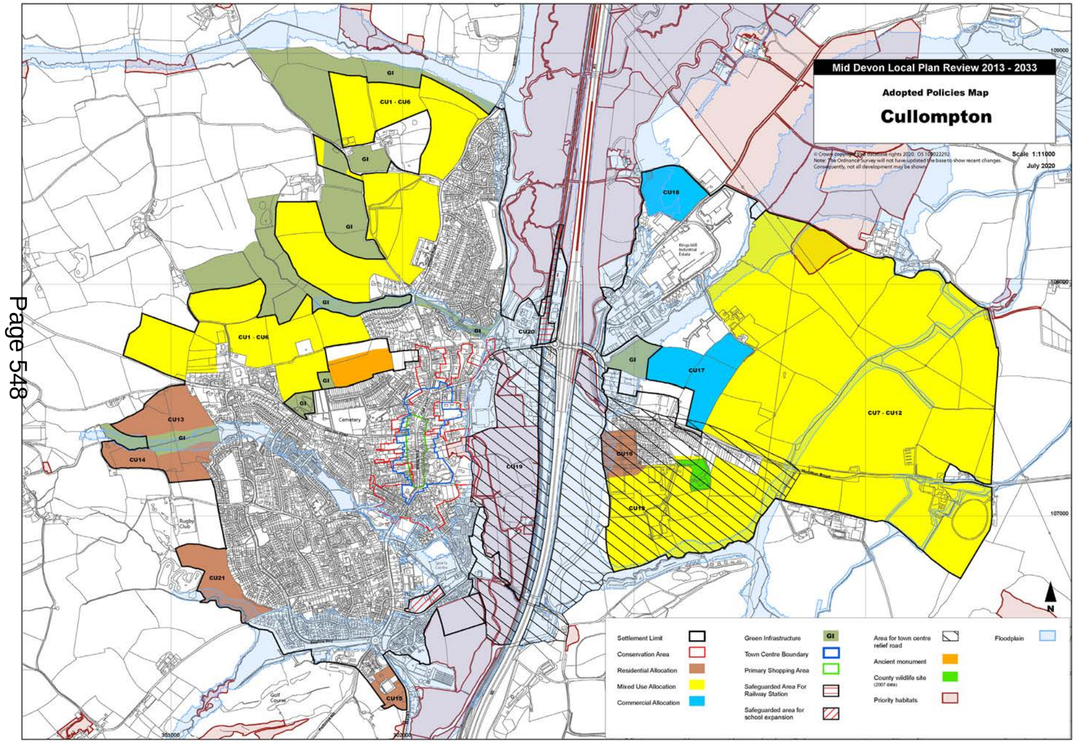
Natural Capital

Delivery and Phasing

Summary of Engagement

Parallel Work

Lessons from Elsewhere



Mid Devon Local Plan Adopted Policies Map: Cullompton

3.1 Policy Context

The Mid Devon District Council Local Plan

The Mid Devon Local Plan for the period 2013-2033 was adopted in July 2020 and forms the Development Plan for the area. The key policies from the adopted Local Plan in respect of the East Cullompton allocation are summarised below:

Policy S2 - Amount and Distribution of Development
This sets out the district's housing requirement for the plan period (2013-2033) of 7,860 dwellings. Central to the spatial strategy is the role of Cullompton in meeting the district's long-term development needs.

Policy S11 - Cullompton
This sets out a long-term vision for Cullompton to develop as a fast-growing market town with a strategic role in the hierarchy of settlements in Mid Devon.

The town will become the strategic focus of new development reflecting its accessibility, economic potential and environmental capacity. This strategy will improve access to housing through urban extensions and expanded employment opportunities. There will be significant improvements to the town's infrastructure and connectivity, including the reopening of the railway station, and improved services for its population and nearby rural areas. Proposals will provide for approximately 3,930 dwellings, of which 1,100 will be affordable, and 73,500 gross square metres of commercial floor space over the plan period.

Key investment priorities include:

- Strategic mitigations to maintain highway capacity, safety, integrity, and sustainability including the M5 and local highway network;
- reopening of Cullompton Railway Station;
- Continue measures to support the implementation of the Cullompton Air Quality Action Plan;
- Manage the town centre so that economic regeneration and heritage reinforce each other;
- Provide community infrastructure such as education and enhanced open space to support new development proposals;
- Support measures to reduce flood risk within Cullompton and make provision for green infrastructure.

Policy CU7 - East Cullompton
This allocates a site of 160 hectares at East Cullompton, to the east of Junction 28 of the M5 for the development of an area of new settlement. Policy CU7 sets out a number of development requirements, covering a range of matters:

- 1,750 dwellings within the plan period and further development of at least 850 dwellings post 2033;
- 28% affordable housing to include extra care housing and at least ten pitches for gypsies and travellers, subject to viability;
- 5% of housing to be provided as serviced plots for sale to self-builders;
- 20,000 square metres commercial floorspace within the plan period and a further 12,000 post 2033, to include a care home or retirement complex, appropriately scaled retail development and other suitable uses such as offices and a hotel or leisure development;

East Cullompton Masterplan SPD

- Provision of at least 40 hectares strategic green infrastructure;
- Provision of transport improvements to ensure safe and suitable access for all modes, including necessary capacity improvements to M5 Junction 28 and pedestrian and cycling links across the motorway to the existing town;
- Environmental protection and enhancement and noise mitigation where necessary;
- Assessment of land contamination and remediation if necessary;
- Land and facilities for community use including a new primary school to meet local needs arising;
- Contributions towards expansion of local secondary education facilities to meet needs arising;
- Carbon reduction and air quality improvements;
- Archaeological investigation and appropriate mitigation;
- An agreed phasing strategy to bring forward development and infrastructure in step and retain the overall viability of development; and
- Comprehensive Masterplanning of the development including at least two stages of public consultation and adoption of the Masterplan as a Supplementary Planning Document, before any planning application is determined.

Policy CU8 – East Cullompton Transport Provision

As part of the development of East Cullompton, contributions towards or delivery of the following transport infrastructure will be provided by all new development within the site:

- Capacity improvements at Junction 28 M5 to deliver a strategic highway improvement as demonstrated by capacity studies completed to assess the impact of the traffic generated from the site;
- Provision of appropriate highway improvements on roads around the development to ensure any unacceptable traffic impacts are mitigated;
- Reopening of Cullompton Railway Station;
- Provision of a network of streets linking to the existing highway network, and appropriate mitigation to reduce impacts on the existing road network such as Honiton Road;
- Provision of bus, pedestrian and cycle routes at appropriate locations throughout the development, creating an attractive, permeable network for non-car modes travelling within, into and out of the area;
- Safe and attractive cycle and pedestrian links to and from the town centre and within the mixed use urban extension;
- Creation of safe and attractive pedestrian and cycle links between the development and the Kingsmill Industrial Estate;
- Implementation of travel plans and other non-traditional transport measures to minimise carbon footprint and air quality impacts;
- Bus service enhancements within, into and out of, the mixed-use urban extension, linking to Cullompton town centre;
- Bus service enhancements between Cullompton, Exeter, Tiverton Parkway and Tiverton

Policy CU9 – East Cullompton Environmental Protection

As part of the development of East Cullompton, the following environmental protection and enhancement measures will be implemented at the expense of all new development within the site:

- Measures to protect and enhance trees, hedgerows and other environmental features which contribute to the character and biodiversity, maintaining a wildlife network within the site and linking to the surrounding countryside;
- An area of 40 hectares for strategic green infrastructure, laid out and managed with an appropriate mix of public parkland, open space, landscaping and local nature reserve;
- Areas of equipped and laid out public open space, totalling 0.4 hectares of equipped children's play, 0.12 hectares for teenage facilities, 6 hectares amenity green space, 9 hectares of parks, sports and recreation grounds, and 1.5 hectares of allotments;
- Protection and enhancement where possible of existing Public Rights of Way;
- Appropriate screening and landscaping for properties adjacent to the M5;
- Appropriate provision of a sewerage system to serve the development and a strategically designed, and phased, Sustainable Urban Drainage Scheme to deal with all surface water from the development and arrangements for future maintenance;
- A strategic landscaping and tree planting scheme to mitigate landscape impact, protect the setting of the Blackdown Hills Area of Outstanding Natural Beauty, and enhance biodiversity and the character of development; and
- Design solutions which respect the settings of listed buildings adjoining the site.

Policy CU10 – East Cullompton Community Facilities

As part of the development of East Cullompton, the following community infrastructure will be provided at the expense of all new development within the site:

- A serviced site of 2.5ha for a new 630 place primary school, or alternatively 3ha of serviced land in two parcels of 1.1ha and 1.9ha appropriately located for the delivery of two new primary schools, at no cost to the Local Education Authority;
- A site of 2 hectares for a shopping and community centre, and the provision of a multi-purpose community building for youth, children and other community uses;
- Construction costs for a primary school capacity of at least 630 places plus additional early years provision, including the requisite land to deliver these facilities. The required primary school capacity should be delivered through the provision of either one or two schools;
- Contributions towards the expansion of secondary education facilities in the local area;
- Contributions towards the expansion or improvement of local library services
- Contribution towards sporting and leisure facilities; and
- Contributions towards a new recycling centre to serve Cullompton.

Policy CU11 – East Cullompton Carbon Reduction and Air Quality

The development of East Cullompton will be required to implement a Carbon Reduction and Low Emissions Strategy at the expense of all new development in the site. This will propose measures to minimise the overall carbon footprint of the development, making provision for sources of decentralised onsite renewable or low-carbon energy and ensure that impact of the site on air quality is acceptable, such as:

- Renewable and low carbon energy to provide a proportion of the site's energy use;
- Measures to ensure that residents, employees and businesses are encouraged to travel in the most sustainable fashion, including travel plans, information, car clubs, lift-sharing and infrastructure for low emission vehicles;
- Measures to encourage the sustainable treatment of waste;
- Measures to manage the impacts of construction;
- Offsite tree planting where sufficient cannot be accommodated onsite;
- Energy improvements to existing buildings; and
- Other measures to capture or mitigate carbon emissions and air quality impacts from development.

Policy CU12 – East Cullompton Phasing

A phasing strategy will be required for the development of East Cullompton to ensure that the development and infrastructure come forward in step, minimising the impact of development while ensuring that the development remains viable. The strategy should take account of the following requirements, variation of which will have to be carefully justified. Development shall be subject to the following:

- Provision of affordable housing will be broadly in step with the market housing;
- Provision of all serviced self-build plots after strategic highways infrastructure has been completed;
- Provision of commercial development in step with housing, at a rate of at least 1 hectare per 500 occupied dwellings;
- Provision of strategic green infrastructure broadly in step with development, with public open space provided at a rate of at least 1 hectare per 150 dwellings or phased to deliver a larger area of multi-functional public open space at a suitable stage in the development;
- Implementation of bus service improvements in step with housing development, provided in appropriate instalments;
- Capacity improvements at junction 28 M5 to deliver a strategic highway improvement as demonstrated by capacity studies completed to assess the impact of the traffic generated from the site; and
- Transfer of serviced land together with right of access for primary school(s) at no cost to the Local Education Authority prior to the first occupation of residential development, with necessary funding to construct the facilities being paid to the Local Education Authority in appropriate instalments.

Revised Mid Devon Local Plan

The Council have started work to prepare the new Local Plan. This will have regard to the latest national planning policies, practice guidance and thinking about how best to plan in the context of a national housing crisis, economic and pandemic recovery and the challenges of a climate emergency. It will also ensure Mid Devon will continue to benefit from a plan-led approach for development to meet current and future needs over a longer time period to 2043.

Consultation on the Plan Mid Devon 2023-2043 Regulation 18 Issues Paper took place from 31st January - 28th March 2022. This was the first stage in preparing the new Local Plan in which sought views about what the new Local Plan will include and how Mid Devon should be planned for in the future.

The emerging Local Plan includes the ambition for the Culm Garden Village. The Culm Garden Village proposal is one of only 14 areas initially awarded Garden Village status by the Government in January 2017. Mid Devon's expression of interest for the Garden Village identified the potential to deliver up to 5,000 sustainable new homes in a country park landscape, with jobs, community facilities and transport, all integrated with Cullompton itself. 1,750 of these homes are already planned at East Cullompton through the current adopted Local Plan for the period to 2033 and there is provision for at least another 850 new homes beyond. The development of a garden village in this location would build on the strategy of the current Local Plan, where Cullompton will be the strategic focus of new development in Mid Devon due to its accessibility, economic potential and environmental capacity.

Cullompton Neighbourhood Plan

The Cullompton Neighbourhood Plan was adopted in June 2021 and now forms part of the statutory development plan for the Cullompton area, alongside the Mid Devon Local Plan and the Devon Waste and Minerals Plan, and carries full weight for guiding planning applications submitted to the Council for determination and the decisions made on these.

The Neighbourhood Plan reflects on the proposed growth of Cullompton and in respect of the East Cullompton states:

Cullompton Town Council is happy to go along with the 'Garden Village' approach to development in east Cullompton if it helps achieve the strategic policies of the Local Plan, delivers a high-quality living environment and facilitates sustainable growth of Cullompton that will offer benefits to all the parishioners of the area. However, it is the Town Council's position that this can only be achieved if the east Cullompton growth area is conceived from the outset as an integral part of the town of Cullompton and not a separate settlement; and master-planned accordingly.

This principle of seeking to think about the existing town of Cullompton and the proposed development at East Cullompton and the wider Culm Garden Village as one place has been a key influence in developing the proposed Masterplan Framework.

SPD Stage 1

In December 2018, the Council published the East Cullompton Masterplan SPD Stage 1: Issues, Opportunities and Concepts for consultation. This is not an adopted SPD but it presented the emerging local planning policy context and the initial vision and principles for the site, before going on to summarise the masterplanning evidence base to date and the subsequent issues that have been identified. The document then proceeds to outline initial development options and opportunities for delivery of the vision and principles. A Vision & Concept document for the wider Culm Garden Village was also prepared and published for consultation alongside this Stage 1 Masterplan SPD. These documents help set the context for this SPD.

Mid Devon Design Guide

In October 2020 the Council adopted the Mid Devon Design Guide Supplementary Planning Document. The Design Guide applies to the whole of Mid Devon and is intended to raise design awareness and standards throughout the planning process.

We have had regard to the overarching design principles in this guide in preparing this SPD and setting out the principles, design guidance and requirements for new development at East Cullompton.

Devon Waste Plan

The Devon Waste Plan for the period 2011-2031 was adopted in December 2014 and forms part of the Development Plan for the area. The key policy from this plan is Policy W4: Waste Prevention. This policy looks for sustainable construction, procurement and waste management in Devon to achieve a reduction in the waste generated through all forms of development. Development at East Cullompton will need to show how sustainable construction, procurement and waste management has been considered.

3.2 Carbon Reduction Principles

Context

There is a legal requirement enshrined in the Climate Change Act (2008) to achieve net zero carbon emissions in the UK by 2050 as part of a global effort to reduce temperature rises to “well below 2°c” compared to pre-industrial levels.

This climate emergency has been acknowledged by Mid Devon District Council in 2019 and is reflected in the Interim Devon Carbon Plan (2020) which provides a roadmap for Devon to achieve net-zero by 2050, with an interim target of a 50% emissions reduction by 2030 (from 2010 levels). Further detail on the roadmap itself will be reflected in the Devon Carbon Plan which remains in preparation and is due to be finalised later in 2022.

Reflecting this context and acknowledging the impact that the built environment has on emissions, the Adopted Mid Devon Local Plan Review (2013 – 2033) embeds a requirement to minimise emissions in the delivery of future allocated development across key policies. This includes Policy S1 (Sustainable Development Priorities) and Policy S9 (Environment) alongside wider policies such as Policy DM2 (Renewable and Low Carbon Energy) and Policy DM3 (Transport and Air Quality).

From a site-specific context, Policy CU7 (part k) of the Local Plan Review makes it a requirement for the allocation at East Cullompton and the wider Culm Garden Village site to implement ‘carbon reduction’ improvements. This is further reflected in Policy CU11 which obligates the preparation of a Carbon Reduction and Low Emissions Strategy with a focus on measures to minimise the overall carbon footprint of the site.

East Cullompton Masterplan SPD

Carbon Emission Assessment Framework and Emission Sources

MDDC are currently developing a Low Carbon Affordable Housing Development Framework Assessment Tool however, there is not yet an agreed assessment framework obligated in national planning policy (e.g. NPPF) by which the relative whole-life carbon (WLC) emissions generated by new development sites can be measured in a consistent way. From a buildings perspective, the most widely accepted methodology currently used within the industry and already applied within a local policy context (e.g. Adopted London Plan) is the WLC Assessment framework. This applies standards contained within BS EN 15978: 2011 through consideration of the following building-related emission sources (typically over a 60-year period):

The WLC framework is not exhaustive and does not consider the emissions from all in-use sources (from human behaviour) such as from surface transport, waste processing or food and service consumption. No framework is currently widely applied within the industry to measure the emissions from these sources. Based on preliminary City Science research for the Royal Town Planning Institute (RTPI), these unmitigated human behavioural based emission sources are estimated to comprise around two thirds of the total life-cycle emissions (60-years assumed) of a development site.

WLC Carbon Assessment Component	Emission Sources		Typical % WLC Emissions Contribution
A1-A3 Product Stage	• A1: Raw Material Supply • A2: Transport of Materials	• A3: Manufacturing	30%
A4-A5 Construction Stage	• A4: Construction Transport	• A5: Construction Process	10%
B1-B7 Use Stage	• B1: Building Use (emissions from building components only) • B2: Maintenance of Building • B3: Repair of Building • B4: Replacement of Building Parts	• B5: Building Refurbishment • B6: Operational Energy Use (Regulated & Unregulated) • B7: Operational Water Use	55%
C1-C4 End of Life Stage	• C1: Demolition Process • C2: Transport from Demolition	• C3: Building Waste Material Processing • C4: Building Waste Materials Disposal	5%

Table: Typical Emission Sources Considered by Whole Life Carbon Assessment

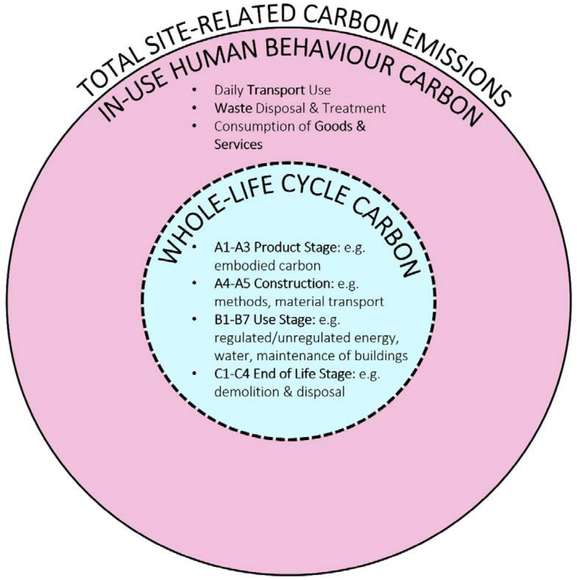
Quantification of Estimated Carbon Emissions

A Carbon Reductions and Low Emission Strategy is to be provided by developers in consultation with the Council. It should apply a comprehensive approach to estimate a 'Do Nothing' baseline for carbon emissions across the lifecycle of the site (60 years assumed). This 'Do Nothing' baseline should then be used as the basis to develop the carbon reduction targets & strategy for the site. Subject to any future national policy revisions or provisions in the Local Plan, this should comprise:

- Whole-Life Cycle Carbon Assessment Framework: consideration of potential approximate emissions across the WLC components identified in BS EN 19578:2011, incorporating both regulated and unregulated energy consumption as part of B6.
- In-Use Human-Behaviour Carbon: consideration of potential approximate emissions from in-use human behaviour considering transport, waste and consumption of goods and services.

Carbon Reduction Key Principles and Target Setting

Setting a target to reduce carbon emissions from the site should be embedded as a clear outcome across all disciplines of the planning process. Embedding this vision at the outset is critical to ensure that delivery of East Cullompton is successful in minimising its impact across all potential emission sources.

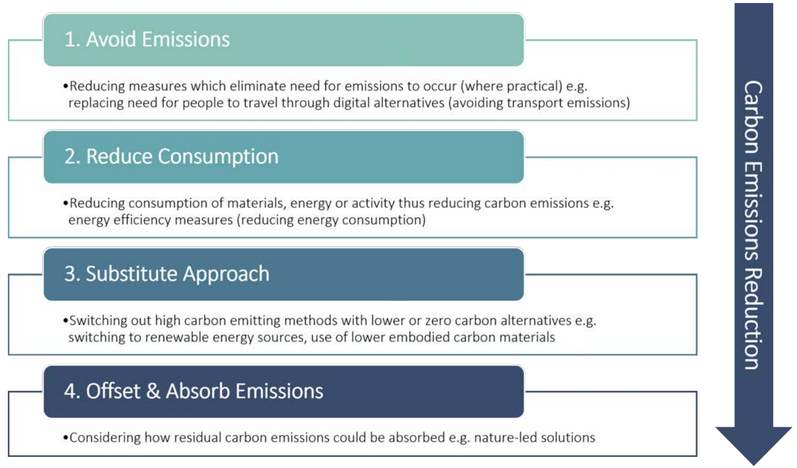


Total Lifetime Site-Related Carbon Emissions

Overarching Carbon Reduction Hierarchy

The Carbon Reductions & Low Emission Strategy in conjunction with the Masterplanning process should be underpinned by a hierarchy of core principles focused on the outcome of reducing emissions. This should be comprised of the following:

- Avoid Emissions: through measures which eliminate the need for emissions to occur entirely (where practical) such as through substituting the need for people to travel with digital alternatives (avoiding transport emissions)
- Reduce Consumption: through measures such as energy efficiency (reducing energy consumption), rationalisation of material selection in construction (reducing material use) or through embedding circular economy principles (reducing waste generation)
- Substitution: through switching out high carbon methods with lower or zero carbon alternatives such as renewable energy sources, electric vehicles, or lower carbon building material selection
- Offset & Absorb: through consideration of how residual emissions anticipated could be absorbed e.g. nature-led solutions



Carbon Reduction and Low Emissions Strategy Hierarchy

Broad Carbon Reduction Approach by Source

The following table identifies potential criteria for success for decarbonisation measures across the various carbon emission sources. This considers all sources which includes all those identified in Policy CU11 of the Mid Devon Local Plan Review.

These potential decarbonisation measures are indicative and are not exhaustive and remain subject to further testing through more detailed planning stages by developers. The Carbon Reductions and Low Emission Strategy submitted by developers should set out measures against each source.

	Source	Broad Low Carbon Emission Outcome		
		Avoid Emissions	**Reduce Consumption**	**Substitute Approach**
Whole-Life Cycle Carbon Emissions (Buildings)	**Buildings (Embodied Carbon, Construction, In-Use & Demolition [A1-A5, B1-B5, C1-C4])**	✓ Ensuring the development content directly matches future needs of site users ✓ Reduce building footprints and site coverage	✓ Lightweight construction method ✓ Building materials locally produced in Devon (where appropriate) to reduce transport emissions ✓ Use of recycled / reclaimed materials	✓ Switching out high embodied carbon products (e.g. steel, aluminium, concrete) with low embodied carbon products (e.g. timber, lime render, slate) ✓ Moderate to high repurposing of building materials rather than use of composite materials ✓ Selection of standard components to reduce emissions from future maintenance of site ✓ Modern Methods of Construction
	Energy (WLC B6)		✓ Dwellings designed in accordance exemplary energy efficiency standard such as the Future Homes Standard (due to be implemented from 2025) ✓ Low energy consumption intensity for both building and user consumption such as through per-room energy control or communal access to white goods	✓ On-site renewable electricity generation including rooftop and surface photovoltaic solar panels *(electricity proportion subject to feasibility assessment)* ✓ On-site heating in buildings from renewable sources such as air-source or ground-source heat pumps *(subject to feasibility assessment)*
	Water (WLC B7)		✓ Widescale water consumption meters ✓ Water-efficient design ✓ Maximise use of rainwater and greywater throughout the site	✓ On-site water heating from renewable sources such as ground-source heat pumps ✓
In-Use Human Behaviour	**In-Use Transport**	✓ Maximise digital connectivity through ensuring full fibre broadband access ✓ Parking policies	✓ Integration of land use content with transport, including opportunities for flexible work space and hubs ✓ To demonstrate how the place it fits within ‘a 20-minute place’ with residents able to access essential local services and employment within 20 minutes via walking, cycling and shared transport	✓ Active travel routes to be fully integrated with public and shared transport networks and aligned with major trip generators ✓ Public and shared transport provision to and within the garden village to demonstrate zero tailpipe emissions ✓ Provision of electric car club for longer-distance trips ✓ Appropriately located mobility hubs including delivery hubs and shared community services
	In-Use Waste		✓ Potential for on-site hubs to support local and circular / sharing economies e.g. swap shops ✓ Potential for site-wide circular economy-based schemes for retail units e.g. reuse schemes	✓ On-site compost facilities integrated as part of community allotments for food waste ✓ Maximise recycling rates through measures such as exceeding minimum requirements for recycling bin storage space
	In-Use Consumption of Goods & Services (e.g. Food)		✓ Community growing space and allotments to in each phase of the garden village to support reduced meat consumption	

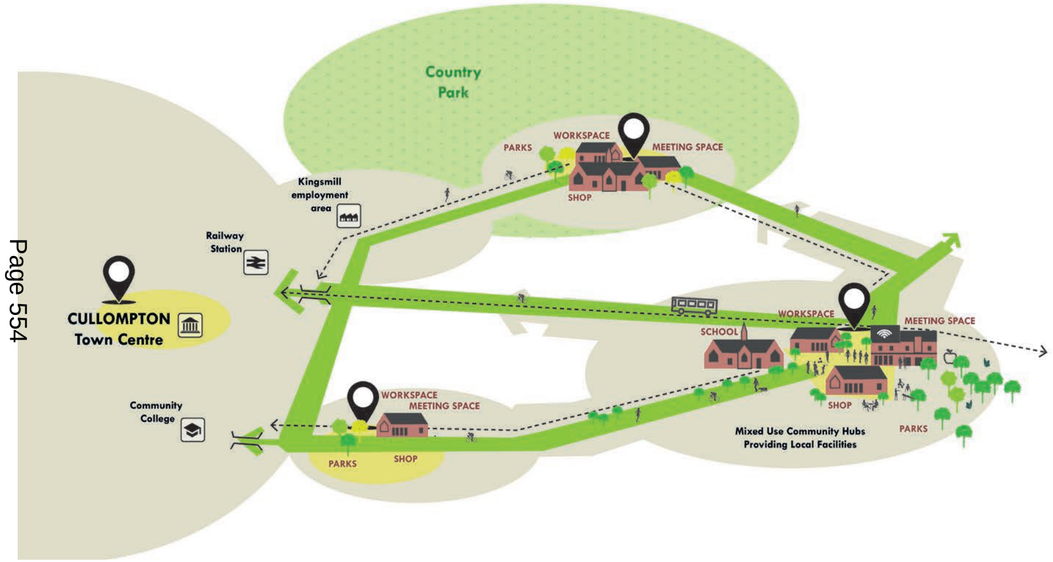


Illustration of the 20 minute place at Cullompton demonstrating the town wide and neighbourhood scale opportunities

3.3 The 20 minute place

A fundamental aspect of successful placemaking and addressing critical issues such as decarbonisation is reducing the dependence on private car journeys. The proximity of Cullompton Town Centre, expanding employment areas and East Cullompton, if combined with a comprehensive mobility strategy, maximises the ability to achieve net zero carbon ambitions, address the climate emergency declaration and promote active and healthy mobility practices.

The idea of a 15 or 20 minute place is well recognised and promoted in many cities worldwide and relates to a concept which aims to create neighbourhoods where you can find most of what you need day to day within 15-20 minutes of home. While improved connections in to the rest of the region will clearly remain important, and helped by the reopening of Cullompton railway station, the allocation at East Cullompton and the wider Garden Village opportunity will be of a scale that can bring forward a range of land-uses that not only benefit the site, but also the wider area allowing people to access more services and opportunities for day to day needs. Active and shared travel interconnectivity between East Cullompton and Cullompton is essential to ensure that sustainable travel options are woven in to plans with the aim of reducing reliance on use of the car.

While the concept of the 20 minute place emerged in an urban context and Cullompton has a more rural character, the ideas are still relevant and essential to addressing the issues above. The Masterplan Framework translates the idea and applies it directly to the local context. When we refer to the 20 minute place at Cullompton this refers to both:

- A town wide scale, where Cullompton as a whole offers a broader range of local services, jobs, enhanced Town Centre, railway station and recreational opportunities and where cycling and public transport may need to be used as well as walking.
- A neighbourhood scale where walkable new communities provide local facilities such as workspaces, schools, community space, open spaces and shops as a central part of the new neighbourhoods.



Extract from the TCPA Guide on 20 Minute Neighbourhoods



Illustration of the range of benefits possible through harnessing natural systems

3.4 Natural Capital

Our environment is our life support system sustaining and providing our food, fuel, building materials, fresh air, clean water, carbon storage, and economic worth. Climate change, significant declines in biodiversity, and population growth are putting pressure on our environment.

We can capture the value of nature by harnessing natural systems and processes rather than working against them. This approach is described as nature-based solutions and the benefits of natural processes are commonly referred to as ecosystem goods and services. These comprise tangible and intangible benefits and include the production of food and timber, carbon sequestration, improved air quality, reduced storm-water runoff and the regulation of the climate.

Ecosystem goods and services provide many benefits and their value can be measured using a natural capital approach. Ecosystem goods and services are varied and closely interrelated. A single well considered intervention can result in multiple benefits. Mid Devon District Council commissioned a Natural Capital assessment of the site as part of the preparation of the Masterplan, this work helps to identify where the environment is working well, where is the best place to site new development and how we can intervene to deliver multiple benefits or minimise risk of things such as erosion or flooding. The findings and recommendations of the Assessment are incorporated in the following sections of the SPD.

3.5 Delivery and Phasing Priorities

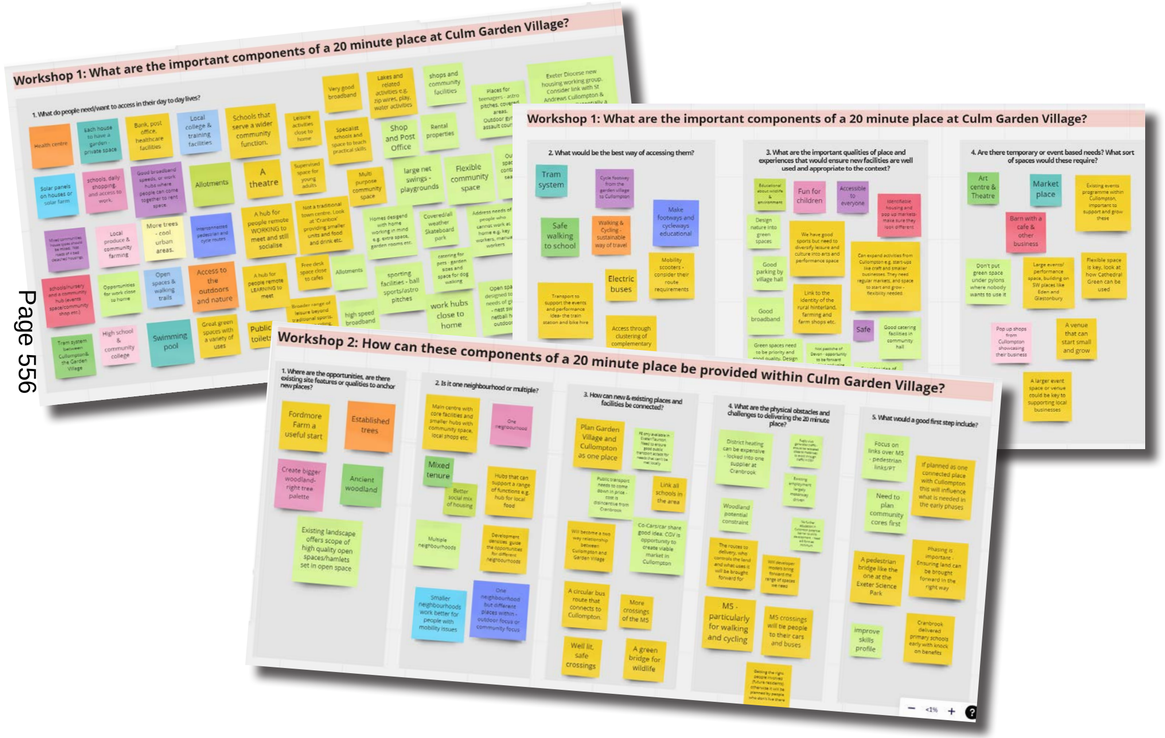
East Cullompton is a large-scale and complex development with a long duration that will span over more than a decade, particularly so, given its potential in the future to grow into the Culm Garden Village. There is more than one site promoter and there are multiple land ownerships to consider. As development commences there will be others too who will have a strong stake in its successful outcome, including a flourishing local community of residents and businesses.

Policy CU7 is very clear about the need for a comprehensive masterplan to guide development and sets out the land use and infrastructure requirements for East Cullompton and Policy CU12 sets out the phasing requirements. The delivery mechanisms required to ensure that this sequence happens successfully and that it is viable and sustainable at every stage in its development will be the subject of further work involving all interested parties to comprise the Phasing and Delivery Strategy. Initial phasing principles are included within this SPD and planning applications will be required to demonstrate how these principles are being met.

The drivers of change we highlighted in the introduction, whether that is rapidly changing patterns of living and working or, for example, increasing support for local business, all point to the urgent need to deliver the essential ingredients of place and the right kind of infrastructure either at the same time or ideally in advance of building homes. We also need to deliver a good choice of homes with a variety of tenures and types right from the outset. The East Cullompton site offers some unique opportunities of a development of this type and scale. These include links to large employment areas at the edge of the site, the potential to improve links with the existing communities and facilities in Cullompton and the potential to utilise the diversification of existing farm clusters on site as a model and catalyst for establishing a variety of activities on the site from the outset.

Establishing “village life” early on and providing alternatives to entrenched patterns of daily out-commuting and the use of the private car for all daily activities is at the heart of the “20 minute place” concept and this must be a high priority and a key driver in the phasing and delivery strategy.

The multiple landownerships have influenced the masterplan and the way this has been described to provide an overarching structure to East Cullompton. The guiding principles and key features that we want to see in the early phases of development have also shaped the overall approach and plans for East Cullompton described in the Masterplan Framework Section. The resulting phasing principles are also contained in the Masterplan Section.



Extracts from stakeholder workshop

3.6 Summary of Engagement

During the preparation of the Stage 1 SPD extensive engagement and collaborative working took place with a number of technical stakeholders such as landscape architects, ecologists, highways officers, urban designers, flood risk and drainage specialists, education and housing officers, leisure and health professionals; as well as with community organisations and groups forming the Culm Garden Village Community Stakeholder Forum. This Forum is attended by representatives from organisations such as Cullompton Town Council, Kentisbeare Parish Council, Cullompton Neighbourhood Plan Steering Group, sports clubs, local health providers, local schools, arts groups and faith groups.

The key findings from engagement during Stage 1 have been used to inform the preparation of this SPD. These key findings include:

- Ensure the new community is integrated with Cullompton, physically and socially.
- Green buffer with Kentisbeare.
- Sense of community and well-being with sports and leisure to meet the needs of the existing and new communities – being happy where you live, active, inclusive and safe.
- Adequate and natural flood risk management and sustainable urban drainage systems.
- Good quality employment in a high quality environment to attract the right people to the right jobs – reducing out-commuting.
- Business hubs with fast broadband, links with the Exeter Science Park, highly skilled workforce and quality apprenticeships
- Focal points for gathering people together, arts, culture and faith.
- A community hub with provision for healthcare, catering for all ages.
- Central neighbourhood centre with post office, pub, church, shops, cash point, nursery, community centre – focal point of the village.
- Education provision close to Honiton Road, sports and employment.
- Easy to find your way around.
- Timely provision of infrastructure.
- Suitable mix of housing to meet demographic need, high quality, well designed and built housing, including care homes and variety of tenures.
- Innovative design and new technology with low running costs and self-sufficiency designed in.
- Flexible live-work space.
- Community ownership and stewardship of open space and facilities, open space and facilities optimised to build community cohesion; facilities well run; fair for everyone.
- Respect and respond to natural features, incorporate renewable energy, grow your own food; environmentally sensitive.
- Prioritise walking and cycling, green routes, connect north and south of Honiton Road and across M5 motorway.
- Country parks and green corridors; space for wildlife; bringing the countryside into the village; and a green perimeter trail.

Building on the engagement undertaken as part of the Stage 1 SPD for East Cullompton, engagement and collaborative working has continued to inform the preparation of the Masterplan SPD. This has primarily taken place through two workshops with the Culm Garden Village Community Stakeholder Forum, held in November 2021 and April 2022.

The first workshop explored the major contextual changes since the preparation of the Stage 1 SPD in 2018 including declaration of a climate emergency, biodiversity decline and the Environment Act, the emergence of the National Model Design Code, the increasing awareness of the role of spatial planning in addressing health

and wellbeing and the implication of the COVID pandemic.

During the workshop attendees reviewed the aspirations and priorities for East Cullompton and the wider Garden Village using the principles of the 20-minute place as a model for helping to address some of these challenges. Attendees considered what the important components of a 20-minute place at Cullompton were and how the SPD could help ensure they were provided. Key discussion points included:

- Supporting choice and flexibility in working patterns.
- Flexible community spaces that can be used for a variety of events and functions.
- Open spaces that cater for a broad range of society.
- Placing nature and open space close to homes.
- Incorporating leisure and cultural space as well as shops and schools.
- Exploring opportunities for local energy production.
- Importance of a broad range of active and sustainable mobility solutions.
- Importance of place quality that responds to existing local character.
- Incorporating temporary and flexible events space that can change as the community grows.
- Using Fordmore Farm as a useful mixed-use hub and starting point.
- Using the existing landscape as a key placemaking influence.
- Viewing East Cullompton and existing Cullompton as one place.
- One settlement with multiple neighbourhoods and centres.
- Effective connections across the M5.
- The importance of phasing to set sustainable patterns of living and establishing the quality of place.

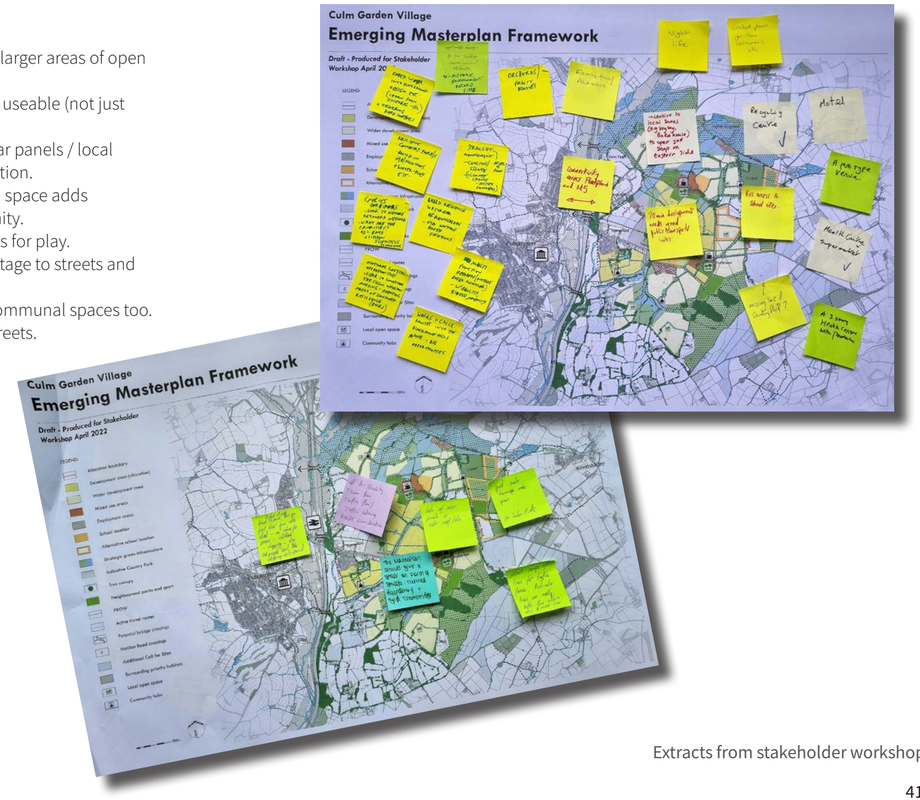
At the second workshop in April attendees were presented with emerging thoughts and a draft framework masterplan for East Cullompton and the Garden Village. Attendees were asked to review the emerging plans against the principles of a 20-minute place. Key discussion points included:

- Ensuring early delivery of successful mixed-use areas.
- The need for effective crossing of the M5.
- Importance of traffic calming and air quality.
- Incorporating water as a placemaking feature.
- Ensuring resilience through use of natural solutions and plant species selection.
- Ensuring strong connections to the Country Parks and surrounding landscape.
- How the plan can encourage sustainable travel through provision for buses, bicycles, scooters, and walking as well as limiting provision for cars and parking.
- Incorporating heritage features into the site.
- Incorporation of areas for local food production and orchards linked to other community uses.
- Incorporating a variety of retail space that can complement what is on offer in the high Street.

During the second part of the April workshop, attendees reviewed examples of other recently built schemes, looking at a range of streets, spaces and community hubs to explore what worked about them and what didn't. The objective of this second part was to help determine the placemaking priorities for East Cullompton and the Garden Village. Key discussion points included:

- Incorporating well defined front gardens to all homes.
- Avoid poorly defined spaces with no clear ownership.
- Consider a split of parking / limiting on plot parking.
- Avoid dominance of parking in community areas.
- Avoid harsh 'hard edge' where development meets open space.
- Include provision for car clubs.

- Consider maintenance of larger areas of open space. E.g. grazing.
- Ensuring open spaces are useable (not just constrained land).
- Including provision of solar panels / local renewable energy production.
- Ensure planting and open space adds biodiversity not just amenity.
- Incorporate car free streets for play.
- Ensure clear building frontage to streets and spaces.
- Incorporate small scale communal spaces too.
- Ensure trees planted in streets.



Extracts from stakeholder workshop

3.7 Parallel work

The masterplanning work for East Cullompton has been undertaken in parallel with several other work streams. These have been used to inform the proposals and to test options.

Cullompton Town Centre Masterplan
The Cullompton Town Centre Masterplan, once adopted by Mid Devon, will form the basis for the regeneration of the town; enhancing the town's economic prospects and providing a clear strategy to ensure the town meets its full potential as an attractive and thriving town post COVID-19 and into the future.

Future Mobility
A Future Mobility Strategy (April 2021) has been prepared for the site, covering a strategic review of the site, policies and best practice, and future trends; in addition to locally-led considerations such as the emerging place vision, human-centred mobility, viability and delivery.

Employment and Skills
An updated Employment and Skills Strategy was developed in parallel with the masterplan. The objective of the strategy is to support self-sufficiency and reduce out-commuting by attracting high quality jobs and setting the right conditions for inward investment. The findings of this report have been factored into the development of the Masterplan SPD.

Town Centre Relief Road
Planning permission (reference 20/00876/MFUL) was granted in January 2021 for a new Cullompton town centre relief road to relieve traffic queues at Junction 28 and in the town centre, and improve the historic environment and air quality in the town.

Feasibility testing of M5 junction improvements
Mid Devon District Council is working with Devon County Council and National Highways to progress this aspect of infrastructure.
The masterplan SPD retains flexibility on the preferred junction improvement configuration.

The Proposed Country Park
A number of workshops covering green and blue infrastructure were held with local stakeholders to capture information and continue the locally-led conversation about the potential for multi-functional green space to the north of the East Cullompton allocation. Proposals for this Country Park are being explored by MDDC but are beyond the scope of this SPD.

Ongoing work on the Connecting the Culm Project
The Connecting the Culm team have been involved in the development of the masterplan through Stakeholder workshops and through the Flooding and Drainage work relating to East Cullompton and the Garden Village.

Reopening of Cullompton Railway Station
Mid Devon District Council is committed to re-open Cullompton Train Station by 2025 as part of a wider project to improve train services in the subregion.

Flooding and Drainage
Mid Devon District Council commissioned the East Cullompton and Culm Garden Village Strategic Flood Risk Assessment and Drainage Strategy to coincide with work on the Masterplan SPD.

East Cullompton Masterplan SPD

3.8 Lessons from Elsewhere

Place Alliance Research

In 2021 the Place Alliance launched A Housing Design Audit For England. The research systematically evaluated 142 large-scale housing-led development projects across England. Overwhelmingly the message is that the design of new housing environments in England are 'mediocre' or 'poor'.

Some of the most common failings included:
- Overly engineered highways infrastructure and poor integration of storage and car parking.
- Lack of response to local context and poor 'sense of place'.
- Poor 'walkability' due to dominance of cars and lack of local facilities.
- Failure to deliver a green and biodiverse landscape and sub standard response to the environmental challenges we face.

