

Public Document Pack

Mid Devon District Council

Cabinet

Thursday, 14 June 2018 at 2.15 pm
Exe Room, Phoenix House, Tiverton

Next ordinary meeting
Thursday, 5 July 2018 at 2.15 pm

Those attending are advised that this meeting will be recorded

Membership

Cllr C J Eginton	Leader and Environment
Cllr R J Chesterton	Deputy Leader and Planning and Economic Regeneration
Cllr P H D Hare-Scott	Finance
Cllr C R Slade	Community Well Being
Cllr Mrs M E Squires	Working Environment and Support Services
Cllr R L Stanley	Housing

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. Declarations of Interest under the Code of Conduct**
Councillors are reminded of the requirement to declare any interest, including the type of interest, and reason for that interest, either at this stage of the meeting or as soon as they become aware of that interest.
- 3. Public Question Time**
To receive any questions relating to items on the Agenda from members of the public and replies thereto.
- 4. Minutes of the Previous Meeting (Pages 7 - 14)**
Members to consider whether to approve the minutes as a correct record of the meeting held on 23 May 2018
- 5. Bereavement Services Fees and Charges (Pages 15 - 26)**
To reconsider a report of the Director of Finance, Assets and Resources setting out the Bereavement Service fees and charges for 2018/19. This report had previously been considered by the Cabinet on 5 April 2018, however, due to a change in Government guidance with regard to fees

and charges, the it had been resolved that the matter be referred back to the PDG for further consideration.

6. **Street Scene Education and Enforcement Service** (Pages 27 - 32)
Following a report of the Group Manager for Streetscene and Open Spaces, the Environment Policy Development Group had made the following recommendations:

- a) The fine for littering be increased to the statutory maximum of £150.
- b) The time allocated to discretionary duties be varied as specified in paragraph 2, Table 2.
- c) Policies, systems and procedures necessary to enable Fixed Penalty Notices (FPN's) to be served on the relevant person(s) associated with littering from vehicles be introduced.

7. **Tenant Involvement Strategy** (Pages 33 - 60)
Following a report of the Group Manager for Housing, the Homes Policy Development Group had recommended that the revised Tenant Involvement Strategy be approved

8. **Tenant Involvement Policy** (Pages 61 - 70)
Following a report of the Group Manager for Housing, the Homes Policy Development Group had made the following recommendation: that the revised Tenant Involvement Policy be approved subject to a revision of paragraph 9 on Equality and Diversity to state the following:

As a registered provider of social housing, the Council has an equality duty and is bound by the provisions of the Equality Act 2010. This means that the Housing Service must ensure that there will be no discrimination or unfair treatment on the grounds of gender (or gender reassignment), race, colour, ethnicity or national origin, faith, sexual orientation, marital/civil partnership status, age, disability, politics or trade union membership. We will not tolerate any discriminatory remarks or actions and will challenge anyone who behaves in that manner. Tenants will be excluded from any further involvement if they continue to behave in an offensive or discriminatory manner.

9. **Community Housing Fund Grant Policy** (Pages 71 - 96)
Arising from a report of the Group Manager for Housing Services, the Homes Policy Development Group had recommended that the Cabinet recommend to Council that:

- a) The Community Led Housing Fund Grant Policy be adopted and endorsed so that it can be used within the Council's District.
- b) That Members support the framework for the allocation of grants as presented within the report.
- c) Should any disagreements occur then the final decision should be delegated to the Director of Operations in conjunction with the Cabinet Member.

10. **Revenue and Capital Outturn 2017/18** (Pages 97 - 134)
To consider a report of the Director of Finance, Assets and Resources presenting the revenue and capital outturn figures for the financial year 2017/18.
11. **Annual Treasury Management Report** (Pages 135 - 144)
To consider a report of the Director of Finance, Assets and Resources providing Members with a review of activities and the actual prudential treasury indicators for 2017/18.
12. **Revenues and Benefits Performance Report** (Pages 145 - 148)
To consider a report of the Director of Finance, Assets and Resources providing an overview of the performance of the Revenues and Housing Benefits Services in 2017/18.
13. **Tiverton Eastern Urban Extension Area A – Masterplanning - Land South of West Manley Lane** (Pages 149 - 278)
Report of the Head of Planning, Economy and Regeneration updating Members on the outcome of the public consultation regarding the proposal to amend the adopted Masterplan Supplementary Planning Document (SPD) by removing housing land parcels on the southern side of West Manley Lane (within Area A) and to seek approval to revise the adopted Masterplan SPD accordingly.
14. **Revised Data Protection Policy** (Pages 279 - 288)
To consider a report of the Group Manager for Performance, Governance and Data Security updating the existing policy to incorporate the requirements of the Data Protection Act (DPA) 2018 and GDPR.
15. **Records Management** (Pages 289 - 296)
To consider a report of the Group Manager for Performance, Governance and Data Security requesting the Cabinet to approve the revised Records Management Policy.
16. **Performance and Risk** (Pages 297 - 334)
To consider a report of the Director of Corporate Affairs and Business Transformation providing Members with an update on the performance against the Corporate Plan and local service targets.
17. **Notification of Key Decisions** (Pages 335 - 346)
To note the contents of the Forward Plan.
18. **Access to Information - Exclusion of the Press and Public**
During discussion of the following item(s) it may be necessary 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 will 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.

To consider passing the following resolution so that financial information may be discussed.

Recommended that under Section 100A(4) of the Local Government Act 1972 the public be excluded from the next item of business on the grounds that it involves the likely disclosure of exempt information as defined in paragraph 3 respectively of Part 1 of Schedule 12A of the Act, namely information relating to the financial or business affairs of any particular person (including the authority holding that information) .

19. **Crediton Office, Crediton** (Pages 347 - 428)

Following the meeting on 10th May 2018, the Chairman of the Scrutiny Committee had called in the decision of the Cabinet: that subject to contract, to dispose of the Crediton office building to buyer 2 on the terms set out in paragraph 3.5 of the report for the following reasons:

1. the decision appears to have been made, not in haste, but without full recognition of the potential for:
 - further negotiations to take place with Crediton Town Council to see whether a more acceptable offer could be achieved. There is, despite the known financial pressures in local government, no deadline by which the decision had or has to be made - other than the need for a disposal to take place before the end of the 18-month protected period which applies to disposals of assets of community value in order to avoid a further moratorium.
 - the central and valued location of the building to Crediton which, if it were to be transferred to Crediton Town Council, could sustain the well-being and social cohesion of the town
2. it is unclear how the Cabinet took into account the following Corporate Plan objectives:
 - working with local communities to encourage them to support themselves, including retaining and developing their local facilities and services
 - working with town and parish councils

The Scrutiny Committee at its meeting on 21 May 2018

“RESOLVED that the Cabinet be requested to reconsider its decision to dispose of the Crediton office building to buyer 2 and that Crediton Town

Council be allowed to make a final offer for the building”.

Stephen Walford
Chief Executive
Wednesday, 6 June 2018

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

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If you would like a copy of the Agenda in another format (for example in large print) please contact Sally Gabriel on:

Tel: 01884 234229

E-Mail: sgabriel@middevon.gov.uk

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MID DEVON DISTRICT COUNCIL

MINUTES of a **MEETING** of the **CABINET** held on 23 May 2018 at 10.00 am

Present

Councillors

C J Eginton (Leader)
R J Chesterton, P H D Hare-Scott,
C R Slade, Mrs M E Squires and
R L Stanley

Also Present

Councillor(s)

Mrs E M Andrews, Mrs A R Berry, F J Rosamond and
Mrs N Woollatt

Also Present

Officer(s):

Andrew Jarrett (Director of Finance, Assets and Resources), Jill May (Director of Corporate Affairs and Business Transformation), Andrew Pritchard (Director of Operations), Kathryn Tebbey (Group Manager for Legal Services and Monitoring Officer), Jenny Clifford (Head of Planning, Economy and Regeneration), Adrian Welsh (Group Manager for Growth, Economy and Delivery) and Sally Gabriel (Member Services Manager)

Also in

Attendance:

Ian Sorenson (Devon County Council, Highway Authority)

12. **APOLOGIES**

There were no apologies.

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

Members were reminded of the need to declare any interests when appropriate.

14. **PUBLIC QUESTION TIME (00- 01-17)**

Mr Warren referring to item 5 on the agenda (Housing Infrastructure Fund) stated that in September 2017 a bid was made to the fund in relation to two projects in Mid Devon. On 1 February 2018 a press release from MDDC stated "Today the Council learned it was successful with its bids for both Tiverton and Cullompton, unlocking growth potential for both towns. Cullompton will receive £10 million to undertake short term improvements to Junction 28". It goes on to describe those works. Comments are also included which are attributed to Councillors Chesterton and Eginton. Councillor Eginton is quoted as saying "this shows not only the quality of our own bids, but with success being repeated across the greater area".

The report before you today, under risk assessment, contains the words “lead us now to believe that the scheme as initially submitted under the HIF MV fund is not deliverable and will not achieve the desired outcomes”.

At paragraphs 4.1.1 it states “It is therefore concluded by the highway authorities that the scheme of works at the junction as submitted under the HIF scheme is both undeliverable and would not represent value for money.

How can the Leader substantiate his quote that the original bid was one of quality?

Having read the report before you and the requirement of due diligence and further assessments needed, was it not premature to advise members of the public that the original bid was successful?

The latest press release dated 15 May 2018 concludes with the words “The Council learned it was successful in principle with both its bids in February, subject to further stages of evaluation by Homes England prior to a final decision in summer/autumn 2018”.

Now that we have the words ‘in principle’ included was the press release in February misleading the public as it now appears the funding was not definite as more work and discussions were needed?

Is the statement by Councillor Chesterton in that May 2018 press release predetermining the outcome of your discussions and decision today?

Catherine Penharris again referring to item 5 on the agenda (Housing Infrastructure Fund) stated that in your report and in particular the risk assessment, I cannot see anything about earmarking the land, if the land (you are proposing to use for the relief road) is not available for the relief road what are you proposing to do? You state that discussions are well advanced, what are the options and what other options do you have?

The Chairman indicated that answers would be provided when the item was discussed.

15. MINUTES OF THE PREVIOUS MEETING (00-06-07)

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

16. HOUSING INFRASTRUCTURE FUND (00-07-08)

The Cabinet had before it a report* of the Head of Planning, Economy and Regeneration updating Members on the latest position with regard to the Housing Infrastructure Fund (HIF) bid for Cullompton and to seek approval to pursue opportunities to use the Government investment on an amended transport intervention to bring forward housing development and address congestion and air quality problems in the Cullompton area and seek approval to fund related work.

The Cabinet Member for Planning and Economic Regeneration initially asked the Monitoring officer if she felt that he was predetermining the outcome of the

discussions and the decision that would be made today. The Monitoring Officer advised that as long as the Member was satisfied that he was willing to listen to the discussion then predetermination was unlikely. He therefore outlined the contents of the report stating that in July 2017 the Government launched its £2.3 billion Housing Infrastructure Fund to finance infrastructure to unlock housing delivery.

The Marginal Viability part of the fund would be used to provide the final, or missing, piece of infrastructure funding in order to get existing sites unblocked quickly or new sites allocated. The Government expected the infrastructure to be built soon after schemes had been awarded funding and for the homes to follow at pace.

Bids to the fund were assessed against three criteria:

- Value for money
- Strategic approach to delivering housing growth
- That the scheme and homes could be delivered.

Mid Devon District Council submitted marginal viability bids in relation to two schemes for highways infrastructure which would unlock development sites identified within both the adopted Local Plan and the emerging Local Plan Review:

1. J28 M5 Cullompton - A £10m scheme for improvements at the junction itself to increase its capacity through the creation of an additional lane on the bridges, new footbridges and full signalisation.
2. A361 junction east of Tiverton – A £8.2m scheme for phase 2 covering the bridge across the A361, the north side slip roads and associated landscaping.

The Government had announced the success of both schemes in early 2018. This was subject to a process of further assessment and due diligence by Homes England which was still ongoing. Assessment was currently focussed on value for money (cost/benefit) and delivery. A final decision over whether the funding would be awarded was expected within the next few months.

Since the original bid submission, further transport analysis and further discussions had taken place with Devon County Council officers and Highways England over the proposed scheme for Cullompton. This has resulted in advice that:

1. The scheme at the junction would not achieve the benefits to traffic flows and junction operation initially expected.
2. The highway authorities had expressed strong concern over the ability for the scheme as submitted to be constructed.
3. Neither authority therefore wished to take responsibility for the delivery of the scheme which was now considered to be undeliverable and not to represent value for money.

Officers had therefore concluded that the scheme as submitted would not now satisfy Homes England and would not be funded. Officers considered there was an opportunity to evolve the proposed highway scheme in order to better address the issues of traffic flows and junction operation, unlock the same number of homes and

delivery better value for money. This would be through the delivery of a relief road for Cullompton rather than the previously proposed scheme located at the motorway junction itself. A relief road would provide:

1. Better management of queueing in the PM peak on the north bound off-slip at J28, removing a potential safety concern;
2. Reduction of traffic from Cullompton High Street which was an existing Air Quality Management Area;
3. Delivery of a long-standing community aspiration for a town centre relief road to support economic and environmental regeneration of Cullompton High Street; and
4. Early delivery of the first part of the longer term strategic solution which would be required to unlock the full potential for homes and growth at Culm Garden Village.
5. Less disruption to the operation of the motorway junction during construction as the original proposal.

Amending the £10m HIF bid to deliver a relief road for Cullompton did have the support of Highways England and Devon County Council.

The route and precise alignment of the relief road was yet to be determined and would be subject to public consultation before the submission of a planning application. Officers were working on a project programme to meet the Homes England requirement that money was spent and schemes delivered by 2020/21. To meet the tight timetable, some work would need to be financed in advance of final confirmation of the bid outcome from Homes England. A budget of £100,000 for the work would be needed and was therefore at risk should Homes England not agree to support the intervention. A further £300,000 budget was proposed within the recommendation, but this would only be sought in the event that Homes England confirmed approval of the funding and that spend was eligible to be reimbursed through the Housing Infrastructure Fund.

The Council was therefore:

1. Seeking to secure investment in Cullompton's infrastructure;
2. Trying to find the best way to not just deliver the housing, but to also meet the long term needs and ambitions of the town; and
3. The views of local people on potential road alignment would be sought over the following months if the funding was secured.

The Head of Planning Economy and Regeneration answered the questions posed in public question time; she stated that this was an evolving situation; the timescales that Mr Warren referred to were correct and that the press release was as a response to the ministerial announcement which listed the successful projects. What was not clear at that time was the extent of further assessment and due diligence required; the press release was written and published in good faith. What was unknown at the time was the extent of the further processes that were required and that the approval was only in principle and that more work and engagement with Homes England was required. The report before you reflected the evolving situation. She reported that work was taking place with Devon County Council, Highway

Authority and Highways England and through the local authority's due diligence it was now clear that the scheme at Junction 28 would not achieve the extent of benefits originally identified. There was now the opportunity to capture the greatest benefit for Cullompton by delivering a relief road and that was now the preference of Highways England. She outlined the concerns of the Highway Authorities with regard to PM peak congestion backing up on to the motorway and the wider benefits that the relief road could produce. Referring to the question regarding the routes of the relief road, she was aware that the land was in different ownership and there would be a need to secure the land, the precise route had not been decided in the current Local Plan policy it was described as an eastern relief road from Station Road to Meadow Lane and therefore the route had been identified as going through the CCA fields, however subject to technical constraints, whether there was potential for another option on the other side of the motorway was being investigated. A public consultation process would take place to consider options for the route.

The Leader added that with regard to the press release, he still believed that they were quality bids and that the press release was not misleading but based on information that was available at the time.

The Cabinet Member for Planning and Regeneration also highlighted a recent planning appeal which had questioned the impact of new development on the junction and that it was unlikely that substantial S106 funding from the North Western Cullompton development would be made available for improvements to J28.

Consideration was given to:

- The initial funding requirement of £100k and where that money would come from
- The overall cost of the road, funding streams and the timetable for delivering a relief road
- The cost benefit ratio
- Initial works already planned by Devon County Council, Highway Authority for the summer for J28 to widen the carriageway on the eastern side of the junction.
- The details within the North West Cullompton Masterplan regarding the release of funding upon land same and prior to development.
- The views of local Ward Members: Cllr Mrs Woollatt stated that the report did not fully address the risks involved, there was a lack of data with regard to housing growth in the area and that she felt that the scheme would not stand up to due diligence by Homes England. The relief road would cause more congestion as Junction 28 would still be a bottleneck and that the relief road would only deal with town centre congestion; the original plan was deemed to be unsatisfactory and therefore there was a need for a Plan B, she questioned the outcome of the Environment Agency report of flood issues, the landowners on the proposed route options for the relief road were stakeholders and would have to be consulted, the timescales were too tight and that an additional junction on the M5 would be the best option. She also requested that any decision be deferred to allow for better modelling data to be supplied. The

representative from Devon County Council Highway Authority stated that a new relief road would remove the congestion within the town centre and that the modelling outcomes would be better served by an eastern relief road and would reduce the safety concerns of Highways England with regard to queuing back onto the motorway at PM peak times. Cllr Mrs Woollatt also questioned how long a compulsory purchase order would take and the impact that would have on the scheme.

Cllr Mrs Berry stated that the residents of Cullompton were desperate for a relief road and that there was a need to grab the opportunity before Members today; if the scheme was deliverable then there was a need to welcome it.

Cllr Mrs Andrews stated that there was a need for a relief road but it had to be in the right place, there was a need to consider the impact of a relief road crossing the CCA fields and the impact that this would have on the school and the residents of Meadow Lane and Duke Street. Should the relief road be established on the other side of the motorway which would be nearer to the Garden Village? She spoke about the congestion in the High Street and the large vehicles that travelled through the town, the flood issues in the area of the CCA fields and the need for the scheme to cover all the issues in Cullompton.