Enough data was collected to make regional comparisons. The research concluded that the potential exists for good design everywhere, despite this the south west scored significantly lower than the national average. These specific failings have helped to inform the priorities and recommendations of the SPD.

Garden Village review

A review of garden villages and new settlements in the south west and south coast has been undertaken as part of preparing this SPD. These projects are at various stages of delivery. The intention was not to use them as a benchmark of quality but to to identify lessons learned in masterplanning at the scale of East Cullompton.

Summary of lessons learned
- Putting Health into Place includes a useful summary of the significance and role of the built environment in improving the health of residents.
- The importance of walkable places and the challenge of establishing mixed uses to support incoming residents.
- The importance of place quality in establishing successful community and commercial hubs.
- Co-location of commercial, community space, schools and open space.
- A range of energy solutions have been developed from district heating, to anaerobic digestion to efficiency in building fabric alongside heat pumps and solar.
- Incorporation of significant areas of open space close to homes for a broad range of functions.
- The need for a clear co-ordinating plan to guide development.


East Cullompton, Mid Devon


Cranbrook, East Devon


Sherford, Plymouth/ South Hams


Poundbury, Dorset


Langarth, Cornwall


Welborne, Hampshire



East Cullompton Masterplan SPD

SECTION FOUR
UNDERSTANDING THE PLACE

Overview and Landscape
Site Context
Ecology
Natural Capital
Hydrology
Heritage
Infrastructure and Utilities
Mobility
Combined Constraints
Opportunity Plan

Page 560



Aerial Photo with East Cullompton Allocation Boundary

4.1 Overview and landscape context

Understanding the context and capturing the special qualities, or 'spirit', of the place is a crucial first step in developing a genuinely landscape-led Masterplan for East Cullompton.

This section of the SPD describes both the conditions within the allocated site boundary and the surrounding area to ensure the Masterplan Framework for East Cullompton is driven by a thorough understanding of the wider context.

The market town of Cullompton lies within the broad landscape context of the Devon Redlands, an extensive swathe of generally low-lying, gently rolling landscape stretching from the fringes of Exmoor in the north to the Exe Estuary and coast in the south, and from the edge of Dartmoor in the west to the Blackdown Hills in the east. The character of the area is distinguished and unified by its underlying red sandstone geology, reflected in distinctively red-tinged cob and sandstone traditional buildings, and its deep, fertile red soils which make it the agricultural heart of Devon. Rivers have created the topography that we see today and they remain as key landscape features within this area, arising within the surrounding hills and meandering through broad, open floodplains across the central part of the Redlands towards the coast.

It is the broad valley of the River Culm, running roughly NW-SE through the Redlands to join the Exe Valley, that provides the local landscape context for Cullompton and adjacent land to the east. Topography, geology and, in particular, the river and its associated watercourses and drainage characteristics have shaped patterns of settlement and land use in this area and continue to have a profound influence on local character and sense of place.

The Culm Valley is strongly defined to the west by the distinctively hummocky rolling hills that frame the town of Cullompton lying at their foot. The town's historic core originated along a N-S strip of relatively level ground just above the valley floor, contained between the physical constraints of rising landform to the west and the braided channels of the R. Culm and floodplain to the east. The western river channel formed the town's Mill Leat and is part of an integrated system of water courses (river, tributaries, channels and culverts) that have been fundamentally important to Cullompton's historic development - influencing its location, supplying water to its inhabitants and powering its mills and industries. Indeed, part of its name is thought to be derived from the Celtic cwlwn ('looped' or 'winding' river). Water continues to be a highly significant feature of Cullompton and a key part of its identity - in addition to the river/valley-side setting, there are streams, leats, culverted water supplies or the river itself, encroaching on or running through most parts of the town.

Eastwards from the town, the valley opens out into a wide low-lying and essentially flat landscape, punctuated only by localised low ridgelines and subtle undulations (e.g. around Upton and north of Stoneyford) before meeting the more distinctively rolling foothills of the Blackdowns on its far eastern side. Water is a fundamental and unifying element of this valley floor landscape, comprising a dense network of watercourses and features that include the channels of the River Culm and its tributary the River Ken; an ancient leat originating from the



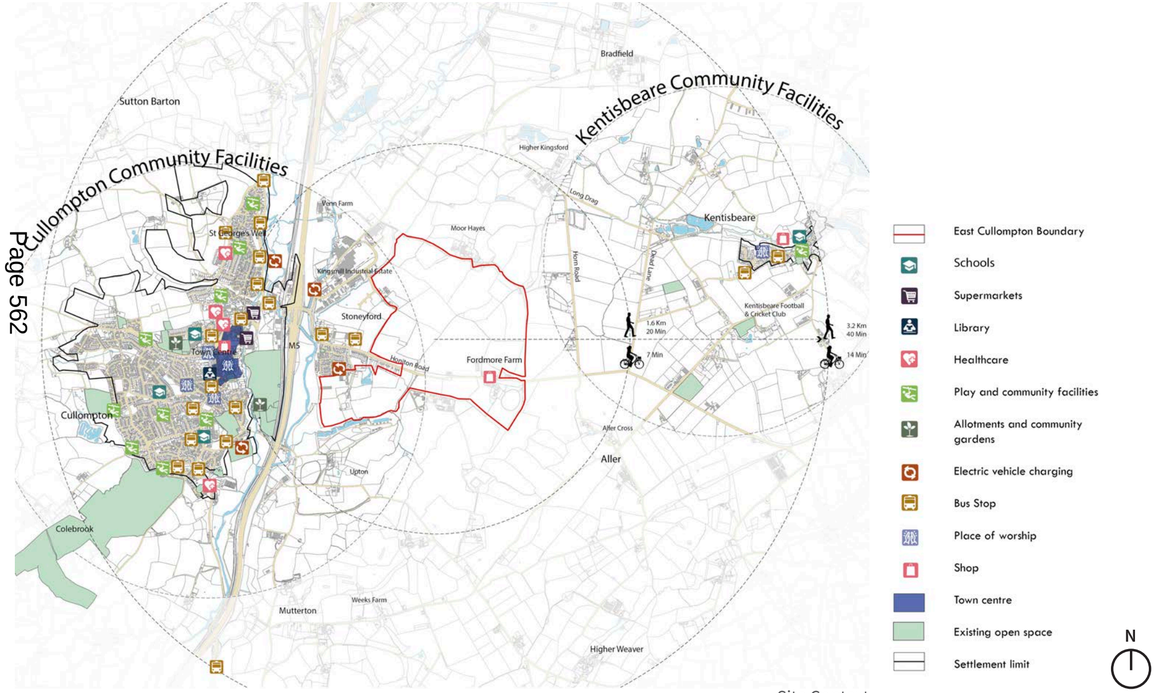
Settlements and Landform

12th century (providing a supply of water to farmsteads between Goodiford and Newland); historic fords and weirs; numerous streams and drains; and scattered farm ponds, fishing lakes and reservoirs, some created by former sand and gravel extraction. Aside from the river, these features are not especially visually prominent but the 'watery' nature of the landscape has nonetheless been responsible for the sparse pattern of farmsteads, clustered hamlets and small linear villages (e.g. Kentisbeare) typically located on slightly better drained ground but still strongly associated with natural and man-made watercourses and features.

Although historically a barrier to the eastern expansion of Cullompton, the drainage network of the River Culm is also a fundamental connecting element that links the town with its eastern landscape setting and has influenced the siting of historic mills, bridges, culverts and other structures and access routes within the landscape. This physical and perceptual connection between the town and land to the east is vital to the spirit of both 'places' but has been progressively obscured by the development of the motorway and rail corridor along this side of the valley floor and needs to be re-established.

The rural road network within the valley floor is sparse and follows local topography: straight, more open roads (droves) characterise the flatter valley floor and ridgelines, while winding, enclosed lanes and sunken 'holloways' are typical of the more strongly undulating land further to the east (e.g. around Kentisbeare). Particularly distinctive are the dead straight early 19th century 'new' roads of Dead Lane and Horn Road and the highly rectilinear pattern of fields that lies between them.

Although not heavily wooded, and despite some hedgerow removal, the farmed landscape retains a well-treed character that contributes positively to its sense of place. Key features include the strong structure of mature hedgerows and trees (particularly mature oaks) that line field boundaries, roads and watercourses right across the area but particularly to the south of Honiton Road, and surviving areas of woodland on elevated slopes (e.g. at Aller Wood and Upton). Orchards were once a frequent feature of this landscape but only a few remnants survive in areas further to the east.



Site Context

East Cullompton Masterplan SPD

4.2 Site context

The estimated population of Cullompton in 2020 (ONS) was 11,633, and over the period of the last 20 years the population has increased by 19.5%. Population growth has been far higher than that observed across Mid Devon as a whole. The Local Plan describes how Cullompton will continue to develop as a fast growing market town with a strategic role in the hierarchy of settlements in Mid Devon. The town will become the strategic focus of new development reflecting its accessibility, economic potential and environmental capacity.

The Employment and Skills Strategy commissioned in parallel to this SPD includes a socio-economic description of Mid Devon and Cullompton. The Strategy summarises that it would be expected that the incoming population would see some similar characteristics to the District and Cullompton populations. It would be expected that this would be a working population, with high levels of economic activity and dual-income households. The age profile is likely be younger than the District as a whole, with younger adults and children, including high proportions of pre-school and school age children. However, the ageing population trend is likely to be exhibited throughout the District in coming years and this would be seen within the development. This would have implications for the mix of housing and services that should be provided within East Cullompton, as well as the availability of labour that would be expected.

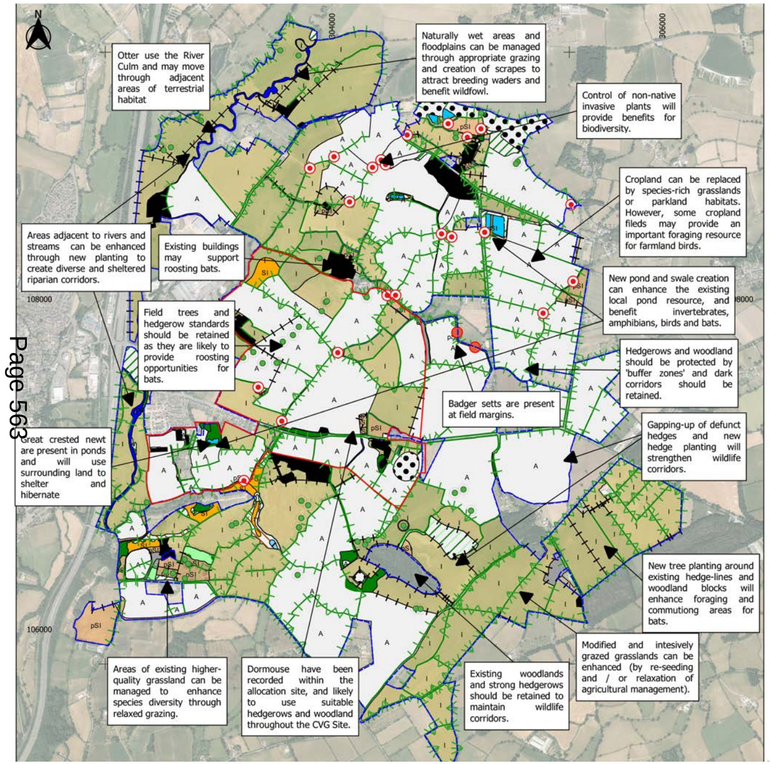
The Strategy also identifies that this community has high levels of working age people and growth in employment, particularly in arts, business administration and transport. While Mid Devon itself is the largest destination of employment for working residents of the District, significant out-commuting locations are Exeter, East Devon and Taunton Deane.

The Local Plan describes how the major growth of the town will provide the opportunity to revitalise the town centre through additional investment and transport improvements. The Local Plan also describes how future employment provision is expected grow and be centred around the Kingsmill industrial estate and within the adjoining urban extension at East Cullompton.

The growth strategy set out in the Local Plan is based on ensuring East cullompton is planned as an integral part of Cullompton. This is a key objective that is supported through other major influences explored through this SPD. The concept of the 20 minute place explored in this SPD is applied to Cullompton as whole. This means that East Cullompton should be planned in a way that supports the wider functions of the town, ensuring that as Cullompton grows it becomes more resilient with a strong local economy to support a growing working age population and to help reduce out-commuting.

This is important context for the SPD Masterplan and means that attractive, sustainable and active travel connections to the Town Centre, employment areas , proposed station, schools and key open spaces and facilities are essential. It also informs decisions on land use planning at East Cullompton, ensuring that new commercial areas can complement the Town Centre offer and that employment areas are planned in a way that is accessible to all parts of Cullompton.

Surrounding villages such as Kentisbeare and Willand can benefit from the successful expansion of Cullompton too through improved connectivity to jobs and services. However, there has been a clear desire expressed through local consultation that these villages remain clearly separate from Cullompton in terms of identity and village setting.



Ecology Constraints and Opportunities Plan

4.3 Ecology

Further ecology work was commissioned by Mid Devon District Council in parallel to the masterplanning work. This work included a desk study to collate existing ecological information for the site, a walkover survey to record the habitats within the site, a summary of opportunities and constraints and an indicative biodiversity net gain assessment using the Defra Metric 3.0. The ecology surveys were also conducted on the surrounding area to understand habitat connectivity, explore potential opportunities for biodiversity net gain and to inform the natural capital opportunity mapping undertaken as part of the preparation of the SPD.

Habitats

The land use within the Site is predominantly agricultural, comprising arable land (crops, stubble, fallow, ploughed fields and grass/grass-clover leys), along with heavily improved, rye-grass Lolium perenne dominated grassland. There are a few fields of poor semi-improved grassland, but more semi-natural habitat is limited in extent and mostly concentrated at the south-west of the Site, where there are patches of habitat and habitat mosaics of semi-improved neutral grassland, swamp, tall ruderal vegetation and bramble scrub.

There are occasional patches of woodland across the Site comprising broadleaved semi-natural and plantation, mixed semi-natural and plantation woodlands, and a single small patch of conifer woodland. The woodlands include the Section 41 (NERC) habitats of principal importance (HPI) of lowland mixed deciduous woodland and wet woodland. There are occasional scattered mature trees across the Site, nearly all pedunculate oak Quercus robur species.

Hedgerows are a strong feature of the Site, with the majority located on an earth bank, and many also having an adjacent ditch. A large number are classified as 'Hedgerow with trees', containing tree standards, at varying frequencies, along the length. The hedgerows are mostly managed by flailing to a box-shape, although some have been unmanaged for several years and are now outgrown hedgerows or lines of trees and scrub. Many of the hedgerows and lines of trees contain species in the ground flora that are listed in the Hedgerow Regulations 1997, including bluebell Hyacinthoides non-scripta. The majority of the hedgerows are moderately species rich, assessed as containing an average of 3-4 woody species at frequency of occasional or higher; some hedgerows contain an average of 5 or more species at sufficient frequency and are classified as species rich hedgerows.

Standing and flowing water within the Site comprises several ponds, the majority of which are constructed ornamental or recreation features, and flowing water including the River Culm and several streams and ditches across the Site.

Small areas of habitat within the Site include tall ruderal vegetation, marshy grassland, swamp, and patches of scrub.

Several locations, particularly in the northern half of the Site, contain invasive non-native plant species as listed on Schedule 9 of the Wildlife and Countryside Act, 1981 (amended). The majority of the locations contain populations of Himalayan balsam Impatiens glandulifera, however there is one location with a small population of Japanese knotweed Reynoutria japonica, and one location with a rhododendron bush Rhododendron ponticum.

There are opportunities to enhance habitats within the Allocation Area and wider Site through change of use and relaxation of current land management.

Species

The Site supports several protected and notable species, and consideration of these and the habitats that support them will be required. The key considerations are set out below.

Bats

The Allocation Area contains several buildings, in addition to scattered mature trees and hedgerow standards. It should be assumed that bats roost within existing buildings and trees within the Allocation Area and that appropriate mitigation and compensation for their loss will need to be built into proposals. New tree planting to provide enhanced foraging opportunities, and integration of bat roost boxes in new builds should be considered to enhance the Site for bats.

Bats also use hedgerows and woodland for commuting, and these 'corridors' should be kept dark. Final proposals should include considerate lighting plans to retain dark corridors for bats. Hedgerow removal should be minimised and will need to be compensated for through new planting to retain connectivity and satisfy the requirements of biodiversity net gain.

Badger

Badger setts have been recorded within the Allocation Area. Therefore, 'wildlife corridors' alongside hedgerows and woodland should be retained to allow continued dispersal of badger and other mammals, such as hedgehog and brown hare. Providing buffers from existing field boundaries will also reduce the risk of damaging or destroying an active sett.

Dormouse

Dormouse has been recorded within the Allocation Area, and the network of hedges and woodland throughout the Site provide suitable habitat for this species. Loss of hedgerows and woodland should be avoided as far as possible, with suitable buffers provided from built development to reduce possible disturbance effects. Supplementary planting within existing hedgerows, relaxing hedgerow management, new hedgerow planting, and softening woodland edges with new tree and scrub planting will benefit this species.

Great Crested Newt

The Allocation Area is within a great crested newt consultation zone. These consultation zones were created in order to help Local Planning Authorities, developers, and consultants identify where planning applications may need to consider the potential impacts of a development on great crested newt populations. Great crested newt have been recorded in a pond within the Allocation Area. Proposals should demonstrate that the availability of suitable terrestrial habitat for great crested newt will not be significantly reduced, and will not adversely affect the local population. This will necessarily require retention of the ponds and surrounding vegetation, as well as wider woody habitats and dispersal corridors. Creation of additional ponds and hibernacula with access to a retained hedge network should be part of the design.

Designated Sites

There are no statutory designated sites within 2 km of the Allocation Area. There are thirteen non-statutory designated sites within 500 m of the CGV Site. Of these sites, one is within the Allocation Area (East Culm House UWS), and five are within the CGV Site (Willand – Aller Wood CWS, Aller Wood (West) UWS, Weeks Farm Orchard CWS, Knights Wood CWS / PAWS, Cullompton Marsh UWS, and Sherwoods UWS). Policy DM28 of the Mid Devon Local Plan states that: "development proposals adversely affecting a County Wildlife Site [or other non-statutory site] will be considered on a case-by-case basis, according to the amount of information available about the site and its significance, relative to the type, scale and benefits of the development being proposed." and "Planning permission will be granted only when:

- The benefit of and need for the development clearly outweigh the direct and indirect impact to the protected site and the ecosystem services it provides;
- The development could not be located in an alternative, less harmful location; and
- Appropriate mitigation measures have been put in place. Where mitigation measures are not possible compensatory measures in some cases may be considered appropriate."

Designation*	Site Name	Location (OSGR)	Area (ha)	Description
CWS	Knight's Wood	ST023055	4.7	Ancient semi-natural woodland partly replanted with conifers
CWS	Aller Wood	ST045064	9.9	Plantation on ancient woodland site, wet in areas
CWS	Weekes Farm Orchard	ST032053	1	Traditional ridge and furrow orchard stocked with traditional varieties including cider apple, pear, plum and cherry. Approximately 30 mature trees.
OSWI	Peverstone Embankment	ST022052	5.3	Unimproved neutral grassland with scrub and areas of conifers
OSWI	Maddock's Farm	ST052066	1.9	Mixed plantation with a pond
UWS	Aller Wood (West)	ST041064	1.3	Broadleaved woodland
UWS	East Culm House	ST032071	0.9	Pond with amphibian interest
UWS	Willand - Cullompton Marsh	ST027096	261.7	Possible floodplain grazing marsh
UWS	Sherwoods (E)	ST036053	2.3	Orchard
UWS	Cullompton - Hele Marsh	ST016045	161.1	Possible floodplain grazing marsh
PAWS	KNIGHTS WOOD	ST023054	3.8	Ancient & Semi-Natural Woodland
		ST044063	6.1	Ancient Replanted Woodland
		ST047065	3.8	Ancient Replanted Woodland

*CWS: County Wildlife Site; OSWI: Other Sites of Wildlife Interest; UWS: Unconfirmed Wildlife Sites; PAWS: Possible Ancient Woodland Sites.

East Cullompton Masterplan SPD

East Cullompton Masterplan SPD

4.4 Natural Capital

Introduction

Our environment is our life support system sustaining and providing our food, fuel, building materials, fresh air, clean water, and carbon storage. Climate change, significant declines in biodiversity, and population growth are all putting pressure on our environment. This section sets out the Natural Capital Assessment undertaken to inform the Masterplan. It explores where the environment is working well, where is the best place to site new development and how we can intervene to deliver multiple benefits to minimise risk of things such as erosion or flooding through nature based solutions.

The mapping is based on key natural aspects of the land i.e. the habitats, the soil and geology, the land form and hydrology. The mapping covers a wider area than just the East Cullompton allocation boundary to explore landscape and biodiversity net gain opportunities in the surrounding area potentially associated with the Country Park or Garden Village area. The findings and recommendations of the Assessment are incorporated in the East Cullompton Masterplan Framework.

Carbon Storage

Considering ecosystem goods and services, and the natural capital they provide, allows us to understand how the land is currently storing carbon and supporting carbon sequestration. These considerations play a significant role in helping us to reach carbon targets towards net zero. The data modelled here allows us to create a carbon budget showing how much each area of land in the Masterplan area is storing carbon, in tons per hectare. From this, we can understand what needs to be re-created, or restored, in order to reach that net zero target and help offsite carbon elsewhere.

The Carbon Storage Plan illustrates the current estimated Carbon storage, in tonnes per hectare. The areas of woodland are the best at storing carbon, and that the hedgerows are also prominent.

Currently, the total carbon stored on the site is estimated to be:

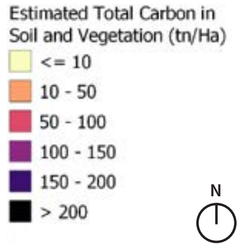
Allocation area	2,430 tonnes
Wider Garden Village	13,870 tonnes
Total Carbon stored	16,300 tonnes

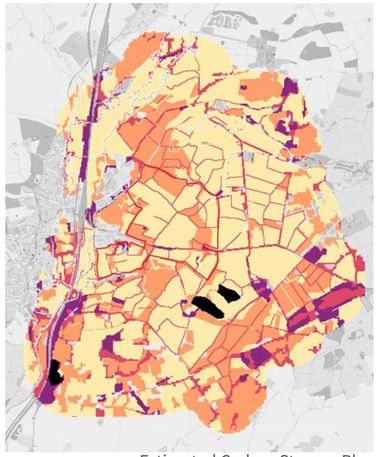
The existing habitats that have a high carbon storage potential (e.g., woodlands and hedgerows) should be kept in place and opportunities for restoring and converting relatively low carbon storage habitats into better opportunities should be explored.

For example, hedges that have been in place for centuries have very high carbon stores below ground. Minimising disruption around hedgerows and storing any removed soil as carefully as possible, will be important in maintaining carbon neutrality with existing habitats.

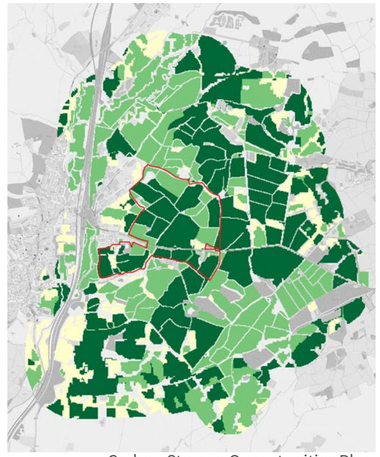
Currently, large areas of the site are arable, which, during harvests, removes a lot of the vegetation carbon, and releases the soil carbon. Establishing new areas of broadleaf woodland, wetland, and grassland habitats, preferably with native species, will help increase the carbon sequestration of the area, and keep it locked up in the soil as well.

The Carbon Storage Opportunities plan illustrates the potential opportunity for increasing Carbon storage, from low (yellow-green) to high (dark green).





Estimated Carbon Storage Plan



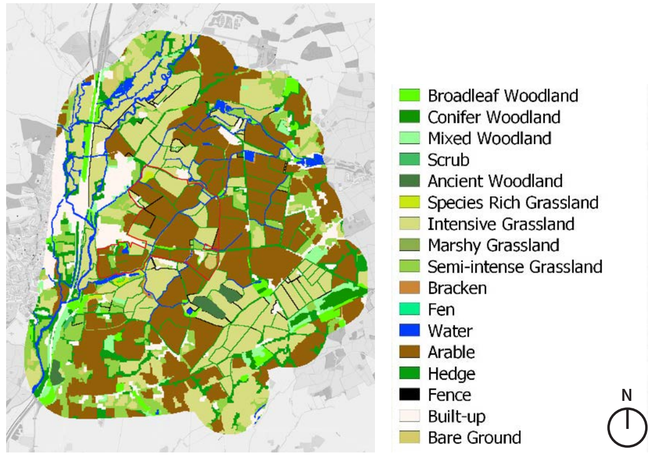
Carbon Storage Opportunities Plan

Natural Habitats and their Importance

Natural habitats are key for biodiversity as they tend to have a fully functioning ecosystem. These are made up of multiple parts, and provide the area with a strong resilience against climate change, as well as supporting a wide range of species; even those generally less common.

The bigger the block of habitat the more robust it to change, as it has a greater amount of genetic material to share. For example, a small woodland might contain only one nest of dormice, but a larger woodland block might contain a few. The spatial relationship between these blocks of habitats is also important.

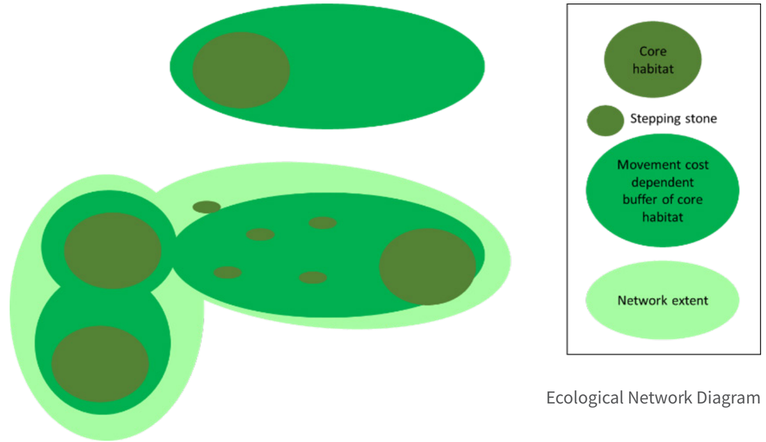
The nearer the blocks of habitats are together, the more chance they have of sharing the genetic material. Following on from earlier, even if a small woodland only has one nest of dormice, but is close to another small woodland with only one nest, there is a chance that the two can share their genetic material; particularly if the woodlands are connected by a hedgerow. Where habitats are close enough to share these resources is called an ecological network.



Habitat Class Plan

The Ecological Network Diagram diagram illustrates this concept. The dark green is the main habitat area, such as a woodland. These can be large (often called a core habitat), or small (termed a 'stepping-stone'). The lighter green areas illustrate the ecological network that facilitates the movement between the core and stepping stone habitats.

The Habitat Class Plan shows the habitats within the site, and the way they relate to those on the outside of the site. Some particularly important features for biodiversity are the ancient blocks of woodland, the more species rich grasslands and marshy grasslands, and the hedges and the trees.



Ecological Network Diagram

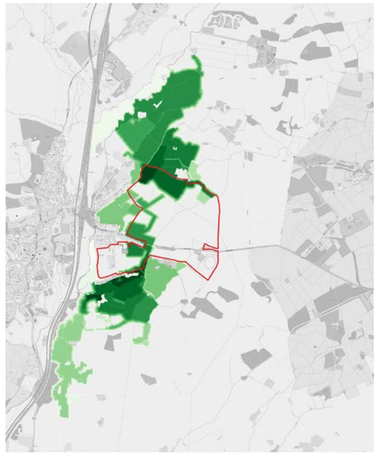
Habitat Networks

The following diagrams show how the existing habitats can support biodiversity when retained, and also where establishing new habitats on site will significantly enhance the biodiversity. Using this information allows the creation of a mixed landscape with the habitats which would work best in each space, and support cultural needs.

Grassland Features

The Grassland Habitats Plan shows the current ecological network of the grassland habitats, these areas have the best grassland connectivity. It is recommended that as much of the existing grassland network be left intact as possible and connectivity improved.

The Grassland Opportunity plan shows the most opportune locations for expanding the ecological network of the grassland habitats. Enhancing these areas with additional planting of native grassland species within the existing high connectivity areas, will assist biodiversity and maximise carbon capture.



Grassland Habitats

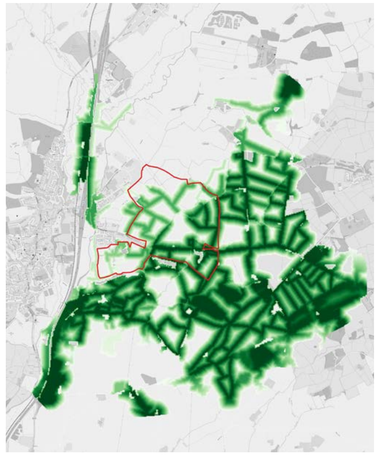


Grassland Opportunities

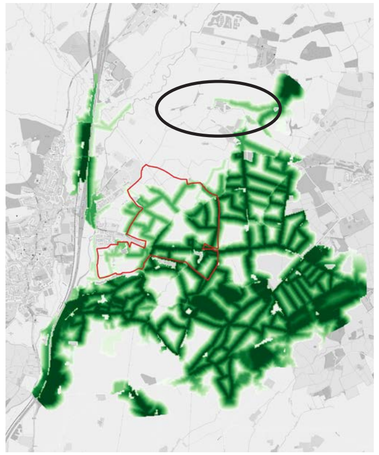
Woodland Features

The Woodland Habitat Plan shows the current ecological network of the woodland habitats, the areas to the south east have the best woodland connectivity. There is an extensive hedgerow network that connects large stands of woodland across the area. It is recommended that as much of the existing woodland network be left intact as possible.

The Woodland Opportunities plan shows the area that, if established with native woodland species, would provide the greatest impact for the woodland network in the area; making it bigger, better, and more joined up. Woodland features here would link the woodlands around Kingsmill to those around Bradfield. There is a synergy here with grassland and wetland networks, so woodland pasture, or marshy grassland would be beneficial.



Woodland Habitats



Woodland Opportunities

Wetland Features

The Wetland Habitat plan shows the current ecological network of the wetland habitats, the areas that have the best wetland connectivity are highlighted with circles. There is an extensive river network that connects a number of large water bodies and ponds throughout the site.

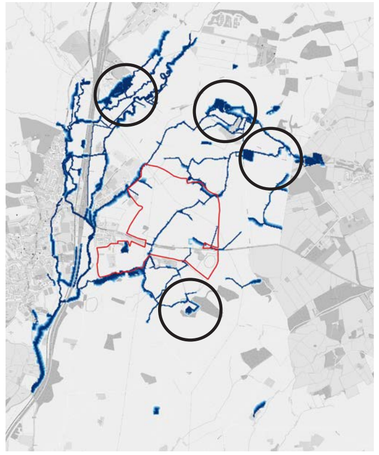
The Wetland Opportunity plan shows the most opportune locations for expanding the ecological network of the wetland habitats.

Generally speaking, the vast majority of the area is an opportunity for new wetland features. Establishment / enhancement of wetland features in the northern region would help make the existing network bigger, better, and more joined up, whilst in the south would help in establishing new corridors.

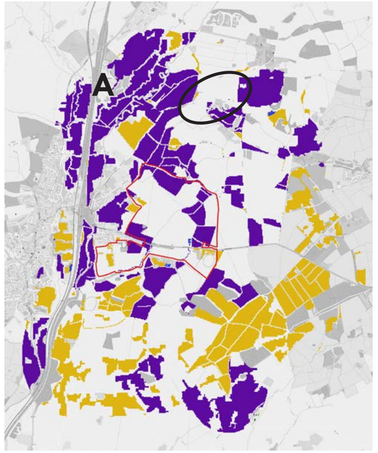
The area marked A is especially good for establishing wetland adjacent to existing wetland habitats, as part of a potential Country Park. There is a synergy here with a potential for woodland creation, and also grassland creation as well. This means that wet woodland or wet grassland features would benefit these networks as well.

The wider area to the north east of Venn Farm is currently located in a region that is great for establishing wetland features, which are also outside of the current network. Wetland features here would mean the network would be larger and more intact.

The Wetland Opportunities plan highlights an area north of Moorhayes that, if established with native wetland species, would provide the greatest impact for the wetland network in the area; making it bigger, better, and more joined up. If this area includes wetland features they would link the wetlands around Kingsmill to those around Higher Kingsford. There is a synergy here also with a potential for woodland creation, and also grassland creation as well. This means that wet woodland or wet grassland features would benefit these networks as well.



Wetland Habitats

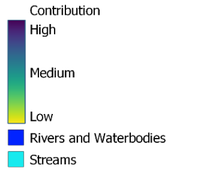


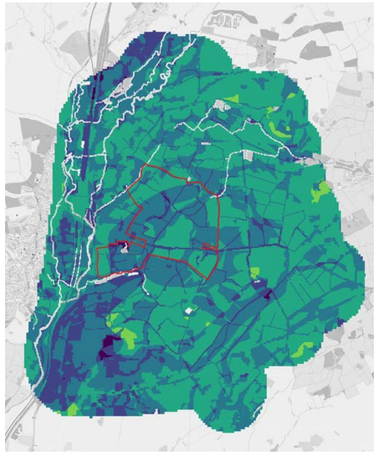
Wetland Opportunities

Natural Flood Management

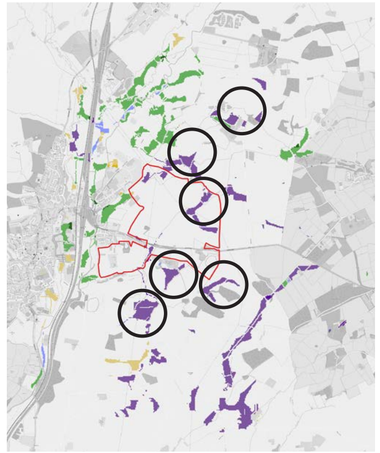
The Natural Flood Management Plan shows the combinations of soil and vegetation that provide a high degree of water infiltration and storage in the soil. The more water that infiltrates the soil, the slower the flood peaks are in reaching the river, helping to mitigate flooding events. Areas with a higher contribution could be factored into future plans for the site.

The establishment of a wetland would allow for storage of water and lengthening time for water to reach the watercourses, helping reduce the height of the flooding. The best way to help slow water down and prevent flooding is to plant native species of deciduous trees. The Natural Flood Management Opportunities plan shows the areas where tree planting will benefit natural flood management and biodiversity of the area.





Natural Flood Management Plan



Natural Flood Management Opportunities

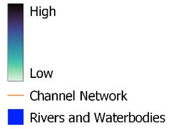
Water Quality

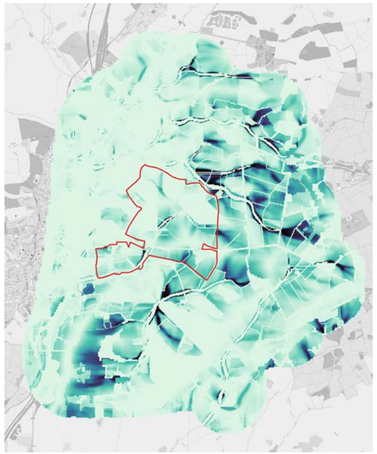
Water quality in the rural environment depends on the land use and pollutants, such as fertilisers and herbicides, blown or running off fields after rain. Another influence is soil particles from nearby fields washing into the streams — these particles tend to carry phosphorus directly into streams.

The Erosion Risk Plan shows the current erosion potential of the area. This is a useful resource to consider when planning soil management, in order to identify areas which should be permanently vegetated to prevent further erosion and help prevent pollution.

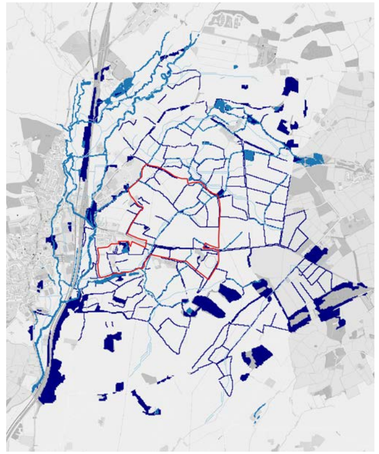
The Water Quality Contributions Plan shows the current features that help prevent water pollution by breaking the flow pathways to the river (in pink). These are predominantly made up of woodland and hedgerow features. Keeping as many of these features intact as possible would help mitigate pollution after development.

The Water Quality Opportunities Plan shows the most opportune locations marked 'A' for improving the water quality across the area.





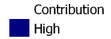
Erosion Risk Plan

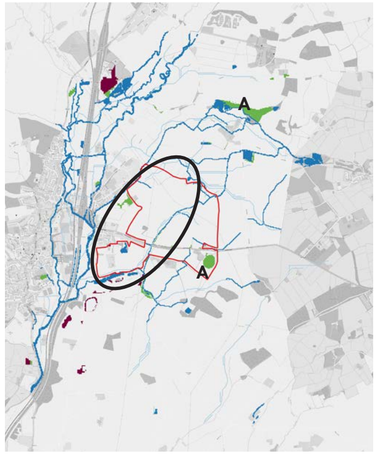


Water Quality Contribution Plan

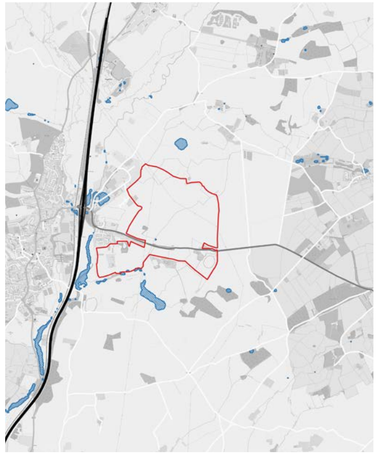
Enhancing these areas with additional planting of native species of hedgerow and woodland would help break the connections between the land and the water courses.

The area to the south marked with a circle is also a potential opportunity due to the optimal soil conditions, and would be a good place to establish open spaces with native habitats and sustainable drainage systems.





Water Quality Opportunities



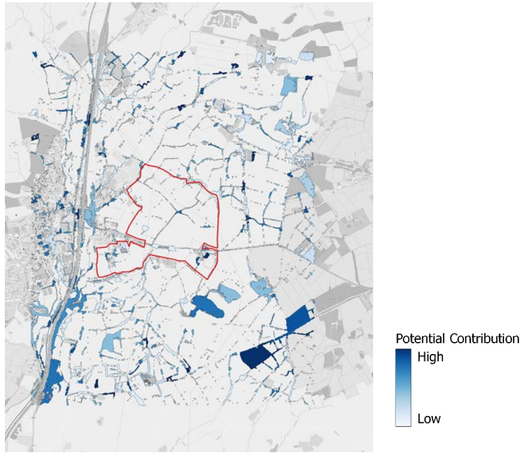
Air Quality Risks Plan

Air Quality

Most of the built area of Cullompton is declared as an air quality management area. The Council will continue to set out actions to improve air quality. Natural capital mapping can help by looking for risks and opportunities associated with topography and vegetation to managing air quality. In developing and siting roads, it is useful to consider where air could pool, as these may develop pollution levels higher than normal. The Air Quality Risks Plan shows these areas in blue; these should be avoided for larger transport routes during development.

Air quality is the largest environmental health risk in the UK. It shortens lives and contributes to chronic illness. Increased traffic is likely to increase vehicular emissions, which may impact on Air Quality. Although air quality assessments have been carried out, they will need to be monitored at regular intervals through the construction phases and afterwards.

Higher Risk Area



Urban Cooling Plan

Cooling

Large trees cool the air beneath them and the surrounding areas, with the larger the canopy providing a better cooling effect. Where works are planned to remove these trees, the top soil from underneath should be used as a separate resource for planting and establishing grassland or woodland features. This is because they are likely to have a well-developed seed bank of native species, which will be able to form a ground flora quickly and help establish their respective ecosystem services in as short a time as possible.

They can also be considered a carbon resource. Therefore, treating the trees and hedges, and the surrounding metre of soil, as a separate resource with its own management plan is a great way of minimising loss, and maximising their restoration potential.

The Urban Cooling Plan shows the trees with large canopies which, if incorporated into the Masterplan, could provide some urban cooling, as well as retaining biodiversity and carbon storage.



Flood Map for Planning Flood Zone 2 with SFRA Q1000 model results

4.5 Flooding

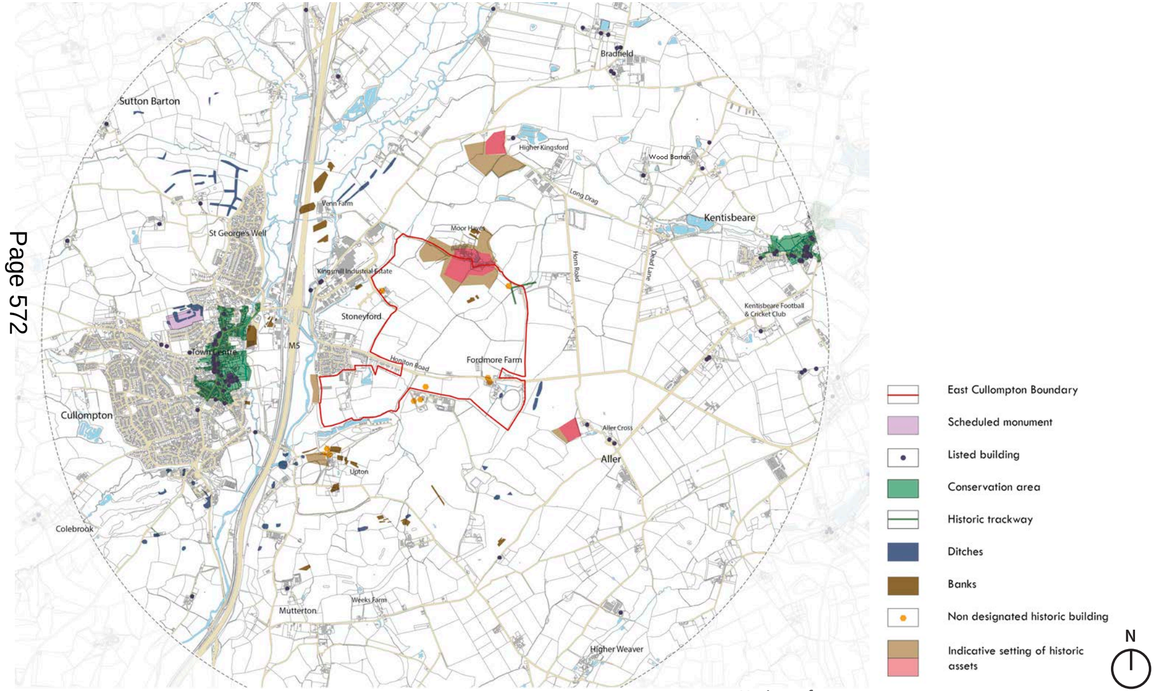
There are several drainage channels that flow through the site. The River Ken is the main watercourse and classified as an Ordinary Watercourse. The River Ken flows from east to west to the north of the allocation area, before flowing southwest where it has its confluence with the River Culm (a Main River) at Honiton Road, A373. There are a number of bifurcations of this watercourse. The first is in the area around the Goodiford Mill area, with the secondary channel flowing down towards Long Drag, where it splits again. One drain flowing south, with the other running alongside Long Drag before flowing southwest. After Horn Road, part of this drainage channel flows west and re-joins the main River Ken, with the remaining drainage channel continuing southwest and joining the River Culm by Old Hill.

The flood risk from the River Ken and the associated drainage ditches is presented by the Environment Agency via the Flood Map for Planning. This shows that the River Ken has a wide floodplain, with areas where the watercourse has become perched, i.e. the watercourse is not in line with the natural valley bottom. There is then much narrower floodplain associated with the drainage channels.

Further, more detailed flood modelling has been undertaken to better understand flood risk in the area. The more detailed flood modelling has been undertaken for 1 in 5, 30, 50, 100 and 1,000 year period events, along with climate change testing for the 1 in 100 year event. This helps to show the flood risk from more frequent events, up to extreme events. The preliminary results from the modelling work generally agree with the Flood Map for Planning, however with the level of flooding reduced, particularly in the wider floodplain areas of the main River Ken channel. This suggests that the current Flood Map for Planning may be overestimating the flood risk slightly through this area, particularly on the edges of the floodplain.

For the drainage channels through the allocation area and wider Garden Village opportunity area the flood zones and the model results are in close agreement. There are some locations where the modelling is showing some additional / wider areas of flooding, however this can be managed as part of the development via formalising and improving the drainage ditches through the area.