The Chairman of the Scrutiny Committee highlighted the preliminary informal discussions that had taken place with Homes England.

- If the relief road did pass through the CCA fields it would be raised, if that option was agreed it was a critical infrastructure and therefore allowed in a flood plain
- The relief road would not replace a future junction/significant junction improvement to the M5 which had been proposed as part of the Garden Village scheme, this would be a different stage of intervention.

It was therefore

RESOLVED that:

- a) Delegated authority be given to the Head of Planning, Economy and Regeneration to pursue further discussions over Housing Infrastructure Fund Marginal Viability (HIF MV) with Homes England on the basis of an amended highway intervention at Cullompton to deliver the town centre relief road;
- b) A budget of £100,000 be approved to progress development of a relief road scheme and delegated authority be granted to the Head of Planning, Economy and Regeneration in consultation with the Cabinet Member for Planning and Regeneration to commission associated work up to this value;
- c) In the event that HIF funding from Homes England is confirmed, delegated authority be granted to the Head of Planning, Economy and Regeneration and the Director of Finance, Assets and Resources (Section 151 Officer), in consultation with the Cabinet Member for Planning and Regeneration, to

approve a further budget of up to £300,000 to support pre-application work which would then be reimbursed through the HIF fund.

(Proposed by Cllr R J Chesterton and seconded by Cllr R L Stanley)

Note: *Report previously circulated copy attached to minutes.

(The meeting ended at 11.25 am)

CHAIRMAN

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ENVIRONMENT PDG

15 May 2018

Bereavement Service Fees and Charges

Cabinet Member: Cllr Clive Eginton

Responsible Officer: Andrew Jarrett, Director of Finance, Assets and Resources

Reason for Report: To review and approve Bereavement Service Fees and Charges for 2018/19.

RECOMMENDATION(S):

To recommend approval to Cabinet the proposed charges for 2018/19 set out in Table A, Column B.

Relationship to Corporate Plan: Priority 5 – Corporate.

Financial Implications: Bereavement Services' total income for 2016/17 was £112.7k in a full year; the proposed increases in fees could generate an additional £12k.

Legal Implications: By virtue of section 214 of the Local Government Act 1972 and of the provisions of the Local Authorities' Cemeteries Order 1977, the Council is the burial authority.

Paragraph 15 of the said 1977 Order provides burial authorities with the power to charge such fees as they think are proper – "(a) for or in connection with burials in a cemetery; 3 (b) for any grant of a right to place and maintain a tombstone or other memorial in a cemetery...(c) for any grant of a right to put an additional inscription on such a tombstone or other memorial".

A burial authority is obliged to keep a table showing the matters in respect of which fees or other charges are payable to them, and the amount of each such fee or charge, and the table, shall be available for inspection by the public at all reasonable times.

Risk Assessment: N/A

Equality Impact Assessment: An equality impact assessment has been undertaken and is attached as Annex A.

1.0 Introduction

1.1 In previous years price increases within the Bereavement Service were necessary for the Council to reduce the estimated cost of service provision. The focus remains on providing the best possible standards of service, which includes not only the maintenance of our two cemeteries but the ongoing aim of ensuring the long-term needs of burials are met. Our two cemeteries provide places for quiet reflection where people are treated with dignity and respect at all stages of their lives.

- 1.2 The Council remains committed and continues to ensure that re-investment is made for various maintenance works across the Council's two cemeteries in Crediton and Tiverton that also includes buildings.
- 1.3 It is proposed to increase bereavement charges from 1 April 2018 by 10%, as set out in Table A.
- 1.4 In the case of a death with no next of kin, or should some members of the public be unable to meet these new charges through financial hardships or other such circumstances, support is available to bereaved families. There are three main means of support: Social Services, the hospital where the death occurred and Funeral Payments, available via the Department of Work and Pensions.
- 1.5 In addition, under Section 50 of the National Assistance Act 1948, a local authority will meet the costs of a basic funeral where the deceased or the next of kin are not in a position to meet the expenses. In 2016/2017 the cost of providing national assistance burials was £2k.
- 1.6 Among the broader financial considerations, the Council continues to face budget pressures and has experienced a reduction of core funding in the region of £493k from central government.
- 1.7 Further to the press release from The Rt Hon Theresa May MP on the 31st March 2018, instruction has been given for a Children's Funeral Fund to be set up in England. This will remove the fees for burials or cremations for those under the age of 18. The intervention brings England in line with Wales and follows a cross-party campaign by bereaved parents. The cost of burials or cremations for those under the age of 18 will be met instead by government funding; the details on how local authorities will do this are yet to be published.

Table A, column B has therefore be updated to reflect the intervention.

2.0 Background

- 2.1 There is a risk that budget targets will not be met due to increased costs of providing the service and therefore this decision is important in ensuring the sustainability of burial provision.
- 2.2 The Council applies a range of fees and charges associated with burials. The existing fees and charges are presented in Table A.

3.0 Table A

- 3.1 Column 'A' lists the current charges that were set in 2016/17.
- 3.2 Column 'B' shows proposed charges for 2018/19 that includes an increase of 10%. Column B has also been updated following government intervention, as detailed in 1.7.

Table A

A			B		
‘A’ - Current charges 2016-18			‘B’ - Proposed charges 2018-19		
Interment fees of a coffin		Ashes	Interment fees of a coffin		Ashes
Adult	£957.00	£157.50	Adult aged 18 or over	£1052.50	£173.00
Juvenile (16-18 yrs)	£370.00	£157.50	Removed	N/A	N/A
Stillborn/NVF/ Under 16	Nil	N/A	Stillborn/NVF/ Under 16	Nil	N/A
Inter ashes into tree cremation plot (this charge includes 30 year Exclusive Rights of Burial and Right to erect a Memorial					
£492.00			£541.00		
Exclusive Rights of Burial and Right to Erect a Memorial					
	30 years	75 years		30 years	75 years
Adult grave	£1037.00	£2540.00	Adult grave	£1140.50	£2794.00
Childs grave	£373.50	£934.00	Childs grave	£410.50	£1027.00
Cremation plot	£298.00	£751.00	Cremation Plot	£327.50	£826.00

Table A Continued

A		B
‘A’ - Current charges 2016-18		‘B’ - Proposed charges 2018-19
Additional costs are required when the grave was purchased before 1 April 2003		
Erect a Headstone	£161.50	£177.50
Headstone & Kerbing	£400.00	£440.00
Additional Inscription	£98.50	£108.00
Place Tablet (18x18) Vase	£98.50	£108.00
Tablet/Ledger (18x36)	£187.00	£205.50
Tablet/Ledger larger than (18x36)	£295.50	£325.00
Place open kerbing up to (7x3)	£258.50	£284.00
Place open kerbing larger than (7x3)	£471.50	£518.50
Place fully enclosed kerbset	£554.00	£609.00

4.0 Financial Implications

- 4.1 The proposed charges from 1st April 2018 would increase income by circa £12k and the schedules of charges are listed at Table A within this report.
- 4.2 A comparison of the cemeteries and crematorium fees currently charged by other surrounding local authority and private providers’ shows fees across the area vary (please see Table B). It is acknowledged that all authorities will review their bereavement service charges in the coming months and each one will differ in terms of the current level of service provision they choose to make. Therefore, it is difficult to make a true like-for-like comparison with other neighbouring authorities.
- 4.3 If a Funeral Director requires any changes or an exhumation that requires a licence prior to disturbing an existing grave, it is proposed to introduce a new fee of £70.00 for every application that the Council has to make, with a quotation being provided on a case-by case basis. Whilst it is acknowledged that these applications are not made on a regular occurrence, they are time consuming in the administration and pursuance of the said licence. In addition to this, it is also proposed to add an additional charge for a ‘trial dig’ of £150.00 that is required to confirm ground conditions.

5.0 Table B

5.1 Column 'A' compares current Mid Devon charges with three neighbouring authorities and a town Council.

5.2 Column 'B' compares increased Mid Devon charges with three neighbouring authorities and a town council.

Table B

		A	B				
Costs as from April 2017		MDDC	MDDC+10%	Exeter City	Torrige	Cullompton Town Council	Taunton D
Burial Interment fees	Juvenile	FOC	FOC	FOC	FOC	FOC	FOC
Burial Interment fees	Adult 18 or over	£957.00	£1052.50	£907.00	£720.00	£980.00	£750.00
Ashes Interment fees	Casket	£157.50	£173.00	£170.00	£135.00	£190.00	£140.00
Ashes Interment fees	Scatter	£157.50	£173.00	£108.00	£70.00	£190.00	£140.00
Saturday and BH supplement	Saturday	£166.50	£183.00	N/A	£135.00	£125/£250	£202 / £62
	BankHol	£166.50	£183.00		£135.00	£125/£250	£202 / £62
EROB 30Yrs	Adult	£1037.00	£1140.50	£1023.00	(25)EROB only £475.00	£950.00	-
EROB 30Yrs	Child	£373.50	£410.50	£464.00	Under 6 £Nil	£Nil	-
EROB 30Yrs	Ashes	£298.00	£327.50	£480.00	£235.00 £ 70.00	£320.00	-
EROB 75 Years	Adult	£2,540.00	£2,794.00	-	-	£1525.00	£890.00
EROB 75 Years	Child	£934.00	£1027.00	-	-	£Nil	
EROB 75 Years	Ashes	£751.00	£826.00	-	-	£760.00	£650.00

6.0 Conclusion

- 6.1 It is estimated that the proposed charges set out in Table A will contribute £12k full year effect and that this additional income will support increased costs of service provision and reduce the current level of net subsidy at circa £120k.

Contact for more Information: Andrew Busby, Group Manager Corporate Property & Commercial Assets - 01884 234948 (abusby@middevon.gov.uk).

Circulation of the Report: Leadership Team, Cabinet Member

Equality Impact Assessment Form and Action Table 2017

(Expand the boxes as appropriate, please see guidance)

"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.**"

What are you completing the Impact Assessment on (which policy, service, MTFP reference etc)?

Review an 10% increase in charges for Bereavement Services.

Version

1

Date

19.02.18

Section 1 – Description of what is being impact assessed

The increase of 10% fees and associated charges for Bereavement Services.

Section 2A – People or communities that are targeted or could be affected (taking particular note of the Protected Characteristic listed in action table)

Communication will be necessary with the funeral directors who use our two cemeteries, as their customers will be affected that include.

- Age
- Disability

Section 2B – People who are delivering the policy or service

Potential of direct/indirect customer dis-satisfaction of an increase in fees leading to challenging phone calls to the Corporate Property and Commercial Assets team who are based at Phoenix House.

Section 3 – Evidence and data used for the assessment (Attach documents where appropriate)

Attached report includes benchmarking fees and charges with other authorities.

Section 4 – Conclusions drawn about the equalities impact (positive or negative) of the proposed change or new service/policy (Please use **prompt sheet** in the guidance for help with what to consider):

The increases in fees are necessary to maintain standards at our two cemeteries and are comparable with other authorities.

If you have identified any negative impacts you will need to consider how these can be mitigated to either reduce or remove them. In the table below let us know what mitigation you will take. (Please add rows where needed)

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			
Different approaches and mechanisms are required for engaging with and representing, people of different ages, in particular children and young people.	The specification requires the Provider to not only comply with the Equality Act 2010 and related duties, but to strive for best practice.	Communication with funeral directors regarding the increase in fees that will be carried out by the Corporate Property and Commercial Assets team upon Cabinet approval.	This would be directly monitored by the service, increased income is expected that is required to maintain current service levels.

Disability			
Different approaches and mechanisms may be required for engaging with and representing, people with a range of disabilities depending on their individual needs.	The specification requires the Provider to not only comply with the Equality Act 2010 and related duties, but to strive for best practice.	Financial assistance with burials is available in the event that families do not have the means to bury relatives.	This would be directly managed by the service detailed in section 2B.
Gender Reassignment			
N/A	N/A	N/A	N/A
Marriage and Civil Partnership			
No issues identified	N/A	N/A	N/A
Pregnancy and Maternity			
N/A	N/A	N/A	N/A
Race (including ethnicity or national origin, colour, nationality and Gypsies and Travellers)			
N/A	N/A	N/A	N/A

Religion and Belief			
N/A	N/A	N/A	N/A
Sex			
N/A	N/A	N/A	N/A
Sexual Orientation			
N/A	N/A	N/A	N/A
Other (including caring responsibilities, rurality, low income, Military Status etc)			
Rurality It is important that the service is able to engage with and represent individuals who live in rural areas and / or have limited access to public transport.	<p>The specification requires the Provider to meet the needs of all people in Mid Devon, to have a presence in local communities and ensure that communications plans reflect the rurality of Mid Devon.</p> <p>The Provider is required to ensure that the service represents the diverse population of Mid Devon and that reasonable adjustments are made to all services / activities to ensure individuals are able to access the service.</p> <p>Operational commissioning of the service will ensure that the service is being delivered according to the service specification and quality standards and will take account of customer feedback.</p>	Communication with funeral directors and helpline number on Mid Devon District Council web site.	This would be directly managed by the service detailed in section 2B.

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

The Corporate Property and Commercial Assets team will implement, in the event of Cabinet resolving to approve the attached report

Completed by:	Andrew Busby
Date	19.02.18
Signed off by:	
Date	
Compliance sign off Date	
To be reviewed by: (officer name)	
Review date:	

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ENVIRONMENT PDG 15 MAY 2018

UPDATE ON THE STREET SCENE EDUCATION AND ENFORCEMENT SERVICE

Cabinet Member(s): Cllr Clive Eginton
Responsible Officer: Stuart Noyce, Group Manager - Street Scene and Open Spaces

Reason for Report: This report outlines the first full year performance of the Street Scene Education and Enforcement Service following the service review in 2016/17.

RECOMMENDATIONS:

1. To increase the fine for littering to the statutory maximum of £150.
2. To vary the time allocated to discretionary duties as specified in paragraph 2, Table 2.
3. To introduce the policies, systems and procedures necessary to enable Fixed Penalty Notices (FPNs) to be served on the relevant person(s) associated with littering from vehicles.

Relationship to Corporate Plan: The Street Scene Service is a frontline service which works throughout the district ensuring the cleanliness and attractiveness of our public realm through both education and enforcement.
Priority 4: Environment – Protect the natural environment

Financial Implications: A like-for-like increase in income from an increase in the fine, offset by the risk of an increase in non-payment. The risk from non-payment is mitigated by an expected increase in the number of Fixed Penalty Notices (FPNs) being issued.

Legal Implications: None

1.0 Introduction

- 1.1 The Environment PDG meeting held on the 7th March 2017 made recommendations to Cabinet regarding working practices. These recommendations were accepted by Cabinet and the Service committed to implement them.
- 1.2 A revised working pattern was developed and introduced on the 1st April 2017. Under the new working pattern officers moved to a four out of six day (Mon – Sat) working pattern on a rota basis (9.25 hours per day).
- 1.4 The new working pattern split the district into two areas, North and South; each area having two officers assigned to it. This allowed officers to build up knowledge and provide cover for periods of absence. On each week day at least two officers are working across Mid Devon.

1.5 The longer working days allow District Officers the ability to communicate with residents outside normal office hours and enforce across a longer time period.

2.0 District Officer Activity

2.1 The duties carried out by the Service are outlined below.

- Statutory – the authority has a legal duty to undertake this activity. This includes: stray dogs, dangerous dogs, fly tipping investigations and abandoned vehicle removal.
- Mandatory – activity which if not undertaken could lead to a loss of income, service disruption or reputational damage for the authority. This includes: car parking enforcement, compulsory recycling, trade waste enforcement, environmental crime investigation and administration.
- Discretionary – activity which the authority can choose how much or little it wants to do. This includes: litter patrols, dog fouling patrols, cleansing inspections and microchipping events.

2.2 At present, the activity for the District Officer Team is monitored by manual timesheets that are submitted by the officers at the end of each week.

2.3 For 2017/18 the 300 hours of discretionary activity were split as detailed below in Table 1.

Table 1 – Allocation of discretionary hours for 2017/18

Duties	Agreed allocation of discretionary hours	Hours allocated	Outcomes
Compulsory Recycling	40% (120 hours)	120	Stage 1 - 288 Stage 2 – 2 Stage 3 – 0
Cleansing Inspections	10% (30 hours)	30	96% A or B litter 89% A or B detritus
Dog Fouling Patrols	30% (90 hours)	90	1 fine issued = £80
Litter Patrols	20% (60 hours)	60	49 issued = £3,920

2.4 At the March 2018 Environment PDG, it was resolved to recommend to Cabinet to vary the allocation of 300 discretionary hours of enforcement activity as detailed below in Table 2.

Table 2 – Proposed allocated discretionary hours

Duties	Allocation of 300 discretionary hours 18/19
Compulsory Recycling	40% (120 hours)
Cleansing Inspections	10% (30 hours)
Dog Fouling Patrols	10% (30 hours)
Litter Patrols	40% (120 hours)

2.5 A total of 637 street cleansing inspections were undertaken. The results from the inspections can be seen below in Table 3. The inspections carried out followed refresher training from Keep Britain Tidy and aligned to the legacy NI195 methodology (a national reference standard). The results show that 96% of roads inspected were graded at A or B for litter and 89% for detritus. Areas with a higher incidence of litter and detritus (Grade C & D) were prioritised by the operations service for cleansing.

Table 3 – Land Survey results to date 2017/18

	Litter	Detritus
Number of Wards Surveyed	26	26
Total Number of Transects Surveyed	637	637
% of Transects Graded A	51.1%	21.6%
% of Transects Graded B	45.6%	68.6%
% of Transects Graded C	2.9%	8.6%
% of Transects Graded D	0.1%	1.1%

Grade A – No litter or refuse

Grade B – Predominantly free of litter and refuse except for some small items

Grade C – Widespread distribution of litter and refuse, with minor accumulations

Grade D – Heavily littered, with significant accumulations

3.0 Performance Information

- 3.1 The outcome of the new way of working for the team can be seen in Table 4 (below). The total number of Parking Contravention Notices (PCNs) issued in 2017/18 has increased by 33%. The total number of Fixed Penalty Notices (FPNs) issued in Quarter 1 has increased by 114%.
- 3.2 Investigations into vehicles reported abandoned have increased by 14%. This is likely due to the decrease in value for scrap vehicles.