The more detailed flood modelling was also utilised to test a number of interventions to try and help reduce the downstream flood risk. Generally, the options had minimal impact on the wider flood risk. This work is ongoing and will be discussed further as part of the Strategic Flood Risk Assessment, to ensure that opportunities for flood risk improvements are considered further.



Heritage features

East Cullompton Masterplan SPD

4.6 Heritage

There are no listed buildings within the East Cullompton allocation boundary but there are two Grade II farmhouses with five associated curtilage listed buildings situated immediately to the north, namely:

- Upper Moorhayes Farmhouse including front garden wall;
- Lower Moorhayes.

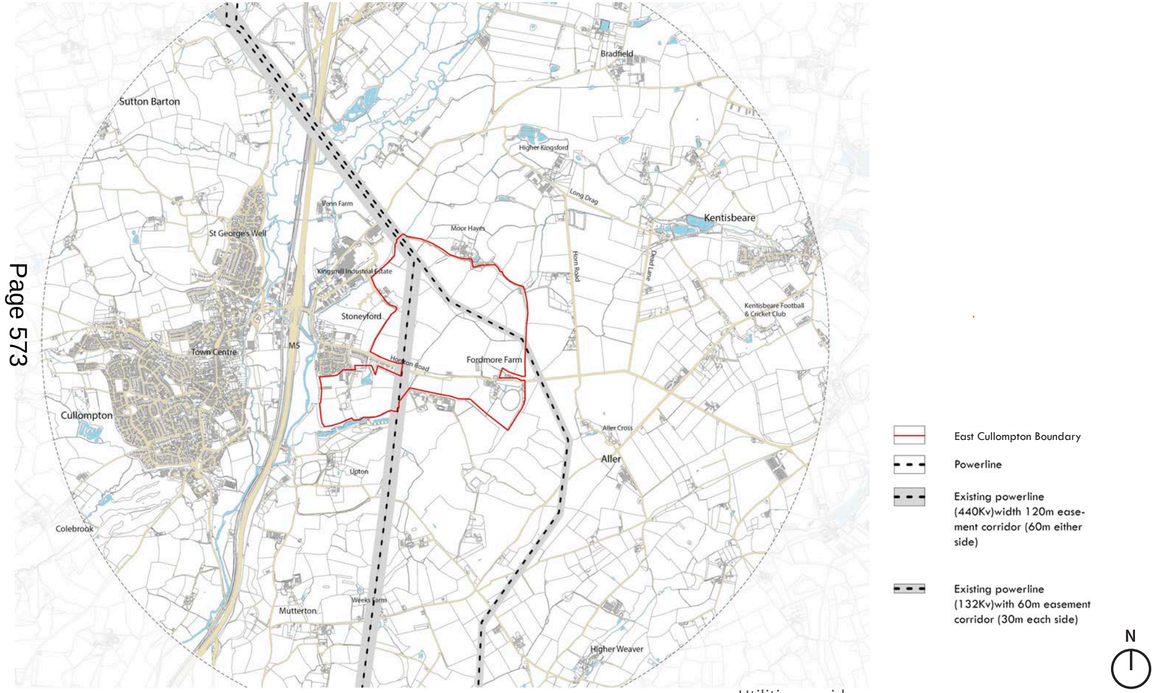
An indication of where development should be planned to protect the setting of these farmhouses is shown on the heritage plan. Where development does take place in the vicinity, particular attention and care will need to be taken to its layout, detailing and materials.

There are other historic buildings and features, some of which are non-designated heritage assets at Newlands Farm, Week Farm and East Culme House within the site together with a linhay and historic trackway in the north-east and a short stretch near Week Farm. Buildings associated with Bathill and Aller Barton lie due south of the site. Further afield there are a number of listed buildings at Maddocks Farm, Woodbarton Farm and Bradfield.

The site is located within a wider landscape containing evidence of prehistoric and Roman period activity. To the east there is evidence of Roman iron working as well as place names such as 'Orway' and Stoneyford' that could indicate the presence of a Roman road between the settlement at Cullompton and the iron ore extraction industry operating up on the Blackdown Hills. As such, there is the potential for this landscape to contain evidence of prehistoric and Roman activity in the form of buried archaeological and artefactual deposits.

The current field system and farm landscape dates to the later medieval and post medieval periods. There are likely to be below ground remains of early to post medieval activity associated with farmsteads with and adjoining the site. There is an opportunity within the site area for the enhancement of historic built and landscape features such as ditches, orchards and water meadows as well as the opportunity to incorporate existing water features and leat as important placemaking aspects of the Masterplan. This will be informed through further archaeological investigation.

All plans in this SPD will be subject to further archaeological investigation by developers prior to layouts being fixed and planning applications being submitted.



Utilities corridors

East Cullompton Masterplan SPD

4.7 Utilities

Preliminary infrastructure work has identified the existing utilities within the site. 440kV National Grid (NG) power lines and 132kV Western Power Distribution (WPD) powers lines enter the site in the north-west and run in parallel for a short distance, before bisecting the area on different alignments.

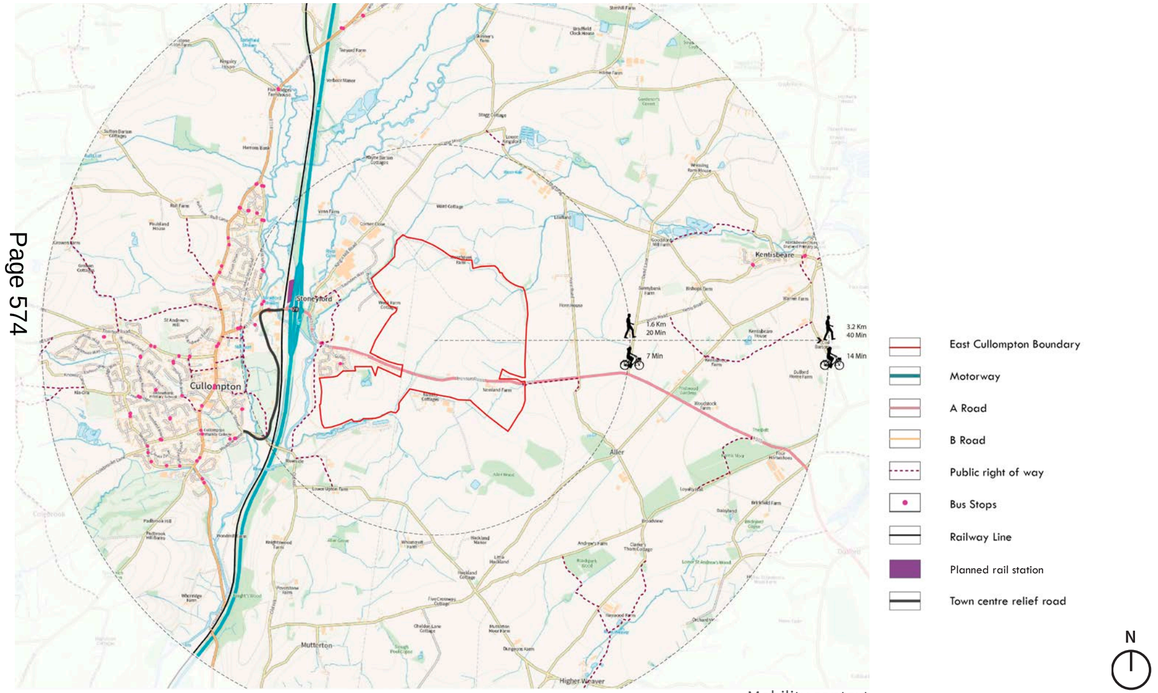
The National Grid (440kV) power lines are a fixed constraint and have been be factored into the masterplanning process. Not only will the easement need respecting, but a residential amenity buffer will need to be established.

There is no set formal guidance on the size of easements but a figure of 60m from any dwelling to the centre line of the 440kV transmission lines (i.e. a 120m corridor) is an approach that has been used in planning policy for development to the east of Didcot in South Oxfordshire. Non-residential uses may need to be considered closest to the transmission lines.

At a detailed level, The National Grid has produced design guidance, in respect of how to Masterplan around transmission lines and treat the space beneath them.

There are options available to reduce the effect of the Western Power Distribution (132kV) power lines. The land over which the lines pass within the site benefits from 'lift and shift' clause over the route easement. This enables the landowner (at their cost) to alter the path of the power lines if an alternative route is available. Land north of the allocation is also in the ownership of the landowner over which the WPD cables currently pass.

In respect of foul drainage, South West Water has indicated that directing foul flows north to Willand Sewage Treatment Works (approximately 3km away) via a new pumping station and rising main would be its preferred option.



Mobility context

4.8 Access and Mobility

One of the core principles embedded in the Masterplan SPD is the idea of the 20 minute place. The purpose of this principle is to encourage local living and self containment within the town for as many day to day needs as possible, reducing the need to travel further afield and creating more vibrant places and stronger local economies. It is therefore expected that East Cullompton and the existing town will be planned as one place, ensuring that all residents benefit from existing and proposed community facilities, shops and employment areas.

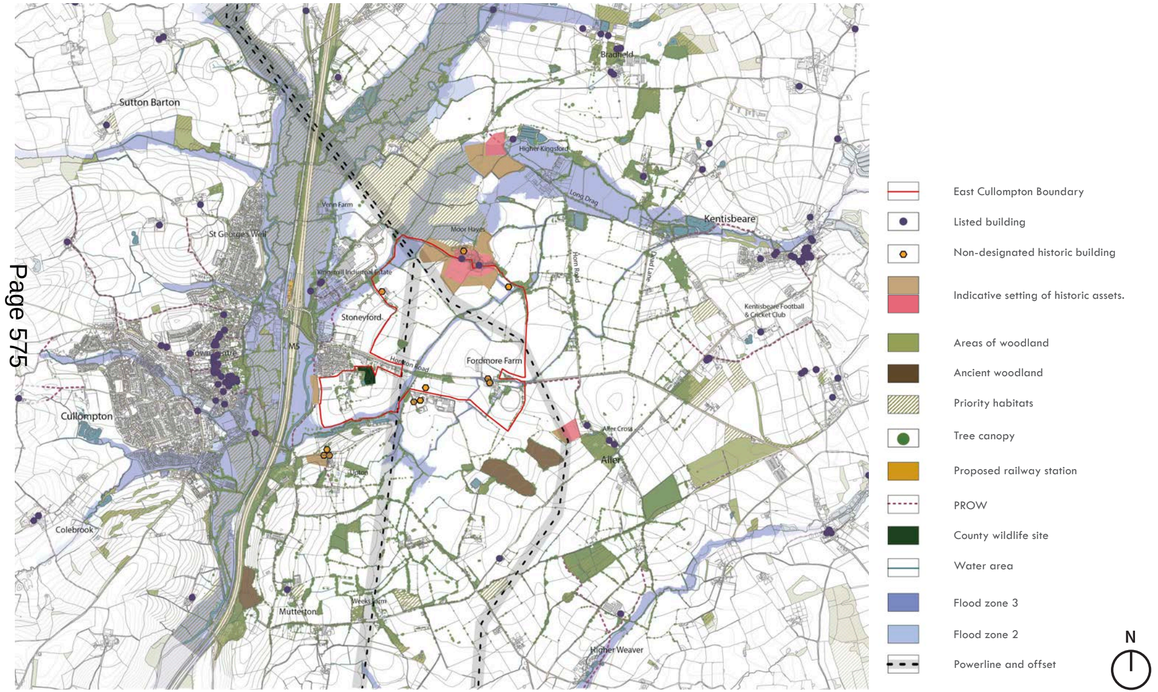
The objective of providing these services within 20 minutes of home is to reduce the reliance on the private car and encourage more active means of travel such as walking and cycling. There are currently no public rights of way across the site, there is a footpath to the west of the site along the floor of the shallow Culm Valley, between the M5 and the site boundary which connects to the two existing crossings of the M5. However, the M5 corridor places a significant barrier to active travel currently and it is important that the Masterplan for development to the east of the M5 incorporates attractive, direct active travel routes and improved crossings leading to key destinations including the Town Centre, schools, open spaces and employment areas on both sides of the M5.

It is recognised that although the site is located nearby to a wide range of facilities, and that the allocation includes provision of new employment areas, shops and community facilities, there will be some that still require day-to-day access outside of a reasonable walking distance. Stonyford is currently served by the 350 Cullompton Town Service and 694 Honiton, Cullompton, Feniton Circular buses, but the services are infrequent. The Exeter, Cullompton, Tiverton Service can be accessed from within Cullompton with an hourly service and journey times of approximately 50 mins to Exeter and 34 mins to Tiverton. Key destinations within the Masterplan will therefore need to be served by improved public transport, and emerging shared use modes of transport such as e-mobility, demand responsive transport and other future mobilities.

The proposed reopening of Cullompton Railway Station will provide a sustainable transport option for all residents of Cullompton, reducing carbon emissions, congestion and improving air quality in Cullompton as well as cutting commuting times. The Station will comprise an important element of any future mobility strategy, providing a vital means by which to reduce reliance on private car use for longer distance journeys currently utilising the neighbouring trunk road network. On this basis, any future railway station must be connected directly to development to the east via exemplary active and shared mobility connections.

East Cullompton is located to the north and south of Honiton Road to the east of the M5 corridor at junction 28. The vehicular access into East Cullompton will need to be achieved primarily from Honiton Road. Honiton Road itself will require significant improvements which may require downgrading of the existing highway to reduce vehicles speeds and reduce the impact future access proposals may have on existing hedgerows and trees. Multiple points of access will be required to allow access to both the north and south of Honiton Road. Options to reallocate space on Honiton Road or incorporate additional space for other users should be considered alongside parallel east - west routes that connect into Cullompton ensuring that priority can be given to active and shared modes.

In addition to the existing highways network, this SPD has been undertaken in parallel with work on both the Town Centre Relief Road and feasibility work on improvements to Junction 28 of the M5. A number of options for junction improvements are under consideration at the time of writing and so the SPD Masterplan retains some flexibility on how access to potential junction locations and crossing points will be configured.

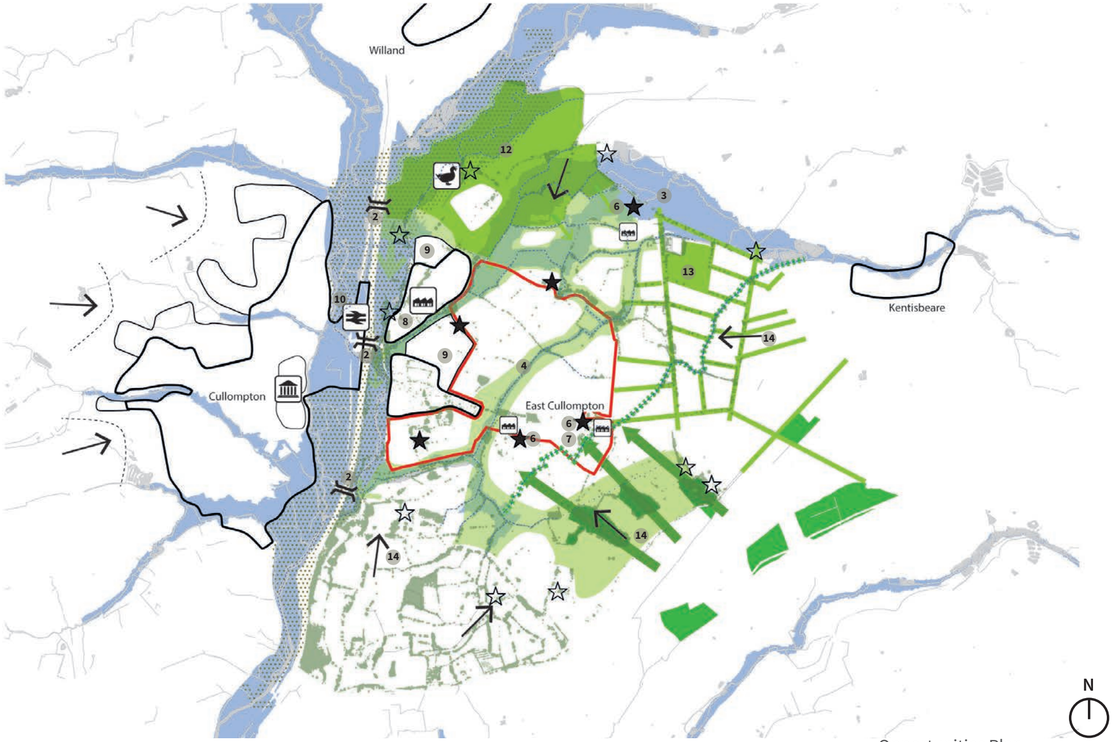


Combined Constraints Plan

4.9 Combined Constraints Plan

The combined constraints plan draws together physical constraints described above into a single plan to show their combined effect. These have been taken into account in the masterplan proposals and include.

- Existing hedgerows and trees to be retained as far as possible.
- Listed buildings around Moorhayes and the area which is currently considered important to their setting.
- Non designated historic buildings which should be incorporated into the masterplan.
- 400kV and 132kV power lines and the associated easements from any proposed dwellings.
- Noise and intrusion from Honiton Road.
- Potential noise and visual intrusion from the M5.
- Water courses and flood zones. The masterplan framework is based on avoiding development with associated flood zones.
- The potential to incorporate and enhance the County Wildlife Site near East Culme House.



Opportunities Plan

4.10 Opportunities Plan

The existing character and qualities of the site offer opportunities for successful placemaking if integrated in an appropriate way. Working with the existing qualities of place has been a central feature of the development of the Masterplan. The Masterplan Framework section explores this potential further, but in summary the main site opportunities include:

1. Consider East Cullompton and Cullompton as one settlement, using this to ensure incoming uses and spaces support the resilience and sustainable growth of Cullompton.
2. Ensure local active and shared travel connections across the river corridor are prioritised including the reconfiguration of existing crossing points which are well located in relation to surrounding land uses.
3. Emphasise the movement of water through the site along the existing water courses. Incorporate new water bodies and wetland planting in lower lying areas of the site to draw the influence of water in to the site.
4. Utilise the watercourses as important connections for active travel back to the historic crossing points of the river corridor to Cullompton.
5. Encourage interaction with water, drawing inspiration from the prevalence of fords in the surrounding landscape, the historic significance of mills in Cullompton and leat within the site.
6. Work with the rural qualities of the site by retaining existing farm clusters and expanding them sensitively as mixed use areas for community and commercial buildings.
7. Support the existing diversification of uses happening on site, such as Fordmore Farm as a focal point for early phases ensure a mix of uses from the beginning.
8. Connect into the existing employment areas to the west of the site.
9. Support the further expansion and intensification of employment areas to provide local jobs and shift away from the existing reliance on out commuting.
10. Provide active and sustainable travel connections to the proposed Cullompton Railway Station site.
11. Utilise existing mature vegetation as a structuring network of green infrastructure through the site.
12. Provide strong links to the proposed Country Park as a strategic area of open space and consider utilising the Country Park as focus for biodiversity net gain in the area.
13. Consider links to the relocated sports clubs to the east of Horn Road.
14. Consider views from the surrounding landscape including elevated land around Upton and Aller, from the open landscape and potential Country Park to the north and from open countryside and Blackdown Hills to the east.



East Cullompton Masterplan SPD

SECTION FIVE
MASTERPLAN FRAMEWORK

SPD Masterplan

Activity

Landscape

Mobility

Placemaking

Infrastructure, Delivery and Phasing



East Cullompton SPD Masterplan

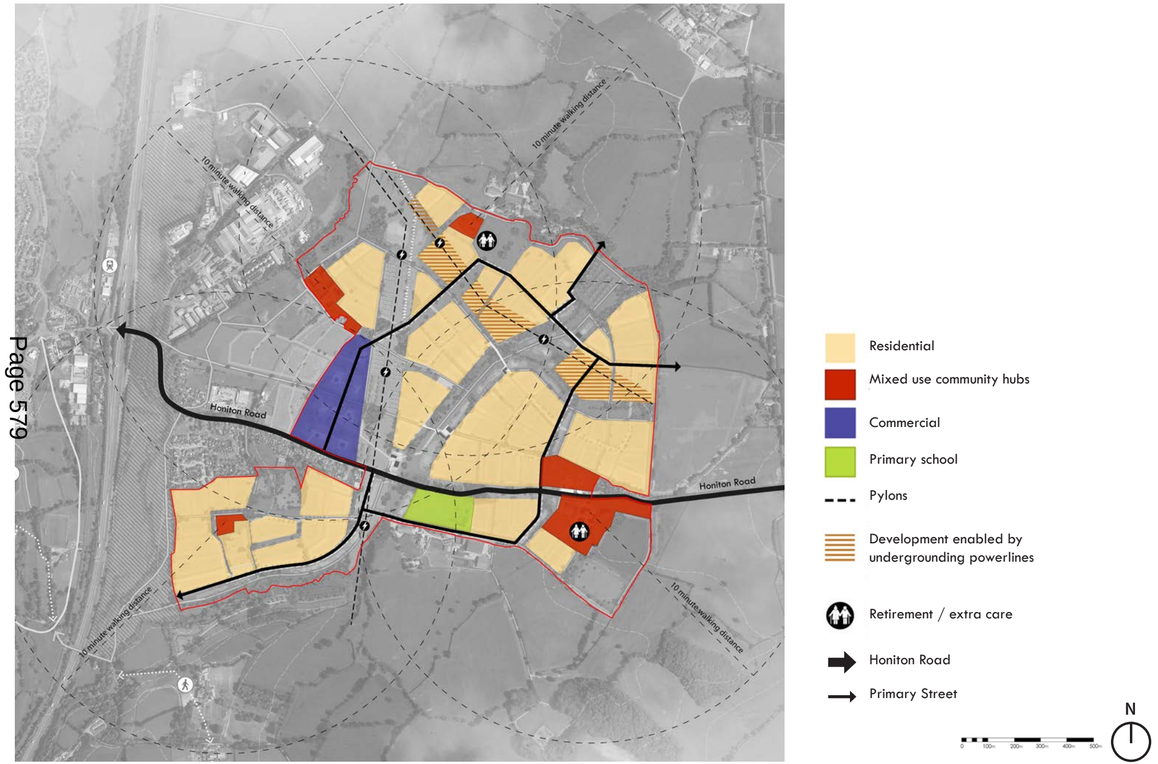
5.1 SPD Masterplan

This section of the SPD sets out a masterplan for the East Cullompton allocation area. It demonstrates how the requirements of the Local Plan can be accommodated on the site driven by the aspirations described earlier in this SPD.

The masterplan is described under the headings of Activity, Landscape, Mobility, and Placemaking. These layers should be seen as providing an organising structure to East Cullompton, setting out the broad locations of development, open space and movement and their relationship to each other. The masterplan also describes specific placemaking aspirations that are considered strategically important that have arisen in response to site constraints, opportunities and through local consultation.

The masterplan is strategic in nature and does not intend to define the precise location and extent of elements of the plan, this will be defined through planning applications and work to agree the detailed phasing and delivery strategy. However, to ensure a comprehensive approach is taken to the planning of East Cullompton, this section translates the Masterplan SPD into a set of requirements in a green text box which planning applications are expected to meet.

Planning applications within the East Cullompton allocation should include a statement demonstrating how these requirements have been interpreted and applied.



East Cullompton Activity Framework

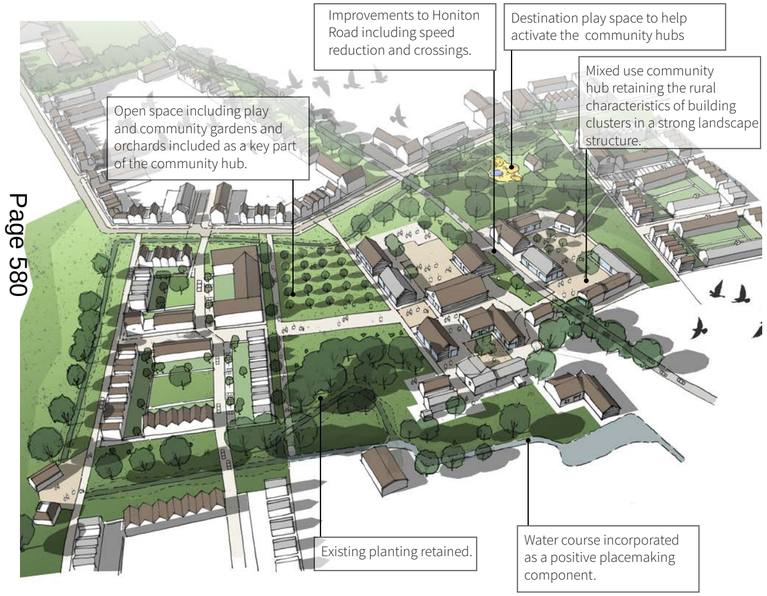
5.2 Activity

The Local Plan sets out the land uses, and quantities associated with the allocation of East Cullompton. The Masterplan SPD proposes a strategy for how this mix of uses can be accommodated and phased in a way which can create a strong identity in response to the existing qualities of the area. Place quality will be a key determinant of the successful integration and longevity of commercial and community space ensuring that they are places that people will be drawn to and choose to use as well as using out of convenience. Community and commercial uses will provide an important function in drawing the community together as well as meeting day to day needs of residents.

The overarching strategy has been driven by a response to activity already happening on site. The creative reuse and expansion of existing building clusters on site provides a model for how future community, commercial and civic buildings can be incorporated into East Cullompton in a distinctive way. These places also provide a useful starting point for future growth ensuring a mix of uses and sense of place is established before housing is delivered. The rural character and local vernacular of these clusters can also be used as a key determinant in new mixed use and community buildings.

	Land area	Notes
Residential	72 hectares	Including market and affordable housing, serviced plots for self builders and gypsy and traveller pitches. Capable of delivering 2,600 homes required by Policy CU7 at an average density of c. 35dph. Assumes limited residential uses will be incorporated in to the mixed use community hubs.
Mixed use community hubs	8 hectares	Area includes existing buildings retained. Capable of delivering an additional 2 hectares for shopping, community centre and multi-purpose community building required by Policy CU10. Assumes some residential uses can be included within the centres and some overlap of uses with commercial area.
Commercial area	6.5 hectares	Including allowance for care home, retirement complex, appropriately scaled retail, offices, hotel and leisure uses and ancillary landscaping. Capable of delivering 32,000 square metres of commercial floorspace required by Policy CU7 with some overlap of uses with the mixed use community hubs.
School site	2.5 hectares	To meet Policy CU10 requirement for a service site of 2.5 hectares for a new primary school.
Green Infrastructure	46 hectares	See separate table within landscape framework for breakdown of open space.
Area beneath 440kv powerlines	16 hectares	
Total	c. 160 hectares	Difference between areas above and the total area comprises area allowance for highways infrastructure (e.g. Primary Streets)

Land budget for Masterplan Framework



Indicative sketch of a mixed use community hub retaining the rural characteristics of the area

Mixed Use Community Hubs



The Local Plan allocates land and facilities for community use including a site of 2 hectares for a shopping and community centre, and the provision of a multi-purpose community building for youth, children and other community uses.

The East Cullompton site is currently very rural in character. Although large parts of the site will change fundamentally in character as development progresses, there is an opportunity to ensure the influence of the rural Mid Devon landscape is still apparent as a positive characteristic in its identity.
The Masterplan SPD proposes that the mixed-use community areas are, in part, focussed around existing farm clusters that are already providing a sense of place and generating activity and a local economy through a diversification of uses. A number of these clusters include listed buildings or non-designated heritage assets which can provide design cues for incorporating additional development in a sensitive way. Supporting the growth and considered expansion of these clusters to provide a broader range of commercial and community functions can be done in a way which preserves their characteristics as building clusters in a strong landscape structure. These can be considered as maintaining a rural character that is fundamentally different to more urban typologies, to differentiate the experience of living or visiting East Cullompton and complement the existing town centre offer. It can also ensure their delivery early which is something which has proven difficult to do successfully in other similar schemes.

- The principal community hub for East Cullompton will be located around an expansion of Fordmore Farm to the north and south of Honiton Road. This hub will expand to include community space as well as further retail and commercial space including potential healthcare, indoor multi-purpose spaces which can cater for a range of activities, including: dance, yoga/pilates, circuits, babies/toddlers activity sessions, short mat bowls, table tennis etc.
- The layout of the area around Fordmore Farm will be done in a way which retains the rural characteristics including an informal arrangement of buildings and courtyards in a strong landscape structure.
- Parking within mixed use areas will be provided in a way which does not compromise pedestrian experience, with main parking areas away from key buildings and spaces.
- These mixed use hubs can include residential use, where it does not detract from intended character or community hub function.
- The materials, detailing and scale of buildings and public realm in mixed use areas will take design cues from existing buildings on site and the aspiration to retain a rural influence.
- Secondary hubs, incorporating smaller scale shops and flexible community space will be encouraged in areas of high accessibility in areas further from the principal hub including at East Culme House near the existing community around Culm Lea and near Moorhayes serving the northern areas of the allocation close to the potential Country Park.
- A community hub near Moorhayes will demonstrate how it can also support the potential Country Park to the north with potential for ancillary uses, spaces and attractive connection points to the Park.
- The area around Week Farm is shown to provide further opportunities for incorporating a mixed use area with a commercial focus. This could serve as an expansion of the existing employment area around Stoneyford providing opportunities for smaller scale commercial uses and workspaces.
- Retirement, healthcare and aged services cluster should be co-located with the mixed use community hubs with good accessibility to public transport.
- Mixed use community hubs should also incorporate appropriate workspace.
- The mixed use community hubs are to be easily accessible from active travel routes and the primary street network.
- Developer proposals will need to demonstrate clear governance structures for community facilities.



Image showing the character of the mixed use community hub at Fordmore Farm



Example of farm buildings converted into a mix of community and commercial buildings around high quality public realm.



Example of community buildings with rural character integrated into open space.

School site



The Local Plan states a requirement for a serviced site of 2.5 hectares for a new 630 place primary school or alternatively 3 hectares of serviced land in 2 parcels of 1.1 hectare and 1.9 hectares appropriately located for the delivery of 2 new primary schools. The Local Plan also requires that serviced land for the school should be provided prior to the first occupation of residential development. The SPD masterplan has sought to locate the school in an area of high accessibility, close to the mixed-use areas. The site shown to the south of Honiton Road has been identified previously as the preferred site of the education authority. Alternative locations may be suitable for the school but would need to meet the following requirements.

- Any school sites to be located close to other employment, community and retail spaces with clear and attractive active travel links between them.
- Clear, attractive active travel routes should be provided from residential areas to the school sites.
- A safe and attractive crossing of Honiton Road should be provided on a clear desire line to any school sites.
- The school buildings should be designed and located to be a prominent and positive feature of the development.
- Proposals should demonstrate how schools will provide an important anchor in the early phases of development.
- The active travel network should include attractive, safe routes to Cullompton Community College in the early phases.
- Appropriate drop off space should be provided away from Honiton Road and the primary streets.



Pedestrian and cycle friendly primary street as a central feature with high quality public realm and strong building frontage.

Attractive active travel route linking East Cullompton and Cullompton with strong building frontage.

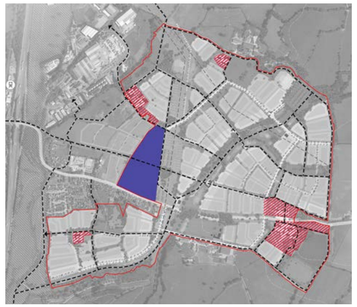
Existing tree planting retained and extended to provide a strong landscape structure.

Overarching character of commercial area to be defined by individual buildings or buildings grouped around a shared courtyard within a strong surrounding landscape. structure.

Building frontage onto Honiton Road.

Inset plan of commercial area.

Integrating commercial space



The Local Plan allocates 20,000sqm of commercial floorspace within the plan period and a further 12,000sqm post 2033, to include a care home or retirement complex, appropriately scaled retail development and other suitable uses such as offices and a hotel or leisure development. A commercial area of 6.5ha. is shown to the north of Honiton Road. This is of sufficient size to accommodate the majority of the floor area required by the Local Plan. The mixed use community hubs should be used to accommodate the remainder of the commercial space. For example it is anticipated that the care home, retirement complex, smaller scale retail and some leisure uses would be better located adjacent to the community hubs.

An Employment and Skills Strategy commissioned by Mid Devon in parallel to the Masterplan SPD includes recommendations on the employment opportunities and how skills improvement programmes can help to drive business interest in the area. The findings of this report have been factored into the development of the Masterplan SPD and include spatial influences such as:

- Viewing employment as crucial elements of the overall masterplan with a high priority for development in the early phases.
- The clear need for units and serviced, developable employment plots in Mid Devon, with East Cullompton offering a good opportunity to help meet need.
- To expand employment areas adjacent to existing and permitted industrial elements at the edge of the allocation around Kingsmill Industrial Estate.
- To include an element of dispersed employment that could have differing functions and target markets, with proposed employment uses at Fordmore Farm cited as an useful example.

The Masterplan is set out to the following principles:

- Land adjacent to the employment allocation CU17 will provide additional space for commercial uses as an important expansion of the employment area to the east of the M5 and proposed railway station.
- The commercial area will incorporate an east – west active travel route to connect into the rest of East Cullompton. Co-ordination with proposals for employment allocation CU17 will be required to ensure continuity of the route into Cullompton.
- The commercial area will include the mix of uses allocated including retail, offices, hotel and leisure, but should be planned to provide an appropriate transition between larger employment uses to the west and residential use to the east. This will include an emphasis on provision for walking and cycling.
- The layout of the main commercial area should follow the principles described on the employment area inset plan.
- Commercial uses should also be included into mixed use community hubs including smaller scale workspace and co-working space and work hubs that will be drawn to the place quality of these clusters.



Extract of proposed residential areas

Residential

The Local Plan allocates 1750 dwellings within the plan period and at least another 850 dwellings post 2033 taking the overall residential capacity of the East Cullompton allocation to 2600 dwellings. Policy CU7 also requires 28% affordable housing and extra care housing and at least ten pitches for gypsies and travellers and 5% of housing to be provided as serviced plots for sale to self-builders.

The residential neighbourhoods have been formed around the Landscape, Mobility and Land Use Frameworks. Parcels of residential land are identified where they can form coherent neighbourhoods around the organising structure of open spaces, streets and mixed-use areas avoiding areas of development constraint. The Masterplan SPD assumes an average density of 35 -40 dwellings per hectare to achieve the residential capacity set out in the Local Plan. The Placemaking section provides further guidance on character.

Mid Devon District Council wants to enable more people to build their own home with Custom and Self Build housing growing in popularity. The Council recognises the benefits of Custom and Self Build in meeting the housing needs of Mid Devon residents. It provides opportunities to reduce costs by sourcing your own materials and being involved in the construction and fitting yourself and create high quality, well-designed buildings bespoke to your needs. Custom and Self Build Housing is also more likely to draw upon local tradespeople and suppliers, supporting the local economy. Further guidance on the provision of the custom and self build plots will be provided in the forthcoming Meeting Housing Needs SPD. This will provide detail on planning, design and delivery processes and locational requirements such as positioning the plots in smaller clusters and avoiding locating plots on remote corners of the site.

- No residential development to take place within flood zones.
- Typical densities will be in the region of 35 – 40 dwellings per hectare with potential for higher densities in areas of greatest access to sustainable travel and mixed-use areas and potential for lower densities towards the edges of the community.
- Building heights are expected to typically be 2-3 storeys with incorporation of 4 - 5 storey buildings in appropriate landmark locations such as on key junctions or terminating views. Proposals must demonstrate a clear logic to building heights that assists placemaking.

Powerlines

The potential to underground overhead powerlines should be explored, particularly where leaving them in-situ would place a significant obstruction and detraction from the quality of residential areas. Mid Devon District Council's preference is for the powerlines to be moved underground but a final decision will be subject to further masterplanning, feasibility and viability work. The SPD Masterplan shows the eastern 132kv line undergrounded as this would cut through and segregate residential areas hindering the creation of a coherent development form. The area of land made available for development by undergrounding the 132kv lines (as shown) equates to around 7ha. or approximately 250 homes within the allocation area. The potential to realign the route while undergrounding should also be explored. The larger 440kv powerline is left in situ and its alignment used to define the extent of extended commercial areas.

The land beneath the powerlines is not considered suitable for the primary useable areas of public open space, where the presence of the lines would undermine the quality of the spaces beneath. The land beneath may be used for ancillary open space, wildlife corridors, streets and active travel corridors and potentially renewable energy generation. It may also be possible to accommodate commercial space in the area beneath the powerlines although this would be subject to further consultation and demonstrating an appropriate design response to Mid Devon District Council. A 10m wide corridor of open ground would be required above any undergrounded cables.



East Cullompton Landscape Framework

5.3 Landscape

Policy CU9 sets out environmental protection and enhancement measures required for East Cullompton, this section of the SPD elaborates on these requirements showing their application and contribution to placemaking at East Cullompton. Policy CU7 requires allocation site to deliver 40 hectares of strategic green infrastructure, laid out and managed with an appropriate mix of public parkland, open space and landscaping. The site benefits from an existing landscape structure that offers great placemaking potential. Existing watercourses, hedges, tracks, mature trees, and landform can all be used to drive the character and sense of place at East Cullompton.

The MDDC Open Space and Play Area Strategy can be referred to for general guidance on design of open space types. The objective of the Landscape Framework described here is to use the existing clues in the landscape to frame interventions ensuring that:

- New development is rooted in the existing qualities of the site providing a sense of identity and permanence from the outset
- Incoming open spaces simultaneously provide multiple benefits to people, wildlife, and the environment informed by a natural capital approach.

	Land area	Notes
Amenity green space	6 hectares	Accessible areas of green space to be provided within Blueways, Community Greens and areas shown on the Landscape Framework plan as 'Green Infrastructure', where these areas are not adversely effected by flooding, powerlines or sustainable drainage features.
Parks, sports and recreation grounds	9 hectares	To be provided within the Community Greens as more formalised and functional spaces.
Allotments	1.5 hectares	Community growing space such as orchards to be incorporated into Community Greens. Allotments to be provided within the central Blueway, indicative location shown.
Equipped children's play space	0.4 hectares	Primarily provided within the Community Greens with smaller areas for play integrated across the site.
Teenage facilities	0.12 hectares	Older years outdoor and recreation space to be provided within the Community Greens.
Other areas of strategic green infrastructure	29 hectares	Area required for Blueways, retaining existing vegetation and provision of strategic areas of sustainable drainage features.
Area beneath 440kv powerlines	16 hectares	While this area does not form part of the open space requirements, this land could provide space for important green infrastructure functions including wildlife corridors and sustainable drainage features.
Total	46 hectares	Excluding area beneath powerlines.

The Blueways:



Water has played a central role in the history and evolution of Cullompton. The growth of Cullompton to the east of the Culm offers an opportunity to use water as an important placemaking feature and place a renewed focus on water in the town.

A series of existing watercourses traverse the site which each vary in character and ultimately lead to the Culm providing natural connectivity between east and west Cullompton. The placemaking principles below set out how a series of Blueways can embed these watercourses in plans for the future.

- Water courses will be incorporated into three Blueways, shown on the accompanying plan as a positive placemaking feature of East Cullompton.
- Blueways will provide sufficient set back to ensure no development is located within flood zones.
- Blueways will provide the primary areas for consolidation of sustainable urban drainage features including swales and basins making the management and storage of water a visible and positive feature of East Cullompton.
- A 1.5 ha allotment site is required for East Cullompton. An indicative location for this is shown in the central Blueway.
- Blueways will incorporate attractive walking and cycling routes along their length as part of a site wide network of active travel.
- The Blueways will incorporate naturalistic wetlands and water features providing generous naturalistic open space providing continuity with the proposed Country Park to the north.
- The design of these routes will explore the potential for interaction with water and incorporation of water bodies. Design of the southern Blueway will describe how the leat can be retained and celebrated as a positive feature around Fordmore Farm.

- The Blueways will be planned to enable the potential for connectivity into the surrounding area as important landscape corridors and walking and cycling routes.
- The places where the Blueways cross the primary streets and/or the Greenways (described below) will be important points of orientation in the development. Developer proposals must demonstrate how buildings, paths and open space support this landmark function. This may include bringing buildings closer to the water locally, providing community gathering space or varying building height and form. They will also incorporate water or wetland planting as a significant characteristic.



Naturalistic planting around water bodies mixed with areas of mown grass serving a broad range of functions.



Drainage features characterised by naturalistic planting.



Strategic drainage areas with strong building frontage.



Rain gardens integrated in waling and cycling route.

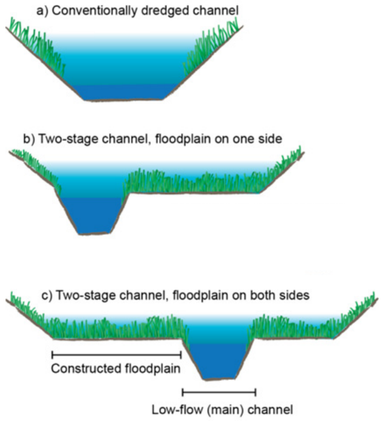


Strategic drainage areas with naturalistic planting and water storage.



A high-level drainage strategy has been developed as part of the Masterplan SPD. The principals of the strategy are to allow for rainwater storage on plot (e.g. in rain gardens) and then the remaining storage provided as a combination of network storage (e.g. swales or linear drainage features in parallel with existing flow paths or channels) feeding into larger strategic storage elements (e.g. infiltration / attenuation basins). This will follow the Sustainable Urban Drainage Systems (SUDS) train to ensure the necessary treatment of any runoff. The advantage of utilising larger storage features is to reduce / make more efficient the overall maintenance requirements for the drainage features and to provide areas of habitat and amenity.

- The SuDS hierarchy should be followed, by using infiltration as far as is practicable. In addition, all off-site surface water discharges from development should mimic “Greenfield” performance up to a maximum 1 in 10 year discharge rate or lower if possible.
- All on-site surface water should be safely managed up to the “1 in 100+climate change” conditions. This will require additional water storage areas to be created thereby contributing to a reduction in flooding downstream.
- Strategic storage areas should be located in the Blueways, with some of the storage providing areas of permanently wet habitat to also help provide increased biodiversity as part of the development.
- Explore the use of cascade basins in strategic storage locations where this would help deal with the steepness of the overall catchment. The basins, and the connectivity between them, offer the potential for amenity and ecological benefits, as well as drainage and flood risk management.
- Explore the use of two stage channels, in combination with storage basins, weirs and meandering channels, as a means of ensuring a permanent water presence can be maintained, while providing additional capacity for flood flows and storage.





Buildings adding to the character of green space with natural materials.



Incorporating water as a positive feature.

Minimum levels for development parcels

The development parcels for the SPD Masterplan have taken into account the location of the flood zones. The parcels avoid areas of flood risks and allow space adjacent to the drainage channels to incorporate strategic storage as part of the overall Surface Water Drainage strategy for the area.

- The minimum acceptable levels of the development parcels will be set based on the 1 in 100 year plus climate change peak water level with a freeboard allowance included. This ensures that all of the development will be safe in during a flood event based on the recently updated guidance.

Crossing points and fords

The aim for the management of the drainage channels through the allocation area is to utilise and improve the existing channels where possible. This will include consideration of crossing points for transport links. Fords already have a distinctive presence in the wider landscape allowing a connection to the watercourse to be maintained, providing an alternative to bridge and culverts, which have a risk of blockage, particularly with beavers known to be within the wider Culm catchment.

- Fords will be considered within the overall water management strategy. These can be designed to have small culverts underneath to pass the normal flow so that the ford itself is only utilised in flood events.
- Due to the risk that in a flood these will not be passable, the wider transport strategy will ensure there are alternative routes available so that safe access/egress is always possible.
- Where fords are proposed as part of the allocation area, signage will be provided to explain the idea and when there are potential restrictions to access.



Indicative study of crossing points on Blueways.



Existing fords in the surrounding area.



Inset plan of crossing points on Blueways.

Greenways



- Greenways will be planned to complement Bueways, providing a connected network of active travel routes across the site. Generally, they will run towards and across Blueways to form a grid.
- The character of each Greenway can vary to its context either running through larger green spaces or provided adjacent to streets within built areas but must provide attractive, dedicated space for pedestrians and cyclists and planting.
- The combination of Greenways and Blueways will provide walking and cycling loops around the site. The loops will serve multiple functions from direct routes to key destinations to slower, recreational routes at the edges of East Cullompton.

The Eastern Loop



Defining the eastern edges of East Cullompton is important in the early phases where development meets the open countryside. The potential future expansion of East Cullompton promoted through the wider Garden Village opportunity requires that this edge also considers the flexibility required to allow possible further phases of development to connect in future. It is envisaged that this will form an attractive edge to East Cullompton defined by walking and cycling routes, planting and a building edge that responds to views from the surrounding area.

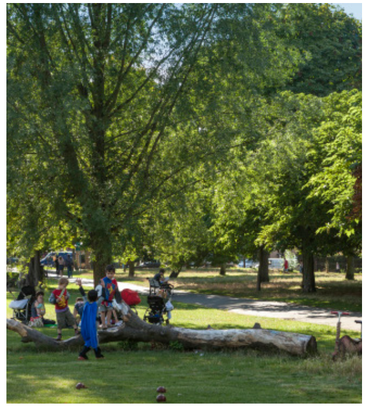
- The Eastern Loop will be a Greenway planned to follow the northern, eastern and southern edges of East Cullompton, in the early phases this will provide an active travel route around the outer limits of the development providing interaction with the open countryside.
- The design of the Eastern Loop will demonstrate how it allows for future phases of development to connect into this route to ensure a positive interaction between East Cullompton and any potential future phases of the Garden Village.
- The Eastern Loop will vary along its length but will provide sufficient space to retain existing trees and hedges at the edge of the site and provide space for new planting, hedge banks, and hedges to filter views of development.
- The Eastern Loop will run from the Public Right of Way at Old Hill around the site boundary to Week Farm.
- The Eastern Loop will run through and connect key green spaces including the Community Greens, Blueways and demonstrate the potential to connect to the Country Park.
- Screen planting to be incorporated within the Eastern Loop to protect the amenity of existing houses properties on Honiton Road and views from the surrounding area.

Enhancing the Existing Landscape Structure



The inherited landscape features of the site will only thrive if they are given sufficient space and will only realise their full potential for nature if they are part of linked open space and habitats. The positive retention of existing trees and hedges is a core part of the placemaking objectives for East Cullompton established in policy CU9 of the Local Plan and Stage 1 SPD. The natural capital mapping also stresses the importance of avoiding disturbance to soil beneath existing trees and hedges, the Landscape Framework therefore extends areas of open space around and between significant areas of existing vegetation as far as possible.

- Existing trees and hedges will be incorporated within areas of open space with sufficient building setbacks to ensure longevity of trees and allow for additional complementary planting that can provide habitat enhancement and connectivity.
- Significant trees and hedges will be incorporated as linear features as far as possible and part of a connected grid of open spaces that lead to the edges of the development providing connectivity with the surrounding landscape.
- New tree and hedge planting will be required to the site boundary, particularly the east where there are no existing hedges and trees. This planting should filter and manage views rather than attempt to completely screen development.
- Additional planting will be included to the western boundary of the site helping to provide screening to the M5.
- Additional planting will be required to demonstrate climate resilience and improve biosecurity.



Open spaces incorporating existing mature trees as a central feature.

Community Greens



The Community Greens (shown in dark green) are intended to serve as key community gathering spaces in East Cullompton, providing the principal focus for play, parks and recreation grounds as set out in the Landscape Framework Land Budget. Sports pitches will need to be provided in accordance with the MDDC Playing Pitch Strategy, this includes a preference for a 3G pitch. The Community Green at Fordmore Farm is shown at sufficient scale (5.5ha) to accommodate the allocated requirement for sports pitches in one location but off-site provision of these would be considered if a more suitable location can be demonstrated. Although the exact size and location of open space will be determined through planning applications, the SPD masterplan shows approximately 9.8ha of space within Community Greens which is sufficient to provide the main play space, teen facilities and policy requirement for Parks, sports and recreation grounds.

- At least three Community Greens will be provided in the areas around East Culme House, Fordmore and Moorhayes.
- The Community Greens will be laid out to provide the core open space functions required by the Local Plan open space standards incorporating parks, play areas, teenage facilities, recreation space, sports pitches and community orchards.
- Plans for the Community Greens should demonstrate how they provide sufficient flexibility to accommodate a range of temporary community events and gatherings.
- The Community Greens are co-located with mixed use areas and must be planned to be visually prominent from within areas of surrounding mixed-use development.
- The Community Green at Moorhayes will be planned to create an appropriate setting to listed buildings at the edge of the allocation boundary.
- The Community Green at East Culme House will provide an appropriate setting to the County Wildlife Site in this location.
- The Community Green at Fordmore will provide an appropriate setting to the non-designated heritage assets as well as enhancing the character of this area as a mixed-use hub capable of retaining the rural qualities of the area and will incorporate areas for community gardens and orchards.
- The Community Greens will be supplemented with smaller areas of informal open space and play across the site.
- Sports pitches are to be provided within the Community Greens in accordance with Mid Devon District Council Playing Pitch Strategy unless offsite provision in a favourable location is agreed with MDDC.
- Areas adversely effected by powerlines or flooding will not contribute to meeting open space standards.



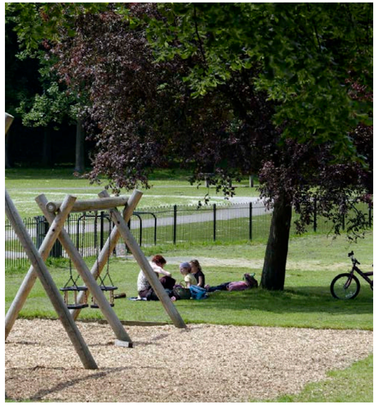












Character images of Community Greens showing a broad range of functions, including food growing, play, sports and community space.



Aerial view of the River Culm in the area being explored for the Country Park

Country Park and off site landscape improvements along the River Culm



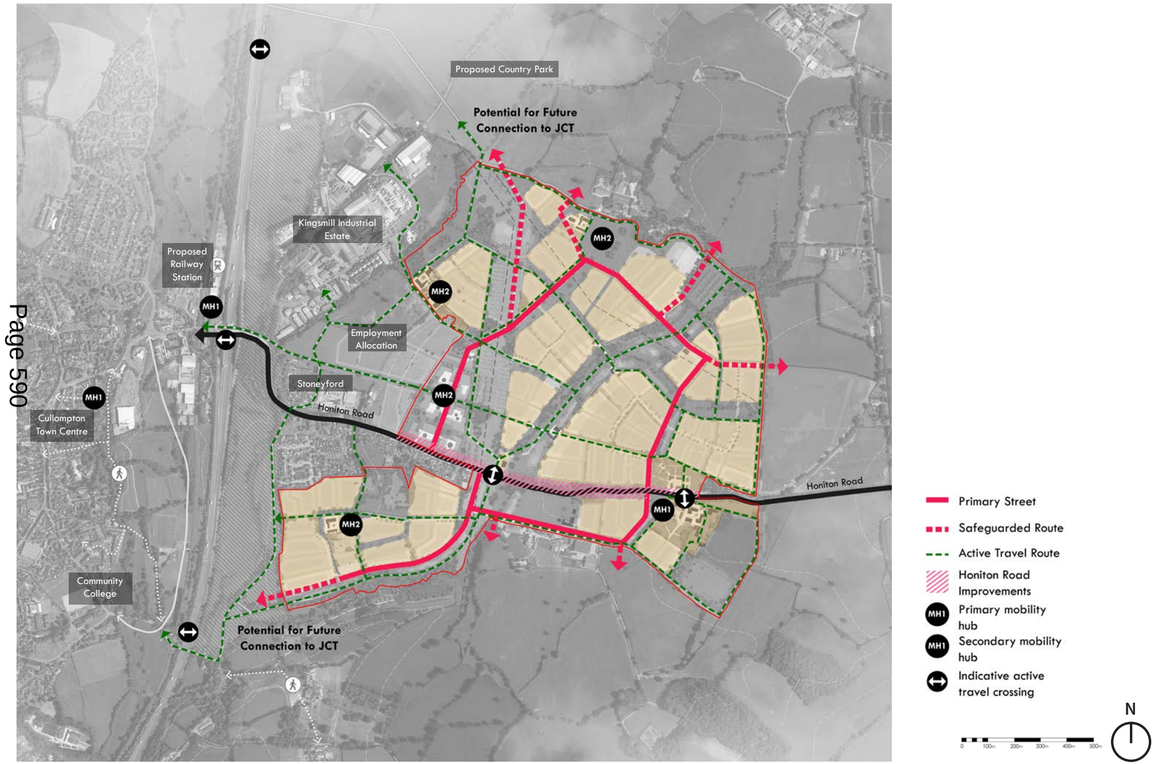
One of the key principles of the SPD is to ensure that East Cullompton is experienced as part of one town with existing parts of Cullompton. This aspiration places significance on the River Culm corridor in creating the setting and point of connectivity between eastern and western parts of Cullompton in the future. Mid Devon District Council are exploring plans for a Country Park to the north of East Cullompton around the River Culm to serve new and existing residents. The Country Park has the potential to provide an outstanding asset to the wider area. The Masterplan Framework also identifies the areas of riverside adjacent to the M5 as having a potential role in providing strong links between all parts of Cullompton. While not a formal requirement of the SPD, the Country Park and areas of riverside can provide important walking and cycling links, off site public open space provision and also assist with delivering off site biodiversity net gain if required. Mid Devon District Council will work with developers to explore the delivery of these enhancements.

In addition, proposals at East Cullompton can support and enhance these proposals by ensuring the Blueways provide attractive walking and cycling connections to the proposed Country Park to the north and by ensuring that the landscape design of the Blueways provide a continuation of the qualities of the Country Park into the East Cullompton allocation area.

Biodiversity Net Gain

Biodiversity net gain is required by the National Planning Policy Framework, The Environment Act 2021 and Policy DM26 of the Mid Devon Local Plan 2020. To demonstrate measurable biodiversity gain, the Defra Biodiversity Metric 3.1 calculation tool (Defra, 2022) has been used to provide an initial indicative calculation of the biodiversity value of the Allocation Area, both for the existing baseline conditions and for the post-development masterplan scenario. Although strategic in nature at this stage, this calculation indicated that the masterplan framework would not deliver the biodiversity net gain required within the allocation area alone, although this should be explored and prioritised in accordance with the mitigation hierarchy. The biodiversity net gain calculations did however identify suitable land within the wider area to provide habitat creation and enhancement outside the allocation boundary. The wider area includes cropland and modified grassland which have the potential to offer significant biodiversity net gain. As an example, the enhancement of approximately 15 ha of existing modified grassland to create neutral grassland of moderate condition, and replacement of approximately 15 ha of cropland to provide neutral grassland of moderate condition will provide an overall gain of 55.88 units, and a 10.77 % net gain. These enhancements could be provided as part of the Country Park.

Developer proposals must demonstrate how biodiversity net gain will be delivered, either on site within the allocation boundary in the first instance, or through off-site contribution to the delivery of landscape enhancements. Mid Devon District Council's preference would be for off-site improvements to be delivered in areas adjacent or accessible to the East Cullompton allocation.



East Cullompton Mobility Framework

5.4 Mobility

Approach to mobility

Policy CU8 of the Local Plan sets out the required transport provision associated with East Cullompton. This includes contribution to, or delivery of improvements to junction 28 of the M5, the Town Centre relief road, reopening of the railway station and provision of walking, cycling and bus routes at appropriate locations throughout the development as part of future planning applications.

The Masterplan Framework has adopted the 20 minute place principles and Sustainable Accessibility and Mobility (SAM) framework, where the priorities are as follows;

- Substitute Trips: Replace the need to travel beyond your community
- Shift Modes: For longer trips, use active, public and shared forms of transport
- Switch Fuels: For any trips that must be made by car, ensure the vehicle is zero emission

The Vision and Overarching principles for East Cullompton re-enforce this at the local scale with the aspiration to reduce the reliance on out-commuting from Cullompton to create more vibrant communities and to help address the current climate emergency. With this approach and the overall vision in mind, traffic assessment should be focused on people's core access requirements, over capacity enhancements or optimisation of route convenience for cars. The prioritisation of highway infrastructure, may inhibit the full potential of other measures. To achieve the site's full potential, an approach to the assessment of traffic impact should be used which realises the greatest level of modal shift. It is expected that the Sustainable Accessible and Mobility hierarchy guides planning applications for each phase of development in support of the overarching vision for East Cullompton. The Infrastructure, Delivery and Phasing section sets out the requirement for a co-ordinated approach to transport assessment.

Junction 28

At the time of preparing the SPD, the preferred option for strategic highways improvements had not been determined. The Masterplan therefore leaves flexibility for the preferred solution to be developed, indicating locations for safeguarded routes should alternative junction locations to the north or south be required. What is clear through the preparation of the Masterplan SPD is that newly designed highways and junction infrastructure and modifications to existing infrastructure that improve mobility must not adversely impact the qualities of Cullompton and its environs as a place. Indeed, it should contribute to place-making.

It is clear that local connections across the M5 corridor are critical to delivering the aspirations for East Cullompton. Initial consultation has identified that Suicide Prevention should be a priority for a bridge crossing in a location of this nature. Indicative locations for active travel crossings of the M5 are shown on the SPD Masterplan, further co-ordination with ongoing design of offsite infrastructure will be needed, including junction improvements to ensure this requirement is delivered effectively against the following principles.

- Delivering effective active and shared travel crossings of the M5 in the locations shown should help to define the preferred location and arrangement of junction improvements ensuring active and sustainable travel is a key consideration in the overall movement strategy. These broad locations have been set to provide the most direct routes possible to the Town Centre, Community College and Railway Station.
- The central and southern active and shared travel crossings must be prioritised as an early part of proposals at East Cullompton. The northern crossing should be considered where it could be delivered in parallel to a new junction.
- The detailed design of active and shared crossings must demonstrate how these will be attractive and safe for users and encourage their use.
- Well-designed infrastructure must "fit" in terms of scale height and visual impact and make its own contribution to place.

Active Travel



The Blueways and Greenways described in the Landscape Framework set out how a connected network of active travel routes can be provided across East Cullompton. As well as providing an important healthy living and recreational function they will form an important part of a mobility strategy that reduce the reliance on trips made by car.

- An active travel network must be developed that demonstrates how it provides direct and attractive connectivity to key destinations within the site and into the surrounding area.
- A dedicated active travel route will be provided between the community hubs and Cullompton Town Centre, Community College, key employment areas and Rail Station. This will comply with current best practice. Active travel routes should ensure that the earliest stages of development benefit from viable alternatives to the private car, from the outset.
- A phased approach to the provision of key active travel links will be provided, seeking to maximise the connectivity of subsequent development parcels. This will provide links to key land uses and transport interchanges outside of the site, along with internal connectivity to a network of key Mobility Hubs throughout the site. Such links will comply with current best practice guidance, such as that contained within LTN 1/20 or its successor.
- To increase the attractiveness of such links, secured by design principles will be key. Routes may therefore benefit from facilitating multiple modes, including light traffic use such as bus/shared mobility.
- Active and shared travel routes should be supported by clear signage to facilitate wayfinding within the development and connecting to surrounding routes and destinations.
- Active and shared travel routes may run alongside other streets but proposals must demonstrate how they provide attractive and functional space for a variety of users and how priority can be given over vehicles.
- Active travel routes should be more direct and attractive than using the private car and should be free of interruption as far as possible.
- To deliver the points above Active Travel connections into and through employment areas to the west will need to be explored particularly through allocation CU17 and along the River Ken Blueway past Week Farm.
- Proposals should demonstrate how active travel routes can be extended into neighbouring parcels and beyond into communities including Kentisbeare and Willand.
- Walking and cycling routes should connect to the Public Rights of Way at the River Culm and opportunities to improve and extend these routes explored.
- Active travel routes and street design to provide sufficient space for all users including mobility vehicles.



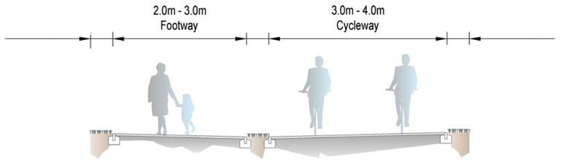
Example of dedicated space provided to cyclists and pedestrians separated from the carriageway with tree planting and sustainable urban drainage.



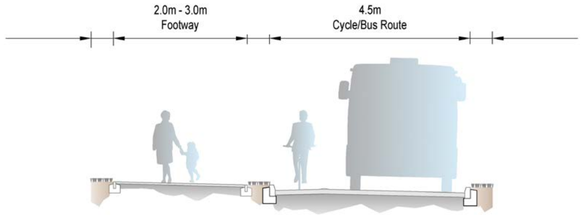
Example of a junction between a street and a footpath where a raised table and textured paving gives priority to pedestrians

Shared Mobility

- The implementation of key shared mobility routes providing spaces for buses and demand responsive transport will be agreed to connect the site with the town centre and railway station. Consideration should be given to a circular route encompassing both existing M5 crossing points, allowing residents the opportunity to benefit from direct links to the south of the town, bypassing Junction 28, with Cullompton Community College providing a key destination during the earlier stages of development.
- Demand responsive transport may represent a viable alternative to timetabled public transport provision, and provide a commercially viable solution during the initial development phases. A range of options will need to be considered which may increase in scope and coverage throughout the lifetime of construction.
- Careful consideration needs to be given to key destinations outside of the town, particularly those that currently rely on the private car for journeys, such as major employment destinations.
- The implementation of key active and shared mobility connections will be required in advance of strategic highway infrastructure improvements, making best use of existing links across the M5 during early stages of development. This should aim to ensure that traffic is managed down at every opportunity.



Typical section of active travel route.



Typical section of active travel route alongside shared mobility route.

East Cullompton Masterplan SPD

Street Hierarchy



A clear street hierarchy must be demonstrated that creates an easily understood structure to all development areas in each phase.

- The primary and secondary street network should be planned to minimise crossings of green infrastructure corridors and dedicated active travel routes.
- The design of the primary street network must demonstrate how it is co-ordinated with junction improvements to the M5, which may require demonstration of safeguarded routes to potential future junction locations.
- The design of the primary and secondary street network must demonstrate how it could be extended into surrounding parcels, ensuring continuity and clear street hierarchy in potential future phases of development.
- SUDs and planting should be incorporated into all primary streets, which could include permeable paving and other features such as swales or rain gardens.
- Tree planting should be incorporated as a prominent feature into all primary and secondary streets.
- All streets through development areas will be designed to a maximum of 20mph speed and this will be clearly apparent in the detailed design of the street. On long straight sections of street, slower speeds will be encouraged through changes in carriageway material, build outs to alter the carriageway alignment and narrowing of carriageways at key places.
- Streets for a Healthy Life should be used as a detailed checklist for developing appropriate design response to each street type.
- The primary street network should provide access to the mixed-use community areas and schools but highways design should not dominate these areas. Opportunities to separate key gathering spaces from parking and highways should be explored to ensure public spaces can remain at a comfortable, human scale.
- The Masterplan Framework shows a primary mobility loop serving the main areas of development with a view to incorporating a bus route through East Cullompton.
- Subject to the preferred junction 28 solution the primary street to the south of East Culme House could be realigned to run through the centre of the development.



Example of a primary street with strong building enclosure, space for pedestrians and tree planting.



Example of a primary street consistent built form and boundaries, street trees and sustainable urban drainage.



Example of a secondary street with consistent building line and boundary treatment, front gardens, street trees and on street parking.



Example of a tertiary street with limited vehicle role and the scale of the street has been reduced.

Honiton Road

Whilst Honiton Road is an A road and plays a key movement role in the wider highway network, it will also need to form a stronger place function within East Cullompton achieving safe and pleasant environment that responds to local context along its length.

The current alignment has the potential to disconnect key parts of East Cullompton which in turn may discourage walking and cycling. Low speed environments should be promoted with the reallocation of road space through the allocation area, enabling road users to give way on a more conciliatory basis facilitated by a range of both uncontrolled and controlled crossing points to cater for all users and abilities.

A strong sense of place will need to be created around Fordmore Farm, whilst facilitating movement in a manner that does not create unnecessary conflict between road users. Detailed highways design to reduce vehicle speed along Honiton Road will assist in ensuring that a higher priority can be given to the needs of pedestrians, cyclists and public transport users. The context of each section of the road within the East Cullompton area should be used to develop a proposed movement framework with distinct character types in residential, commercial and mixed use areas that seek to reduce the overall vehicle dominance of Honiton Road.

It should be demonstrated that the priority afforded to each mobility mode reflects its function within the development, and the volume of pedestrian and cycle traffic anticipated. Vulnerable road users should be given appropriate priority, noting that different demographics may benefit from alternative levels of priority over traffic. Within mixed use areas, at active travel crossings and in the vicinity of schools, where pedestrian footfall and cycle traffic is higher, priority should be facilitated through both active and passive means, relying on both signal crossings and informal crossings.

Junction layouts from Honiton Road should avoid highways dominance and will need to prioritise active modes, ensuring safe movement of pedestrians and cyclists across key areas of conflict. Alongside this, consideration should be given to other forms of mobility including e-mobility and traditional and future forms of shared mobility. It should be demonstrated that the level of priority is commensurate with its movement function and the vulnerability of road users, including priority at side roads and signal crossings at key routes along its length.

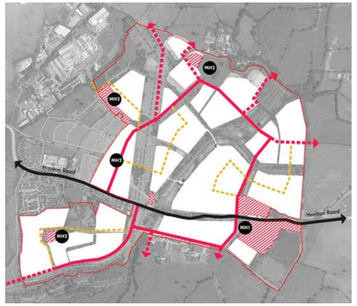
Consideration needs to be given to how the use of the corridor will change over time, both during the phasing of the development but also it's longer term life cycle. Mobility strategies should be developed to predict and incorporate

future expectations over the long term. Some flexibility should be incorporated to ensure that key interchange points can adapt to future mobility expectations. This might mean greater space for pick-up/drop-offs for example, the recognition of changing demands on the mixed use buildings fronting the route or the need for greater space for people to pass, stop, rest and socialise.

A co-ordinated design scheme is required for Honiton Road which would allow the road to perform a 'place' function regardless of volumes of traffic. Reduction in speed reduces the space required for vehicles as well as offering potential environmental benefits and reduced noise. A scheme design should demonstrate:

- Zoning of the route where it moves through either residential or mixed use areas with appropriate development frontages.
- Reallocation of space to multiple users.
- Active travel crossings at key desire lines.
- Place over movement function.
- Direct access points off Honiton Road while aiming to reduce the scale of access junctions.
- A range of parallel mobility solutions reducing the priority given to cars.

Mobility Hubs



Mobility hubs are points in the new development where a range of mobility solutions are offered. Detailed proposals will need to be developed through design codes and planning applications and agreed with key stakeholders to ensure that Mobility Hubs are implemented at key locations in the town and throughout East Cullompton. The range of transport solutions available at these destinations should form part of a strategy that will seek to prioritise shared and active modes over the car, and provide a range of inclusive mobility solutions that can be utilised by the widest possible demographic. This may include on demand solutions such as bike or scooter hire, car club spaces, along with complementary services and facilitates that will encourage the take up of alternative modes such as buses.

- Mobility hubs should be well integrated into development areas, providing high quality public spaces offering people an alternative to the private car.
- The success of mobility hubs will be dependant on usage, primary hubs should be prioritised in areas of highest demand, i.e. around the railway station, primary mixed use areas i.e. Formore Farm, the Town Centre and employment areas.
- Secondary and tertiary hubs can be provided as part of a wider interconnected network where they can provide services appropriate to their area. They will include a more limited provision of services, and points at which docking stations or drop off/collection points could be provided. These will need to be included within attractive and convenient locations throughout East Cullompton.
- The effectiveness of mobility hubs is reliant on a network that allows convenient and predictable movement to the wider area. They should aim to provide greater ease and offer a more attractive proposition than travelling by car. A clear branding across the whole hub network will increase visibility and user awareness, which would complement a marketing strategy to raise awareness, inspire change, and provide advice on how to use the facilities.
- Further detail on the provision of mobility hubs will be developed through planning applications.

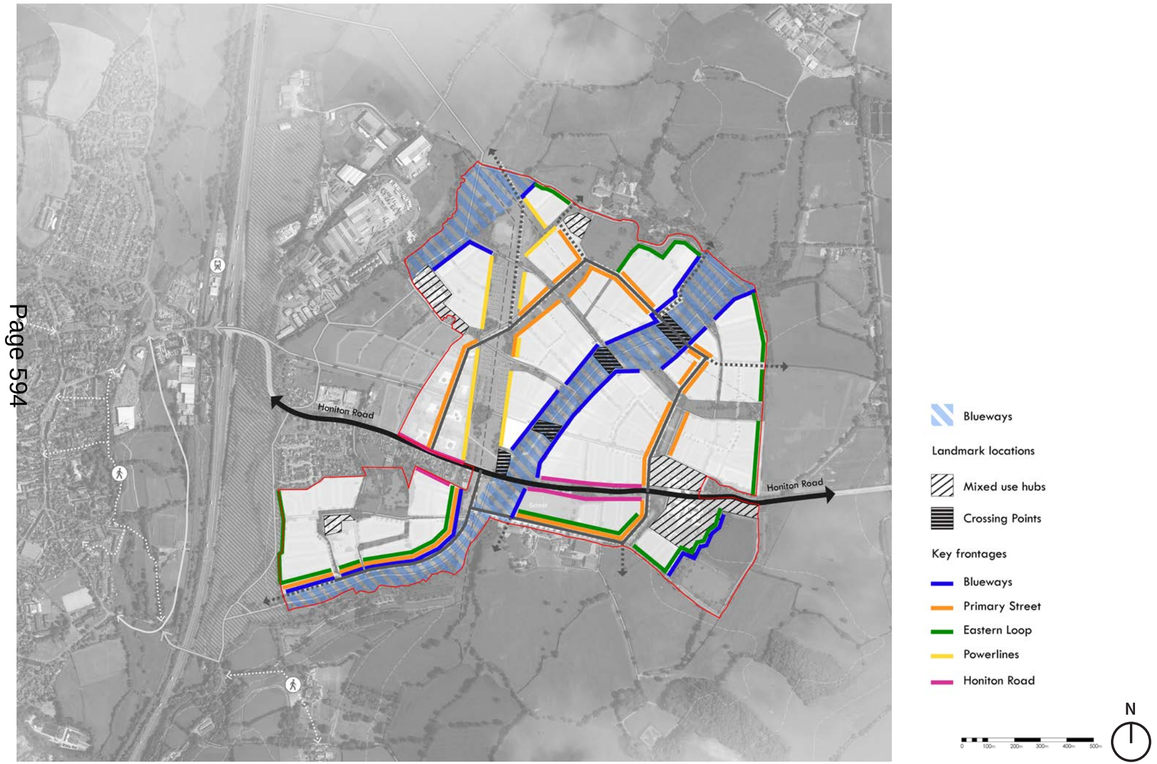








Examples of mobility hubs, demand response travel and space dedicated to active travel.



East Cullompton Placemaking Framework

5.5 Placemaking

The Placemaking Framework is primarily made up of a combination of the Landscape, Mobility and Activity layers described above. This sets out the organisation of the key spatial features of the SPD masterplan and how they relate to each other. The following additional principles have been defined in response to site characteristics, the vision and through consultation as important placemaking principles for East Cullompton.

Integrating water

- Masterplan proposals must demonstrate how water has been used as a positive placemaking feature. This may include areas of wetland, new water bodies and integration of moving water as a visible part of the scheme. It is expected that water will be incorporated into prominent areas of the plan i.e. in mixed use areas and at key crossing points of movement corridors.
- Development parcels should be clearly structured around water and water courses and explore opportunities for bringing key buildings closer to water.

Overarching character

- It is expected that the overall character of East Cullompton will be defined by the interaction of buildings and the elements described on the Placemaking Framework. There should not be arbitrary changes in character, instead neighbourhoods should be structured clearly around this Framework.
- Building enclosure and architectural detailing should be planned with sufficient consistency to a neighbourhood, street or greenspace to create recognisable character. Consistency can be achieved by providing a repeating pattern of development components such as building line, height, form, roof line, boundary treatments, architectural style, or restrained palette of high quality materials. Variations in these components should be done in a deliberate way to place emphasis on landmark locations.

Key Frontages

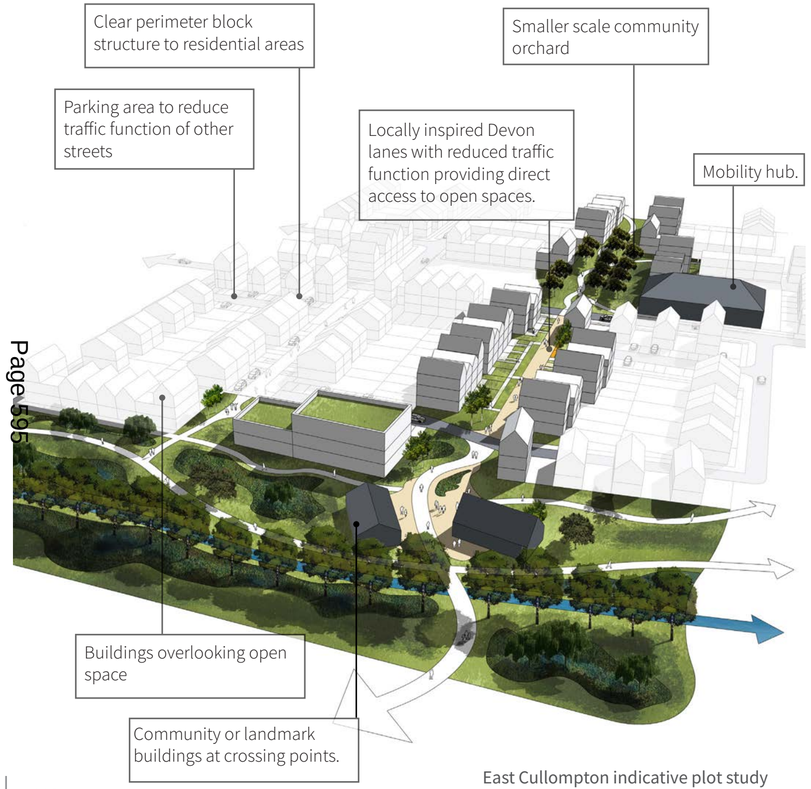
- Buildings should provide frontage and overlooking onto adjacent publicly accessible streets and spaces. Rear fences, walls and parking courts must not become dominant features. In addition, the following have been identified on the Placemaking Framework as key frontages in setting the overall character and legibility of East Cullompton.



Consistent approach to character through materials, building form and building set back. Planted boundary to public space. Coloured render is used to add interest.



Example of a strong building frontage onto a green space.



East Cullompton indicative plot study

- Blueway: The Blueways are a key organising feature of the masterplan, the open spaces of the Blueway are an important part of the character. Proposals must demonstrate how buildings can contribute to the character of these corridors in a consistent way. It is expected that a strong frontage is created to the Blueways.
- Primary Streets: Buildings should have active frontages with windows and front doors onto the street. Large areas of blank façades will not be allowed. The buildings along the street should have a uniform rhythm with consistent height, roof lines and massing with marker buildings in key locations as the exception to this. Buildings should have a consistent building line and set back from back of footway. The set-back should be minimum of 2 metres. Buildings should provide consistent and high degree of street enclosure. All gardens should have a defined boundary treatment such as a low wall with planting and this should be consistent along the primary street.
- Eastern Loop frontage: The Eastern Loop forms the development edge to East Cullompton and will meet the open countryside. Proposals must demonstrate how the building frontage can create a lower density edge where building massing is matched by tree and hedge planting.
- Honiton Road: The Mobility Framework describes how Honiton Road will need to change as part of East Cullompton to ensure that it forms a place function as well as its current movement function. A key part of that will be ensuring that a strong development frontage is created. Proposals must demonstrate how this will be achieved. It is expected that the building frontage will vary as the road moves through different areas including the mixed use community hubs, residential areas and the commercial area.
- Powerlines: Where powerlines are left in situ, they will present a significant obstruction due to their associated easements. Proposals must demonstrate how buildings will provide some overlooking of the powerline corridors from adjacent properties. It is expected that this will not be from the primary frontage of buildings but from gable ends with windows and building entrances. Continuous rear fences to publicly accessible green spaces will not be accepted.

Landmark locations

- Mixed use community hubs: Non-residential buildings should reinforce the aspiration to utilise the rural character of the site and its context in the layout, detailing and choice of materials. Typically, this will involve single, or two storey buildings laid out in an informal arrangement within a very strong landscape utilising the form and type of materials found in the surrounding area.
- Crossing points: The Landscape Framework describes the use of crossing points as key points of orientation in East Cullompton. Landmark buildings should re-enforce this role with taller buildings, bringing buildings out into the landscape or including mixed use buildings.

Layout

- The Landscape Framework sets out the strategic areas of open space in response to site constraints and to meet the local standards. In addition, proposals should demonstrate how smaller scale community spaces can be incorporated within residential areas to provide functional and attractive spaces close to home. These may incorporate informal or incidental play opportunities or spaces for orchards and outdoor seating areas.
- A clear, rational, and understandable



Strong building enclosure to streets and junctions.



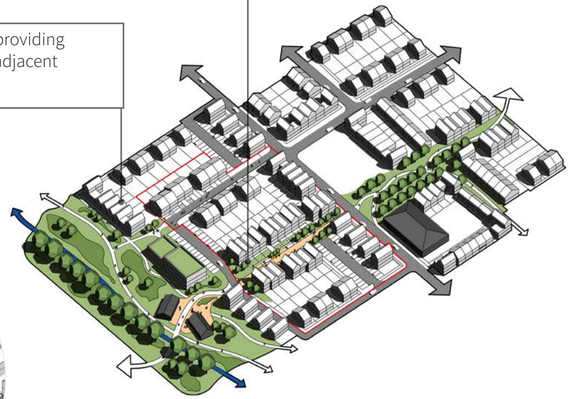
Consistent street frontage and boundary.



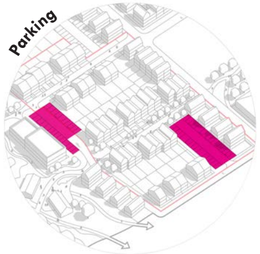
Use of gable ends to provide overlooking.

Streets planned to provide good levels of permeability and lead to strategic areas of open space and mixed use areas to encourage walking and cycling.

Perimeter block structure providing consistent overlooking of adjacent streets and spaces.



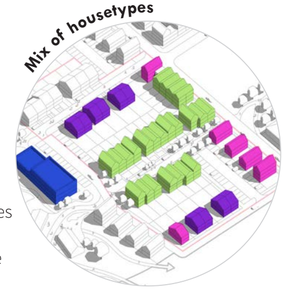
Variety of approaches to parking including areas of communal or more strategic parking for additional cars enabling tertiary streets to have a reduced traffic function.





Locally inspired lanes that are accessible, encourage social interaction, that provide good pedestrian and bicycle links to surrounding open spaces and that reduce the dominance of cars.

The housing density at East Cullompton allows for innovative and adaptable homes with a mix of detached, semi detached, terraced and apartments. Sufficient space for front and back gardens.



East Cullompton indicative plot and density study

residential street layout is required which clearly delineates public and private space, avoiding small, inefficient and poorly overlooked spaces. The most effective way of achieving this will be with rational perimeter blocks with buildings clearly facing public spaces. Perimeter blocks are expected to be consistent throughout East Cullompton and should be of a sufficient scale to provide an easily understood structure to residential areas.

- Proposals must demonstrate how the residential block structure responds to the structuring elements of the framework above. For instance, by organising streets with direct links to primary streets, strategic green infrastructure, or mixed-use areas as far as possible to ensure a clear and legible street pattern.
- Homes should be planned to have front gardens of sufficient size to suit the needs of families and vulnerable groups in orientating on leaving and arriving home. Front gardens should be defined in a low wall or hedge in a consistent way along a street.
- Plots should allow appropriate space for the storage of bicycles.
- Building for a Healthy Life should be used as a useful accompanying checklist for application of good urban design principles.

Parking

Dominance of highways and design for parking was cited as one of the critical failures of residential led developments in the Housing Design Audit for England undertaken by the Place Alliance. The Masterplan SPD does not intend to promote one outcome for parking, but proposals are expected to demonstrate how parking can be incorporated without having a detrimental effect on place making or the aspirations for encouraging other means of travel. Street designs should demonstrate how they create an unmistakable Mid Devon character.

- A range of parking solutions will be appropriate but preferred solutions should demonstrate how they will work alongside and encourage active travel as an attractive alternative.
- Innovative solutions to parking will be encouraged that explore incorporation of more strategic provision of parking through shared parking areas, car clubs and mobility hubs described in the Mobility Framework.
- Strategic parking should be provided in a way that avoids expansive rear parking courts that compromise the clear perimeter block structure and definition of public and private space.
- Proposals should demonstrate how the dominance of cars in streets will be avoided.



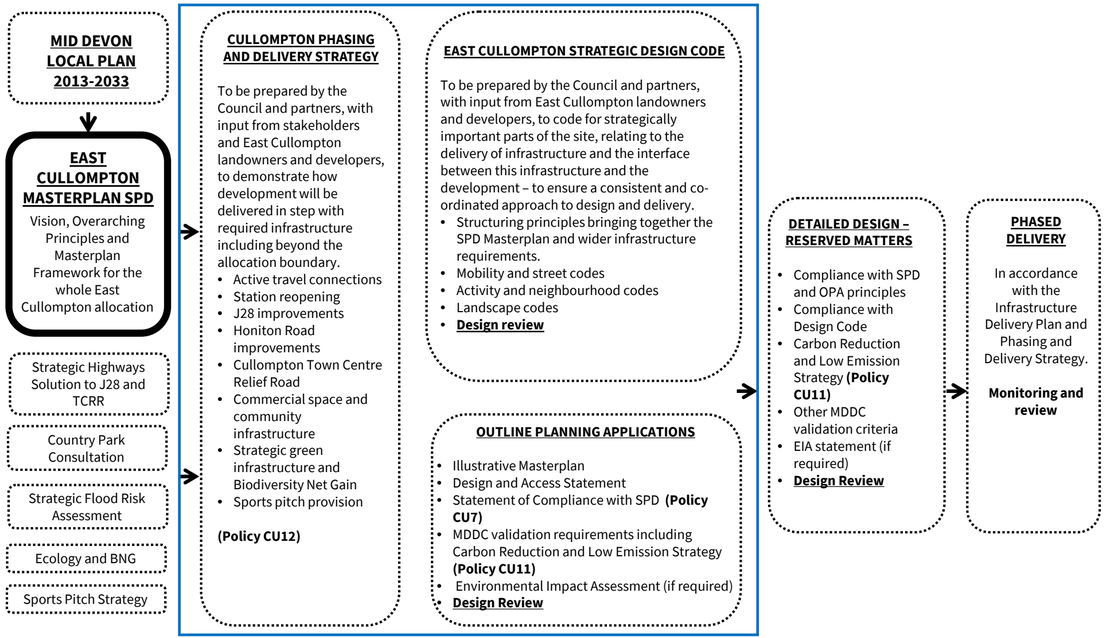
Courtyard parking with planting and overlooking



On plot parking to the side.



On street and on plot parking.



NB: Work within the blue box can be progressed in parallel but the Phasing and Delivery Strategy and Strategic Design Code are to be complete before determination of planning applications.

Planning and Design Process Flow Diagram: The role of the SPD in relation to the Local Plan and the planning application process

East Cullompton Masterplan SPD

5.6 Infrastructure, Delivery and Phasing

Delivery Strategy

It is essential that the development is taken forward in a co-ordinated and cohesive manner to ensure the overall vision and aims of the area can be achieved. Important to the consideration of each planning application or phase will be that it does not prevent or inhibit other areas of the site to be delivered.

Local Plan Policy CU7 requires an agreed phasing strategy to ensure that development and infrastructure come forward in step, minimising the impact of the development, while ensuring it remains viable. Further detail in relation to specific phasing requirements is then set out in Policy CU12 including expectations for the phasing of commercial and housing, green infrastructure, highway improvements, bus service enhancements and transfer of land for the primary school. Phasing will be a critical factor in ensuring place quality and delivering the vision for East Cullompton. An effective phasing strategy will establish the opportunity for patterns of local living and sustainable travel from the outset.

There is more than one landowner and site promoter involved in delivering East Cullompton, and it is important that it should be delivered as a single unified development. How this is achieved in practice will be the subject of further discussions and collaboration between landowners, site promoters, stakeholders and Mid Devon District Council. Following the adoption of this SPD, the Council will work with stakeholders and landowners to prepare a phasing and delivery strategy to inform the sequence of development on the site, capacity of each phase coming forward and the associated infrastructure requirements. It is therefore anticipated that a Phasing and Delivery Strategy document will be produced prior to determination of any planning applications at East Cullompton. The Council recognises that the high infrastructure costs of this site will not solely be funded by the development. The Council will work with its partners and the development industry to secure external funding to ensure the delivery of the necessary infrastructure as necessary.

The Phasing and Delivery Strategy should:

- Achieve the spatial principles set out in this SPD, to create self-sustaining places which are supported by facilities and infrastructure;
- Set out phasing and milestones for delivery;
- Demonstrate delivery of on and off site infrastructure needed for the development in accordance with the agreed phasing and milestones;
- Be collaborative and developed by a joined-up delivery team comprising stakeholders who work together to build the various components of the masterplan;
- Set a clear plan for long term stewardship;
- Achieve the build-out rates needed to deliver the site allocation in the Local Plan, and captures uplifts in land value to resource the features needed to create a sustainable place;
- Be aligned with the phasing set out in the Council's Infrastructure and Delivery Plan and Local Plan Policies and this SPD; and
- Be adaptable, monitored and updated, and include provisions to overcome barriers to delivery.

Strategic Design Code

It is proposed that a strategic design code for East Cullompton is prepared prior to planning applications for the site coming forward. The Design Code will be produced in parallel to the Phasing and Delivery Strategy and future planning applications. The purpose of this is to ensure a coordinated approach to more detailed design considerations with a specific focus on the strategically important aspects of East Cullompton and their relationship to planned infrastructure delivery. It is expected that the Design Code will assist the delivery of the requirements of this SPD and will include the following:

Structuring Principles

- The site wide framework, building on the SPD Masterplan, wider infrastructure requirements including preferred interventions at junction 28 and the Phasing and Delivery Strategy.
- Overarching character statement and design response to the requirements of the SPD.

Street and Mobility Codes

- Details of the infrastructure plan providing links to Cullompton, Junction 28 works and Honiton Road design scheme.
- Design approach to streets, spaces and active travel routes, including typical street sections for primary streets, secondary streets, tertiary streets and active travel routes.
- Strategic approach to provision of mobility hubs, vehicle and cycle parking.

Neighbourhood Codes

- Mixed use hub and commercial area codes setting out layout principles, height, frontage, massing, character and public realm treatment.
- Codes for typical residential block structure, character, boundary treatments, frontage and amenity space.

Landscape Codes

- Codes for key areas of open space including the Blueways, Greenways, Eastern Loop and Community Greens covering size, function, character, materials, planting and layout principles.
- Sustainable urban drainage.
- Planting codes for retaining existing vegetation and new structural planting.
- Codes for public realm treatment.

Ensuring a comprehensive approach

Further measures that could ensure a comprehensive and integrated approach to development will be explored with MDDC and could include:

- The role of a lead / master developer in co-ordinating delivery of site-wide infrastructure, s106 obligations and planning applications, the draw-down and disposal of individual parcels of land and overall marketing and promotion;
- The preparation of an outline planning application for the whole allocation site or a process for the effective co-ordination and phasing of multiple applications that accord with the masterplan framework set out in this SPD;
- A consistent approach to the assessment of transport that starts with the vision for the site and then assesses the impacts on that basis, offsetting any impact with a range of agreed initiatives;
- The potential for community involvement through mechanisms such as a management company or community land trust (CLT).

This SPD has been prepared to assist a comprehensive approach to development and infrastructure across the whole site. A high level Infrastructure Delivery Plan and initial indicative phasing strategy and phasing principles are set out in the following sections to guide more detailed proposals.

East Cullompton Masterplan SPD

Phasing

Policy CU12 requires a phasing strategy for East Cullompton to ensure that development and infrastructure come forward in step. Phasing will be a critical factor in ensuring place quality and delivering the vision for East Cullompton. An effective phasing strategy will establish the opportunity for patterns of local living and sustainable travel from the beginning. In addition to the requirements of Policy CU12, the phasing and delivery strategy will be expected to demonstrate the following:

An immediate step away from a "business as usual", traffic-dominated environment to one that is genuinely pedestrian-friendly and has all the qualities of local living and village life built-in from the beginning building on the principles of the 20 minute place in each phase.

- All phases are required to contribute towards the delivery of mixed-use, walkable communities from the outset. It is expected that phases will be planned around existing, new and expanded mixed-use clusters around established existing places or hubs such as Fordmore Farm including small- scale flexible workspace or workshops , local shops and space for community activities. The loose farmstead-type arrangements of barns and outbuildings of these places is an important aspiration and key to developing a strong place identity and visitor experience that can help to ensure their long term success. These centres should be largely traffic-free and pedestrian priority.
- Priority must also be given to the early establishment of high quality, pedestrian-priority, public spaces in and around these hubs including community greens. This will help reinforce the sense of place and form the focus of village life from the start of the development.
- Street design through all areas of East Cullompton is planned to manage design speeds and avoid dominance of cars. The scale and width of new roads and streets is to be designed to slow or restrict traffic to create the intimate and people-friendly qualities of a village.
- Central to this will be the early transformation of the A373 Honiton Road. Early phases of development will happen on both sides of Honiton Road including development north and south of Fordmore Farm and the building of the primary school and crossing it must be made safe and convenient for everyone. This includes possible narrowing of the carriageway, and measures to improve the quality of the route for all users including pedestrian and cycle crossings.
- Early phases of development must make active travel, and shared transport links to existing workplaces at Kingsmill and include connections into the allocated employment sites.
- Phasing should emphasise a linear east – west orientation of development to ensure priority is always given to ensuring connectivity back to Cullompton and employment areas.
- The early delivery of strategic active travel and Bus/Demand Responsive Transport connections between East Cullompton and Cullompton and beyond the boundaries of the East Cullompton site allocation is also a top priority. These may need to cross a number of land ownerships and across the physical barriers of the Culm, the M5 and the railway. The proposed new station will be a critical destination. The precise location of routes will be dependent upon the continuing work on improvements to Jct 28 and potential new links over the M5.
- Multiple, simultaneous phases may be appropriate where they can demonstrate compliance with the requirements above with development emanating from multiple centres.
- Early delivery of strategic areas of open space with clear walking and cycling routes from areas of development.