Table 4 – Number of PCNs & FPNs issued and abandoned vehicle reports inspected

Month	PCNs 2015/16	FPNs 2015/16	PCNs 2016/17	FPNs 2016/17	Abandoned Vehicles 2016/17	PCNs 2017/18	FPNs 2017/18	Abandoned Vehicles 2017/18
April	102	0	132	1	29	116	4	28
May	87	2	117	1	29	117	4	42
June	70	0	129	0	26	179	1	39
Total Q1	259	2	378	2	84	412	9	109
July	116	2	175	0	31	148	3	27
August	160	2	206	0	25	17	3	37
September	171	2	146	1	29	153	5	47
Total Q2	447	6	527	1	85	478	11	111
October	121	2	205	0	26	136	3	43
November	72	2	155	1	38	169	7	30
December	70	4	156	3	47	147	6	24

Total Q3	263	8	516	4	111	452	16	97
January	118	0	156	1	14	119	5	2
February	63	2	130	1	20	119	1	14
March	136	3	80	1	32	143	7	3
Total Q4	317	5	366	3	66	381	13	79
Grand Total	1,286	21	1,787	10	346	1,723	49	396

4.0 New IT system

- 4.1 New parking enforcement software has been jointly procured with two other Devon authorities. The parking system has a self-service portal available to enable customers to update their vehicle registration details on 'live' active account for their virtual parking permit.
- 4.2 The system works in real time and in 'the cloud'. This offers the public the ability to engage online as soon as a parking charge notice is issued.
- 4.3 The IDOX IT system is currently being adapted and tailored to the needs of the Street Scene Service. In time, it will enable all the District Officers to complete their administration away from the traditional office environment; allowing for more time on enforcement activity.

5.0 Increased fines

- 5.1 The Government has introduced a new Litter Strategy for England to curb littering with proposals for new enforcement, education and community engagement. There is now the ability to increase fines from the previous maximum of £80 to £150, introducing new powers to fine the registered keeper of vehicles if litter is dropped from that vehicle.

6.0 Conclusion

- 6.1 Initial findings show that the changes recommended and implemented have made a positive impact on performance and delivered the expected efficiency savings.

Contact for more Information: Vicky Bowden, Environment and Enforcement Manager 01884 244601 /vbowden@middevon.gov.uk

Circulation of the report: Cllr Clive Eginton, Legal, Leadership Team

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HOMES POLICY DEVELOPMENT GROUP 22 MAY 2018

REVIEW OF HOUSING SERVICE TENANT INVOLVEMENT STRATEGY

Cabinet Member(s): Councillor Ray Stanley
Responsible Officer: Claire Fry, Group Manager for Housing Services

Reason for Report: The Housing Service tenant involvement strategy is due to be reviewed in 2018. This work has been completed and the new draft strategy takes account of expected changes to the regulatory framework; it contains amended priorities which should deliver greater value for money.

RECOMMENDATION: It is recommended that Homes Policy Development Group review the revised Tenant Involvement Strategy relating to tenant involvement and to recommend to the Cabinet that it is adopted.

Relationship to Corporate Plan: The efficient and effective management of our housing stock is a priority within the corporate plan and this strategy supports work to achieve this. It ensures compliance with the regulatory framework for social housing.

Financial Implications: There is a budget in the Housing Revenue Account (HRA) set aside for tenant involvement activity.

Legal Implications: The Housing Act 1985 contains provisions relating to tenant consultation and reference is made to this in the Council standard tenancy agreement. The regulatory framework for social housing contains a Tenant Involvement and Empowerment Standard which sets out a number of required outcomes and specific expectations.

Risk Assessment: The Housing Service must take account of the views of tenants, offering them opportunities to scrutinise performance and to comment on the service offer, in accordance with the regulatory framework for social housing. Failure to consider their views could result in increased complaints, which upheld, could result in reputational damage. The Regulator for Social Housing expects tenants to be offered opportunities to be involved and could order an investigation if there is evidence that regulatory obligations are being ignored.

Equality Impact Assessment: The Housing Service collects data on the diversity of tenants and endeavours to tailor services to meet the needs of all tenants. With regard to tenant involvement, our activities take into account the needs of those involved. For example, we have a tenant expenses scheme and the cost of childcare, travel or other reasonable expenses can be reimbursed in accordance with this in order to remove any barriers to involvement.

1.0 INTRODUCTION

1.1 The existing strategy relating to tenant involvement requires review. It was agreed in 2015 and became due for review in January 2018.

1.2 The revised version (version 5) is shown at Annex A. A change of template has meant that the draft would not have been very easy to read with tracked changes. For this reason, the existing strategy and the new draft have been provided, and tracked changes will be made available upon request showing what has been deleted from the existing strategy and what has been included as part of the revision.

2.0 **CONTEXT**

2.1 Registered Providers (RPs) of social housing are regulated by the Regulator for Social Housing (RSH) which operates a regulatory framework. The framework consists of a number of regulatory standards and each of these includes a number of required outcomes and specific expectations.

2.2 The standards are divided into two groups: there are economic standards and consumer standards. Local authority landlords are obliged to ensure that they meet the needs of the consumer standards.

2.3 The Tenant Involvement and Empowerment Standard is a consumer standard, as are the Home, the Tenancy, and the Neighbourhood and Community Standards.

2.4 The RSHs role is to set the consumer standards and to intervene where failure to meet the standards has caused, or could have caused, serious harm to tenants.

2.5 The RSH operates a co-regulatory approach. This means that Councillors who govern the Council's service delivery are responsible for ensuring that the Council is meeting the regulatory standards, and for being open and accountable in how the Council meets its objectives.

2.6 Co-regulation also requires providers to support tenants in the shaping and scrutiny of service delivery and in holding Councillors to account.

2.7 The Tenant Involvement and Empowerment Standard states that RPs shall ensure that tenants are given a wide range of opportunities to influence and be involved in the work of their landlord. This will include the formulation of housing-related policies and strategic priorities, the making of decisions about how housing-related services are delivered, including the setting of service standards and agreeing local offers for service delivery.

2.8 In addition, landlords are expected to offer opportunities to tenants to enable them to scrutinise performance, and to suggest how performance might be improved.

2.9 The specific expectations set out in the Tenant Involvement and Empowerment Standard relating to Involvement and Empowerment include the need for RPs to support their tenants to develop and implement opportunities for these areas; to consult with tenants on the scope of local offers for service delivery; and to consult tenants at least once every three

years on the best way of involving tenants in the governance and scrutiny of the organisation's housing management service.

3.0 PROPOSED CHANGES TO THE STRATEGY

- 3.1 The strategy was originally written on an earlier version of the corporate policy template and this has now been addressed.
- 3.2 Proposals are in hand to survey tenants about a variety of matters including the best way of involving them in the running of the Housing Service, and reference to this is made in the new draft strategy. There is a regulatory requirement to engage with all tenants on a regular basis.
- 3.3 The aims and objectives as set out in the existing strategy have been amended to ensure that they better reflect the requirements of the regulatory framework.
- 3.4 The new draft strategy acknowledges the need to ensure that there is a range of ways in which those interested in the work of the Housing Service can get involved. The menu of involvement remains unchanged allowing tenants to get involved as much or as little as they would like.
- 3.5 In the years since the existing strategy was agreed, the way in which stakeholders interact with the Housing Service has changed. Social media has assumed a greater importance as a channel of communication and 579 people now "follow" the MDDC Housing Facebook page. Most of our posts generally reach 100 to 400 people but there have been posts that have reached a lot more people. The strategy acknowledges that the way in which stakeholders wish to interact with the Housing Service is changing and, for this reason, there is a commitment to promote opportunities for tenant involvement using a variety of media channels, which will include print and other electronic means of communication.
- 3.6 The new draft strategy includes an additional paragraph entitled: "Increasing Involvement" which explains that the Housing Service will pay legitimate expenses to those who wish to engage in involvement activities. This demonstrates the commitment of the service to increasing involvement; in addition, it also means that our approach is inclusive. By covering expenses incurred as a result of tenant involvement activity, hopefully no tenant will feel excluded or unable to participate if they would like.
- 3.7 Paragraph 6.4 in the new draft strategy refers to the Code of Conduct which is used to ensure that anyone who is involved with the work of the Council is respectful of the views of others and does not make any comments which may be offensive. It also explains that our Scrutiny Group, Tenant's Together, has terms of reference which have been agreed by the Group.
- 3.8 The Housing Service has a newsletter, Housing News 4U, which is edited by tenants. In order to reduce the cost of production and despatch, the new draft strategy states that greater emphasis will be placed on sending this out electronically. Furthermore, it is understood that not all tenants will

necessarily see information published by the Housing Service via social media. However, as some of this may be useful, the new draft strategy contains a commitment to using the newsletter to bring together information circulated elsewhere, predominantly on the MDDC Facebook page.