East Cullompton Indicative Phase 1 and 2

Phases 1 and 2

Early phases are built around the mixed use community hubs, school site and associated Community Greens to build a sense of place and provide community facilities from the outset.

Complete active travel routes are delivered to connect back to employment areas and Cullompton. Honiton Road improvements delivered.

Commercial areas delivered in parallel.

Opportunities to deliver offsite landscape improvements to the Country Park and River Culm explored.

All infrastructure delivered in line with infrastructure delivery plan and Phasing and Delivery Strategy.

- Mixed use community hubs
- Residential
- School
- Green Infrastructure
- Active travel routes
- Commercial area delivered in parallel
- Country Park and landscape improvements to Culm river side
- Honiton Road improvements
- Access streets

N

East Cullompton Masterplan SPD



East Cullompton Subsequent Phases

Subsequent Phases

Further areas of development extend from Fordmore Farm with an east west orientation initially, strengthening links back to Cullompton.

Further areas of development are focussed and expand from around mixed use areas and community hubs.

Complete active travel routes are delivered to connect back to employment areas and Cullompton and between neighbourhoods.

Commercial areas delivered in parallel.

Opportunities to deliver off-site landscape improvements to the Country Park and River Culm explored.

All infrastructure delivered in line with infrastructure delivery plan and Phasing and Delivery Strategy.

- Mixed use community hubs
- Residential
- School
- Green Infrastructure
- Active travel routes
- Commercial area delivered in parallel
- Country Park and landscape improvements to Culm river side
- Honiton Road improvements
- Access streets

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East Cullompton Infrastructure Delivery Requirements

Highways and Accessibility

Infrastructure Requirement	SPD Position	Local Plan Policy	Timing	Mechanism
Capacity improvements at M5 Junction 28	Masterplan designed to work with options for J28 – sets design principles for active travel connections across J28 and safeguarded routes to provide connection	Policy CU8 Policy CU12	Informed by capacity studies completed to assess the impact of the traffic generated from the site - provision likely to be required after first 500 homes completed and delivery of the Town Centre Relief Road	Funded through a combination of developer contributions and public funding
Cullompton Town Centre Relief Road	Masterplan provides design principles and locations for active travel routes and connection to the Town Centre.	Policy CU12 Policy CU20	To be delivered first prior to new homes being completed	Funded through a combination of developer contributions and public funding
Local highway enhancements to ensure any traffic impacts are mitigated	Determined through transport assessment work but to include early works to improve Honiton Road and introduce traffic calming (particularly around Fordmore Farm) which forms a strong place function in the Masterplan.	Policy CU8 Policy CU20	Delivered in Phase 1 (to be defined in the agreed phasing and delivery strategy) and then in step with development	Developer contributions towards identified works.
Reopening Cullompton Railway Station	Active travel links and safeguarded routes across the M5 and J28 to access the railway station shown on Masterplan.	Policy CU8	MDDC intention for the Station to be operational by 2025	Funded through a combination of developer contributions and public funding
Provision of a network of streets linking to the existing highway network	Sets requirements in terms of location and hierarchy of street design and active travel connections.	Policy CU8	Deliver connection to Honiton Road in Phase 1 (to be defined in the agreed phasing and delivery strategy) and then in step with development	Developers to show how facilitating these connections and contribute to improvement works.
Safe and attractive cycle and pedestrian links to and from the town centre	Active travel links and safeguarded routes across the M5 and J28 to access the town centre shown on Masterplan.	Policy CU8	Deliver in early phases and in step with capacity improvements to Junction 28 (to be defined in the agreed phasing and delivery strategy) and then in step with development.	Funded by developer contributions / linked to public funding projects. Developers to demonstrate how proposals link to the active travel routes and principles set in the SPD
Safe and attractive pedestrian and cycle links to Kingsmill Industrial Estate	Early phases of development must make active travel, and shared transport links to existing workplaces at Kingsmill and include connections into the allocated employment sites. SPD sets design requirements for development adjacent to employment sites	Policy CU8	Complete active travel routes delivered to connect back to employment areas and Cullompton town centre in early phases (to be defined in the agreed phasing and delivery strategy).	Delivered by developer
Local and strategic bus service enhancements	The early delivery of strategic active travel and Bus/Demand Responsive Transport connections between East Cullompton and Cullompton and beyond the boundaries of the East Cullompton site allocation is a top priority.	Policy CU8 Policy CU20	Improvements in step with phased housing development	Funded by developer contributions/bus operator

East Cullompton Masterplan SPD

Housing

Infrastructure Requirement	SPD Position	Local Plan Policy	Timing	Mechanism
Affordable Housing - 28% To include 10 gypsy and traveller pitches as a minimum Affordable extra care housing will be required either as part of an extra care development or delivered separately.	Masterplan provide 72 hectares of land proposed for residential use, including market and affordable housing, serviced plots for self builders and gypsy and traveller pitches. Capable of delivering 2,600 homes at an average density of c. 35dph. Assumes limited residential uses will be incorporated in to the mixed use community hubs.	Policy CU7 Policy CU12	Trigger linked to market housing to ensure delivered together. Contribution within each phase of development and phased delivery linked to occupation.	Funded by developer – provision within each phase and to comply with policy target of 28% affordable housing, subject to viability
5% Self Build Plots	-	Policy CU7 Policy CU12	Provide all serviced self-build after strategic highways access to the site completed and operational.	Planning applications will be expected to include the 5% self-build plots and developers to identify plots for private sector purchase

East Cullompton Masterplan SPD

Commercial

Infrastructure Requirement	SPD Position	Local Plan Policy	Timing	Mechanism
20,000 square metres commercial floorspace within the plan period and a further 12,000 post 2033 To include a care home or retirement complex, appropriately scaled retail development and other suitable uses such as offices and a hotel or leisure development	Sets spatial and design principles for the delivery of new commercial floorspace adjacent to existing allocated employment areas and ensuring connectivity through these spaces to wider allocation site as well as to the Town Centre.	Policy CU7 Policy CU12	Provision of commercial development in step with housing, at a rate of at least 1 hectare per 500 occupied dwellings. Provision of active route connecting through these spaces to be safeguarded.	Phased provision of space and delivered by developer and offered to private sector

Community

Infrastructure Requirement	SPD Position	Local Plan Policy	Timing	Mechanism
Primary school (630 place or 2 schools) including early-years provision and children's centre service. SEN provision to be included.	Sets indicative location for the Primary School, as discussed with Devon County Council, to the south of Honiton Road and area of high accessibility, close to the proposed mixed-use areas. Will require early delivery.	Policy CU10 Policy CU12 Policy CU20	Transfer of serviced land at no cost to the County Council together with legal right of access for primary school(s) prior to the first occupation of residential development and contributions towards the build costs phased with development.	Funded by developer contributions
Contributions towards expansion of local secondary education facilities to meet needs arising.	-	Policy CU10 Policy CU20	In step with housing	Funded by developer contributions
Site of 2 hectares for a shopping and community centre, and the provision of a multi-purpose community building for youth, children and other community uses	Expected that phases will be planned around existing, new and expanded mixed-use clusters around established existing places or hubs such as Fordmore Farm including small- scale flexible workspace or workshops, local shops and space for community activities.	Policy CU10 Policy CU20	Delivery of mixed use local centre in Phase 1 (to be defined in the agreed phasing and delivery strategy) to build a sense of place. Then in step with future phases with development focused around community hubs.	Funded and delivered by developer
Contributions towards the expansion or improvement of local library services	-	Policy CU10 Policy CU20	In step with housing	Funded by developer contributions
Contribution towards sporting and leisure facilities	-	Policy CU10 Policy CU20	In step with housing	Funded by developer contributions
Contributions towards a new waste and recycling centre to serve Cullompton	-	Policy CU10 Policy CU20	In step with housing	Funded by developer contributions
Contribution towards expansion of emergency fire and rescue services	-	Policy CU20	In step with housing	Funded by developer contributions
Contribution towards healthcare and wellbeing facilities for Cullompton	-	Policy CU20	In step with housing	Funded by developer contributions

East Cullompton Masterplan SPD

Green Infrastructure

Infrastructure Requirement	SPD Position	Local Plan Policy	Timing	Mechanism
Provision of at least 40 hectares strategic green infrastructure and to deliver biodiversity net gain To include areas of equipped and laid out public open space, totalling: - 0.4 hectares of equipped children's play - 0.12 hectares for teenage facilities - 6 hectares amenity green space - 9 hectares of parks sports and recreation grounds - 1.5 hectares of allotments	Masterplan provides 46 hectares strategic green infrastructure. Masterplan provides space for: - 0.4 hectares of equipped children's play - 0.12 hectares for teenage facilities - 6 hectares amenity green space - 9 hectares of parks sports and recreation grounds - 1.5 hectares of allotments	Policy CU9 Policy CU12 Policy CU20	Early delivery of strategic areas of open space with clear walking and cycling routes from areas of development and delivered in step with development. Public open space provided at a rate of at least 1 hectare per 150 dwellings or phased to deliver a larger area of multi-functional public open space at a suitable stage in the development	Funded / provided by developer
A strategic landscaping and tree planting scheme to mitigate landscape impact, protect the setting of the Blackdown Hills Area of Outstanding Natural Beauty, and enhance biodiversity and the character of development	Sets Landscape Framework to use the existing cues in the landscape to frame interventions ensuring that new development is rooted in the existing qualities of the site and that incoming open spaces simultaneously provide multiple benefits to people, wildlife, and the environment informed by a natural capital approach.	Policy CU9	Scheme to be agreed prior to construction. Phased delivery as development comes forward	Funded / provided by developer. Principles to be agreed in site wide design code.
Appropriate provision of a sewerage system to serve the development and a strategically designed, and phased, Sustainable Urban Drainage Scheme to deal with all surface water	A high-level drainage strategy has been developed as part of the SPD. The principals of the strategy are to allow for rainwater storage on plot and then the remaining storage provided as a combination of network storage feeding into larger strategic storage elements as shown on Masterplan. Sets further principles in relation to detailed SuDS design.	Policy CU9	SuDS strategy to be developed as part of future planning applications, in accordance with the Strategic Flood Risk Assessment. Phased delivery as development comes forward.	Funded / provided by developers.

Carbon Reduction

Infrastructure Requirement	SPD Position	Local Plan Policy	Timing	Mechanism
Carbon Reduction and Low Emissions Strategies	To set clear principles around carbon reduction and framework as part of each planning application.	Policy CU11	To be submitted with each application for each phase. Phased delivery as development comes forward	Funded / delivered by developers. Also to be considered in Strategic Design Code to allow for spatial implications associated with decarbonisation (e.g. renewable energy solutions on site).



East Cullompton Masterplan SPD

SECTION SIX

GROWING EAST CULLOMPTON

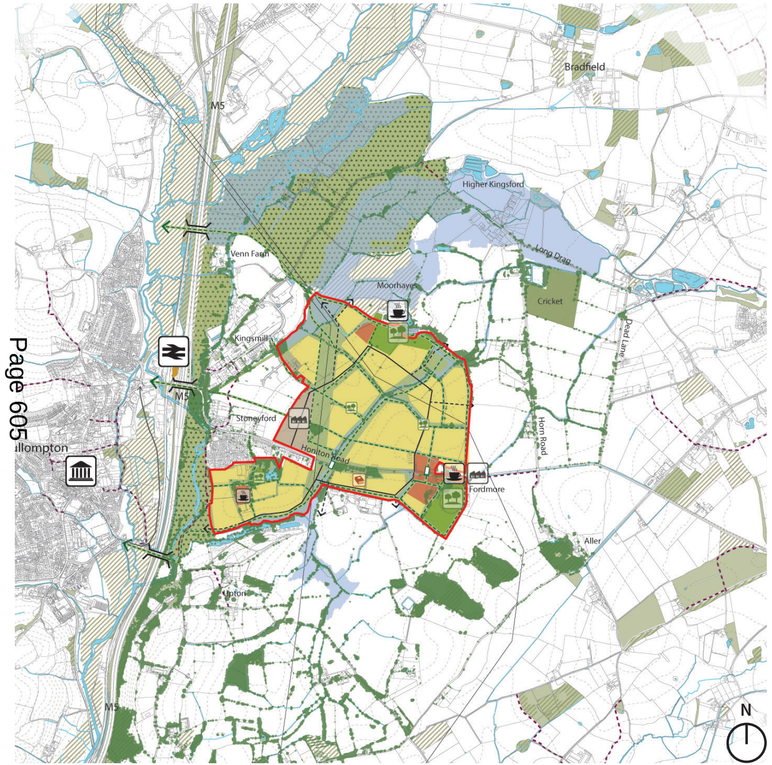
Developing a framework for the wider opportunity area

Activity

Landscape

Mobility

Placemaking



Simplified version of the East Cullompton Allocation Area Masterplan

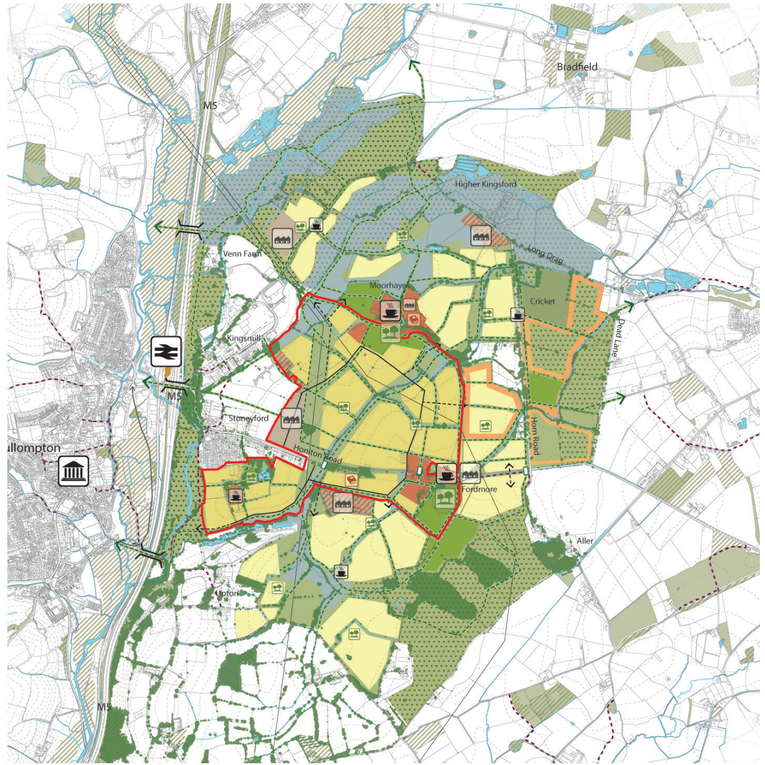
6.1 Developing a framework for the wider opportunity area

The Masterplan SPD for the East Cullompton Allocation has been developed alongside the exploration of a Masterplan which considers opportunities associated with the wider Culm Garden Village project.

The Masterplan and principles described in the previous section set out how the requirements of the Local Plan could be met at East Cullompton. The Masterplan demonstrates how multiple influences can be reconciled and brought together into a comprehensive plan without any further development associated with the wider Garden Village.

This section sets out how the principles defined within the allocation area for East Cullompton could be used to inform a model and framework for further growth to the east of Cullompton should the Garden Village project continue, without setting defined outcomes.

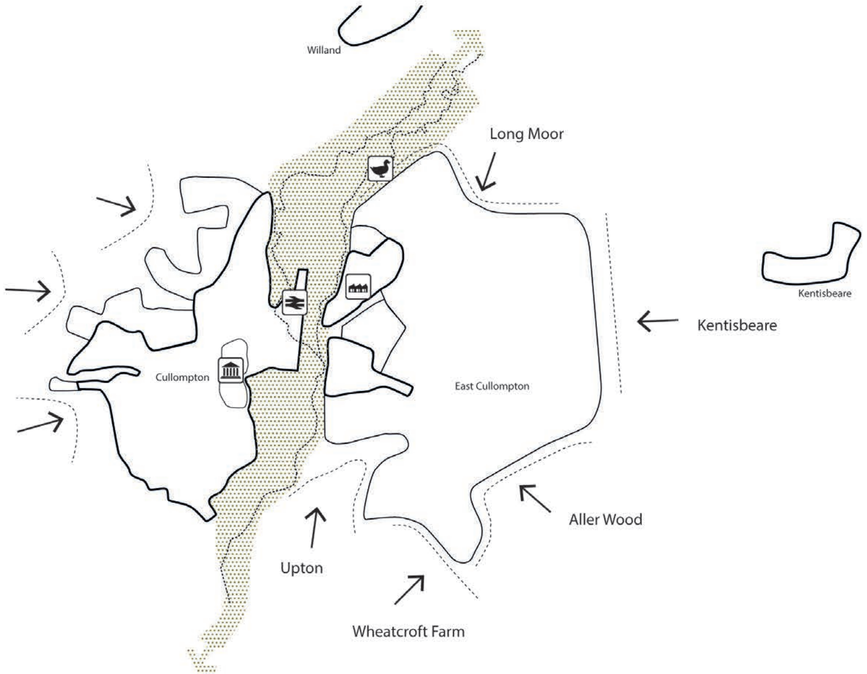
The opportunities set out for the wider Garden Village in this section are intended to provide a commentary and indicative arrangement only, further work will be required to define any proposals definitively through the Local Plan process.



A masterplan framework for the wider Culm Garden Village project

The plans presented in this section show one possible way that East Cullompton could grow in the future following the same placemaking principles established for the allocation area masterplan and is intended to be illustrative only.

- Allocation boundary
- Development area (allocation)
- Wider development area
- Mixed use areas
- Employment areas
- Primary School location
- Potential all through school location
- Strategic green infrastructure
- Indicative Country Park
- Tree canopy
- Neighbourood parks and sport
- PROW
- Active travel routes
- Potential bridge crossings
- Honiton Road crossings
- Main streets
- Surrounding priority habitats
- Local open space
- Community hubs



Influences defining the settlement extent of the Garden Village

Opportunities to explore in the wider Garden Village Masterplan informed by the East Cullompton Masterplan:

Defining the settlement extent

The overall extent of the Garden Village should always link strongly back to existing parts of Cullompton to support the aspiration for new development to feel as though it is a part of one town. The Garden Village should also continue to be organised around a primary infrastructure of open spaces, active travel routes, community hubs, employment and mixed-use community hubs. Residential areas should be planned to form an overall coherent structure of walkable communities clearly linked to the primary infrastructure. Retaining a compact form overall should be a priority to avoid peripheral areas becoming car dominated. Residential areas should continue to be brought forward in step with improved infrastructure, strategic open space and employment space to assist with shift away from a reliance on out-commuting.

The extent of the Garden Village should be driven by the natural capital opportunities defined below, should respect the landscape character of the area and the key influences at the edges of the site including:

Long Moor
An area of historic water meadows in the north that provides the setting for listed buildings and could become part of a large Country Park to serve new and existing parts of Cullompton and nearby villages. Landscape character, areas of flood constraint, priority habitats and opportunities for wetland and woodland planting should frame development extent and character to the north.

Horn Road
This area is characterised by large rectilinear fields, straight roads with verges and mature hedgerow trees that create a distinct ‘grand avenue’ feel. The objective of maintaining settlement separation from Kentisbeare and an appropriate settlement edge and transition to the open countryside around Horn Road has also been clearly stated through local consultation. The distinct linearity and rectangular layout could inform the identity and character of a new neighbourhood framed around new broadleaf planting, avenues and terraces, allowing retention of important trees and hedgerows to create a strong landscape to the eastern edge of the Garden Village.

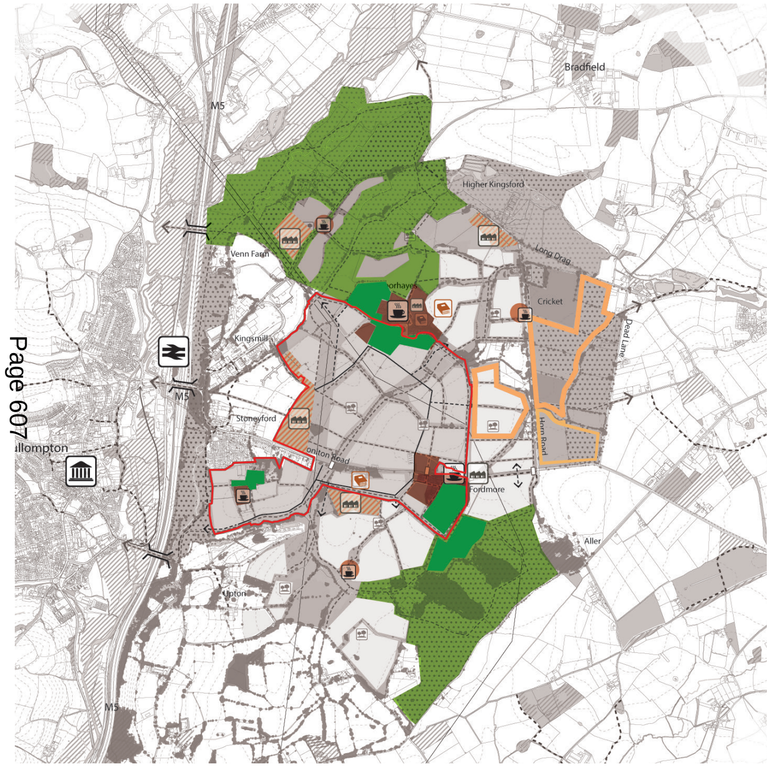
Aller Woods
The two ancient woodlands on the hillside to the southeast could be linked through new woodland and grassland areas offering recreation and productive woodland potential that would expand this important habitat. The Garden Village should maintain an appropriate set back from areas of woodland and the local ridge utilising existing lines of vegetation to define the edge of the Garden Village.

Wheatcroft Farm
Development should respect and avoid harming the character of the area around Wheatcroft Farm with an irregular medieval intact field pattern of ancient important hedges, veteran trees, and remnant traditional orchard which offer significant biodiversity and landscape value.

Upton
Use the landform of the local ridge at Upton to enclose the extent of the Garden Village. This is a pronounced and distinct ridge offering views east towards Blackdown Hills and intimate streamside landscape that provides the setting for Upton Lakes holiday lodges.

Residential Capacity

The capacity testing undertaken at this stage utilising these principles suggests a Garden Village of around 5000 homes is possible in this location at an average density of 35-40 dwellings per hectare. The final capacity will be developed through further testing and local consultation.



Land Use opportunities in the Wider Garden Village

Expanding the 20 minute place principle

The Land Use plan shows how the principle of building the community hubs around existing farm buildings could be expanded. The Wider Garden Village could include the further expansion of Fordmore Farm linked to a strategic area of open space or Country Park to the south around existing and extended blocks of woodland. In addition, the area around Moorhayes could be explored as an additional community hub to the north, reducing the walk distances. Moorhayes could mirror Fordmore in identity and form and incorporate similar community, retail and community spaces and also link to the potential Country Park to the north around the River Culm and Ken.

LEGEND:

- Allocation boundary
- Mixed use areas
- Employment areas
- Primary School location
- Potential all through school location
- Indicative Country Park
- Neighbourood parks and sport
- Community hubs

N

6.2 Activity

Opportunities to explore in the wider Garden Village Masterplan informed by the East Cullompton Masterplan:

Mixed Use Community Hubs

Explore the potential to expand Fordmore Farm centre further to the east along Honiton Road in a way which retains the character of this area.

- Explore the potential for the area around Moorhayes to expand to become more of a community focal point in the north taking equal significance and function to Fordmore in the wider Garden Village.
- The form of Fordmore and Moorhayes could mirror each other to the north and south of Honiton Road providing a mixed-use area of community buildings, workspace and shops in a strong landscape defined by the Community Greens with a direct connection out to the Country Parks to the north and the south.
- Further Community Hubs providing facilities like local shops, community meeting spaces and small scale workspaces should be explored to minimise walking distances anchored to other uses including schools and sports clubs.

Integrating Commercial Space

The original Garden Cities were based on a strong foundation of industry and employment. The TCPA's Garden Village principles include the need for a wide range of jobs within easy commuting distance of homes. Further integration of commercial and workspace will therefore be essential to the successful growth of East Cullompton into a larger Garden Village. Opportunities for new and expanded commercial and employment areas should be explored alongside any plans for a growing community.

- Further expansion and intensification of the industrial uses around Kingsmill and Stoneyford should be explored in the Wider Garden Village particularly in areas of high accessibility to the railway station and junction 28 of the M5. The area immediately around the station may offer some potential for intensification and incorporation of additional space.
- The potential to retain and expand existing employment clusters at Higher Kingsford and Aller Barton should be explored.
- The potential to incorporate further commercial and employment areas at Fordmore and Moorhayes community hubs should be explored.
- The potential to incorporate small scale workspace and work hubs within residential areas, with a particular focus around smaller scale community hubs should be explored.

Schools

The emerging education strategy for the wider Garden Village includes provision of an all-through education campus to include both primary and secondary provision alongside a further separate primary school.

- Plans for the wider Garden Village should determine the most appropriate location for the all-through school demonstrating a priority for walking, cycling and bus links to the school site.
- Potential to co-locate the all-through school with proposed sports clubs to the east of Horn Road should be explored.
- The potential to use the larger, all-through school site to establish an appropriate eastern edge to the Garden Village should be explored, avoiding a 'hard' urban edge to the Garden Village.
- The potential for a second primary school site near Moorhayes should be explored. A school in this location would reduce the walk distances to school sites from residential areas and would also support the creation of a secondary community hub in the area around Moorhayes and the proposed Country Park.



Landscape opportunities in the Wider Garden Village

6.3 Landscape

Opportunities to explore in the wider Garden Village Masterplan informed by the East Cullompton Masterplan:

Blueways

- Blueways could continue to provide a central organising feature of the Garden Village. The three Blueways established within the allocation area could extend through further development areas and beyond into the surrounding landscape. Additional Blueways could be established to the north and the south along additional existing watercourses. Blueways would continue to be a key connecting feature of the area and could provide attractive connections to, and effectively an expansion of, large open spaces and country parks to the edges of the Garden Village.
- Explore the potential to create a new watercourse to the north of Moorhayes providing a better defined water and drainage channels potentially reducing flood risk as well as providing a key placemaking feature in an expanding community hub at Moorhayes.
- Use the leat as a key placemaking and connecting feature through the larger Garden Village site.
- Potential for incorporating large wetlands or waterbodies could be explored in the County Park to the north of Moorhayes and in the low lying basin between Upton and Aller Barton.

Greenways and Loops

- The principle of the Greenways could continue, expanding connections and attractive active travel routes across the larger Garden Village area.
- The Eastern Loop established within the allocation area can become a green infrastructure corridor within the extended settlement area of the Garden Village with development on either side. A new Eastern Loop could be defined around the edge of the new Garden Village. The extended Eastern Loop can set the landscape edge of the Garden Village establishing the relationship to Kentisbeare and views of the Garden Village from the surrounding landscape.
- An extended Eastern Loop can provide a recreational route around the edge of the Garden Village, connecting to the planned Country Parks and providing interaction and potential connectivity into the open countryside.

Community Greens

- The Community Greens established at Fordmore and Moorhayes, at the edge of the allocation boundary could expand into the wider Garden Village area to serve a growing community.
- The Community Greens established at Fordmore and Moorhayes could be planned to link directly into the proposed County Park areas to the north and the south as part of a much larger open space resource.
- Additional, smaller Community Greens can be established as part of additional mixed-use areas within the wider Garden Village opportunity area providing local open space.
- Community Greens can continue to create a rural character and strong landscape structure as a key part of mixed use community hubs.

Sports Hub

- There is an opportunity in the wider Garden Village area to establish a sports hub that consolidates relocated sports clubs with playing pitches required as a result of the growing community. The sports hub would be located to the east of Horn Road around the proposed cricket club. Sports pitches would provide a good fit with the linearity of this landscape which is also relatively flat.
- A primary sports hub could work alongside smaller sports facilities within the Community Greens.
- Opportunities for co-locating the all-through school with the sports hub should also be explored to take advantage of the potential to share facilities.

Opportunities to explore in the wider Garden Village Masterplan informed by the East Cullompton Masterplan:

Country Parks

- In addition to the Proposed Country Park planned to the north around the River Culm, there is potential to establish a second Country Park to the South around the blocks of woodland near Aller. This Park could have a different character to the lower lying riverside park to the north with areas of parkland and additional areas of woodland planting connecting woodland blocks together.
- Explore the potential for other areas of strategic open space such as the Blueways and Greenways to connect in to the Country Parks to ensure habitat connectivity and to bring the benefit of naturalistic open space into development areas and throughout the Garden Village.

Flooding and Drainage

- The overall aim for the wider opportunity area will be to continue the main principles of the drainage strategy for the allocation area.
- Particularly in the north and south of the wider opportunity area, the ground levels are flatter than the allocation area and therefore larger single attenuation basins / ponds will be possible which can aid with development of strategic drainage areas and raises potential for permanent wet features such as water bodies and wetlands.
-
- Management of development levels, drainage and surface water flow paths will be key elements for managing flood risk in these areas which require agreement with the Environment Agency regarding how these features can interact with the existing floodplains and flow routes.

Natural Capital

Carbon

- Retain existing woodland, trees and hedges for carbon storage.
- Minimise disruption to soil from beneath hedges and trees and if disturbed, store as carefully as possible.
- Habitat improvements for increased carbon storage. Establish new areas of broadleaf woodland, wetland and grasslands with native species. The area marked **(1)** is identified as an area with particularly high potential for increased tree cover.

Habitats Grassland Features

- Retain existing grassland habitats where possible.
- Establish new grasslands including north south connectivity in area marked **(6)**.
- Incorporate grasslands, alongside additional tree planting, around existing woodland to the south in area marked **(2)** to enhance connectivity, biodiversity and carbon storage.

Habitats Woodland Features

- Retain existing features.
- Establish new areas of woodland planting including to the north in area marked **(3)**. Woodland features here would link the woodlands around Kingsmill to those around Bradfield. There is a synergy here with grassland and wetland networks, so woodland pasture, or marshy grassland would be beneficial.

Habitats Wetland Features

- Retain existing features.
- The vast majority of the area is an opportunity for new wetland features. Establishment / enhancement of wetland features in the north would help make the existing network bigger, better, and more joined up, whilst in the south would help in establishing new corridors.
- The area marked **(5)** is especially good for establishing wetland adjacent to existing wetland habitats, as part of the proposed Country Park. There is a synergy here with a potential for woodland creation, and also grassland creation as well. This means that wet woodland or wet grassland features would benefit these networks as well.
- Wetland features in area marked **(4)** would link the wetlands around Kingsmill to those around Higher Kingsford. There is a synergy here also with a potential for woodland creation, and also grassland creation as well. This area co-insides with the potential creation of a new watercourse to reduce flood risk.

Natural Flood Management

- Position SUDS features in areas of high infiltration and storage adjacent to existing watercourses.
- Include native deciduous tree. In particular, planting in areas marked **(A)** will benefit natural flood management and biodiversity of the area.

Water Quality

- Retain existing hedges and trees to break flow pathways to streams.
- Enhancing areas marked **(B)** with additional planting of native species of hedgerow and woodland would help break the connections between the land and the water courses to improve water quality.
- Establish native habitats and SUDS in area marked **(7)** to take advantage of soil conditions.

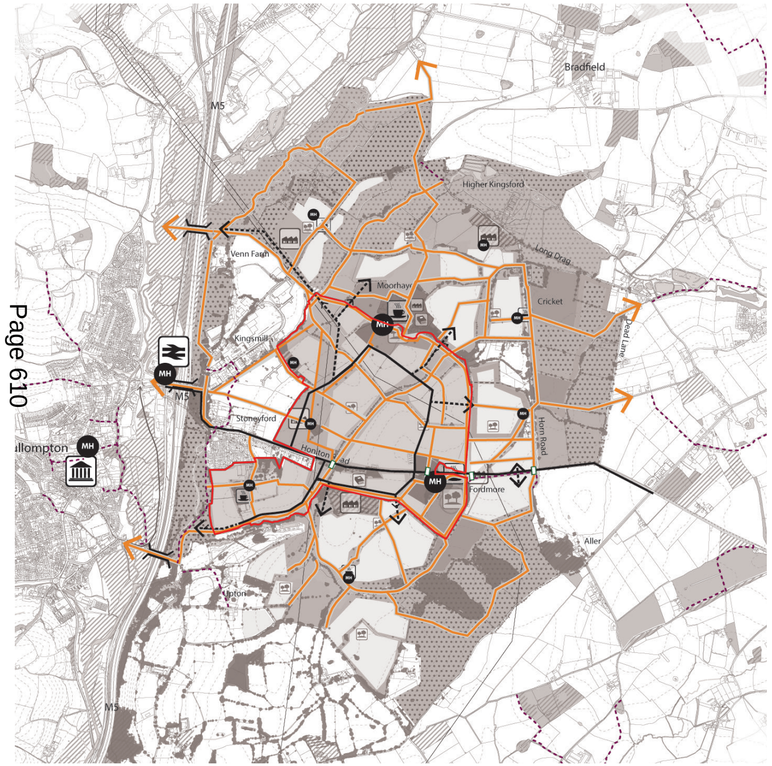
Urban cooling

Retain existing trees and woodland and establish new tree planting and areas of woodland.



Natural Capital and Ecosystem Services opportunities in the Wider Garden Village

East Cullompton Masterplan SPD



Mobility opportunities in the Wider Garden Village

East Cullompton Masterplan SPD

6.4 Mobility

Opportunities to explore in the wider Garden Village Masterplan informed by the East Cullompton Masterplan:

Active Travel

- Further active travel crossings of the M5 to the north, in addition to the central and southern crossing.
- The principle of a regular grid of active travel routes utilising Blueways and Greenways can be applied to the wider Garden Village opportunity. Additional routes should be planned that demonstrate connectivity to key destinations and how they can offer priority over use of private cars.
- Active travel routes can be planned to connect into existing public rights of way around Kentisbeare. Potential for an improved route to Willand should also be explored.

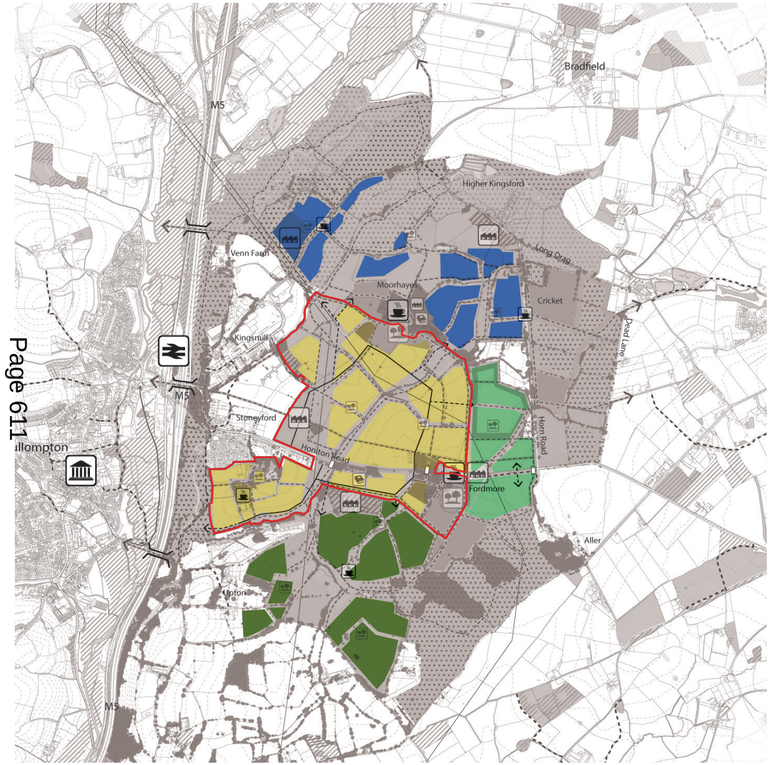
Street Hierarchy

- The Street hierarchy principles established as part of the East Cullompton allocation area can be applied to the Wider Garden Village.
- Proposals for the wider Garden Village should demonstrate how the primary street network can be effectively expanded to serve the larger development area without compromising the need for a clearly understood primary street network.
- Any improvements to Honiton Road should expand into the wider Garden Village area with additional crossings established to coincide with active travel routes.

Mobility Solutions

The mobility strategy for the site should evolve to embrace the innovation, new technology and new mobility solutions that may emerge as East Cullompton grows. A successful larger settlement can support a broader range of services and therefore greater levels of self containment. The mobility strategy should continue to be driven by the vision and issues such as parking standards and timing of infrastructure kept under review to support the overarching principles at East Cullompton.

Mobility hubs and public transport should continue to be planned following the principles from the allocation with a focus on key areas of activity and ensuring that more peripheral areas of the settlement, with longest walk distances, are well served.



Character Areas in the Wider Garden Village

6.5 Placemaking

Opportunities to explore in the wider Garden Village Masterplan informed by the East Cullompton Masterplan:

The placemaking and phasing principles established as part of the East Cullompton allocation area should continue to influence the character of the wider Garden Village with a review of lessons learned from early phases.

The potential to use the following influences to determine the layout of streets, spaces, and development parcels as well as materials and planting should be explored. These features can be used to define a four distinctive character areas to the Garden Village.

- The central character area of East Cullompton framed around the central Blueways and Fordmore Farm.
- The Water Meadows character area formed around the influence of lower lying, flatter areas to the north close to the River Culm, the Country Park and the greater presence of water.
- The Avenues character area framed around the longer, straight lanes, avenues and field patterns around Horn Road and Dead Lane emphasised in development areas to the east.
- The Woodland Character Area where the large blocks of woodland and the presence of mature trees in the area to the south of Fordmore Farm could define the character of development parcels and open spaces to the south.



Additional character influences in the wider Garden Village area

AUDIT COMMITTEE
24 JANUARY 2023

PROCUREMENT PARTNERSHIP

Cabinet Member(s): Cllr Bob Deed – Leader and Cabinet Member for Finance
Responsible Officer: Andrew Jarrett – Deputy Chief Executive (S151)

Reason for Report: To introduce the draft new Procurement Strategy covering the period 2023 to 2027.

Recommendation: Audit Committee are recommended to review the draft Procurement Strategy and recommend it for approval by Cabinet.

Financial Implications: Procurement is a critical element of service delivery, with strict regulations in place to ensure Value for Money is delivered. The Council spends multiple millions per year on goods, services and works.

Budget and Policy Framework: Procurement has a critical role to play in delivering strategic objectives, innovation and improving the overall quality of services delivered to the public.

Legal Implications: The Council must adhere to the EU Public Procurement Regulations for above threshold spend. Below threshold procurements will adhere to Public Procurement Notices and the Council's own financial regulations.

Risk Assessment: The EU Public Procurement Regulations are due to be replaced during this calendar year. There is a risk that this could outline different requirements which would necessitate an update to this Strategy.

Equality Impact Assessment: No implications arising from this report.

Relationship to Corporate Plan: Procurement has a critical role to play in delivering strategic objectives, innovation and improving the overall quality of services delivered to the public.

Impact on Climate Change: No direct implications arising from this report. However with the investment required, Procurement will be a key element in the delivery of climate change.

1.0 **Introduction/Background**

1.1 The current Procurement Strategy covered the period 2019 to 2022 and was a joint strategy adopted by the District Council's across Devon. Following MDDC joining in partnership with Devon County Council (DCC) it is more appropriate to align with Devon's strategy. Therefore this closely follows DCC's recently adopted strategy and sets out the procurement priorities for 2023 to 2027. The aim is to ensure that our procurement function is best able to support the Council and be compliant with all applicable legislative requirements.

2.0 **2023 – 2027 Procurement Strategy**

2.1 The proposed strategy is attached in Appendix 1.

2.2 MDDC's procurement approach is informed by the National Procurement Strategy and local influences such as the Council's Corporate Plan, Service Business Plans, local economy considerations and reinvestment, the wider supply market, the national procurement strategy and legislative framework.

2.3 The draft strategy covers a number of strategic themes. They interrelate as a balance of considerations, are not in order of priority nor are they exhaustive. These themes will be promoted across services through the procurement approach and performance will be monitored for continuous improvement.

2.4 In partnership with Devon Procurement Services this strategy will support the council to deliver high quality procurement that delivers value for money and is compliant with legislation.

3.0 **Conclusion**

3.1 It is recommended that Audit Committee recommend approval of the attached Strategy.

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Circulation of the Report: Cllr Bob Deeb, Cabinet, Leadership Team



Procurement Strategy 2023 – 2027

Mid Devon District Council

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Website: Information on all of our services is available at:
www.middevon.gov.uk

Foreword

Our Vision for Mid Devon
Through innovative and effective procurement and effective selection and management of third-party relationships, we will obtain best value on all goods and services required by the Council, which in turn makes a difference to our services and locality and helps make lives better.

At Mid Devon District Council, we recognise that our spend on the procurement of goods, works and services has a major impact on many aspects of life in the district. This includes the environment, social factors and local economic development. This can be particularly important to those local businesses and the voluntary and community sector which form part of our supply chain. Wherever it supports achieving the best value for money, we wish to encourage our local economy and work with our public, private and voluntary sector partners to deliver services.

In a post Brexit and Covid-19 world, we aim to stimulate our local economy and help local businesses work with the Authority through tender opportunities, and promote training/engagement opportunities to ensure our supply chain is ready to bid for work with the Authority and wider region.

This strategy covers all areas of Council third party expenditure, including capital expenditure and major projects such as the investment in high quality affordable housing and our commitment to become carbon neutral by 2030. It draws from the National Procurement strategy for Local Government in England and provides a local interpretation of key themes from a procurement perspective.

The Council's services are advised and supported by a procurement partnership with Devon County Council, and therefore this strategy and related policies align closely. We have access to a large, well-established and respected Procurement Team comprising of experienced, highly skilled and committed people across six relevant categories of service/expenditure.

Delivery of this strategy will be challenging for the Council, with fewer resources available and likely significant change to regulations following Brexit. However we are committed to delivering our objectives, providing high quality and sustainable services and creating an environment where communities and businesses can flourish and grow together.

Cllr Bob Deed
Cabinet Member for Financial Services

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Introduction

Welcome to Mid Devon District Council's procurement strategy for 2023 and beyond. The strategy complements the Local Government Association National Procurement Strategy, highlights a range of priorities for the Authority's procurement approach, and utilises the skills of the Devon Procurement Services to enable the Council's services to deliver high quality, mitigate risks and comply with public sector procurement legislation.

Procurement concerns the acquisition of all goods, works and services. The aim of this Procurement Strategy is to set a clear framework for procurement throughout the Council which reflects the Council's Corporate Plan and provides a framework for securing value for money within the regulations.

Procurement is a facilitator through which diverse considerations and objectives are drawn together to form a practical approach. This programme has been developed to support all areas of the Authority's activity in a joined-up way, bringing significant added value to our aim of providing the best possible service for Mid Devon's residents and communities.

Our procurement approach supports the organisation's core purpose and contributes to continual evolution. The procurement function is about far more than just competition and compliance; it is an expansive, value adding system which supports alignment of purpose and overall public value.

This procurement strategy links with the LGA National Procurement Strategy and brings together key considerations. This links into the Authority's wider objectives, many of which are highlighted within. Naturally as our landscape continually changes, the strategy will be updated periodically to reflect today's evolving environment.

The Authority Context

Mid Devon District Council serves a rural location covering an area of 353 square miles (914 km2) in the agricultural heartland of Devon, between Dartmoor, Exmoor and the Blackdown Hills. More than half the population of some 82,000 people is scattered in villages in the rural hinterland, with the balance divided between the three main towns of Tiverton, Cullompton and Crediton.

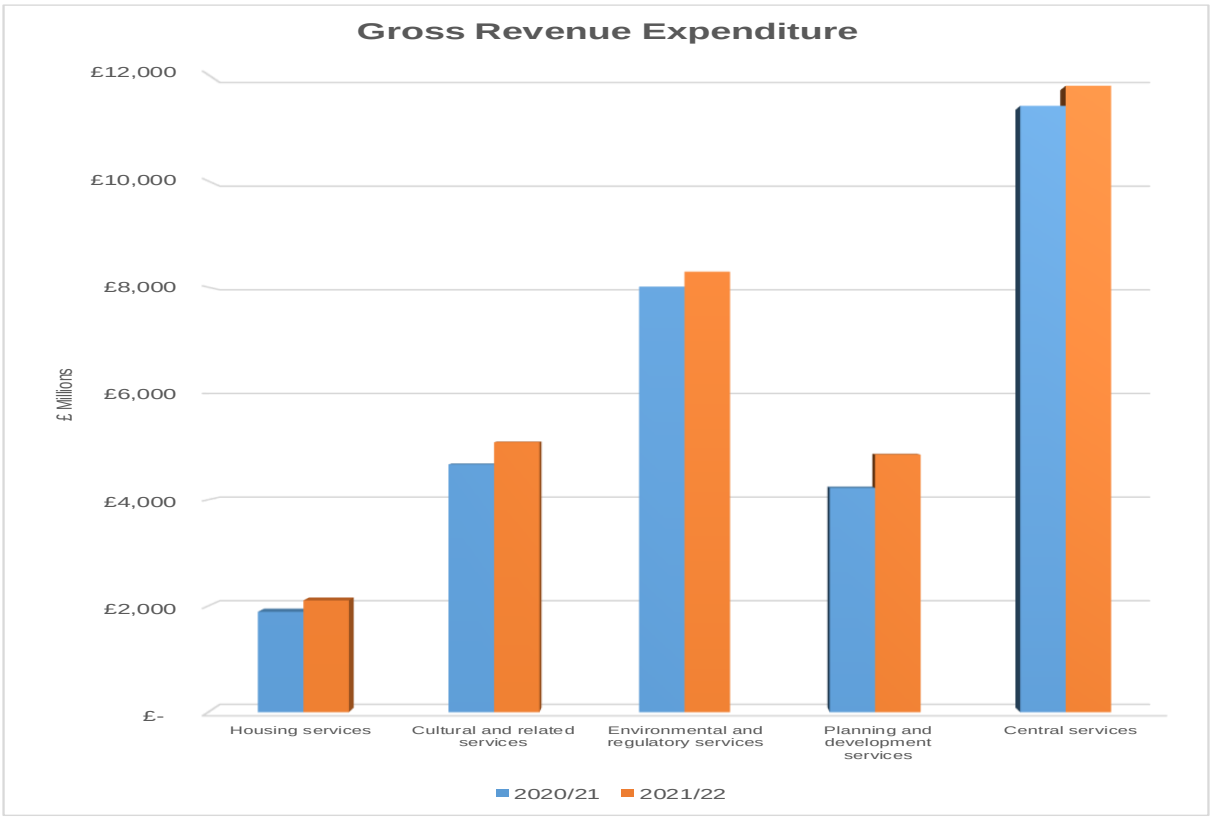
While it is the 23rd-largest district council in England by area, it is also the 34th-smallest by population. Our main offices lie to the north of the city of Exeter, one of the most rapidly expanding economies in the country, and as a district council Mid Devon has sought to maximise this opportunity by delivering quality growth in a high-quality environment.

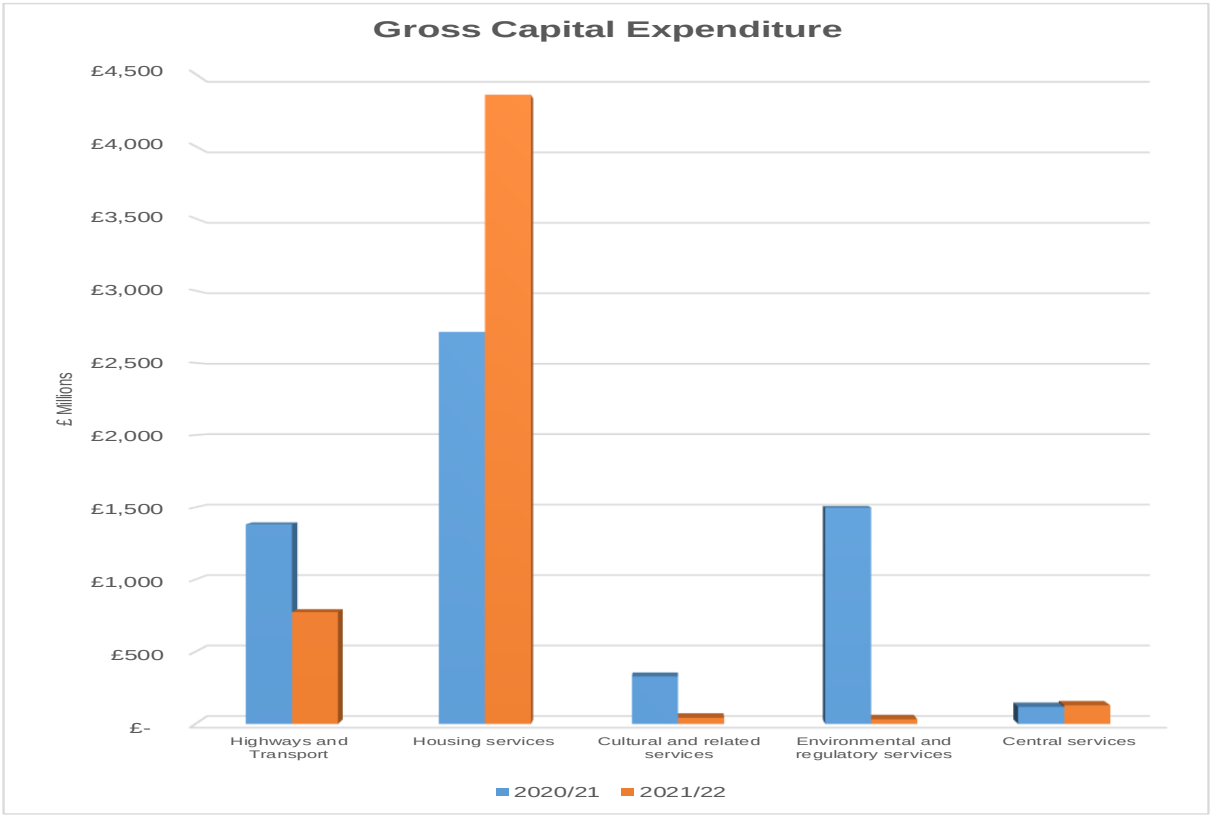
As a district council, we are responsible for providing services such as Housing, Leisure and Cultural services, Environmental and Regulatory services, Waste Collection and Planning Services. Also as a billing authority, we are also responsible for the collection and administration of Council Tax and Business Rates income on behalf of those that levy it.

The Council applies a variety of different service delivery models across its operations including an increasing number of Joint Ventures and partnership operations. This utilises single / multiple provider frameworks and contracts, use of small Lots, local, and sometimes regional frameworks.

Mid Devon District Council is a progressive council committed to providing high quality and sustainable services, creating an environment where communities and businesses can flourish and grow together.

The Council spends significant sums on delivering services for its communities and residents across its capital and revenue workstreams. The charts below illustrate the value of spend across various categories. Over the timeframe of this strategy, the Council will be investing in further quality social and affordable housing and in reducing our carbon footprint.


Gross Revenue Expenditure
£12,000
£10,000
£8,000
£6,000
£4,000
£2,000
£-
£ Millions
Housing services
Cultural and related services
Environmental and regulatory services
Planning and development services
Central services
2020/21
2021/22


Gross Capital Expenditure
£4,500
£4,000
£3,500
£3,000
£2,500
£2,000
£1,500
£1,000
£500
£-
£ Millions
Highways and Transport
Housing services
Cultural and related services
Environmental and regulatory services
Central services
2020/21
2021/22

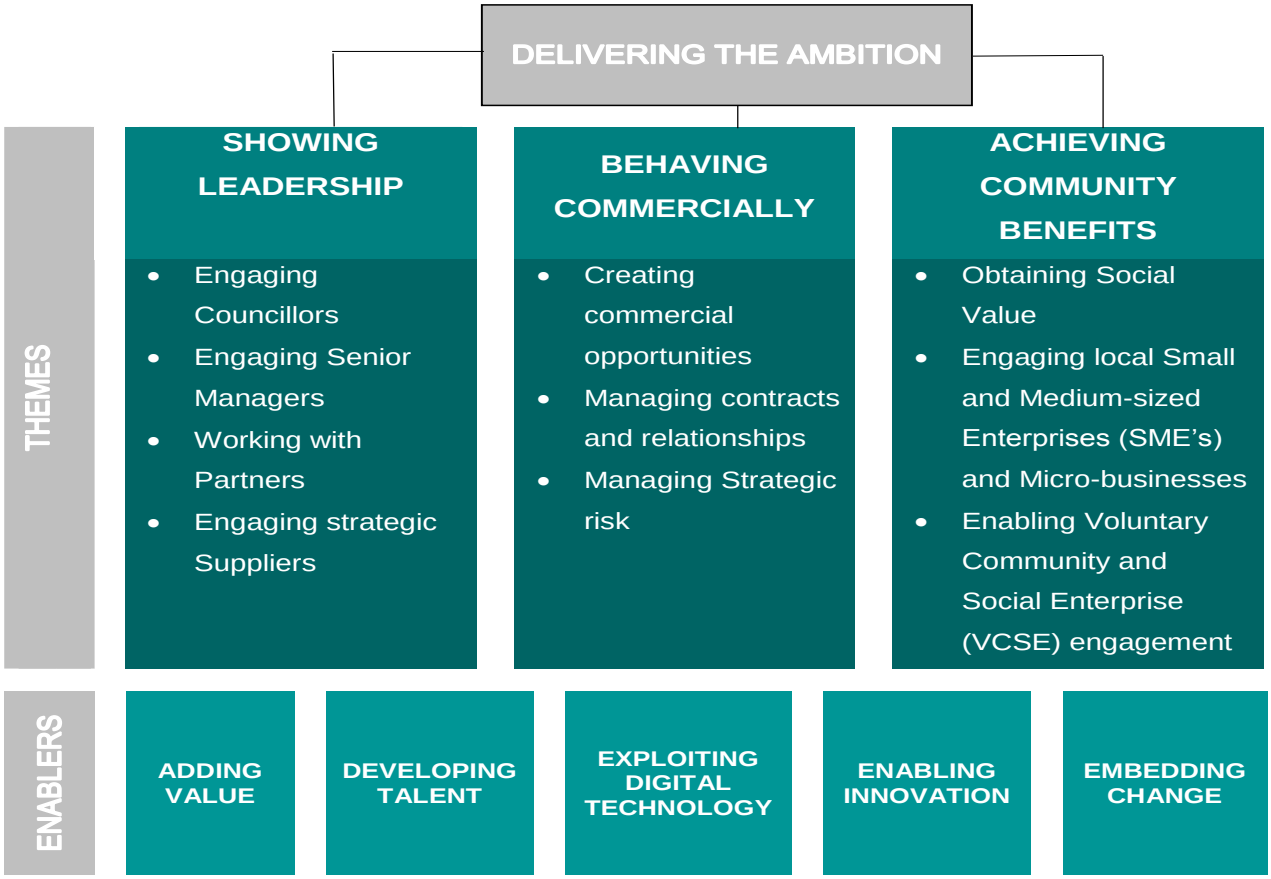
National Procurement Strategy for Local Government in England

The Local Government Association (LGA) has published the National Procurement Strategy for Local Government in England. The strategy outlines three Priority Themes and five 'Enablers' for Local Government procurement in coming years. [1]

The LGA national strategy highlights these themes and invites Authority's to develop their own approach linked to them. The strategy themes are illustrated below and are available via:

https://www.local.gov.uk/publications/national-procurement-strategy-local-government-england-2022

Mid Devon District Council's procurement strategy links these themes with local priorities, forming our procurement approach.



[1] Source: National Procurement Strategy for Local Government in England

Procurement Strategy

Below are the key procurement themes. The Authority's procurement strategy closely links these themes with local priorities, to form our overall procurement approach. The approach works in line with organisational objectives and the National Procurement Strategy, and will develop over time. These themes will be promoted across services through the procurement approach and performance will be monitored for continuous improvement.



Support Strategic Objectives



Procurement is an enabler which supports the Authority's objectives.

Our priorities include:

Procurement awareness

- Understand how procurement can help in the delivery of the Council's aims and objectives.
- Maintain excellent procurement links with the Authority's Senior Managers and Budget Holders.

Support future service design

- Early procurement involvement in service planning.
- Promote stakeholder input to support efficient and effective service design.
- Consult service providers to build supply market skills into service design.
- Support Service delivery and decision making.

Support daily activities

- Support daily operations across the Authority's business.
- Promote procurement support for public sector partnerships and income generation / cost recovery to support partners as appropriate.

Continuous learning

- Identify continuous learning opportunities and share knowledge widely.
- Undertake support and challenge to enable effective decisions.

Promote equality and diversity objectives

- Work with services to ensure equality and diversity considerations are central to the procurement approach, helping build a society where everybody can thrive.

KEY MESSAGE

Attuned to organisational strategy with an enabling procurement environment.

01 Promote procurement as an enabler to support the organisation's strategic objectives and daily operations.

02 Lead the Authority in a fair and proportionate procurement approach and enable monitoring through contract duration.

Global Climate Change



Mid Devon's climate declaration

Mid Devon's Climate Declaration is in place along with a Devon Climate Emergency Response Group. Relevant Procurement considerations are part of the Authority's Net Zero Action Group's (NZAG) responsibility which is working in response to the climate emergency.

This includes working with service providers to reduce the Authority's carbon footprint in line with developing commitments, as part of Mid Devon's Net Zero ambition. It will carefully consider specifications and standards alongside a total lifecycle approach to consider the long-term impact.

Procurement activity will underpin the Authority's climate emergency activities by supporting the sourcing of low carbon alternatives, renewable energy, waste management strategies and climate enhancement initiatives. We will work with services, communities, external partners and supply markets to show leadership, improve standards and enable investments which support environmental sustainability priorities and play our part in tackling the global climate emergency.

We will promote local service delivery, reduce road miles, help de-carbonise the supply chain and support opportunities for local supply in our procurement approach.

KEY MESSAGE

Our procurement approach will underpin the Authority's Climate Change Action Plan

01 We will proactively support procurement for climate emergency activity.

02 Work with services across the Authority to reduce the carbon footprint including supply chain carbon reductions.

Social Value



“Social Value drives everything”

Unlocking social value promotes the improvement of economic, social, and environmental wellbeing, and our work must prioritise the things that bring value. Our approach includes:

- Creating opportunities in line with the Social Value Act 2012.
- Implementing a social value matrix to maximise Social Value opportunities when planning procurement activity.
- Ensuring social value considerations are proportionate with the size, scope and nature of procurement activity.
- Working in line with good practice approaches such as the national social value framework.
- Ensuring Social Value is considered upfront in all procurement approaches as appropriate (e.g. quality criteria, specifications, design of route to market and contract evolution through its lifecycle).
- Social Value Championing ensuring wide engagement.
- Supporting local social value creation events.
- Promoting Social Value across all our collaborative procurement forums and contributing towards further development of shared social value frameworks with other local authorities.

KEY MESSAGE

Social value drives everything.

01 Our approach will prioritise the overall value ahead of the cost.

02 We will ensure Social Value considerations are built centrally into the planning of all procurement activity.

Prioritise Local Economic Development & SMEs



Mid Devon's organisational strategy emphasises local economic wellbeing. The Authority's Procurement Strategy aims to prioritise opportunities for local suppliers, Small and Medium-sized Enterprises (SMEs) and Voluntary Community and Social Enterprise (VCSE) when planning the procurement approach and that applying to do business with the Authority is as streamlined as possible.

We recognise that engaging local SME's and VCSE's is a powerful means to support the local economy. This brings a multiplier effect through which local service providers can upscale, create and sustain local jobs, invest in personnel, generate local economic growth, social stability, be agile and support innovation.

Service providers working within their localities bring an unrivalled appreciation of local considerations. Their contribution is tireless, and they are able to direct their operations in line with fast changing local priorities. We are mutually reliant on their success.

We recognise VCSE's can play a critical role in local communities and look to build suitable opportunities into our approach when planning procurements.

The Authority's approach includes:

- Applying an SME / VCSE engagement strategy for specific contracts, designing services at an appropriate scale to support engagement and attending local 'Meet the Buyer' events.
- Approaching the competitive process in a practical way, with procedures and templates proportionate to each procurement – with early market engagement, appropriate routes to market and small Lots.
- Promoting the 'Multiplier effect', whereby £1 spent locally is multiplied many times over through the local economy. As organisations gain turnover, they can upscale and invest, gain resilience and support sustainable services and communities.
- SME / VCSE use of e-procurement systems including a common system across local procurers.

- Using Dynamic Purchasing Systems to support SME engagement.
- Utilising VCSE sector for insights into local community requirements and support service design, with community engagement in service development.
- Building Social Value when planning all our procurements: consider breaking down opportunities into smaller lots, ensuring SME's and VCSE's have good opportunity to bid.
- Ensuring fair payment and other positive practices flow through the supply chain.
- Improve the monitoring of spend with local SME's/VCSE's.
- Considering how 'Tail spend' is managed and ensure it is not just the high profile spend areas which attract due attention.
- Recognise how local supply chains contribute to the Local Economic Multiplier effect.

KEY MESSAGE

Local supply is key for sustainable services and economic wellbeing. We will promote opportunities for local community and partnership engagement.

01 Ensure wherever possible we create opportunities for small to medium-sized enterprises and the voluntary/ community sector.

02 Promote and prioritise local economic development across our procurement engagement and delivery.

03 Ensure we are easy to do business with and always take a proportionate approach.



Client of Choice,

Service providers have choices around which clients to prioritise, and to secure the best outcomes for the people of Mid Devon our approach must enable us to be client of choice.

This includes being practical and consistent in our approach, transparent and diligent and communicating well. This requires early planning, market communications, risk allocation, meeting our commitments and holding to our principles.

We plan procurements to accommodate SME's and VCSE's, use small Lots as appropriate and build contracts of sensible scale. Supporting measures include prompt payment, avoiding onerous contract terms, meeting our timescales, good implementation planning and quality relationship management.



Ease of Doing Business

Procurement can sometimes feel complex due to many competing priorities. Therefore, we take a proportionate approach and work transparently.

Working with the SW Regional Procurement Board we support the uptake of e-tendering. This ensures our suppliers have a common system to embrace opportunities from SW public bodies, as a joined up supply side experience which promotes ease of doing business.



Transparency

Mid Devon District Council works transparently. We ensure our operations are well structured, logical and predictable, and that our procurement procedures are transparent, practical and easy to engage with.

The Authority supports the transparency regime and publishes details of all spending over £500 via this link:

Payments to suppliers - MIDDEVON.GOV.UK

The team supports information enquiries from the public, many of which link to MDDC's contractual arrangements, a link to the Authority's published Access to information responses can be found here:

Access to information - MIDDEVON.GOV.UK

Our contract register and opportunities to work with us can be found here:

Current contract opportunities - MIDDEVON.GOV.UK

KEY MESSAGE

We will be a client of choice. In meeting our obligations, we prioritise purpose over process.

01 Openness, transparency, fairness, sustainability, resilience, equality and democracy

Contract Management and Performance Regime

Contract management is vital to service performance. It supports overall service quality, value for money, promotes continual innovation, agility and flexibility, supports early intervention and encourages collaborative service development.

As the Authority's financial resources are stretched ever further, the importance of contract management grows. This requires clear objectives and measurement of what's important to people. We take a proportionate approach to contract management ensuring considerations of strategic, political and citizen importance are within the performance regime.

Contract management focuses service delivery on quality performance, making efficiencies and achieving cost reductions, increasing social value opportunities, decreasing environmental footprint, mitigating risks, increasing resilience and harnessing continuous innovation and change.

Our priorities for contract management include:

01 Working with strategic suppliers via supplier relationship management.

02 Collaborative framework management and focus sessions.

03 Promoting supply chain opportunities through 'Meet the Buyer' events.



04 Performance monitoring of suppliers. Measures include financial resilience, service quality and continuity, modern slavery, carbon footprint and early problem resolution. Ensuring all parties are held mutually to account.

05 Sharing supply side intelligence with partners to support joined up public service.

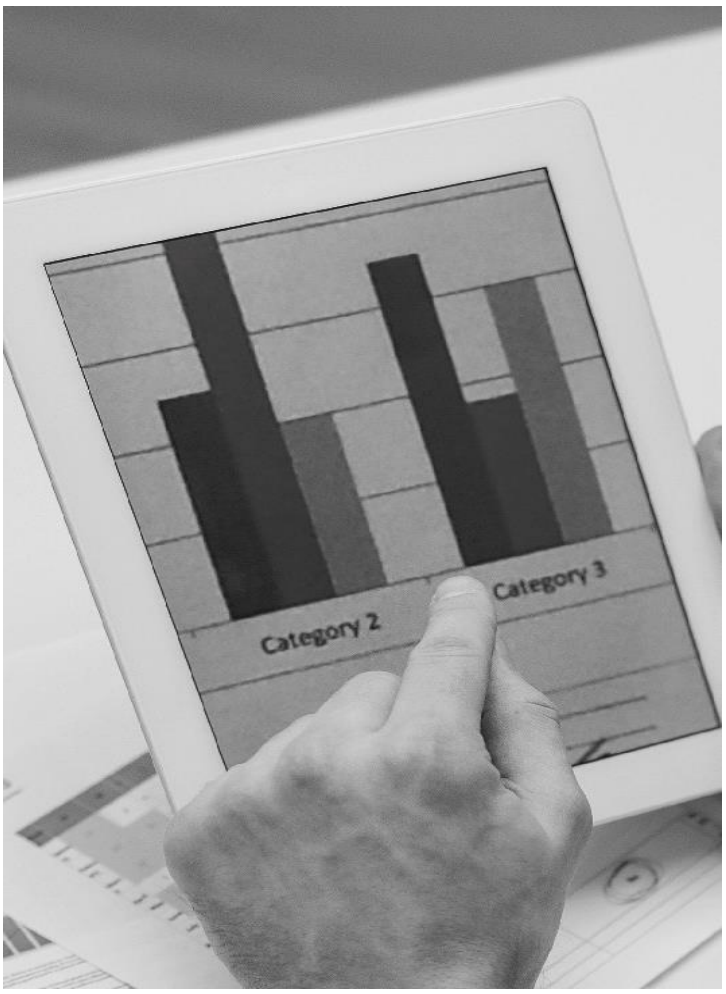
06 Enabling services to fulfil governance and control over provider performance through good measurement and reporting. Ongoing performance reviews and meetings.

07 Promoting visibility of potential risks and ability to mitigate these to avoid underperformance / disaster with early intervention (e.g. inclusion of "Termination on Insolvency, Change of Control, and Breach of Warranties" clause)

08 Understanding market development opportunities, innovation and value creation; ensure contract agility and continual development

09 Post contract review meetings and lessons learned sessions including exit strategy

10 Maintaining the contracts register and supporting services in identifying procurement risks and opportunities.



KEY MESSAGE

We need to understand what's important to people.

01 Support services to develop contractual arrangements that facilitate effective contractual relations.

Value for Money and Benefits Realisation

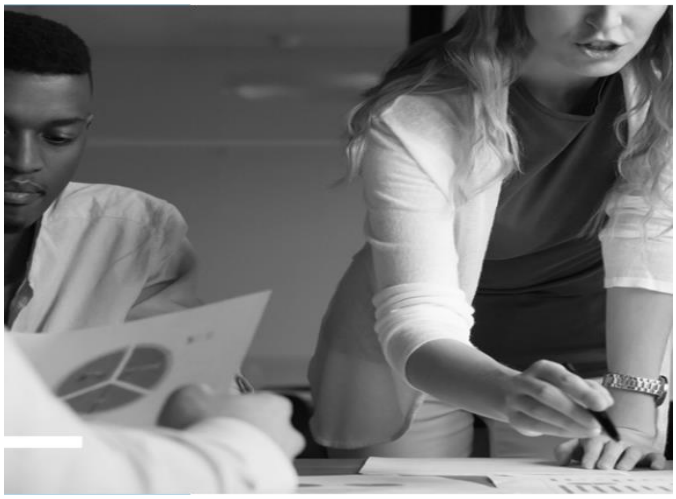
Our services prioritise value for money and our supply competitions include specific criteria which identify the critical success factors for each opportunity. We optimise the performance of our contracts and prioritise value for the people of Mid Devon. We promote service quality and lifecycle value with performance, sustainability and longevity in mind.

Procurement activity requires the highest standards of probity, transparency and fair competition. This includes adherence to the Authority's Code of Business Conduct and strategic procurement good practice and operating procedures.

Further details can be found in the procurement documents we publish for each competitive process and the wider considerations outlined in this strategy.



Commercialisation and Working Efficiently



As government funding changes, we increasingly rely on sustainable models which promote service outcomes in the best possible way. This includes the following approaches:

- Income generating / cost recovery through procurement services for other public bodies.
- Developing ideas for further cost reductions and revenue generation opportunities.
- Maximising commercial attractiveness by aggregating requirements if appropriate.
- Bringing innovative ideas for service delivery (e.g. creation of trading services).
- Utilising frameworks and dynamic purchasing systems for operational efficiency.
- Engaging and researching the market for up-to-date intelligence.
- Developing documentation for each competition to ensure opportunities are attractive for the market and include innovation and value creation.

KEY MESSAGE

Value is at the centre of everything we do.

01 We will consider income generation / cost recovery opportunities with a good organisational fit, which enable us to support partners and promote joined up public services.

02 Investing in our team will enable us to support our own financial sustainability, continuously develop our skills base and maintain our strategic procurement offer.

Risk Appetite and Risk Management



The Authority has complex services for which innovation and transformation comes as standard, which requires risk appetite to pursue our objectives. This demands balance between the benefits of innovation and the risks this can carry.

Risk management is important to our activities and is part of good governance. Risks are identified and made transparent, with mitigations considered and implemented within the contract management approach. This also requires that risks are appropriately apportioned through our contracts and sit with whichever risk owners are best placed to manage them.

This ensures service providers do not take on inappropriate risk and then build risk allocations into their proposals; we can then provide better assurance and reduce costs in the system.

Our approach includes the following:

- Procurement and Services collaboratively designing contract specifications to include risk identification and mitigation – for example supplier resilience and business continuity.
- Identifying risk ownership and mitigation assurance.
- Reporting and monitoring of suppliers' input and responsibilities.
- Developing and applying suitable terms and conditions for contracts.
- An appetite for innovation.
- External environment monitoring and identifying risk implication and mitigation in relation to strategic contracts.

KEY MESSAGE

We need a proportionate approach to risk and will maintain a responsible risk appraisal process.

01 Procurement will support risk appraisal areas and help identify appropriate ownership and mitigation of risk amongst stakeholders.

02 We will create an environment of opportunity and promote innovation.

Workforce Skills Development



We rely on the skills of our people and all those we work with to run our activities with professionalism, diligence, knowledge, open mindedness, and leadership. We are committed to continual professional development. Through collaboration we have access to procurement professionals who bring unique skillsets, expertise, technical knowledge and offer peer challenge and support.

We aim for high quality procurement support at all times. This requires continuous development of skills, and competencies, diversity, broad exposure to experience and learning, and cross functional working with services and market areas for knowledge development. This brings exposure to diverse experiences, formal professional development and links to industry forums, partnerships and learning events.

We invest in skills development to evolve our service, improve resilience and link back to our purpose of supporting Mid Devon's communities by providing high quality public service.

We value and embrace diversity at the heart of what we do.

This includes:

- Linking with HR strategy to encourage workforce development and diverse experiences.
- Identifying leadership / career development opportunities.
- Promoting a management and mentoring approach.
- Cross-matrix working.
- Utilising the apprenticeship programme and opportunities for wider staff development.

KEY MESSAGE

We invest in our team for continual learning, embrace autonomy and shared purpose.

01 Apply a workforce strategy which supports and enables professionals to continually develop their knowledge and make ever greater contributions. Ensure personal accountability and continual learning help.

02 We will continuously review opportunities to help our services be more efficient, effective and smart.

Working with Partners



Our procurement philosophy is a "one team" approach working with networks to ensure resources are applied efficiently, needs are understood, knowledge is shared, and innovative solutions are implemented.

We encourage early stakeholder involvement and recognise the value in service co-design, consultation, and working together. We promote early engagement, collaboration, collective intellect and partnership, and recognise that competition can in some cases risk driving out co-operation in service design.

We engage with other local public bodies to uncover benefits which can be derived through collaboration. We also look to community groups, service providers and reference groups to build intelligence and local service knowledge into the planned approach.

We see advantages of a collaborative approach being:

- The avoidance of duplication of effort/resources and working in silos, fostering cooperation across services and with external partners.
- Joined up planning and budgeting processes.
- Strong cross-organisational governance structures
- A cross service project management approach and shared support/resources.
- Greater economies of scale and cost savings

KEY MESSAGE

We promote collaborations and partnerships which are greater than the sum of the parts.

01 We will look to the big picture in supporting relationships, and consider whether competition or collaboration is the best approach.

Digital Transformation



The Authority's strategic procurement system is closely aligned with the digital agenda, working across all our markets to seek opportunities through digital access, using innovation to facilitate change.

Procurement is a facilitator of change. It supports the Authority's digital ambitions in identifying opportunities for digital change, harnessing opportunities from specialist and innovative service providers.

We will support digital transformation and modernisation opportunities across the Authority, partners, stakeholders and service users to improve quality outcomes, promote wellbeing and efficiency. We will improve citizen experiences, support fitness for the future and transformational change.

Digital opportunities through the procurement approach include:

- Supporting service re-design;
- Enabling agile working and flexibility; and
- Increasing efficiency through use of better devices, hardware and software systems.

Cloud commissioning / remote hosting approach:

- Supporting better IT infrastructure;
- Using Data & Business Intelligence;
- Maximising benefit created through technology;
- Innovating; and
- Working to modern e-Government standards including Cyber Security and Information Governance.

KEY MESSAGE

We will support digital transformation throughout services, reduce waste, automate, digitalise, innovate, transform, simplify and streamline. Ensuring the local community and efficiency is at the heart of what we do.

01 We will seek opportunities for digital transformation across all service areas to improve all areas of our overall public service.

Utilise the Legal Framework to Best Effect

We apply the legal framework in an enabling manner which allows us to work fairly, transparently and consistently. Considerations include:

- Common appreciation of legal considerations Authority wide.
- Staying continuously up to date with the developing public sector legal framework.
- Modern Slavery measures and compliance checks.
- Innovation and consistent approach.
- Information Governance and GDPR measures and compliance checks – collaboration with the Information Governance team.
- Assisting internal stakeholders and external partners in procurement compliance.
- Ensuring ethical trading standards are supported by the supply chain.
- Working within the Authority's Equality and Diversity Policy.
- Considering opportunities available through legislative change such as BREXIT.
- Counter fraud measures and awareness of procurement fraud risk.

United Against Modern Slavery

We are united against Modern Slavery and Mid Devon's Modern Slavery statement is available here:

Modern Slavery and Human Trafficking Statement 2021-2022 - MIDDEVON.GOV.UK

As part of the SW Procurement Board we have a joint approach in which all its members stand united in our commitment to positively contribute to both influencing and supporting the National Procurement agenda across the public sector. We aim to do this by providing a strategic voice with links into national policy, best practice and emerging changes to commissioning, procurement and supplier relationship management.

We can all make a difference.



KEY MESSAGE

We apply the legal framework in an enabling manner and maximise opportunities from legislative change.

We are united against all aspects of Modern Slavery and will take a unified approach with regional partners.

01 We will apply the legal framework to ensure our operations are consistent, practical, innovative and legally compliant.
02 Ensure our procurement practises are compliant with all relevant legislation and reflect the latest best practises resulting from case law.
03 Work across the Authority and the SW Procurement Board to raise the profile and bring attention to this area.
04 Undertake supplier assessments and focus reviews to uncover and eliminate slavery from our supply chains and all areas of activity.

Website: www.middevon.gov.uk

Email: Procurementoffice@middevon.gov.uk



HOMES POLICY DEVELOPMENT GROUP
17 JANUARY 2023

PRIVATE SECTOR HOUSING ASSISTANCE POLICY UPDATE

Cabinet Member(s): Councillor Stuart Penny, Cabinet Member for Housing

Responsible Officer: Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing

Reason for Report: To present a revised Housing Assistance Policy under Article 4 of the Regulatory Reform (Housing Assistance) (England and Wales) Order 2002, following a review of the current Housing Assistance Policy 2019-22.

Recommendation:

1. **That Cabinet approve the revised Housing Assistance Policy 2022-2025 attached in Annex A.**

2. **That delegated authority is given to the Corporate Manager for Public Health, Regulation and Housing, in consultation with the Cabinet Member for Housing, to make minor adjustments to the policy based on demand and local priorities.**

3. **That delegated authority is given to the Corporate Manager for Public Health, Regulation and Housing, in consultation with the Cabinet Member for Housing, to suspend some or all non-mandatory parts of the revised Housing Assistance Policy attached in Annex A (all elements of the Policy other than Section 4 Mandatory Disabled Facilities Grants) if adequate funding is not available.**

Financial Implications: Part One of the revised policy relates to the mandatory and discretionary assistance to be provided utilising the Better Care Fund (BCF). The Better Care Fund is an annual allocation from Government that is awarded to Devon County Council (DCC). DCC are then responsible for allocating funding to the District Council to deliver the mandatory disabled facilities grant programme. Government publish the DFG allocation for each Local Housing Authority and DCC are required to transfer that funding to the district by 30th June. In Devon a local agreement is in place that allocates the overall BCF pot on a needs basis. In 2022/23 the Government allocation for Mid Devon was £817,853 but under the local agreement our share of the Devon pot was £1,173,079. The Government allocation of BCF is expected to remain stable for the next three years.

Part Two of the revised policy relates to local assistance that utilises the Council's available Rough Sleeping Initiative (RSI) funding and the Homelessness Prevention Grant. For the first time we have put in policy the types of assistance we will provide – subject to funding – to prevent homelessness and rough sleeping. The RSI allocation of £345,076 is for three years until 2025. Financial assistance was identified as part of the bid with an award of £17,000 per year towards this. The Homelessness Prevention Grant is an annual allocation from Government to assist with the delivery of our services to tackle homelessness and in 2022/23 this was £197,431. There is no specified amount that should be used on grants but the funding is to be used to deliver

homelessness prevention activities, including staff time, accommodation costs and the assistance in this policy. By providing these small grants the aim is to reduce the need for Bed and Breakfast (B&B) accommodation and the burden this places on the Council's budgets.

In addition to directly funding the grants and loans set out in the policy, the Council applies provision under both BCF and RSI to use these (locally held) funds to cover staff delivery costs. Consequently, all parts of the policy and its delivery are funded through external and ring-fenced mechanisms with the control to suspend discretionary grant elements if budget funding comes under pressure as set out in Recommendation 3.

Budget and Policy Framework: As detailed above all the discretionary assistance in the policy is subject to external funding being available. The policy makes it clear throughout that assistance is only available whilst funding is in place. In terms of policy framework, the policy seeks to deliver some of the ambitions and priorities set out in the Housing Strategy 2021-25, in particular Chapter 3 (Making the most of our existing homes) and Objectives 36-38. In addition, there are legal reasons for having a policy in place as set out below.

Legal Implications: The Council must have an up to date and relevant Housing Assistance Policy under Article 4 of the Regulatory Reform (Housing Assistance) (England and Wales) Order 2002 in order to provide different types of discretionary housing assistance other than the mandatory disabled facilities grant (DFG).

Risk Assessment: Not having a relevant policy means that the Council would be unable to utilise the BCF for anything other than the mandatory DFG. This would have an impact on the Councils ability to meet housing priorities and help vulnerable households across the district. This could lead to increased homelessness; a greater number of accidents in the home; an increase in admissions to hospital and care; and bed blocking in local hospitals.

Equality Impact Assessment: An updated equality impact assessment has been undertaken in respect of the revised policy. No equality issues have been identified within the policy and none have arisen to date as a result of its previous implementation. The Public Sector Equality Duty will apply to decisions made under this policy. The assessment can be seen in Annex B.

Relationship to Corporate Plan: The Housing Assistance Policy has a direct relationship with all four priorities in the Corporate Plan 2020-24.

Under the Homes priority the policy contributes towards the improvement of existing housing stock and reducing homelessness, as well as working with private landlords. Under the Environment priority the policy aims to improve energy efficiency of homes through supporting retrofit schemes. In respect of Economy the policy aims to help people remain in their own homes and reduce the impact on local services. For Community, the policy promotes integrated approaches to health and wellbeing, addresses disparities in the community, and aims to prevent unnecessary hospital admissions due to accidents in the home.

Impact on Climate Change: Although not directly relevant to climate change the policy does aim to help improve the energy efficiency of homes through retrofitting measures where appropriate to do so.

1. Introduction/Background

1.1 In 2015 the Government introduced the Better Care Fund (BCF) with an aim to bring health and social care together in an integrated way. The fund is a combination of government funding from the Department of Health and the Department for Levelling Up, Housing and Communities and includes the grant allocation for Disabled Facilities Grants (DFG).

1.2 The change in funding has allowed Devon District Councils in partnership with Devon County Council to deliver more innovative approaches to meet the needs of local residents beyond the DFG.

1.3 In 2018, the first Devon Wide Housing Assistance Policy was adopted and following a review of the first year was expanded to provide more flexible assistance. The current policy was adopted in 2019-2022 and following a more detailed review this year has resulted in the policy being enhanced further.

1.4 The review has been undertaken in consultation with the other District Councils and Devon County Council. As part of the process the group has considered a range of criteria including:

- Local demand;
- Frequently requested types of work;
- Use of the Exceptions to the policy section;
- The increase in the cost of materials and labour;
- Affordability in respect of the cost of living crisis;
- Grant maximums;
- Local priorities;
- Issues that have fallen outside of the policy that we would like to address

1.5 In addition to the county wide review relating to the BCF it was agreed that the Policy would be split into two parts to allow for locally funded assistance that falls outside of the BCF.

1.6 For Mid Devon this means that Part Two of the policy focusses on assistance to prevent homelessness and rough sleeping by utilising external funding such as the Rough Sleeper Initiative fund and the Homelessness Prevention Grant.

2. Scope of the Policy

2.1 The Policy is presented as two parts; Part One covers the Devon wide assistance covered by the BCF, whilst Part Two focusses on local assistance that falls outside the scope of the BCF.

2.2 All the discretionary assistance in this policy is subject to available funding, and could be withdrawn at any time. However, the Council has a mandatory duty to provide Disabled Facilities grants (DFG) and therefore, in the event that there

is an issue with funding, priority must be given to the delivery of the DFG programme.

3. Summary of Part One of the Policy

Mandatory Disabled Facilities Grant (DFG)

3.1 The delivery of the Disabled Facilities Grant programme is mandatory and a statutory function of the local housing authority. The delivery of this function is governed by the Housing Grants, Construction and Regeneration Act 1996.

Stair Lift Grant

3.2 This grant provides internal and external straight track or curved track stair lifts, step lifts and through-floor lifts without a means test for the applicant.

3.3 The review of the policy has shown that providing a lift can prevent accidents in the home and often is the only adaptation needed. By removing the means test, the grant can be processed quickly and the lift installed within a few weeks.

3.4 Over 50% of lifts are installed within 8 weeks of the customer being referred to us. Where this has taken longer, it is likely that a bespoke lift has had to be manufactured or there are complexities in the case that mean it is not straight forward.

3.5 Compared to the time frame to complete a DFG application and associated works this is a much more efficient approach for the customer and allows to help more people in the community.

Bathroom Adaptation Grant

3.6 This is a new grant that has been added to the policy as a result of the review.

3.7 The grant provides level access showers, automatic wash-dry WCs and other bathroom adaptations and/or equipment without a means test for the applicant.

3.8 As with the stair lift grant experience shows that straight forward bathroom adaptations can have a positive impact on the disabled person, providing them with a safe method of washing and maintaining dignity.

3.9 Removal of the means test will make these applications quicker to process and we envisage a similar result to the stair lift grants in terms of ease of application and efficiency.

Accessible Homes Grant – General

3.10 The existing policy has the Accessible Homes Grant (AHG) in One section outlining that it can be used for a variety of purposes.

3.11 The review has found that the approach in the current policy is confusing for customers and has been open to interpretation by the different Councils.

3.12 In the new policy the AHG has been split into three separate grants.
The General Accessible Homes Grant can be used in the following circumstances:

- To provide a top up to the DFG where the cost of the works exceeds the DFG maximum;
- For works that are not covered by the DFG but are needed in relation to adapting the home and making it safe;
- To cover fees associated with feasibility surveys to determine if the adaptation can proceed.

Accessible Homes Grant – Contribution

3.13 The Accessible Homes Contribution Grant is available where the DFG means test identifies that a contribution is required.

3.14 There are regulations in place that prescribe the method by which the disabled person must be assessed financially. This is called a test of resources or means test and takes account of all income and savings.

3.15 The methodology has not been updated since it was introduced and does not take account of the outgoings of the disabled person. This can result in the disabled person being assessed as having a contribution with no means to pay it.

3.16 This part of the policy has been in place since the original policy in 2018 and has been invaluable in making sure essential adaptations can go ahead. Prior to this grant a number of applicants would withdraw from the process as they could not afford the contribution.

3.17 In order to try and make this straight forward originally the contribution element was allocated where the contribution towards the DFG was more than One third of their savings. This has been interpreted differently across the Councils and for some people resulted in a situation where they may only miss out on the grant by a small margin.

3.18 The new policy allows for an assessment of the savings against the contribution using a calculator that has been developed by Exeter City Council. This ensures that the contribution grant is provided on a sliding scale to help more people.

Accessible Homes grant – Moving application

3.19 This grant may be available to assist a disabled person to move to more suitable accommodation where the current home cannot be adapted.

3.20 This grant already exists in the current policy and is unchanged.

3.21 The only addition to be considered is that the policy places a £40,000 limit for the combined applications under an AHG for general, contribution and moving purposes.

Healthy Homes Grant

3.22 The Healthy Homes grant is a flexible grant to provide repairs and other works to the home to ensure the health, safety and welfare of the occupier(s).

3.23 Other works include:

- Assisting an occupier with infestations and accumulations (hoarding) where the condition of the dwelling will lead to a delayed transfer of care (hospital discharge) or potential avoidable hospital admission;
- Repairs to existing disabled adaptations.
- Some heating and energy efficiency works in conjunction with the Warm Up Grant and as determined necessary by the Council.

3.24 The Healthy Homes Grant is in the current policy but has been expanded to include the works detailed above. In particular the repair to an existing adaptation is essential to avoid the customer having to go through the whole DFG process again and has been identified as a welcome revision to this grant.

3.25 The grant maximum has also been increased from £5,000 to £10,000 to take account of the increases in materials and labour.

Home Improvement Loans

3.26 These remain unchanged but the policy now provides clarity over the types of loan that can be funded using the BCF.

Warm Up Grants

3.27 This grant replaces the ECO Top grant in the current policy. Up to a maximum of £3,000 per property may be available to provide top up funding where energy providers and installers are part funding energy efficiency measures under their Energy Company Obligation (ECO) or other energy efficiency funding.

3.28 Because this grant is being offered under the BCF part of the policy it is only available to those households that meet the requirement of the BCF in terms of health and vulnerability.

4. Summary of Part Two of the Policy

4.1 All the assistance under this section is new to the policy.

Home Start Grant

4.2 This is a One off grant to help those that are moving out of an unsustainable housing situation into the private rented sector. The grant can only be applied for once and if further similar assistance is required the applicant should apply for the Home Start Loan.

4.3 The grant is designed to prevent the need for the Council to place people in B&B accommodation by providing a deposit and rent in advance as well as an initial rent top up while benefits or wages are being organised.

4.4 Conditions have been added to this grant to encourage tenants to be responsible and help them to maintain a tenancy in the private rented sector.

Home Start Loan

4.5 This loan replaces the current DARS loan scheme (Deposit and Advanced Rent Scheme) and places the delivery of the loan with Lendology CIC.

4.6 Each year the Council will write off bad debt for non-payment of DARS so by moving this to a formal loan administered by Lendology CIC the aim is to ensure tenants take repayment of the loan seriously and increase collection rates.

4.7 Recovery of the loan is managed by Lendology CIC with the aim of recycling funds for future loans.

4.8 An interest rate of 4.2% APR will be charged to help cover the management costs for Lendology, this only adds a small additional amount to the loan.

Rent Arrears Grant

4.9 The aim is to help those households on low incomes avoid eviction from their homes by using the grant to pay their rent arrears and prevent homelessness.

4.10 If a private tenant has accrued rent arrears as a result of circumstances beyond their control then they may be eligible to apply for this grant.

4.11 By providing a grant in these circumstances we can prevent a household being evicted for rent arrears. Agreement will be required from the landlord that the only reason eviction is being considered is for this reason.

4.12 As part of the grant we ask the landlord to extend the tenancy by 6 months. This is to allow time for the tenants to show that the rent is affordable and that they do not fall into arrears again.

4.13 As part of the grant the tenant is expected to adhere to the terms of the tenancy agreement and the landlord is expected to engage with the Council if issues with the tenancy begin to arise.