3.9 There is no longer a regulatory requirement to publish an annual report. Last year, the information was published as an insert in Housing News 4U. The resources involved in putting together an annual report do not justify the outcome, especially as the Housing Service already publishes performance data. Therefore, the section in the existing strategy relating to the annual report has been amended to show that the Housing Service will publish annual performance information setting out how the Regulatory Standards have been met, in the future. This will be available on-line and other information will be made available to tenants using other channels of communication which may include Housing News 4U, the tenant newsletter.

3.10 The other changes to the menu of involvement are relatively minor.

4.0 CONSULTATION

4.1 The Tenants Together group will be consulted on the new draft strategy at their meeting on 10 May 2018 and the Group Manager for Housing will update the PDG as part of her verbal report on it, at the meeting on 23 May 2018.

Contact for more Information: Claire Fry, Group Manager for Housing Services, telephone 01884 234920 / cfry@middevon.gov.uk

Circulation of the Report: Councillor Ray Stanley, Cabinet Member for Housing

List of Background Papers:

The Tenant Involvement and Empowerment Standard

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/628396/Tenant_Involvement_and_Empowerment_Standard.pdf

How should social housing landlords change after Grenfell? – Comment by Greg Campbell, Social Housing, 10 January 2018
<https://www.socialhousing.co.uk/comment/comment/how-should-social-housing-landlords-change-after-grenfell-53861>

Mid Devon District Council

Tenant Involvement Strategy

Policy Number: HSG{number}

{HSG – Housing & Property Services}

April 2018

Version Control Sheet

Title: Tenant Involvement Strategy

***Purpose:* To set out the Council's plan for increasing tenant involvement to ensure that service delivery meets the needs of tenants and leaseholders, and to support them in making a difference to the quality of service provided**

***Owner:* Group Manager for Housing Services, Claire Fry**

cfry@middevon.gov.uk

Telephone number 01884 234920

***Date:* April 2018**

***Version Number:* 5**

***Status:* Draft**

***Review Frequency:* Every 4 years or sooner if required and in accordance with legislation and/ or the regulatory framework for social housing**

***Next review date:* April 2022**

Consultation This document was sent out for consultation to the following:

Management Team

Cabinet Member for Housing

The Tenants Together Housing Scrutiny Group

Document History

This document obtained the following approvals.

Title	Date	Version Approved
Director of Operations	10 April 2018	
Leadership Team		
Tenants Together		
Homes PDG*		
Cabinet*		

*- Delete if not applicable

1. Introduction

- 1.1 This new strategy for 2018-2022 builds on previous tenant involvement strategies.
- 1.2 The purpose of tenant involvement is to identify the priorities of our tenants and this includes leaseholders. The Housing Service is committed to listening to tenant's views and to ensuring that tenants are able to advise on future service delivery by scrutinising performance and identifying areas for improvement. During 2014, we surveyed tenants asking them how they wanted to engage with us. A further consultation is planned with a view to identifying any issues or themes which may require further investigation.
- 1.3 The main aims and objectives of our strategy are to make sure that tenants:
 - Can contribute to the debate about how we use the resources available to us in such a way as to deliver services appropriate to their needs
 - Have opportunities to identify issues relating to service delivery and to advise on service improvement
 - Feel that they have been listened to and their views considered
 - Have confidence in the Housing Service and are satisfied with the service which they receive

2. Scope

- 2.1 This policy applies to all those with an interest in the Housing Service:
 - Elected members
 - Tenants, residents and leaseholders of Mid Devon
 - Mid Devon District Council employees
 - Organisations working in the community and voluntary sector
 - Partners and other stakeholders

3. Related Documents

- a. The Tenant Involvement & Empowerment Standard in the regulatory framework for social housing
- b. The Housing Act 1985
- c. The Council's suite of tenancy agreements
- d. The Tenant Involvement Policy

4. The Statutory & Regulatory Framework

- 4.1 The Regulatory Framework for Social Housing operated by the Regulator for Social Housing (RSH) contains a National Standard relating to Tenant Involvement and Empowerment. This contains certain expectations and, as a result, registered providers of social housing (RPs) must:
 - Tailor our services to meet the needs of our tenants
 - Treat all tenants with respect and fairness

- Ensure tenants are given opportunities to be involved in shaping services to reflect local priorities
- Give tenants opportunities to identify areas for improvement and delivery
- Offer training and support to tenants to help them develop their skills and capacity so that they can make a meaningful contribution

5. Meaningful Involvement

- 5.1 Our approach is to encourage as many tenants as possible to have their say, to become engaged and to participate in the running of the Housing Service. However, we acknowledge that it is necessary to support involvement activities by working to maximise participation and accountability. We accept that the extent to which tenants wish to get involved will be affected by many factors and, for this reason, a menu of involvement options is used to ensure that they can get involved to the extent and in the way that suits them best.
- 5.2 Tenant involvement can be described as how the Housing Service engages with tenants and other residents, including leaseholders, across the District. That may be through both formal and informal routes, to provide information and to receive feedback on our services. It is to engage tenants in our activities from a strategic level through to a neighbourhood level.
- 5.3 The Housing Service needs to reach as many tenants as possible. To this end, we will promote opportunities for tenant involvement using a variety of media channels, including print, social media, and the web. We will also use our customer knowledge to understand the preferred channels of engagement. We recognise that the way in which people wish to use new technologies, where possible, to increase access to information, and to receive feedback, ideas and information. This will include, but is not limited to, the use of the web, social media, mobile apps, email lists and text SMS.

6 Menu of Involvement

- 6.1 The menu of involvement for 2018-2022 is set out below, and more detailed information about delivery is contained in Appendix A and B of this strategy.



Our programme of involvement is divided into three parts:

- Staying informed (low level of demand on time)
- Being consulted (some demands on time)
- Participating in decision making (higher level of demand on time)

6.2 Staying Informed

- Website
- Facebook, Twitter, electronic email and any other forms of social media
- Service Business Plan and Performance Information
- Annual Report
- Letters to individual tenants about their tenancy and work to their home
- Housing News 4U

6.3 Being Consulted

- Facebook, Twitter, electronic email and any other forms of social media
- Surveys and web polls
- Email group
- Neighbourhood Walkabouts
- Estate Representatives
- Tenants and Residents Groups
- Neighbourhood Based events

6.4 Participating in Decision Making

- Tenants Together (TT)
- Attending the Homes Policy Development Group (PDG) meetings
- Attending the Housing Performance & Improvement Board meetings
- Facebook, Twitter, electronic email and any other forms of social media
- Tenants inspectors for Voids
- Tenant Inspectors for Planned Maintenance
- Short-term Focus/ Working Groups
- Editorial Group
- Local Tenants and Residents Groups

6.5 Scrutiny Arrangements

6.5.1 The Regulatory Framework encourages landlords and tenants to work together to improve the levels of service delivered. We are committed to offering opportunities for tenants to scrutinise the work of the Housing Service and have a well-established scrutiny group, known as Tenants Together. This group's role is to:

- Monitor and check performance
- Challenge and improve services
- Ensure the Housing Service runs the business well and that it meets the needs of its tenants

7 Training

7.1 We recognise the need for targeted training and development opportunities for tenants and staff. We give new staff a briefing about tenant involvement as part of the induction process. We also encourage and support tenants to access training activities. This enables our tenant representatives to have an understanding of current housing issues. Training has been focused on individuals but group training is also available, if a need is identified.

8 Increasing Involvement

8.1 The Council appreciates that there may be barriers which may limit the involvement of tenants. These may include transport issues or caring responsibilities. In order to encourage greater involvement, the Housing Service operates an expenses scheme in relation to any out of pocket expenses for travel and other reasonable costs. The aim of this scheme is to enable tenants to attend events and to participate in activities, appropriate to their role. The Housing Service has an obligation to deliver value for

money and, for this reason, expenditure will be monitored to ensure that only the cost of legitimate expenses is covered.

9 Supporting Involvement

- 9.1 Any tenant who is interested in working with the Housing Service should seek more information; there is a dedicated email address, tenantinvolvement@middevon.gov.uk or they can telephone the Lead Officer using 01884 255255.
- 9.2 Those engaged in involvement activity will be asked to sign a Code of Conduct.
- 9.3 Those tenants working as part of our Tenants Together Scrutiny Group will be bound by clear guidelines which have been agreed by the Group. This includes the Code of Conduct and terms of reference.

10 Conclusion

- 10.1 Performance relating to tenant involvement will be monitored by the Housing Performance & Improvement Board and by the Tenants Together Group. This strategy will be reviewed in 2022.