4.14 The grant may be reclaimed if either party breach the grant conditions detailed in the policy. This is to ensure that the tenancy is sustained preventing the need for B&B accommodation.

Landlord Incentive Grant

4.15 As part of our Housing Duty we are able to encourage households to find accommodation in the private sector. This has not been easy as the landlord is required to give a 12 month tenancy and is likely to be taking a tenant that has complex needs or no references.

4.16 In order to build the relationship with private landlords the policy introduces an incentive for landlords that work with the housing options team.

4.17 By accepting a tenant that is nominated by the Council the landlord will receive the equivalent of two-month's rent as an incentive. In return, the landlord is expected to engage with the Council, raising any issues with the tenant at an early stage, to allow quick intervention to prevent homelessness through eviction.

5. Recommendations

5.1 That Cabinet approves the revised Housing Assistance Policy 2022-2025 in Annex A.

5.2 That delegated authority is given to the Corporate Manager for Public Health, Regulation and Housing, in consultation with the Cabinet Member for Housing, to make minor adjustments to the policy based on demand and local priorities.

5.3 That delegated authority is given to the Corporate Manager for Public Health, Regulation and Housing, in consultation with the Cabinet Member for Housing, to suspend some or all non-mandatory parts of the revised Housing Assistance Policy attached in Annex A (all elements of the Policy other than Section 4 Mandatory Disabled Facilities Grants) if adequate funding is not available.

Contact for more Information: Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing snewcombe@middevon.gov.uk or Tanya Wenham, Operations Manager for Public Health & Housing Options twenham@middevon.gov.uk

Circulation of the Report:

Cllr Stuart Penny, Cabinet Member for Housing
Members of the Homes PDG
Leadership Team
Corporate Management Team
Service/Operations Managers
Legal Services

List of Background Papers:

Mid Devon District Council Housing Strategy 2021-25
https://www.middevon.gov.uk/media/353400/housing-strategy-2021-25.pdf

Further information:

Department for Levelling Up, Housing and Communities. Guidance on Disabled Facilities Grant Delivery: Guidance for local authorities in England (March 2022)
https://www.gov.uk/government/publications/disabled-facilities-grant-dfg-delivery-guidance-for-local-authorities-in-england/disabled-facilities-grant-dfg-delivery-guidance-for-local-authorities-in-england

Lendology Community Interest Company (CIC) Social Enterprise Lender
https://www.lendology.org.uk/

Housing Assistance Policy
2022-2025

Date adopted: xxx 2023

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1 Introduction

1.1 Purpose

1.1.1 This policy is required under Article 4 of the Regulatory Reform (Housing Assistance) (England and Wales) Order 2002. The Order provides councils with the discretion to develop schemes to provide financial assistance to deal with a range of housing issues.

1.1.2 This policy is set out in two parts. Part One of the Policy identifies the areas on which the Devon Councils will focus Better Care Funding (BCF) in order to improve housing conditions across the districts. The funding will be targeted to those areas that contribute to the delivery of the Better Care Fund and Health and Wellbeing Board (HWB) priorities.

1.1.3 Part Two of the Policy provides details of assistance specific to the Councils local priorities outside the scope of the Better Care Fund. These schemes will be delivered using the Councils own funding subject to availability.

1.1.4 The policy covers a period of three-financial years from 22/23 to 24/25

1.1.5 This policy provides the Devon Councils with the flexibility and discretion to provide appropriate assistance to meet the aims and priorities set out in section 3 below.

1.1.6 This policy has been agreed by the following Councils:

- Devon County Council
- East Devon District Council
- Exeter City Council
- Mid Devon District Council
- North Devon District Council
- South Hams District Council
- Teignbridge District Council
- Torridge District Council
- West Devon District Council

1.2 Review

1.2.1 The Devon Wide policy has been reviewed twice, the latest being in 2019. Having worked with the policy for the last four years a more detailed review has been undertaken in consultation with stakeholders to identify any gaps or enhancements required to the policy. This policy incorporates the agreed

changes suggested by stakeholders and will be reviewed on a regular basis to ensure it continues to meet local needs.

1.3 Funding

1.3.1 The assistance contained within this policy subject to the availability of funding. Where funding is limited, priority for spend will be given to the provision of the Mandatory Disabled Facilities Grant programme across the County.

2 Context

2.1 Housing and Health

2.1.1 Housing is a key determinant of health, and by promoting good quality housing this policy can contribute to reducing health inequalities for the residents of Devon.

2.1.2 In 2008, flexibilities were introduced enabling councils to use government funding that has been allocated for disabled facilities grants more intelligently to deliver adaptations for disabled people outside of the mandatory grant regime.

2.1.3 Research has shown that there is a direct impact on the health and well-being of residents resulting from the homes in which they live; therefore, poor housing can contribute to poor health.

2.1.4 Each year hazards in the home result in unnecessary injuries, episodes of ill-health, and harm to mental health; in many cases the occupiers do not link the poor condition of their homes with a potential negative impact on their health. The poorest housing stock can be found in the private sector, and in some cases residents who own their own home are not able to maintain them resulting in the development of hazards.

2.1.5 This policy aims to address the link between housing conditions and health through the provision of adaptations that allow disabled people to remain safely and independently in their home; along with works to reduce serious hazards in the home that have the potential to cause accidents and ill health.

2.1.6 The Policy also aims to provide discretionary funding to help prevent homelessness and promote sustainable renting in the private sector.

2.2 Better Care Fund (BCF) and Metrics

2.2.1 In 2015 the government introduced the Better Care Fund (BCF) in an attempt to bring health and social care together in an integrated way. The fund is a combination of government funding from the Department of Health and the Department for Levelling Up, Housing and Communities and includes the grant allocation for disabled facilities grants (DFG).

2.2.2 Each year, in June, the government publishes the Better Care Fund Policy Framework, which lists the conditions that the better care fund must be used to address and these have remained largely unchanged.

The conditions are:

2.2.3 **Condition 1**: *a jointly agreed plan between local health and social care commissioners, signed off by the HWB* – The local authority and Clinical Commissioning Groups (CCGs) must agree a plan for their local authority area that includes agreement on use of mandatory BCF funding streams. The plan must be signed off by the Health & Wellbeing Board (HWB).

2.2.4 BCF plans should set out a joined-up approach to integrated, person-centred services across local health, care, housing and wider public services. They should include arrangements for joint commissioning, and an agreed approach for embedding the current discharge policy in relation to how BCF funding will support this.

2.2.5 **Condition 2**: *NHS contribution to adult social care to be maintained in line with the uplift to CCG minimum contribution* - The funding must be used to contribute to the maintenance of adult social care services in each local authority.

2.2.6 The minimum expectation of spending for each HWB area is derived by applying the percentage increase in the CCG contribution to the BCF for the area to the 2020 to 2021 minimum social care maintenance figure for the HWB.

2.2.7 **Condition 3**: *invest in NHS commissioned out of hospital services* - BCF narrative plans should set out the approach to delivering this aim locally, and how health and local authority partners will work together to deliver it.

2.2.8 **Condition 4**: *a plan for improving outcomes for people being discharged from hospital* - This national condition requires areas to agree a joint plan to deliver health and social care services that support improvement in outcomes for people being discharged from hospital, including the implementation of the hospital discharge policy.

2.2.9 Having regard to the national conditions, areas have flexibility in how the fund is spent across health, care and housing schemes or services. Ambitions need to be agreed on how this spending will improve performance against the BCF metrics detailed below.

2.2.10 The metrics are as follows:

- Discharge Indicator Set - reducing length of stay in hospital, measured through the percentage of hospital inpatients who have been in hospital for longer than 14 and 21 days; and improving the proportion of people discharged home using data on discharge to their usual place of residence
- Avoidable admissions to hospital
- Admissions to residential and care homes
- Effectiveness of re-ablement

2.2.11 Plans under national condition 4 (discharge) should describe how HWB partners will work with providers to improve outcomes for a range of discharge measures, covering both reductions in the time someone remains in hospital, effective decision making and integrated community services to maximise a person's independence once they leave hospital.

2.2.12 This policy forms part of the suite of options to achieve these conditions. Devon County Council and the District Councils have identified an opportunity to provide additional grant and loan products to meet these conditions and deliver against the Health and Wellbeing Board priorities.

3 Priorities

3.1 Devon BCF Priorities

3.1.1 In Devon, the Better Care Fund priorities aim to achieve the following outcomes:

- Reduced admissions to residential and nursing care homes
- Reduce delayed transfers of care
- Reduce avoidable emergency admissions
- Increase dementia diagnosis rates

3.2 Health and Wellbeing Board Priorities

3.2.1 In addition to the above, the 'Healthy and Happy Communities' Devon Joint Health and Wellbeing Strategy 2020–25 also contains a series of priorities that this policy can contribute to.

3.2.2 The priorities are detailed below and those that this policy has a direct impact on are highlighted in bold.

1. Create opportunities for all-inclusive economic growth, education and social mobility a. Narrow gaps in educational attainment and adult skills b. Reduce levels of child poverty c. Support economic growth in more disadvantaged areas **d. Increase social mobility**	2. Healthy, safe, strong and sustainable communities creating conditions for good health and wellbeing where we live, work and learn a. **Improve housing conditions,** reduce homelessness, and increase supply of appropriate, high-quality housing b. Create conditions for good health, physical activity and social interaction c. Support healthy workplaces and schools d. Help keep communities and individuals safe

3. Focus on mental health building good emotional health and wellbeing, happiness and resilience a. Reduce loneliness in all age groups b. Identify people at risk and intervene to improve poor mental health as soon as possible c. Proactively address the mental health consequences of trauma and adverse childhood experiences d. Promote a positive approach to mental health and wellbeing	4. Maintain good health for all, supporting people to stay as healthy as possible for as long as possible a. Prevent ill health by enabling people to live healthier lives b. Detect disease in the early stages to reduce impact on health **c. Support those with long-term conditions to maintain a good quality of life** **d. Support carers to improve and maintain their own health & wellbeing**

3.3 Local District Priorities

3.3.1 Each Devon local authority has its own agreed priorities detailed within its Corporate/Strategic Plans that are specific to their areas. There are however some goals that are common across the county. These include:

- Providing quality housing
- Housing that is safe and meets the communities needs
- Promoting health and wellbeing

3.4 Objectives of this Policy

3.4.1 This policy aims to utilise the BCF funding to provide financial assistance to residents that helps realise the combined priorities detailed above.

3.4.2 In order to achieve this, the policy will focus on the following objectives:

- **Objective 1** - Assist disabled residents to remain in their own homes through supporting the provision of adaptations (so far as this is necessary, appropriate and reasonably practicable). To prevent admissions to care, to assist with delayed transfers where possible and to ensure a safe home that supports health and wellbeing.
- **Objective 2** – Safeguard the health and well-being of vulnerable residents by removing unnecessary hazards to health and safety in the home to reduce avoidable emergency admissions
- **Objective 3** – Provide adaptations that are suitable for the future by ensuring the scheme of works is dementia aware.
- **Objective 4** – Assist vulnerable people to afford to heat their homes through appropriate energy efficiency and heating measures.

- **Objective 5** – Assist vulnerable people impacted by hoarding and the cleanliness of their home environment.
- **Objective 6** – Assist people to move to more appropriate accommodation that meets their needs.
- **Objective 7** – Reduce and prevent homelessness and rough sleeping.

PART ONE – Better Care Fund Assistance

4 Mandatory Disabled Facilities Grants

4.1 Background

4.1.1 The delivery of the disabled facilities grant programme is mandatory and a statutory function of the local housing authority. The delivery of this function is governed by the Housing Grants, Construction and Regeneration Act 1996.

4.2 Eligibility

4.2.1 Any disabled resident seeking financial assistance with the cost of adaptations to their home must be assessed by an Occupational Therapist (OT) working on behalf of, in consultation with, or otherwise approved by Devon County Council.

4.2.2 For the purposes of the Disabled Facilities Grant a person is considered disabled if they meet any of the following criteria:

- their sight, hearing or speech is substantially impaired,
- they have a mental disorder or impairment of any kind, or
- they are physically substantially disabled by illness, injury, impairment present since birth, or otherwise.

4.2.3 A person under the age of eighteen shall be considered disabled if:

- they are on a register of disabled children maintained under paragraph 2 of Schedule 2 to the Children Act 1989, or
- they are in the opinion of the social services authority a disabled child as defined for the purposes of Part III of the Children Act 1989 (local authority support for children and their families).

4.2.4 All owners, tenants, licensees or occupiers who meet the above criteria are eligible to apply for a Disabled Facilities Grant to provide adaptations for a disabled person residing at the property.

4.3 Conditions

4.3.1 All grants other than those for children are subject to a test of financial resources, which is prescribed by The Housing Renewal Grants Regulations 1996.

4.3.2 At the time of writing, the grant maximum in England is £30,000. This is set by Government and is subject to occasional review. If the grant maximum is

reviewed, this policy will adopt the new grant maximum for England, as stated here: https://www.gov.uk/disabled-facilities-grants/what-youll-get, or other official UK Government source.

4.3.3 The disabled person must intend to occupy the property as their only or main residence for a period of five years after the works are complete (or such shorter period as the person's health or other relevant circumstances permit).

4.3.4 In order to make an application the applicant must supply the following:

- A completed and signed application form
- Evidence of financial situation
- Evidence of ownership of the property or the right to reside at the property
- Permission for the works to be carried out (if applicable)
- For more complex works; a detailed schedule of works and plans that must be agreed by the council and OT as appropriate.
- Any planning or building regulation approvals
- Tenders for the works unless using an agreed procurement framework.

4.3.5 The applicant must have permission from the owner of the property for the work to be carried out. The council will require an owner's certificate if the property is rented.

4.3.6 Only the works agreed by the council will be covered by the grant.

4.3.7 If the grant is approved there are 12 months to complete the works from the date of approval.

4.3.8 The works must be completed by the contractor stated on the approval document.

4.3.9 No grant works should proceed until the grant application has been approved and all relevant Planning, Building Regulation or landlord approvals have been obtained.

4.3.10 If the applicant has a financial contribution towards the cost of adaptations they must ensure they have funds in place to cover their share of the costs before the work begins on site.

4.3.11 Subject to conditions, a loan from Lendology Community Interest Company may be available to cover an assessed financial contribution to a grant.

4.3.12 Unforeseen and additional costs will only be paid for where they are necessary in order to complete the adaptation and must be agreed by the council before they are undertaken.

4.3.13 In some cases a local charge may be applied (refer to 4.3.18) when the grant is complete. Any increase in the grant amount awarded may have an impact on the level of charge placed against the property.

4.3.14 Applicants who are successful in their application for assistance will be required to maintain the adaptation. The Council is not responsible for any maintenance or repair once the grant is complete.

4.3.15 The contract for the works is the responsibility of the applicant.

4.3.16 In all but the most exceptional cases, the council will seek to pay any approved grant funds directly to contractors on satisfactory completion of works.

4.3.17 No grant will be paid until a satisfactory invoice has been received and the works have been carried out to the satisfaction of the Council.

4.3.18 Only works falling within the mandatory elements, as specified in Appendix A, will be covered by the grant.

4.3.19 For owner occupiers, where the grant is in excess of £5,000 a local land charge will be placed on the property for the amount over £5,000 up to a maximum of £10,000. This charge will remain on the property for a period of 10 years from the date the grant is certified as complete.

4.3.20 Repayment of the charge is only applicable if the property is sold, assigned or transferred within the 10 year condition period.

4.3.21 If the property is to be transferred, assigned or sold within that period then the council must have regard to the following before repayment is requested:

- the extent to which the recipient of the grant would suffer financial hardship were they to be required to repay all or any of the grant;
- whether the disposal of the premises is to enable the recipient of the grant to take up employment, or to change the location of their employment;
- whether the disposal is made for reasons connected with the physical or mental health or wellbeing of the recipient of the grant or of a disabled occupant of the premises; and
- whether the disposal is made to enable the recipient of the grant to live with, or near, any person who is disabled or infirm and in need of care, which the recipient of the grant is intending to provide, or who is intending to provide care of which the recipient of the grant is in need by reason of disability or infirmity.

4.3.22 Where the cost of the work exceeds the mandatory grant limit the applicant may be eligible to apply for an Accessible Homes Grant, subject to available funds.

5 Stair Lift Grant

5.1 Background

5.1.1 The Stair Lift Grant is subject to available funding.

5.1.2 This grant provides internal and external straight track or curved track stair lifts, step lifts and through-floor lifts without a means test for the applicant.

5.1.3 This grant also covers relevant preparatory and other works necessary for installation of the lift.

5.1.4 This grant includes provision of rented stair lifts for end of life care, or any other reason, as specified by the Occupational Therapist.

5.2 Eligibility

5.2.1 To be eligible for this grant the following must be in place:

- Any disabled resident seeking financial assistance with the cost of adaptations to their home must be assessed by an Occupational Therapist (OT) working on behalf of, in consultation with, or otherwise approved by Devon County Council.
- Where additional works are required to install the stair lift or other relevant lift, these will be covered as part of this grant.
- Where an applicant/disabled person requires multiple adaptations, the stair lift (or other eligible lift) will be provided through this grant and other adaptations will be provided through the DFG or accessible homes grant where the applicant is eligible.
- All owners, tenants, licensees or occupiers who meet the above criteria are eligible to apply for this grant to provide adaptations for a disabled person residing at the property.

5.3 Conditions

5.3.1 The applicant must have permission from the owner of the property for the work to be carried out. The council will require an owner's certificate if the property is rented.

5.3.2 The applicant intends to live in the property as their only or main residence for the period of 5 years or for a shorter period as health or other relevant circumstances permit.

5.3.3 The final approved sum will be based on competitive contracting through the council's procurement system, or other process.

5.3.4 Only the works agreed by the council will be covered by the grant.

5.3.5 The works must be completed by the contractor stated on the approval document, unless otherwise agreed with the council.

5.3.6 No grant works should proceed until the grant application has been approved and all relevant Planning, Building Regulation or landlord approvals have been obtained.

5.3.7 Unforeseen and additional costs will only be paid for where they are necessary to complete the adaptation and must be agreed by the council before they are undertaken.

5.3.8 Applicants who are successful in their application for assistance will be required to maintain the equipment and any associated works. This includes adhering to the terms of any guarantee or warranty and ensuring the equipment is regularly serviced at the applicants cost.

5.3.9 The contract for the works is the responsibility of the applicant.

5.3.10 In all but the most exceptional cases, the council will seek to pay any approved grant funds directly to contractors on satisfactory completion of works.

5.3.11 No grant will be paid until a satisfactory invoice has been received and the works have been carried out to the satisfaction of the applicant and Council.

5.3.12 Lifts (stair lifts, step lifts and through floor lifts) and other equipment funded through the grant process will belong to the applicant. Servicing, upkeep and disposal is the responsibility of the applicant. The Council only usually remove lifts or other equipment if they are able to be economically refurbished and reused, or in the case of a moving grant, equipment may be removed to be re-used in the 'new' property if considered an effective use of resources.

5.3.13 No local land charge will be placed against the property for this grant.

5.3.14 The council reserves the right to reclaim this grant from a social housing provider or private landlord in the following circumstances:

a. if the tenant for whom the grant was originally approved is unreasonably required to leave the property within the grant condition period (5 years), or

b. if the property is not let to a household that will benefit from the adaptation upon any re-let within the grant condition period (5 years).

6 Bathroom Adaptation Grant

6.1 Background

6.1.1 The Bathroom Adaptation Grant is subject to available funding.

6.1.2 This grant provides level access showers, automatic wash-dry WCs and other bathroom adaptations and/or equipment without a means test for the applicant.

6.1.3 This grant also covers relevant preparatory and other works necessary for safe installation but does not cover substantial works such as extensions.

6.2 Eligibility

6.2.1 To be eligible for this grant the following must be in place:

- Any disabled resident seeking financial assistance with the cost of adaptations to their home must be assessed by an Occupational Therapist (OT) working on behalf of, in consultation with, or otherwise approved by Devon County Council.
- Where additional works are required to provide accessible washing/hygiene facilities these will be covered as part of this grant.
- Where an applicant/disabled person requires multiple adaptations, the bathroom adaptations (or other eligible works) will be provided through this grant and other adaptations will be provided through the DFG or accessible homes grant where the applicant is eligible.
- All owners, tenants, licensees or occupiers who meet the above criteria are eligible to apply for this grant to provide adaptations for a disabled person residing at the property.

6.2.2 This grant is not available to fund the building of an extension, or other major building alteration to provide a bathroom. Substantive building work would be funded by DFG, or other means, depending on eligibility. In such cases, this grant can be used to fit out the bathroom.

6.3 Conditions

6.3.1 The applicant must have permission from the owner of the property for the work to be carried out. The council will require an owner's certificate if the property is rented.

6.3.2 The applicant intends to live in the property as their only or main residence for the period of 5 years or for a shorter period as health or other relevant circumstances permit.

6.3.3 The final approved sum will be based on competitive contracting through the council's procurement system, or other process.

6.3.4 Only the works agreed by the council will be covered by the grant.

6.3.5 The works must be completed by the contractor stated on the approval document, unless otherwise agreed with the council.

6.3.6 No grant works should proceed until the grant application has been processed and all relevant planning, Building Regulation or landlord approval has been obtained.

6.3.7 Unforeseen and additional costs will only be paid for where they are necessary to complete the adaptation and must be agreed by the council before they are undertaken.

6.3.8 Applicants who are successful in their application for assistance will be required to maintain the equipment and any associated works and have it regularly serviced at their cost.

6.3.9 The contract for the works is the responsibility of the applicant.

6.3.10 In all but the most exceptional cases, the council will seek to pay any approved grant funds directly to contractors on satisfactory completion of works.

6.3.11 No grant will be paid until a satisfactory invoice has been received and the works have been carried out to the satisfaction of the applicant and Council.

6.3.12 No local land charge will be placed against the property for this grant.

6.3.13 The council reserves the right to reclaim this grant from a social housing provider or private landlord in the following circumstances:

a. if the tenant for whom the grant was originally approved is unreasonably required to leave the property within the grant condition period (5 years), or

b. if the property is not let to a household that will benefit from the adaptation upon any re-let within the grant condition period (5 years).

7 Accessible Homes Grant - General

7.1 Background

7.1.1 The Accessible Homes Grant is subject to available funding.

7.1.2 Grant funding may be available in the following circumstances:

- Where a mandatory grant has been approved but the cost of the work exceeds the mandatory grant maximum.
- Where there are works that may not be covered by the Disabled Facility Grant in relation to adapting the home and making it safe.
- To pay fees associated with feasibility surveys etc. to determine if an eligible adaptation can proceed.

7.2 Eligibility

7.2.1 To be eligible for this grant the applicant must either:

- be eligible to apply for a mandatory Disabled Facilities Grant, or
- require other works or equipment deemed as reasonable and practicable by the council to adapt the home or make it safe for the disabled occupant, or their carer(s).
- All owners, tenants, licensees or occupiers who meet the above criteria are eligible to apply for this grant to provide adaptations for a disabled person residing at the property.

7.2.2 Applications for a disabled adult are subject to the DFG means test, it is likely that this will have been completed as part of the formal Disabled Facility Grant application and therefore will not need to be repeated

7.2.3 There will be no means test of parents and/or guardians of a disabled child in line with the requirements of the mandatory DFG.

7.3 Conditions

7.3.1 Where the applicant has a combination of Accessible Homes Grants (including Contribution grants and Moving grants) to deliver the agreed adaptations the maximum amount that can be applied for is £40,000. Any costs required that are over a combined total of £40,000 will not attract any further Accessible Homes Grant funding and alternative sources such as a loan will need to be considered. This does not preclude further applications for an AHG if additional adaptations are required in the future.

7.3.2 Evidence supplied by the Disabled Facility Grant application will be used to support the application for the Accessible Home Grant.

7.3.3 For owner applications a local land charge will be placed on the property for the full value of the awarded Accessible Homes Grant. The full charge(s) will be repayable if the property is sold, assigned or transferred within 10 years of the grant being completed. This is in addition to any land charge placed on the property under other sections of this policy.

7.3.4 As this is a discretionary grant, the Accessible Homes Grant will be recovered in all circumstances of the property being sold, assigned or transferred unless there are exceptional circumstances. These circumstances will be considered on a case by case basis.

7.3.5 Only the works agreed by the council will be covered by the grant

7.3.6 Eligible works must be completed within 12 months of the grant being approved.

7.3.7 The works must be completed by the contractor stated on the approval document, unless otherwise agreed with the council.

7.3.8 No grant works should proceed until the grant application has been processed and all relevant planning, Building Regulation or landlord approval has been obtained.

7.3.9 Unforeseen and additional costs will only be paid for where they are necessary to complete the adaptation and must be agreed by the council before they are undertaken.

7.3.10 Any increase in the grant may have an impact on the charge placed against the property.

7.3.11 Applicants who are successful in their application for assistance will be responsible for maintaining the adaptation.

7.3.12 The contract for the works is the responsibility of the applicant.

7.3.13 The grant will normally be paid direct to contractors in all but the most exceptional cases.

7.3.14 The council will only offer grant funding for those works that are considered appropriate, reasonable and practicable to meet the needs of the disabled person.

7.3.15 No grant will be paid until a satisfactory invoice has been received and the works have been carried out to the satisfaction of the council.

7.3.16 In addition to the above, this grant is subject to the conditions of the primary DFG grant to which it is contributing.

8 Accessible Homes Grant – Contribution

8.1 Background

8.1.1 The Accessible Homes Contribution Grant is available where the DFG means test identifies that a contribution is required.

8.1.2 The Accessible Homes Contribution Grant is subject to available funding.

8.2 Eligibility

8.2.1 To be eligible for this grant the applicant/disabled person must meet the following:

- eligible to apply for a mandatory Disabled Facilities Grant, or
- eligible for the 'Accessible Homes Grant – General'

8.2.2 An applicant/disabled person will only be eligible for grant funding to cover an identified contribution following an assessment of their available savings to cover the contribution.

8.2.3 As a rule of thumb where the contribution represents a third or more of the person savings then a grant may be available. However, this will be applied on a sliding scale to allow those with some savings to benefit from a partial grant to cover some of the contribution. For example:

a) *An applicant has a means tested contribution of £1500.00. If the applicant has savings of £4500 or less, they will be able to access additional grant to cover the contribution; subject to grant limits and finance availability.*

b) *An applicant has a means tested contribution of £1500.00. If the applicant has savings of £6000, they will be able to access £1000 of additional grant to cover the contribution; but they would be expected to pay £500.*

8.3 Conditions

8.3.1 The grant maximum for combined Accessible Homes Grants (including general and moving grants) is £40,000. Anything over £40,000 will not attract any further Accessible Homes Grant funding.

8.3.2 Evidence supplied by the Disabled Facility Grant application will be used to support the application for the Accessible Home Contribution Grant.

8.3.3 For owner applications a local land charge will be placed on the property for the full value of the awarded Accessible Homes Contribution Grant. The full charge(s) will be repayable if the property is sold, assigned or transferred within 10 years of the grant being completed. This is in addition to any land charge placed on the property under other sections of this policy.

8.3.4 As this is a discretionary grant, the Accessible Homes Contribution Grant will be recovered in all circumstances of the property being sold, assigned or transferred unless there are exceptional circumstances. These circumstances will be considered on a case by case basis.

8.3.5 In addition to the above, this grant is subject to the conditions of the primary DFG grant to which it is contributing.

9 Accessible Home Grants: Moving Application

9.1 Background

9.1.1 This grant may be available to assist a disabled person to move to more suitable accommodation subject to available funding.

9.2 Eligibility

9.2.2 An applicant will be eligible for this grant:

- Where the Occupational Therapist and/or the Council consider re-housing to be more appropriate than adapting the existing accommodation.
- Where the landlord has refused permission for any adaptation works to be carried out and therefore it is no longer feasible for the occupier to remain in the property safely.
- Where it is possible to carry out works at the existing property but a move is preferred, the total cost incurred in the eligible ‘moving’ expenses plus any estimated eligible adaptation costs at the ‘new’ property should not be greater than the cost of adapting the applicant’s current home.
- Where the ‘new’ property, in the opinion of the Council, provides a long term, sustainable home for the person for whose benefit the works are required.

- Adaptations at the 'new' property will be subject to the Statement of Need and a new DFG application. Adaptations may exceed the mandatory DFG grant and any top-up assistance available, so any likely contribution by the applicant/disabled person should be considered prior to moving.
- If the 'new' property is within a neighbouring authority covered by this policy then the receiving authority will need to ensure the new property is suitable. This should also be agreed with the Occupational Therapist. The applicant must ensure that the relevant council's officers and Occupational Therapist have been consulted and any subsequent DFG application is made to the receiving authority.
- To qualify for this grant the applicant must have been resident in the existing property for at least 2 years prior to making an application to move.

9.2.2 In determining the 'reasonable expenses' regard shall be given to the following criteria:

- The cost of the eligible works at the applicant's existing property are not deemed reasonable, or;
- The eligible works at the applicant's existing home are not technically feasible, or;
- The adaptation of the applicant's existing property does not provide a sustainable, long term solution for their housing needs, or;
- The landlord of the property refuses to give permission for the necessary works to be carried out.

9.3 Eligible Expenses – owner occupier

9.3.1 Expenses that can attract grant under this section may include the cost of:

- Any arrangement fee charged by a lender to cover the formation of a mortgage.
- Conveyancing fees.
- Land Registry Fee
- Local Authority Searches
- Stamp Duty
- Valuation, Homebuyers or Full Structural Survey
- Professional or other removal costs
- Estate Agent Commission.

9.3.2 The maximum grant payable for eligible expenses under this heading for an owner occupier is £10,000.

9.4 Eligible expenses – tenant

9.4.1 For a tenant the expenses that can attract grant under this section may include the cost of:

- Letting agent fees
- Rent deposit
- Professional or other removal fees

9.4.2 The maximum grant payable for eligible expenses under this heading for a tenant is £5,000.

9.5 Conditions

9.5.1 The grant maximum for combined Accessible Homes Grants (including General and Contribution grants) is £40,000. Anything over £40,000 will not attract any further Accessible Homes Grant funding.

9.5.2 Grant assistance is only payable to an owner occupier upon the successful completion of the purchase of the 'new' property and the disabled person then occupying that property as their only and main residence.

9.5.3 When moving to rented accommodation the applicant must obtain permission from the landlord for any adaptations to be carried out before the grant will be paid.

9.5.4 The applicant must intend to live in the new property as their only or main residence for a period of 5 years (or such shorter period as the person's health or other relevant circumstances permit).

10 Healthy Homes Grants

10.1 Background

10.1.1 The Healthy Homes grant is a flexible grant to provide repairs and other works to the home to ensure the health, safety and welfare of the occupier(s); subject to available funding.

10.1.2 This includes assisting an occupier with infestations and accumulations (hoarding) where the condition of the dwelling will lead to a delayed transfer of care (hospital discharge) or potential avoidable hospital admission.

10.1.3 It also includes repairs to existing disabled adaptations and some heating and energy efficiency works as determined necessary by the council

10.2 Eligibility

10.2.1 To qualify for this grant the applicant must meet at least one of the following:

a) have been declined by Lendology CIC for a Home Improvement Loan

b) be in receipt of one of the following benefits:

- Housing Benefit
- Disability Living Allowance
- Personal Independent Payment with the daily living component
- Attendance Allowance
- Pension Credit
- Income Support
- Council tax benefit (not the single person discount)
- Universal Credit

(Universal Credit replaces the following means tested benefits: Housing Benefit, Income Related Employment Support Allowance, Income Based Job Seekers Allowance, Child Tax Credit, Working Tax Credit and Income Support)

c) otherwise be in financial hardship following an assessment by:

- Lendology CIC
- The council's Housing Options, Benefits or other relevant team
- Citizens Advice Bureau, or
- Other third party commissioned by the council to work in a community support role.

10.2.2 A grant can be awarded in addition to a loan from Lendology CIC if the amount of loan available is not enough to cover the cost of addressing the eligible works.

10.2.3 Healthy Homes Grant can be used to fund repairs to disabled adaptations where the equipment or other works are out of warranty or guarantee.

10.2.4 This grant can be used to fund temporary measures or items that can be removed, to allow the occupier to return home as part of end of life care, or otherwise to expedite hospital discharge. Eligible works may be funded by DFG or Accessible Homes in the first instance, depending on the most expedient route.

10.2.5 This grant can also be used for home repairs that are likely to have a significant impact on the health and safety of the person residing in the property (category 1 hazard under the Housing Act 2004). Where the person residing is a tenant then only those works that are not the responsibility of the landlord may be covered.

10.2.6 It can also be used to prevent unnecessary hospital admissions, or to expedite hospital discharge, as a result of a hoarding disorder. In practice this can include the following:

a) Help with cleansing a property to expedite hospital discharge, to enable someone to receive care, or to enable other eligible works under this policy to take place.

b) Practical support with hoarding behaviour to alleviate impacts on the health of the occupier, as assessed by an officer of the council, or other social care professional.

c) Clearance of the dwelling to ensure the safety of the occupier following an assessment by an officer of the council

10.3 Conditions

10.3.1 Households are able to apply for a 'Healthy Homes Grant' on multiple occasions. The maximum grant available is £10,000 in any two year rolling period.

10.3.2 For owner applications a local land charge will be placed on the property for the full value of each Healthy Homes Grant that is awarded unless the grant is for one of the reasons stated in 10.3.4 below. The full charge(s) will be repayable if the property is sold, assigned or transferred within 5 years of the grant being completed. This is in addition to any land charge placed on the property under other sections of this policy.

10.3.3 As this is a discretionary grant, the Healthy Homes Grant will be recovered in all circumstances of the property being sold, assigned or transferred unless there are exceptional circumstances. These circumstances will be considered on a case by case basis.

10.3.4 A local land charge will not be placed against the property if the purpose of the grant is to:

a. Repair disabled adaptations already subject to a charge. This will apply to the cost of those repairs only, if the grant is being used for multiple reasons;

b. Provide equipment or works to help with end of life care;

c. Help with hoarding or the cleansing of a property.

10.3.5 For tenants the grant will only be available where the landlord is not responsible for the works required. As such, the grant will be limited to providing assistance with infestations and accumulations (hoarding) where the condition of the dwelling will lead to a delayed transfer of care (hospital discharge) or potential avoidable hospital admission, or where the landlord is not responsible for the works.

10.3.6 An applicant should apply for a loan for any substantial work beyond removing the immediate health and safety risk.

11 Home Improvement Loans

11.1 Background

11.1.1 Lendology CIC (Community Interest Company) is a not-for-profit company contracted by the council to deliver loans to residents in the district.

11.1.2 Lendology CIC administer loans within the requirements of this policy. Home Improvement Loans are flexible and can be used for the following purposes (with specific reference to the Better Care Fund):

- Home repairs and improvements;
- Adaptation works where grant is not available;
- To cover an applicant contribution to a grant;
- To cover the cost of the work over the Disabled Facilities Grant and/or Accessible Homes Grant maximum.

11.1.3 In addition, loans may be available for the following purposes **subject to available funding outside of the Better Care Fund**:

- To bring empty homes back into use
- For renewable energy enhancements and energy efficiency improvements
- For landlords to carry out repairs or improvements to rented accommodation.

11.2 Eligibility

11.2.1 This will vary and is based on the individual circumstances of each applicant. Case managers from Lendology CIC will carry out an assessment and provide independent advice on ethical and responsible lending and the most appropriate product to suit the needs of the applicant.

11.3 Conditions

11.3.1 Conditions may vary depending on the loan product selected and the individual circumstances of each applicant.

11.3.2 Typical 4.2% APR, loans are subject to status. Lendology may insist on loans being protected at the Land Registry by a Title Restriction. Missing payments could affect your credit rating and ability to obtain credit in the future.

12 Warm Up Grants

12.1 Background

12.1.1 The Warm Up grant is a flexible grant to provide top-up funding for energy efficiency measures considered by an officer of the council as essential to ensure the health, safety and welfare of the occupier(s) of a property; subject to available funding.

12.1.2 These grants, up to a maximum £3,000 per property, provide top up funding where energy providers and installers are part funding energy efficiency measures under their Energy Company Obligation (ECO) or other energy efficiency funding.

12.1.3 Warm Up funding can also be used in conjunction with Healthy Homes Grants (based on eligibility for Healthy Homes), where the hazard(s) being rectified requires upgrading of the heating/hot water provision or improved insulation.

12.1.4 Eligible works include:

- Insulation measures (e.g. loft, cavity wall, solid wall, flat roof & room in roof)
- Heating and hot water repairs or upgrade

12.2 Eligibility

12.2.1 Applicants must have been identified through an assessment by an officer of the council under the Healthy Homes Grant criteria or - subject to the Council adopting this process - through the council's Energy Company Obligation Flexible Eligibility Statement of Intent (SOI).

12.2.2 Applicants can only apply for this grant if they meet the health criteria of the SOI in their respective council areas or the Healthy Homes Grant criteria.

12.2.3 To qualify for the top-up a survey must be carried out by the energy provider, an officer of the council, a local installer, or their agent and qualifying works identified.

12.2.4 All owners, tenants, licensees or occupiers who meet the criteria are eligible to apply for this grant.

12.2.4 For owner occupiers a maximum of up to £3,000 is available.

12.2.5 If more than £3,000 is needed then the applicant should apply for a Lendology CIC loan, subject to availability and eligibility

12.3 Conditions

12.3.1 The maximum grant available is £3,000.

12.3.2 The grant can be applied for by the owner of the property where the person occupying the property meets the healthy homes grant criteria or SOI health criteria.

12.3.3 Once a ‘Warm up grant’ has been awarded for works to a property, no further ‘Warm up grant’ will be available for the same property for a period of 5 years from the date the grant is certified as complete.

12.3.4 A local land charge will be placed on the property for the full value of the Warm Up grant and will be repayable if the property is sold, assigned or transferred within 5 years of the grant being completed. This is in addition to any land charge placed on the property under other sections of this policy.

12.3.5 As this is a discretionary grant, the Warm Up Grant will be recovered in all circumstances of the property being sold, assigned or transferred unless there are exceptional circumstances. These circumstances will be considered on a case by case basis.

12.3.6 In all but the most exceptional cases, the council will seek to pay any approved grant funds directly to contractors on satisfactory completion of works.

12.3.7 No grant will be paid until a satisfactory invoice has been received and the works have been carried out to the satisfaction of the applicant and Council.

PART TWO – Local Initiatives

13 Other types of assistance

13.1 Introduction

13.1.1 In addition to the Better Care Fund the Council has other sources of funding that can be used to provide financial assistance.

13.1.2 This section of the policy sets out the types of assistance that are available to prevent homelessness and rough sleeping and can help people to remain in their homes.

13.1.3 All of the grants mentioned in this section are subject to funding being available.

14 Home Start Grant

14.1 Background

14.1.1 The Home start grant is a one off grant to help those that are moving out of an unsustainable housing situation into the private rented sector. The grant can only be applied for once and if further similar assistance is required the applicant should apply for the Home Start Loan

14.1.2 This grant can be used to cover the following elements:

- The deposit for the applicants first suitable private rented home
- Rent in advance as required
- Top up to initial rent shortfall while benefits or wages are being organised

14.2 Eligibility Criteria

14.2.1 To qualify for this grant the applicant must meet the following criteria:

- Be owed a housing duty under the Homelessness Reduction Act 2017;
- Be over the age of 18,
- Be a 16/17 year old supported by Devon County Council into a young person's housing project;
- Be entering into a first tenancy in the UK, at a property within the Mid Devon area.

14.3 Grant Limit

14.3.1 The maximum amount of grant available is £2,500

14.3.2 The amount of grant award is dependent on the circumstances of each case.

14.3.3 A financial assessment of the income and expenditure of the household, along with the affordability of the proposed rent and other expenses will be undertaken to determine the suitability of the accommodation.

14.3.4 Basic furniture and household items to set up the new home may be available via a referral to an external company or charity.

14.3.5 The grant is only available once per household/tenancy.

14.4 Conditions relevant to the application

14.4.1 The person applying for the grant must be named on the tenancy agreement.

14.4.2 For the application to be considered, all sections of the application must be completed and the declaration signed by the applicant. All supporting evidence must be provided with the application.

14.4.3 Once the application has been received the Council will assess whether a grant is available.

14.4.4 The Council, or an organisation acting on their behalf, will carry out a check of the property and other necessary documents and certificates to determine if the property is suitable for the purposes of the grant.

14.5 Conditions relating to Payments

14.5.1 The council will pay grant monies relating to deposit and rent directly to the landlord/agent via a BACs, or by other means in respect of agreed individual circumstances.

14.5.2 A claim form and any other finance declarations or information required by the council must be submitted and validated before any agreed payments are made.

15.5.3 Failing to comply with the grant conditions may result in a claim for payment not being validated - for example failing to engage with the council.

14.6 Conditions following approval

14.6.1 By signing the application the tenant is agreeing to maintain rent payments going forward and to adhere to the terms of the tenancy agreement.

14.6.2 The landlord must place the deposit into a government listed Tenancy Deposit Protection Scheme (DPS).

14.6.3 Failing to comply with the conditions may result in the grant being reclaimed.

14.6.4 Circumstances where the grant may be reclaimed from the tenant:

- Failing to pay rent and allowing arrears to build up without good reason – the local housing authority will determine whether there is good reason when assessing if repayment is required
- Failing to adhere to the terms of the tenancy agreement – for example causing anti-social behavior or acting in a way that means the landlord has to serve a relevant notice to regain possession of their property.

15 Home Start Loan

15.1 Background

15.1.1 The Home Start Loan is to support households owed a housing duty under the Homelessness Reduction Act 2017 and do not qualify for the Home Start Grant.

15.1.2 This loan can be used to cover the following elements:

- The deposit for the applicants private rented home
- Rent in advance as required
- Top up to initial rent shortfall while benefits or wages are being organised

15.1.3 As this is a loan the applicant will be required to make monthly repayments as determined by the loan provider.

15.1.4 This loan will be administered by our local loan provider Lendology CIC.

15.2 Eligibility Criteria

15.2.1 To qualify for this loan the applicant must meet the following criteria:

- Be over the age of 18
- Be entering into a tenancy agreement in the private sector or with a registered housing provider (not the Council)
- Be moving to a property in the Mid Devon area.

15.3 Loan Limit and repayment

15.3.1 The maximum amount of loan available is £2,500 with a maximum loan term of 5 years, but this is dependent on the individual circumstances of the applicant and their ability to repay the loan. Affordability of the loan will be determined by Lendology CIC.

15.3.2 As part of the loan application the council will carry out an assessment of the affordability of the rent to try and prevent potential rent arrears.

15.3.3 Basic furniture and household items to set up the new home may be available via a referral to an external company or charity.

15.3.4 The loan is repayable on a monthly basis. The interest rate on the loan is 4% (4.2% APR) the term for repayment will be agreed with Lendology following the affordability assessment.

15.3.5 It may be possible to apply for further loans but the amount available will be determined by the repayment history, the outstanding balance to re-pay any existing loans and the amount being requested.

15.3.6 A further loan will not be available if the applicant is being evicted for:

- Failing to pay rent and allowing arrears to build up without good reason – the local housing authority will determine whether there is good reason
- Failing to adhere to the terms of the tenancy agreement – for example causing anti-social behaviour or acting in a way that means the landlord has to serve a relevant notice to regain possession of their property.

15.3.7 In exceptional circumstances the Housing Options Manager may allow a further loan, these circumstances will be considered on a case by case basis.

15.4 Conditions relevant to the application

15.4.1 The person applying for the loan must be named on the tenancy agreement.

15.4.2 For the application to be considered, all sections of the application must be completed and the declaration signed by the applicant. All supporting evidence must be provided with the application.

15.4.3 Once the application has been received Lendology will assess whether a loan is available.

15.4.4 The Council, or an organisation acting on their behalf, will carry out a check of the property and other necessary documents and certificates to determine if the property is suitable.

15.5 Conditions relating to Payments

15.5.1 Lendology will pay loan monies relating to deposit and rent directly to the landlord/agent via a BACs, or by other means in respect of agreed individual circumstances.

15.5.2 A claim form and any other finance declarations or information required by Lendology CIC must be submitted and validated before any agreed payments are made.

15.6 Conditions following approval

15.6.1 By signing the application the tenant is agreeing to maintain rent payments going forward and to adhere to the terms of the tenancy agreement.

15.6.2 Failing to keep up with loan repayments may result in recovery action being taken

15.6.3 The landlord must place the deposit into a government listed Tenancy Deposit Protection Scheme (DPS).

16 Rent Arrears Grant

16.1 Background

16.1.1 The purpose of the Rent Arrears Grant is to support households in the private rented sector who find themselves in rent arrears.

16.1.2 The aim is to help those households on low incomes avoid eviction from their homes by using the grant to pay the rent arrears and prevent homelessness.

16.1.3 If a private tenant has accrued rent arrears as a result of circumstances beyond their control then they may be eligible to apply for this grant.