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APPENDIX A: MENU OF INVOLVEMENT

Staying Informed	Details
Website	Provides a range of information and links
Social Media	Provision of information and links to websites. Useful in the event of severe weather events, for example, to provide timely and relevant updates
Service Business Plan & Performance Information	Provide information relating to performance, available on website, via social media, in our offices or posted upon request
Annual Report	The Housing Service provides updates on how the regulatory standards have been met over the previous 12 months on our website, via social media and in the newsletter
Housing News 4U	Tenant newsletter produced periodically bringing together a range of information which may include news which may have been circulated previously using other means such as social media.
Other	Tenants receive individual information about their tenancies including rent and charges; tenants and leaseholders receive information regarding works to their homes; tenants receive a tenant handbook
Being Consulted	
Social media	Tenants can be asked for feedback and views on service improvements. We use Facebook to provide information on available homes and other matters of interest.
Surveys & web polls	These provide an opportunity to consult tenants in a variety of ways
Email Group	This can provide a useful means of collecting feedback on a variety of topics
Neighbourhood Walkabouts	Tenants and other residents are invited to attend these estate inspections which take place on a six monthly basis; dates are published in advance on our webpages. Other stakeholders including Councillors and the Police may also attend.
Tenants and Residents Groups	Neighbourhood Officers will support these groups if required
Neighbourhood Based Events	These can be used to gather feedback on particular initiatives such as issues relating to parking
Participating in Decision Making	
Tenants Together (TT)	Membership consists of a maximum of up to twelve independent tenants (and one of those tenant places is reserved exclusively for a leaseholder). The Chair of the Homes Policy Development Group (PDG) is also invited to attend. The TT reviews policy, scrutinises performance and undertakes service reviews,

	making recommendations relating to possible improvements, as appropriate.
Homes Policy Development Group (PDG)	Tenants are invited to attend the PDG
Social media	This is a useful tool for providing information regarding performance, policies, service improvements etc and seeking views
Tenant Inspectors for Planned Maintenance	Tenant Inspectors can act as a point of contact between the tenant whose home is being improved and the Planned Maintenance team and can be involved in contract management.
Short-term focus/ working groups	Such groups could be involved in discussions about particular nuisance issues in a specific area or to inform specific policy reviews such as a review of our ASB policy
Editorial Group	This group consists of tenant volunteers involved in editing the newsletter, Housing News 4U
Local Tenants & Residents Groups	Neighbourhood Officers will support such groups, if required

APPENDIX B: TENANT INVOLVEMENT ACTION PLAN 2018/2022

This Action Plan is a working document for the Housing Service. The actions in this plan are designed to make sure that our work in 2018/2022 achieves the aims and objectives set out in the Tenant Involvement Strategy

ACTION REQUIRED	COMPLETION DATE	SUCCESS MEASURE/ OUTCOME
Promote and develop online services and the use of social media to engage with the wider community by updating the tenant involvement web, Facebook and Twitter pages and any other social media platforms on a regular basis, as appropriate.	Ongoing	Tenants will be informed Involvement opportunities will be promoted Improved, 24/7 access to information for service users
Produce information on service delivery	Ongoing	To demonstrate how the regulatory standards are being met. This may be included in the tenant newsletter, Housing News 4U, which is published periodically, and may also be provided using other channels of communication
Promote Neighbourhood Walkabouts on our website, social media accounts, newsletters and elsewhere, as appropriate	Annually	To increase levels of tenant satisfaction at a local level by enabling local people to engage with their Neighbourhood Officer, be involved in discussions about possible improvements and to provide opportunities for them to raise issues of concern
Improve our knowledge of those who are living in our homes	Ongoing	Use customer knowledge to understand the needs of tenants and to help us to tailor our services as appropriate. It also informs the work of the Neighbourhood teams who may be able to signpost or refer tenants to other services operated by local partners
Support Tenants and Residents Groups, as appropriate	Ongoing	Tenant involvement in such groups has the potential to deliver greater community cohesion, increased engagement in shaping service delivery, higher levels of tenant satisfaction and improved neighbourhoods
Identify and promote opportunities for tenant representatives to access training relevant to the role	Ongoing	In order to ensure that involved tenants are informed about matters upon which they may be asked to make a decision; and to provide them with skills, knowledge and experience which is transferable to other areas of their lives.

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TENANT INVOLVEMENT STRATEGY 2015 - 2018

February 2015

Content

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Appendix A – Menu of Involvement

Appendix B – Tenant Involvement Action Plan 2015/2016

INTRODUCTION

1.0 The Aims and Objectives of the Strategy

This new strategy for 2015-2018 builds on previous tenant involvement strategies. The purpose of tenant involvement is to find out the priorities of our tenants and this includes leaseholders. This will enable us to focus on listening to tenants' views and aspirations and to ensure tenants are able to influence future service delivery by scrutinising performance and identifying areas for improvement. During 2014 we surveyed tenants asking them how they wanted to engage with us. We have incorporated their views within this strategy.

The main aims and objectives of our strategy are to make sure tenants:

- Can contribute to the debate about we use the resources available to us in such a way as to deliver services appropriate to their needs
- Have opportunities to identify issues relating to service delivery and to influence service improvement
- All have an opportunity to participate in the work which we do
- Feel that they have been listened to and their views considered
- Find it easier to get involved and have their views heard
- Have the confidence in the housing service and are satisfied with the service they receive

2.0 Who is responsible for delivering this strategy?

To make this strategy a reality we need help from all those with an interest in the housing service:

- Elected members
- Tenants, residents and leaseholders of Mid Devon
- Mid Devon District Council employees
- Community and voluntary sector
- Partners and other stakeholders

3.0 The Statutory & Regulatory Framework

The National Standard relating to Tenant Involvement and Empowerment contains certain expectations and as a result RP's must:

- Tailor our services to meet the needs of our tenants
- Treat all tenants with respect and fairness
- Ensure tenants are given opportunities to influence and be involved in shaping services to reflect local priorities
- Give tenants opportunities to identify areas for improvement and delivery
- Offer training and support to tenants to help them develop their skills and capacity so that they can make a meaningful contribution

4.0 Menu of involvement

The menu of involvement for 2015-2018 is set out below, and more detailed information about delivery is contained in Appendix A and B of this strategy.



Our programme of involvement is divided into three parts:

- Staying informed (low level of demand on time)
- Being consulted (some demands on time)
- Participating in decision making (higher level of demand on time)

Staying informed

Housing News 4U

Website

Facebook, Twitter, electronic email and any other forms of social media

Service Business Plan and Performance information

Annual Report

Letters to individual tenants about their tenancy and work to their home

Being consulted

Facebook, Twitter, electronic email and any other forms of social media
Surveys and Web Polls
Email Group
Neighbourhood walkabouts
Estate Representatives
Tenants and Residents Groups
Neighbourhood based events

Participating in decision making

Tenants Together (TT)
Attending the Decent and Affordable Homes Policy and Development Group (PDG) Meetings
Facebook, Twitter, electronic email and any other forms of social media
Tenant Inspectors for Voids
Tenant Inspectors for Planned Maintenance
Short-term Focus/Working Groups
Editorial Group
Local Tenants and Residents Groups

5.0 Scrutiny arrangements

The Regulatory Framework encourage landlords and tenants to work together to improve the levels of service delivered. We are committed to offering opportunities for tenants to scrutinise the work of the Housing Service and have a well-established Scrutiny and Improvement Group. This group's role is to:

- Monitor and check performance
- Challenge and improve services
- Ensure the Housing Service runs the business well and that it meets the needs of its tenants

6.0 Training

We recognise the need for targeted training and development opportunities for tenants and staff. We give new staff a briefing about tenant involvement as part of the induction process. We also encourage and support tenants to access training activities. This enables our tenant representatives to have an understanding of current housing issues. Training has been focussed on individuals but group training is also available, if a need is identified.

7.0 Conclusion

This strategy has outlined the Council's principles and approach to tenant involvement. The Tenant Involvement Strategy will be monitored by the Scrutiny and Improvement Group annually. This strategy will be reviewed January 2018.