16.1.4 This grant is subject to available funding.

16.2 Eligibility Criteria

16.2.1 To qualify for this grant the household must meet the following criteria:

- Be owed a housing duty under the Homelessness Reduction Act 2017;
- Accrued rent arrears due to circumstances beyond thier control but otherwise have been a responsible tenant;
- Be a resident in the Mid Devon District area;
- Be a private tenant with an assured short hold tenancy with a private landlord/agent;
- Be over the age of 18;
- Be a 16/17 year old in a young person's housing project and supported by Devon County Council;
- The landlord is considering ending the tenancy because of the rent arrears.

16.3 Grant Limit

16.3.1 The amount of grant awarded is dependent on the circumstances of each case.

16.3.2 A financial assessment of the income and expenditure of the household will be undertaken to determine if the rent is affordable once the arrears have been cleared.

16.3.3 The maximum grant available per household/tenancy is up to £2,500. However the Council may review this in respect of individual circumstances.

16.3.4 Only one claim may be made per household/tenancy unless there are exceptional circumstances that mean a second application is required. The decision on whether a second grant can be offered will be determined by the Housing Options Manager.

16.4 Conditions relevant to the application

16.4.1 The application form must be completed by one of the tenants named on the tenancy agreement.

16.4.2 For the application to be considered, all sections of the application must be completed and the declaration signed by the applicant. All supporting evidence must be provided with the application.

16.4.3 Once the application has been received the Council will contact the landlord/agent for the property. The landlord must complete and sign the landlord certificate before the grant can be approved.

16.4.4 The landlord must provide the required supporting evidence with the certificate for the application to be considered.

16.4.5 By signing the certificate the landlord agrees to extend the tenancy by a minimum of 6 months subject to the tenant continuing to adhere to the terms of the tenancy agreement.

16.5 Conditions relating to Payments

16.5.1 The local housing authority will pay the grant direct to the landlord/agent via a BACs payment once the application has been approved.

16.6 Conditions following approval

16.6.1 By signing the application the tenant is agreeing to maintain rent payments going forward and to adhere to the terms of the tenancy agreement.

16.6.2 By signing the certificate and the subsequent payment of the grant to the landlord means they are agreeing to extend the tenancy agreement by a minimum of 6 months, subject to the tenant adhering to the terms of the tenancy agreement and continuing to pay their rent.

16.6.3 Failing to comply with the conditions may result in the grant being reclaimed from either party.

16.6.4 Circumstances where the grant may be reclaimed from the tenant:

- Failing to pay rent and allowing further arrears to build up without good reason – the local housing authority will determine whether there is good reason when assessing if repayment is required

- Failing to adhere to the terms of the tenancy agreement – for example causing anti-social behavior or acting in a way that means the landlord has to serve notice under section 8.

16.6.5 Circumstances where the grant may be reclaimed from the landlord:

- Landlord does not extend the tenancy by a minimum of 6 months
- Landlord serves a section 21 notice within 6 months of the grant being paid.

16.6.6 The landlord must contact the council as soon as rent arrears become apparent.

16.6.7 The landlord must allow the council the opportunity to resolve the issue of rent arrears with the tenant before instigating possession proceedings for rent arrears.

16.6.8 The landlord must have placed the deposit into a government listed Tenancy Deposit Protection Scheme (DPS).

17 Landlord Incentive Grant

17.1 Background

17.1.1 The Landlord Incentive Grant is to encourage landlords in the private rented sector to accept tenants that do not have a reference, may have been homeless or rough sleeping, or evicted from another rented property.

17.2 Eligibility

17.2.1 A landlord will be able to apply for the incentive grant when they accept a tenant nominated by the housing options team.

17.2.2 The landlord must enter into a 12 month tenancy to be eligible for the grant.

17.2.3 The landlord must place the deposit into a government listed Tenancy Deposit Protection Scheme (DPS).

17.3 Grant limit

17.3.1 The incentive grant will be based on the monthly rental of the property. A landlord will receive the equivalent of two months' rent if they enter into a 12 month tenancy.

17.3.2 The tenant may also qualify for one of the other forms of assistance in this policy ensuring the landlord will receive a deposit and rent in advance.

17.4 Conditions

17.4.1 The landlord must offer a 12 month tenancy to the eligible tenant.

17.4.2 The landlord must place the deposit into a government listed Tenancy Deposit Scheme (DPS).

17.4.3 The landlord must contact the council before instigating possession proceedings to allow the council the opportunity to resolve any tenancy matters with the tenants.

17.4.4 If the issues cannot be resolved the council will notify the landlord and advise whether or not possession can proceed.

18 Miscellaneous

18.1 Exceptions to this policy

18.1.1 The council accept that applications may be received for adaptations, works or circumstances not covered in the detail of this policy or may fall outside the eligibility criteria listed. In all cases, these will need to be formally determined.

18.1.2 Any such application will be referred for assessment by the Operations Manager for Public Health and Housing Options.

18.1.3 Matters resulting in a significant budget implication will be escalated to the Corporate Manager for Public Health, Regulation and Housing.

18.1.4 Exceptions decisions will be reviewed periodically to determine if a policy change is required and will be presented at the next policy review.

18.1.5 Exceptions applications will be determined with reference to the council's priorities as laid out in relevant council policies and legislation.

18.2 Appeals and complaints

18.2.1 Where the applicant has a complaint about the manner in which the council is applying this policy, then they should follow the Council's formal complaints process.

18.2.2 Where the complaint is in respect of works, the complaint should be made to the contractor in the first instance, if this does not resolve the problem then the council should be contacted for advice.

19 Appendix A: Eligible works

19.1 Disabled Facilities Grant and Accessible Homes Grant

19.1.1 An assessment by an agreed Occupational Therapist must be carried out. The Occupational Therapist will then recommend the type of adaptation required.

19.1.2 Minor works are assessed by the Occupational Therapist and may be dealt with outside of the grant process.

19.1.3 In order to decide on an eligible scheme there is a two stage process:

a. The Occupational Therapist assesses what is 'necessary and appropriate' to meet the needs of the disabled occupant.

b. The Public Health and Housing Options service assess what measures are reasonable and practicable to meet the identified needs in practice.

19.1.4 During both of the stages of this process the Occupational Therapist and Public Health and Housing Options service will work closely with the applicant to ensure, as far as possible, that their input is taken into account.

19.2 Purposes for which a grant must or may be given

19.2.1 The following are the purposes for which a mandatory Disabled Facilities Grant is available, as contained in legislation.

19.2.2 Each adaptation criteria is provided with an example. The examples are intended to give a brief idea of the type of work available. In each case, the eligible works will be decided through the process laid out in 19.1, above.

19.2.3 Facilitating access by the disabled occupant to and from the dwelling, or the building in which the dwelling or, as the case may be, flat is situated;

- *For example, ramping and/or handrails to the main external door.*

19.2.4 Making the dwelling safe for the disabled occupant and other persons residing with them;

- *For example, upgrading of the electrical installation, where the current installation is considered unsafe for the disabled occupant.*

19.2.5 Facilitating access by the disabled occupant to a room used or usable as the principal family room;

- *For example, alterations to facilitate wheelchair access to a living room.*

19.2.6 Facilitating access by the disabled occupant to, or providing for the disabled occupant, a room used or usable for sleeping;

- *For example, alterations to facilitate wheelchair access to a bedroom.*

19.2.7 Facilitating access by the disabled occupant to, or providing for the disabled occupant, a room in which there is a lavatory, or facilitating the use by the disabled occupant of such a facility;

- *For example, installation of a stairlift to facilitate access to a first floor WC.*

19.2.8 Facilitating access by the disabled occupant to, or providing for the disabled occupant, a room in which there is a bath or shower (or both), or facilitating the use by the disabled occupant of such a facility;

- *For example, installation of a level-access shower.*

19.2.9 Facilitating access by the disabled occupant to, or providing for the disabled occupant, a room in which there is a wash hand basin, or facilitating the use by the disabled occupant of such a facility;

- *For example, provision of an accessible wash hand basin, including any alterations necessary to facilitate access.*

19.2.10 Facilitating the preparation and cooking of food by the disabled occupant;

- *For example, installing low-level food preparation areas.*

19.2.11 Improving any heating system in the dwelling to meet the needs of the disabled occupant or, if there is no existing heating system there or any such system is unsuitable for use by the disabled occupant, providing a heating system suitable to meet his needs;

- *For example, upgrading/replacing of boilers/radiators where the property has been extended as part of a wider adaptation.*

19.2.12 Facilitating the use by the disabled occupant of a source of power, light or heat by altering the position of one or more means of access to or control of that source or by providing additional means of control;

- *For example, alterations to the height and/or position of light switches and power points to make them accessible to the disabled person.*

19.2.13 Facilitating access and movement by the disabled occupant around the dwelling in order to enable them to care for a person who is normally resident there and is in need of such care;

- *For example, widening of doorways.*

19.2.14 Facilitating access to and from a garden by a disabled occupant; or making access to a garden safe for a disabled occupant;

- *For example, providing access to an area of the garden suitable for the disabled occupant.*

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Equality Impact Assessment

Title of review	Housing Assistance Policy 2022-2025
Service	Public Health and Housing Options
Date of review	19/12/2022
Date of next review	TBC
Lead officer, Job Title and Service	Tanya Wenham Operations Manager for Public Health and Housing Options
Review team	Tanya Wenham
Scope of the analysis	As a Local Housing Authority ("LHA"), Mid Devon District Council is required to deliver the Better Care Fund (BCF) allocation locally to provide adaptations to assist disabled residents. The aims of the BCF are wider than just the delivery of the disabled facilities grant programme and therefore part one of the revised policy details assistance that can help to meet the wider objectives of the BCF, and local councils. Part two of the policy aims to reduce homelessness by providing options to help tenants remain in their current homes. The purpose of this review is to consider the equality implications of the proposed policy.
Beneficiaries	The majority of residents in Mid Devon live in housing within the private sector. The policy focuses on services for the elderly, vulnerable, disabled and residents that are owed a housing duty. All protected characteristics are represented within the beneficiaries.
Stakeholders	Stakeholders include: • Residents; • Owners/landlords of private residential premises; • Council Members; • Council staff;

	• Public services, such as the Police, Devon County Council, NHS, and the Devon and Somerset Fire & Rescue Service; • Community and voluntary organisations.
Relevant data and research	Foundations guidance on disabled facilities grants
Access complaints	None recorded
Consultation	Not applicable
Results of consultation	Not applicable

Relevance to the duty - Do your proposals contribute towards or impact on any of the aims of the duty?

There is a potential impact that requires further exploration within this assessment.

1. Eliminate unlawful discrimination – harassment, victimisation and any other conduct prohibited by the Act;

Availability of the assistance contained within the policy scheme is restricted to mainly benefit elderly, vulnerable and disabled residents. It has been extended to include those that are owed a housing duty. The policy will be equally and fairly applied to all those who are eligible for assistance under the policy. No potential for unlawful discrimination has been identified.

2. Advance equality of opportunity – between people who share a protected characteristic and people who do not share it by;
• removing or minimising disadvantages suffered by people due to their protected characteristics;
• meeting the needs of people with protected characteristics; and
• encouraging people with protected characteristics to participate in public life or in other activities where their participation is low.

Residents from vulnerable groups can sometimes have limited housing choices. In particular, families with young children, older persons and those with a disability can find themselves in poor quality accommodation. The policy aims to safeguard the health, safety and welfare of the following protected characteristics; Age and Disability. By doing so the policy restricts funding and services available and there may be some households on low income who do not meet the qualification criteria and therefore are unable to access the funding despite still being in need. The option of a Home Improvement Loan is available to such households. This is a necessary restriction due to the amount of funding available which must be targeted on a priority basis and the funding criteria imposed by the BCF and other funding streams.
.

3. Foster good relations – between people who share a protected characteristic and people who do not share it, by; tackling prejudice and promoting understanding between people with a protected characteristic and others.

Having regard to this aim, the proposed policy may have a negative impact as it favours those with a protected characteristic. As detailed above this may disadvantage households that are in need but do not meet the specified criteria.

Equality impacts raised or identified:

The proposed policy shall be equally and fairly applied to everyone who meets the eligibility criteria. As such, no adverse equality impacts have been identified. However, certain beneficial impacts have been identified in respect of some of the protected characteristics.

Protected Characteristic	**Commentary**	
Age	**Impact**	Yes. Poor housing conditions can negatively affect the health, safety and wellbeing of all residents, irrespective of age. However, certain housing deficiencies can have a more serious and harmful impact on individuals of particular ages. For example, older persons will suffer more in cold homes. The access to assistance within in the policy can be complicated and this could be a disadvantage if an individual is unable to make contact with the relevant person.
	Mitigation	Ensure that access to the assistance is as easy as possible for the elderly. Provision of advice and signposting for those age groups not eligible for the scheme.
Gender	**Impact**	No. The means of assessing eligibility does not discriminate against gender.
	Mitigation	Not required as no impact has been identified, negative or positive.
Race	**Impact**	No.

		The means of assessing eligibility does not discriminate against race.
	Mitigation	Not required as no impact has been identified, negative or positive.
Disability	**Impact**	Yes. The policy specifically identifies disabled residents as a beneficiary of assistance. The policy also aims to safeguard disabled residents by making their homes safer for them to live in.
	Mitigation	The impact is positive. No mitigation is required.
Religion or belief	**Impact**	No. The means of assessing eligibility does not discriminate against religion or belief.
	Mitigation	Not required as no impact has been identified, negative or positive.
Gender reassignment	**Impact**	No. The means of assessing eligibility does not discriminate against gender reassignment.
	Mitigation	Not required
Sexual orientation	**Impact**	No. The means of assessing eligibility does not discriminate against sexual orientation.
	Mitigation	Not required
Marriage and civil partnership (Aim 1 only)	**Impact**	No. The means of assessing eligibility does not discriminate against marriage and/or civil partnership.
	Mitigation	Not required
Pregnancy and maternity (Aim 1 only)	**Impact**	Yes. The means of assessing eligibility does not discriminate against pregnancy or maternity. However, they may not meet the eligibility

		criteria for other reasons. In some circumstances this characteristic may be relevant when considering eligibility under certain benefit criteria
	Mitigation	This characteristic should be kept under review in terms of accessing the scheme and eligibility.

Overall conclusions and options to be put before decision maker or to take forward to develop your service:

The policy specifically identifies some of the protected characteristics as beneficiaries of the scheme. The scheme is aimed at targeting resources as those households most in need of assistance.

Actions arising from analysis:

Action	**Officer Responsible**	**Deadline**
Ensure assistance can be accessed easily by elderly and disabled people.	Tanya Wenham	Ongoing
Keep the equality impact under review. In particular in relation to pregnancy and maternity.	Tanya Wenham	Ongoing

Acceptance

Name and signature of assessing officer and date of assessment

Name: Simon Newcombe **Position**: Corporate Manager, Public Health, Housing & Regulation

Signed: **Date**:

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CABINET **PART 1**
7 FEBRUARY 2023 **AGENDA ITEM:**

AWARD OF REPLACEMENT ROOFING PROGRAMME 2023 - 2026

Cabinet Member: Cllr Stuart Penny, Cabinet Member for Housing and Property Services
Responsible Officer: Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing

Reason for Report and Recommendations: To advise Members on the results for the tendering of the Replacement Roofing Programme 2023 - 2026 and confirm the award of the contract.

RECOMMENDATIONS:

1. **It is recommended that the new three year Replacement Roofing Contract be awarded to Contractor 1.**

2. **Delegated authority be granted to the S151 Officer (in consultation with the Cabinet Member for Housing and Property Services) to complete the associated Replacement Roofing Contract.**

Financial Implications: The Housing Revenue Account (HRA) budget for the works is £600,000.00 per annum. Capital investment in the MDDC stock will result in a lower revenue cost in the coming years, which will enable the Repairs Service to operate more effectively and manage future maintenance costs. Further information is provided in the report and as set out fully in Part II Annex A.

Legal Implications: We have a legal duty to maintain the stock and meet the Decent Homes Standard. The conditions of engagement are based on a JCT Intermediate Building Contract 2016, combined with the contractual requirements. This provides a robust framework for managing and controlling the performance of the contractor to meet our legal obligations.

Risk Assessment: The principal risk is failing to limit costs due to additional works and delivery of the programme. The performance of the contract shall be monitored monthly; corrective action will be taken where performance falls below Key Performance Indicator Targets. These also include: 1) Customer satisfaction; 2) Variations and extras; 3) Delivery of programme; 4) Number of defects; 5) Managing Health and Safety

Equality Impact Assessment: All staff have received Equality and Diversity awareness training. MDDC discuss equality and diversity at the progress meetings and encourage the contractor to carry out awareness training.

Relationship to Corporate Plan: To contribute towards meeting the Decent and Affordable Homes target by making best use of the existing stock.

Impact on Climate Change: Investment of this nature in the MDDC stock will lower the amount of fossil fuels used to run and maintain the homes and reduce carbon emissions.

1.0 Introduction

1.1 Mid Devon Housing (MDH) has a requirement to maintain the stock and meet the statutory Decent Homes Standard. This contract will support this duty in enabling end of life and damaged roofs to be replaced on our stock as part of our rolling maintenance programmes (planned and reactive). It will also support decarbonisation with improved thermal efficiency and help us / tenants to manage cold and damp issues which may give rise to issues such as mould.

1.2 The tenders were done on a worst case scenario covering all relevant elements of roofing although in real terms we will not require these at each site but need to have each potential aspect priced. We anticipate that the actual spend will be within the annual budget £600k.

1.3 The term of this contract is three years with the option to terminate the contract at the end of each year subject to performance.

1.4 Due to the nature and value of this procurement, the appropriate procedure was an open tender process. This means that anyone who expressed an interest in the contract would be invited to tender

1.4 To ensure quality of contractors, a number of minimum requirements were set out within the ITT. Any contractor failing to meet these would be disqualified.

2.0 Procurement Process

2.1 Expressions of interest were invited via a notice in the Supplying the South West Procurement Portal published on the 10 November 2022.

2.2 Evaluation criteria set out in the ITT:

Quality	**60%**
Skill, Knowledge, Expertise and Capacity	20%
Communication	20%
Environmental Benefits	20%
Price	**40%**

2.3 Responses were required by midday on 12 December 2022.

2.4 There were a total of 33 expressions of interest of which 2 submitted their tenders on time, 7 opted out and 24 did not respond. The main reason given for opting out was due to workload and insufficient resources at this time.

2.5 Evaluations were carried out during December 2022, by representatives from MDH Building Repairs Service.

2.6 The price was based a schedule of rates within the tender. The lowest priced tender was awarded 40% and the higher priced tenders were awarded the percentage difference. Contractor 1 scored highest on both price and quality as set out below.

2.7 The outcome of the evaluation is shown below:

CONTRACTOR	SCORE		TOTAL
	QUALITY	PRICE	
Contractor 1	40.00%	40.00%	80.00%
Contractor 2	36.00%	23.43%	59.43%

2.8 Contractor 1 are a Mid Devon based specialist roofing contractor.

3.0 Conclusion

3.1 The outcome of the tender process shows Contractor 1 as the winning bidder.

3.2 Approval is required from Cabinet for this contract to be formally awarded.

3.3 Following the decision, there will be a compulsory 10-day standstill period after which the contract will be awarded.

3.4 The contract will not commence until after the 1 April 2023

Contact for more Information: Mike Lowman, Operations Manager for Building Services mlowman@middevon.gov.uk or Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing – snewcombe@middevon.gov.uk

Circulation of the Report:

Cabinet Member for Housing and Property Services
Leadership Team
Corporate Management Team
Operational Leads including Legal Services

List of Background Papers:

- **ANNEX A: PART II - Confidential**

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By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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CABINET
7 FEBRUARY 2023

POLICY FRAMEWORK

Cabinet Member(s): Councillor R M Deed - Leader
Responsible Officer: Stephen Walford – Chief Executive

Reason for Report: To endorse the Policy Framework

Recommendation: To recommend to Council that the Policy Framework be adopted.

Financial Implications: None arising from this report.

Budget and Policy Framework: This report outlines the Council's Policy Framework.

Legal Implications: The report is required by the Constitution.

Risk Assessment: Not updating the strategic policies of the Council would result in policies not being aligned to corporate objectives and an inefficient use of resources.

Equality Impact Assessment: There are no concerns with regard to equalities impact relating to the content of this report.

Relationship to Corporate Plan: An efficient and effective policy framework helps provide the infrastructure to deliver the corporate plan

Impact on Climate Change: Several policies within the Policy Framework have a direct link to climate change.

1.0 Introduction/Background

1.1 The Policy Framework consists of both statutory documents that have to be adopted or approved by the Council as well as locally determined policies and strategies that form an integral part of the decision making process and their subsequent implementation.

1.2 A list of Strategies and Policies covered by the Framework is attached at Appendix 1.

1.3 It is recommended that these Strategies and Policies be formally approved as the Council's Policy Framework in accordance with the Constitution so far as they still apply and are relevant.

1.4 As new policies are approved by Council they will automatically be added to the Policy Framework.

2.0 Way Forward

2.1 Under the Budget and Policy Framework Procedure Rules, the Cabinet will be responsible for the implementation of the Budget and Policy Framework.

2.2 The purpose of this report therefore is to inform the Cabinet of their role in the implementation of the budget and policy framework, and highlighting to the Scrutiny Committee, Audit Committee and Policy Development Groups its work for the coming year.

2.3 The Policy Framework covers all strategic rather than operational policies and highlights those which are for Cabinet only approval and those which require full Council approval.

Contact for more Information: Stephen Walford, Chief Executive or Andrew Seaman, Member Services Manager

Circulation of the Report: Cabinet Members and Leadership Team

Appendix 1 - Community Policy Development Group						
Policy	**Head of Service**	**Last Approved**	**Group/Committee to review/develop**	**Expected date for next approval**	**Approval required from**	**Frequency to be reviewed**
Air Quality Action Plan	Director of Business Improvements and Operations	Nov-21	Community PDG	Nov-24	Cabinet	4 yearly
CCTV Policy	Deputy Chief Executive (S151)	Jan-21	Community PDG	Jan-24	Cabinet	3 yearly
Community Engagement Strategy (including Action Plan)	Director of Business Improvements and Operations	Mar-21	Community PDG	Mar-23	Cabinet	2 yearly
Corporate Anti Social Behaviour Policy	Director of Business Improvements and Operations	Mar-21	Community PDG	Mar-24	Cabinet	3 yearly
Corporate Heath & Safety Policy	Director of Business Improvements and Operations	Jan-21	Community PDG	Jan-24	Cabinet	3 Yearly
Customer Care Policy	Director of Business Improvements and Operations	Jan-22	Community PDG	Jan-24	Cabinet	3 yearly
Grant payments to external organisations (the strategic grants review process)	Director of Place	Jan-22	Community PDG	Jan-24	Cabinet	when appropaire
Enforcement Policy	Director of Business Improvements and Operations	Oct-20	Community PDG	Jan-23	Cabinet	When required
Safeguarding Children & Adults at Risk Policy and Procedures	Director of Business Improvements and Operations	Mar-22	Community PDG	Mar-25	Cabinet	3 yearly
Single Equalities Policy and Equality Objective	Director of Business Improvements and Operations	Mar-22	Community PDG	Mar-23	Cabinet	Annually
Town and Parish Charter	Director of Place	Jan-18	Community PDG	Jan-23	Cabinet	3 yearly
Unauthorised Encampment Policy	Deputy Chief Executive (S151)	Jun-22	Community PDG	Jun-25	Cabinet	3 yearly
Contaminated Land Cost Recovery Policy	Director of Business Improvements and Operations	Sep-20	Community PDG	Sep-25	Cabinet	5 yearly
The Council Tax Reduction Scheme & Exceptional Hardship Policy	Deputy Chief Executive (S151)	Dec-19	Community PDG	Jan-23	Cabinet	When required
Regulation of Investigatory Powers	District Solicitor (Monitoring officer)	Jan-22	Community PDG	Jan-23	Cabinet	Now Annually

Annexe 1
Notes
Joint PDG Community/Environment & Homes
Coming in Nov 2022 - Forward Planning
Coming in Jan 2023

Appendix 2 - Economy Policy Development Group

Policy	Head of Service	Last Approved	Group/Committee to review/develop	Expected date for next approval	Approval required from	Frequency to be reviewed
Destination Management Plan for Mid Devon	Director of Place	Mar-18	Economy PDG	Mar-23	Economy PDG - Cabinet	Every 5 years
Economic Strategy 2019-2024 (formerly known as the Mid Devon Economic Development Strategy 2012 - 2015)	Director of Place	Feb-19	Economy PDG	Jan-24	Economy PDG - Cabinet	5 yearly
Shopfront Enhancement Schemes (£15k non-key)	Director of Place	Nov-22	Economy PDG	Nov-25	Economy PDG - Cabinet	3 yearly
Strategy for Tiverton 2017/27	Director of Place	Feb-17	Economy PDG	Feb-27	Economy PDG - Cabinet	Every 10 years

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Appendix 3 - Environment Policy Development Group						
Policy	**Head of Service**	**Last Approved**	**Group/Committee to review/develop**	**Expected date for next approval**	**Approval required from**	**Frequency to be reviewed**
Bereavement Services Fees and Charges	Deputy Chief Executive (S151)	Nov-22	Environment PDG	Nov-23	Cabinet	Annually
Climate Strategy and Action Plan	Deputy Chief Executive (S151)	Oct-20	Environment PDG	Oct-24	Cabinet	4 yearly
High Hedges Policy	Director of Business Improvements and Operations	Aug-16	Environment PDG	Aug-23	Cabinet	7 yearly
National Assistance Burial Procedure	Deputy Chief Executive (S151)	Jun-19	Environment PDG	Jun-24	Cabinet	5 yearly
Open Space and Play Area Strategy (2013 - 2033)	Director of Business Improvements and Operations	Jan-15	Environment PDG	Jan-33	Cabinet	18 yearly
Parks and Open Spaces 10 Year Management Plan and Design Principles	Director of Business Improvements and Operations	Nov-17	Environemnt PDG	Nov-27	Cabinet	10 yearly
Play Area Safety Inspection Policy	Deputy Chief Executive (S151)	Jul-22	Environment PDG	Jul-25	Cabinet	3 yearly
Environment Educational Enforcement Policy	Director of Business Improvements and Operations	Mar-20	Environment PDG	Mar-23	Cabinet	3 yearly
Tree Policy	Deputy Chief Executive (S151)	May-21	Environment PDG	May-26	Cabinet	5 yearly

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Appendix 4 - Homes Policy Development Group

Policy	Head of Service	Last Approved	Group/Committee to review/develop	Expected date for next approval	Approval required from	Frequency to be reviewed
Tenant Involvement and Empowerment Standard						
Tenant Involvement and Empowerment Standard Policy	Director of Business Improvements and Operations	Jan-22	Homes PDG	Jan-26	Cabinet	4 yearly
Service Standards	Director of Business Improvements and Operations	Aug-16	Homes PDG	Jan-24	Cabinet	Will review when legislation /
Neighbourhood and Community Standard						
ASB Policy	Director of Business Improvements and Operations	Jul-15	Homes PDG	Jul-24	Cabinet	4 yearly
ASB Procedure	Director of Business Improvements and Operations	Jul-15	Homes PDG	Jul-24	Cabinet	4 yearly
Car Parking Management Policy	Director of Business Improvements and Operations	Mar-20	Homes PDG	Jul-24	Cabinet	4 yearly
Garage Management Po	Director of Business Improvements and Operations	Jan-20	Homes PDG	Jul-24	Cabinet	4 yearly
Domestic Abuse Policy	Director of Business Improvements and Operations	Jun-15	Homes PDG	Jul-24	Cabinet	4 yearly

Pets and Animals Policy	Director of Business Improvements and Operations	Oct-19	Homes PDG	Jul-24	Cabinet	4 yearly
Tenancy Inspection Polic	Director of Business Improvements and Operations	Jul-16	Homes PDG	Jul-24	Cabinet	4 yearly
Harrassment Policy	Director of Business Improvements and Operations	Oct-19	Homes PDG	Jul-24	Cabinet	4 yearly
Hoarding Policy	Director of Business Improvements and Operations	Sep-18	Homes PDG	Jul-24	Cabinet	4 yearly
Neighbourhood Management Policy	Director of Business Improvements and Operations	Sep-18	Homes PDG	Jul-24	Cabinet	4 yearly
CCTV and Camera Doorbell Policy	Director of Business Improvements and Operations	Nov-22	Homes PDG	Nov-27	Cabinet	5 yearly

Homes Standard

Void Management Policy	Director of Business Improvements and Operations	Jan-23	Homes PDG	Jan-24	Cabinet	4/5 yearly
Improvements to Council Properties Policy	Director of Business Improvements and Operations	Jan-20	Homes PDG	Jan-24	Cabinet	4/5 yearly

Fire Risk in Communal A	Director of Business Improvements and Operations	Jul-17	Homes PDG	Jan-24	Cabinet	4/5 yearly
Aids and Adaptations Po	Director of Business Improvements and Operations	Sep-16	Homes PDG	Jan-24	Cabinet	4/5 yearly
Asbestos Management F	Director of Business Improvements and Operations	?	Homes PDG	Jan-24	Cabinet	4/5 yearly
Gas Safety Policy	Director of Business Improvements and Operations	Sep-18	Homes PDG	Jan-24	Cabinet	4/5 yearly

Tenancy Standard

Tenancy Standard Fram	Director of Business Improvements and Operations	Jul-22	Homes PDG	Jul-26	Cabinet	4/5 yearly

Rent Standard

Income Management Po	Director of Business Improvements and Operations	Aug-15	Homes PDG	Sep-24	Cabinet	4/5 yearly

Recharges Policy	Director of Business Improvements and Operations	Sep-18	Homes PDG	Sep-24	Cabinet	4/5 yearly
Strategies						
Tenancy Strategy	Director of Business Improvements and Operations	?	Homes PDG	Nov-24	Cabinet	3 yearly
Housing Strategy	Director of Business Improvements and Operations	Sep-21	Homes PDG	Nov-24	Cabinet	3 yearly
Other						
HRA budget	Director of Business Improvements and Operations	Jan-23	Homes PDG	Jan-24	Cabinet	Annually
Private Sector Fees and Charges	Director of Business Improvements and Operations	Nov-22	Homes	Nov-23	Cabinet	Annually

Appendix 5 - Licensing & Regulatory Committees							
Policy	**Responsible Officer**	**Last Approved**	**Group/Committee to review/develop**	**Expected date for next approval**	**Approval required from**	**Frequency to be reviewed**	**Comments**
Hackney Carriage and Private Hire Policy and Conditions	Corporate Manager for Public Health , Regulation and Housing	Nov-18	Regulatory Committee	Mar-23	Council	3 Yearly	
Licensing Policy	Corporate Manager for Public Health , Regulation and Housing	Nov-18	Licensing Committee	Oct-23	Council	5 yearly	
Statement of Principles for Gambling Act 2005	Corporate Manager for Public Health , Regulation and Housing	Dec-21	Licensing Committee	Oct-24	Council	3 Yearly	
Mobile Homes FIT AND PROPER PERSON FEE POLICY	Corporate Manager for Public Health , Regulation and Housing	Sep-21	Regulatory Committee	Sep-22	Delegated to Officers	Annual	

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Appendix 6 - Audit Committee						
Policy	**Head of Service**	**Last Approved**	**Group/Committee to review/develop**	**Expected date for next approval**	**Approval required from**	**Frequency to be reviewed**
Annual Governance Statement and Governance Framework	Director of Business Improvements and Operations	Jan-23	Audit Committee	Sep-23	Audit Committee	Annually
Anti-fraud and Corruption and Anti-Money Laundering Policies	Director of Business Improvements and Operations	Mar-21	Audit Committee	Jan-23	Audit Committee	2 yearly
Corporate Recovery Policy	Deputy Chief Executive (S151)	Mar-21	Audit Committee	Mar-24	Cabinet	3 yearly
Financial and Contract Procedure Rules	Deputy Chief Executive (S151)	Jan-22	Audit Committee	Jan-25	Audit Committee - Full Council	3 yearly
Four year Strategic Audit Plan and Work Programme	DAP	Mar-22	Audit Committee	Mar-23	Audit Committee	Annually
Internal Audit Charter and Strategy	DAP	Mar-22	Audit Committee	Mar-23	Audit Committee	Annually
Risk Management Strategy	Director of Business Improvements and Operations	Mar-22	Audit Committee	Mar-23	Audit Committee	Annually
Whistleblowing Policy	Director of Business Improvements and Operations	Mar-21	Audit Committee	Mar-25	Audit Committee	4 yearly

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Appendix 7 - Cabinet

Policy	Head of Service	Last Approved	Group/Committee to review/develop	Expected date for next approval	Approval required from	Frequency to be reviewed	Detailed notes
Statement of Community Involvement	Director of Place	Aug-20	PPAG	when required	Council	As and when required	
Area of Special Control for advertisements	Director of Place	Dec-11	PPAG	Linked to the Local Plan	Council	When required	
Asset Management and Capital Strategy Plan 2016-2020	Deputy Chief Executive (S151)	Mar-21	Cabinet	Mar-25	Cabinet	4 years	
Channel Access Strategy 2014-2017	Director of Business Improvement and Operations	Sep-18	Cabinet	Mar-23	Cabinet	3 years	
Community Infrastrure Levy	Director of Place	Jan-21	PPAG	As and when required as part of the Local Plan	Council	As and when required as part of the Local Plan	
Complaints and Feedback policy	Director of Business Improvement and Operations	Jan-21	Cabinet	Jan-24	Cabinet	3 years	
Corporate Asbestos Policy	Deputy Chief Executive (S151)	Feb-20	Cabinet	Feb-23	Cabinet	3 years	
Corporate Debt Recovery Policy	Deputy Chief Executive (S151)	Mar-21	Audit Committee - Cabinet	Mar-24	Cabinet	3 years	
Corporate Plan (2020-2024)	Director of Business Improvement and Operations	Feb-20	Cabinet	Feb-24	Council	4 yearly	
Council Tax Reduction Scheme	Deputy Chief Executive (S151)	Dec-16	Cabinet	When Required	Cabinet	When required	This includes the Exceptional Hardship Policy . It also includes the MDDC Fraud penalty Policy (as per JC Apr 16)
Data Protection Policy	Director of Business Improvement and Operations	Oct-22	Cabinet	Oct-25	Cabinet	3 yearly	

Appendix 7 - Cabinet

Policy	Head of Service	Last Approved	Group/Committee to review/develop	Expected date for next approval	Approval required from	Frequency to be reviewed	Detailed notes
Discretionary Rate Relief Scheme	Deputy Chief Executive (S151)	Feb-19	Cabinet	awaited	Cabinet	Annually	The changes that have come in are mandatory – PM/Chancellor to advise anymore and then request s151, portfolio holder sign off
Email Policy	Director of Business Improvements and Operations	Jan-21	Cabinet Member for Community-Well-Being	Jan-23	Cabinet Member for Community Well-Being	2 Yearly	Have asked the question
The Establishment	Director of Business Improvements and Operations	Feb-22	Cabinet	Feb-23	Council	Annually	Now includes details of the Workforce Plan and the
Freedom of Information Policy	Director of Business Improvements and Operations	Oct-22	Cabinet or Cabinet Member	Oct-25	Cabinet	3 yearly	
ICT Strategy	Director of Business Improvements and Operations	Feb-19	Cabinet	Feb-24	Cabinet	5 yearly	
Internet Policy	Director of Business Improvements and Operations	Jan-21	Cabinet Member for Community Well-Being/and Corporate Manager	Jan-24	Cabinet Member for Community Well-Being	5 Yearly	
Leisure Pricing Policy	Deputy Chief Executive (S151)	Dec-22	Individual Decision by the Cabinet Member for Community Well Being	Dec-23	Cabinet Member for Community Well-Being	Annually	
Local Development Scheme	Director of Place	Jan-22	PPAG	As and when required as part of the Local Plan	Cabinet	As and when required as part of the Local Plan	
Local Enforcement Plan (replaces Development Control Enforcement Policy)	Director of Place	Jan-18	PPAG	awaited	Council	3 yearly	
Local Plan	Director of Place	Jul-20	Cabinet	Jul-25	Council	5 Yearly	
Medium Term Financial Strategy	Deputy Chief Executive (S151)	Nov-22	Cabinet	Dec-23	Cabinet	Annually	

Appendix 7 - Cabinet

Policy	Head of Service	Last Approved	Group/Committee to review/develop	Expected date for next approval	Approval required from	Frequency to be reviewed	Detailed notes
Pay Policy	Director of Corporate Affairs and Business Transformation	Feb-22	Cabinet	Feb-23	Council	Annually	
Records Management Policy	Director of Business Improvement and Operations	Oct-22	Cabinet	Oct-26	Cabinet	4 yearly	
Treasury Management Strategy and Annual Investment Strategy	Deputy Chief Executive (S151)	Feb-22	Cabinet	Feb-23	Council	Annually	
Information Security and Information Security Incident Policies	Director of Business Improvements and Operations	Jan-22	Cabinet	Oct-25	Cabinet	3 yearly	

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MID DEVON DISTRICT COUNCIL – SCHEDULE OF MEETINGS – 2023-2024

Ratified by Council on ……..

MEETING	Normal day and Time	1 2023	2	3	4	5 2024	6	
Planning Committee *(first meeting of cycle)*	Wed	14th June	2nd August	13th September	22nd November	10th January	13th March	
Planning Committee *(second meeting of cycle)*	Wed	12th July	30th August	11th October	13th December	14th February	10th April	
CABINET *(first meeting of cycle)*	Tues	6th June	1st August	19th September	14th November	9th January	5th March	
CABINET *(second meeting cycle)*	Tues	4th July	29th August	17th October	12th December	6th February	2nd April	
ENVIRONMENT PDG	Tues	20th June	15th August	10th October	7th November	9th January	12th March	
HOMES PDG	Tues	13th June	8th August	26th September	21st November	16th January	19th March	
ECONOMY PDG	Thurs	8th June	3rd August	4th October	17th November	4th January	7th March	
COMMUNITY PDG	Tues	27th June	22nd August	24th October	5th December	23rd January	26th March	
SCRUTINY COMMITTEE (*first meeting of cycle)*	Mon	19th June	14th August	2nd October	27th November	15th January	18th March	
SCRUTINY COMMITTEE *(second meeting of cycle)*	Mon	17th July	11th September	30th October	18th December	19th February	15th April	
AUDIT COMMITTEE	Tues	27th June	22nd August	24th October	5th December	16th January	26th March	
Standards Committee	Weds	21st June		18th October		7th February		
Licensing Committee	Fri	30th June			1st December			
Regulatory Committee	Fri	30th June			1st December			
Away Days	Fri 9.30am							
COUNCIL	Wed 6.00pm	19th July	6th September	1st November	20th December	21st February	24th April	**22 MAY 2024**

Note: (i) *Annual meeting of the Council at 7.00pm. **Annual Meeting in 2023 is on 24 May**
(ii)*Annual meeting of the Council at 7.00pm. **Annual Meeting in 2024 is on 22 May**

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MID DEVON DISTRICT COUNCIL – NOTIFICATION OF KEY DECISIONS

March 2023

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)
3 Rivers Development Ltd Business Plan. To receive the company business plan and if appropriate to make recommendations to Audit Committee on 22 November	Scrutiny Committee Audit Committee Cabinet	21 Nov 2022 22 Nov 2022 3 Jan 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Part exempt
Council Tax Base To consider the Council Tax Base for 2023/24	Cabinet Council	3 Jan 2023 22 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Open
3 Rivers project appraisal for development in Park Road, Tiverton	Cabinet	3 Jan 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Part exempt

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)
3 Rivers project appraisal for development in Bampton	Cabinet	3 Jan 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Part exempt
Tiverton Town Centre Masterplan To receive a draft copy of the Tiverton Town Centre Masterplan	Economy Policy Development Group Cabinet	12 Jan 2023 7 Feb 2023	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Voids Management Policy To review of the Voids Management Policy	Homes Policy Development Group Cabinet	17 Jan 2023 7 Mar 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	
Housing Assistance Policy To consider a revised policy.	Homes Policy Development Group Cabinet	17 Jan 2023 7 Feb 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	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)
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	24 Jan 2023 7 Feb 2023	Dean Emery, Corporate Manager for Revenues, Benefits and Recovery	Leader of the Council (Councillor Bob Deed)	Open
Revised Procurement Strategy To receive the refreshed Procurement Strategy	Audit Committee Cabinet	24 Jan 2023 7 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Open
2023/24 – 2026/27 Procurement Strategy	Cabinet	7 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Open
Qtr. 3 Budget Monitoring	Cabinet	7 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Open
2023/24 Capital Strategy	Cabinet	7 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	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)
2023/24 Treasury Management Strategy	Cabinet	7 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Open
2023/24 Budget	Cabinet	7 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Open
Cullompton Town Centre Masterplan and Delivery Plan SPD To consider the masterplan	Cabinet Council	7 Feb 2023 22 Feb 2023	Adrian Welsh, Strategic Manager for Growth, Economy and Delivery Tel: 01884 234398	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Schedule of Meetings 2023 - 2024 To consider the Schedule of Meetings for 2023/24	Cabinet Council	7 Feb 2023 22 Feb 2023	District Solicitor and Monitoring Officer	Cabinet for the Working Environment and Support Services (Councillor Clive Eginton)	Open
East Cullompton (Culm Garden Village) Masterplan SPD	Cabinet	7 Feb 2023	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)
Pay Policy To consider the Pay Policy	Cabinet Council	7 Feb 2023 22 Feb 2023	Matthew Page, Corporate Manager for People, Governance and Waste	Leader of the Council (Councillor Bob Deed)	Open
Policy Framework To consider the Policy Framework	Cabinet Council	7 Feb 2023 22 Feb 2023	Stephen Walford, Chief Executive Tel: 01884 234201	Leader of the Council (Councillor Bob Deed)	Open
Budget To consider the budget to GF, HRA and Capital, plus Capital Strategy plus Treasury Strategy	Cabinet Council	7 Feb 2023 22 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Open
National Non Domestic Rates (NNDR1) To consider the NNDR1 for a recommendation to Council	Cabinet Council	7 Feb 2023 22 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	
Establishment To receive the annual review of the Establishment	Cabinet Scrutiny Committee Council	7 Feb 2023 20 Feb 2023 22 Feb 2023	Matthew Page, Corporate Manager for People, Governance and Waste	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)
Shared Prosperity Fund and the Rural Prosperity Fund	Cabinet	7 Feb 2023	Zoë Lentell, Economic Development Team Leader	Councillor Richard Chesterton	Open
Replacement Roofing 2023 – 2026, Award report	Cabinet	7 Feb 2023	Mike Lowman, Building Services Operations Manager	Councillor Stuart Penny	
2023/24 Council Tax Resolution	Council	22 Feb 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Open
Local Authority Housing Fund	Cabinet	7 Mar 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Councillor Stuart Penny	
Supply of PVC-u Windows, Doors and Shower Panels 2023 – 2026, Award report	Cabinet	7 Mar 2023	Mike Lowman, Building Services Operations Manager	Councillor Stuart Penny	
Provision of Cleaning Services 2023 – 2026, Award report	Cabinet	7 Mar 2023	Mike Lowman, Building Services Operations Manager	Councillor Stuart Penny	

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	7 Mar 2023	Lisa Lewis, Corporate Manager for Business Transformation and Customer Engagement Tel: 01884 234981	Cabinet for the Working Environment and Support Services (Councillor Clive Eginton)	Open
Cullompton Town Centre Relief Road	Cabinet	7 Mar 2023	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Resident Survey Results	Cabinet	7 Mar 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Councillor Bob Deed	
Meeting Housing Needs SPD To recommend a draft for consultation to the Cabinet	Cabinet	7 Mar 2023	Director of Place	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
draft Non-Statutory Interim Planning Policy Statement: Climate Emergency (post consultation)	Cabinet	7 Mar 2023	Tristan Peat, Forward Planning Team Leader		

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	21 Mar 2023 4 Apr 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Asbestos Management Plan To consider a revised plan.	Homes Policy Development Group Cabinet	21 Mar 2023 4 Apr 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	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	28 Mar 2023 4 Apr 2023	Maria De Leiburne, District Solicitor and Monitoring Officer	Cabinet Member for Community Well Being (Councillor Dennis Knowles)	Open
Post Hill Tiverton–Tender results and project award for 70 Council homes To consider the outcome of the tender process.	Cabinet Council	4 Apr 2023 26 Apr 2023	Andrew Busby, Corporate Manager for Property, Leisure and Climate Change Tel: 01884 234948	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Part exempt

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)
Air Quality SPD	Cabinet	4 Apr 2023	Tristan Peat, Forward Planning Team Leader		Open
Crediton NHS Hub Phase 2 To consider a funding request.	Cabinet	4 Apr 2023	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Leader of the Council (Councillor Bob Deed)	Part exempt
Tiverton EUE Area B masterplan	Cabinet	4 Apr 2023	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Meeting Housing Needs SPD To approve the draft SPD for consultation.	Cabinet	4 Apr 2023	Tristan Peat, Forward Planning Team Leader	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
S106 Governance	Cabinet	4 Apr 2023	Joanna Williams, Planning Obligations Monitoring Officer		Open

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