APPENDIX A: MENU OF INVOLVEMENT

Staying Informed	Details
Housing News 4U	<ul style="list-style-type: none"> • Tenant magazine providing information on current issues/events and services • Newsletter can be provided in a range of formats such as large print, audio or electronic
Website	<ul style="list-style-type: none"> • A range of information and links • Dates and details of tenant involvement activities
Performance and Business Plans	<ul style="list-style-type: none"> • In depth information relating to performance • Available on our website, in our offices or sent out on request
Annual Report	<ul style="list-style-type: none"> • In depth information relating to how our service have performed over the past 12 months
Receive information from various teams on a regular and ad hoc basis	<ul style="list-style-type: none"> • Tenants receive individual information about their tenancy including rent and charges • Tenants and leaseholders receive information regarding any major improvements works to their homes • Tenants receive a Tenant Handbook
Being Consulted	Details
Surveys and Web Polls	<ul style="list-style-type: none"> • Tenants can take part in completing surveys by telephone, text messaging, over the Internet or in person
Email Group	<ul style="list-style-type: none"> • To establish a group of tenants who wish to be consulted by email
Local Estate Based Events	<ul style="list-style-type: none"> • Consultation takes place in various locations across the district to inform and consult tenants on a on a variety of issues.
Social Networking	<ul style="list-style-type: none"> • Tenants asked regularly for feedback and views on service improvements

Neighbourhood Walkabouts	<ul style="list-style-type: none"> We visit each area at least every six months to meet tenants and check for repair needs. Tenants are invited to join officers and elected members as they walk around their area to raise any concerns and share ideas for improvement

Participating in decision making	Details
Tenants Together (TT)	<ul style="list-style-type: none"> Membership consists of a maximum of up to twelve independent tenants (and one of those tenant places is reserved exclusively for a leaseholder) and the Lead Member for Tenants' from the Decent & Affordable Homes Policy and Development Group (PDG). The group examine, in detail, how we manage the service and how we deliver these services to tenants and for them to make recommendations to the Cabinet Member for Housing, the PDG and the Cabinet to improve the service
Tenant Inspectors for Voids	<ul style="list-style-type: none"> We recruit tenants that inspect our standard of repair for our void properties and ensure they are up to the Decent Homes Standard
Short-term Focus/Working Groups	<ul style="list-style-type: none"> Ad hoc groups are held as and when necessary to consult on issues relating to a service These groups are ideal for tenants who have a particular interest in areas of interest to them
Tenant Inspectors for Planned Maintenance	<ul style="list-style-type: none"> We recruit tenants to check our Planned Maintenance works. The role of Tenant Inspector is to assist in the 'liaison' between the tenant and the Planned Maintenance Team

Editorial Group	<ul style="list-style-type: none"> • This group consists of tenant volunteers who are involved in editing newsletters
Tenants and Residents Groups	<ul style="list-style-type: none"> • Tenants and Residents Groups are where local tenants and residents get together and discuss housing issues in their neighbourhood
Estate Representatives	<ul style="list-style-type: none"> • Tenants can represent the interests of their neighbours in a block of flats, street or any other agreed specified area within their neighbourhood

APPENDIX B: TENANT INVOLVEMENT ACTION PLAN 2015/2016

This Action Plan is a working document for the Housing Service. The actions in this plan are designed to make sure that our work in 2015/2018 achieves the aims and objectives set out in the Tenant Involvement Strategy.

	ACTION REQUIRED	COMPLETION DATE	SUCCESS MEASURE / OUTCOME
1	Promote and develop on-line services and the use of social media to engage with the wider community by updating the tenant involvement web, Facebook and Twitter pages on a regular basis. Publish involvement activities, survey results, outcomes etc	On going	Web pages will be current and more informative for tenants <ul style="list-style-type: none"> • Tenants kept informed • Encouraging involvement opportunities • Improved, 24/7 access to information for service users
2	Produce four newsletters per year with tenant editors and one representative from the Scrutiny and Improvement Group (SIG)	January April July October	Newsletters published and sent out to all tenants and are promoted on our web, Facebook and Twitter pages <ul style="list-style-type: none"> • Keeping all tenants informed • Encouraging involvement opportunities
3	Produce the Housing Service Annual Report	Annually	Sent out to all council households by the required date <ul style="list-style-type: none"> • Informing tenants on how well we performed last year Encouraging tenant engagement
4	Promote and increase tenant involvement with Neighbourhood Officers and Community Housing Support Officers by facilitating and supporting the use of social event such as coffee sessions, , keep fit sessions, healthy lifestyle events, gardening clubs and other events which promote greater sustainable communities	On going	<ul style="list-style-type: none"> • Achieving wider aspiration of tenant, residents and all service users and their communities • Improve residents lifestyles and build sustainable communities in our neighbourhoods
5	Promote Neighbourhood Walkabouts on our website, Facebook and Twitter pages, newsletters and on communal notice boards	Annually	Increase involvement on our estates. Evidence outcomes and publish on website, communal notice boards, newsletters etc <ul style="list-style-type: none"> • Better tenant satisfaction at a local level • Tailoring services to suit the needs of tenants in local areas • Improving neighbourhoods Help create communities where people want to live

6	Increase engagement with young people by working in partnership with agencies who engage with young people	On going	Young people's views being incorporated in the service delivery
7	Increase tenant profiling	On going	Use customer knowledge to identify services most relevant to tenants <ul style="list-style-type: none"> • Capture views from current under- represented groups • Increased scope for inclusion • Tailor our services to meet tenants' needs
8	Continue to support Tenants and Residents Groups and promote the need for more involvement groups to reach the 'hard to reach' groups. Ensure all are accessible for people across the seven strands of diversity. Use tenant profiling information to target specific groups	On going	Promote the work of the current Tenant and Residents Groups across the district by having good news articles on our website, Facebook, Twitter pages, communal noticeboards and in newsletters <ul style="list-style-type: none"> • Increased numbers of groups in our neighbourhoods • Leading to better community cohesion • Increased involvement in shaping service delivery • Better tenant satisfaction • Improving neighbourhoods
9	Increase tenant involvement, especially from the tenants in rural communities	On going	More partnership working with Parish Councils. Promote estate representatives in the rural areas <ul style="list-style-type: none"> • Help create communities where people want to live • Ensuring the views of rural tenants' are being captured • Better tenant satisfaction locally • Tailor service to meet tenants' needs

10	Continue to support existing Tenant Inspectors for Voids and Planned Maintenance and encourage more to come forward	On going	Promote the work of the Tenant Inspectors across the district by having good news articles on our website, Facebook and Twitter pages, communal noticeboards and in our newsletters
11	Continue to support existing Estate Tenant Representatives and encourage more to come forward	On going	<p>Promote the work of the Estate Reps across the district by having good news articles on our website, Facebook and Twitter pages and in the newsletters</p> <ul style="list-style-type: none"> • Help create communities where people want to live • Views of rural tenants' being captured • Better tenant satisfaction locally • Tailor service to meet tenants' needs

HOMES POLICY DEVELOPMENT GROUP 22 MAY 2018

REVIEW OF HOUSING SERVICE TENANT INVOLVEMENT POLICY

Cabinet Member(s): Councillor Ray Stanley
Responsible Officer: Claire Fry, Group Manager for Housing

Reason for Report: The Housing Service's tenant involvement policy was due for review in April 2018. This work has been completed and the draft strategy takes account of changes to the regulatory framework, and new means of consulting with stakeholders.

RECOMMENDATION: The Homes PDG is asked to agree the revised policy relating to tenant involvement and to recommend to the Cabinet that it is adopted.

Relationship to Corporate Plan: The efficient and effective management of our housing stock is a priority within the corporate plan and this strategy supports work to achieve this and to ensure compliance with the regulatory framework for social housing.

Financial Implications: There is a budget in the Housing Revenue Account (HRA) set aside for tenant involvement activity.

Legal Implications: The Housing Act 1985 contains provisions relating to the consultation of tenants and reference is made to these in the Council's standard tenancy agreements. The regulatory framework for social housing contains a Tenant Involvement and Empowerment Standard which sets out a number of required outcomes and specific expectations.

Risk Assessment: The Housing Service should take account of the views of tenants, offering them opportunities to scrutinise performance and to comment on the service offer, in accordance with the regulatory framework for social housing. Failure to take on board their views could result in increased complaints, which if upheld, could result in reputational damage. The regulator for social housing expects tenants to be offered opportunities to be involved and could order an investigation if there is evidence that regulatory obligations are being ignored.

Equality Impact Assessment: The Housing Service collects data on the diversity of tenants and endeavours to tailor services to meet the needs of all tenants. With regard to tenant involvement, our activities take into account the needs of those involved. For example, we have a tenant expenses scheme and the cost of childcare, travel or other reasonable expenses can be reimbursed in accordance with this in order to remove any barriers to involvement.

1.0 Introduction

1.1 The existing policy relating to tenant involvement requires review. It was agreed in 2015 and was due for review in April 2018.

1.2 The revised version (version 4) is shown in Appendix 1 with tracked changes showing what has been deleted from the existing policy and what has been included as part of the revision.

2.0 **CONTEXT**

2.1 Registered Providers (RPs) of social housing are regulated by the Regulator for Social Housing which operates a regulatory framework. The framework consists of a number of regulatory standards and each of these includes a number of required outcomes and specific expectations.

2.2 The standards are divided into two groups: there are economic standards and consumer standards. Local authority landlords are obliged to ensure that they meet the needs of the consumer standards.

2.3 The Tenant Involvement and Empowerment Standard is a consumer standard, as are the Home, the Tenancy, and the Neighbourhood and Community Standards.

2.4 The Regulator of Social Housing's role is to set the consumer standards and to intervene where failure to meet the standards has caused, or could have caused, serious harm to tenants.

2.5 The Tenant Involvement and Empowerment Standard states that RPs shall ensure that tenants are given a wide range of opportunities to influence and be involved in the work of their landlord. This will include the formulation of housing-related policies and strategic priorities, the making of decisions about how housing-related services are delivered, including the setting of service standards and agreeing local offers for service delivery.

2.6 In addition, landlords are expected to offer opportunities to tenants to enable them to scrutinise performance, and to suggest how performance might be improved.

2.7 The specific expectations set out in the Tenant Involvement and Empowerment Standard include the need for RPs to support their tenants to develop and implement opportunities for these areas; to consult with tenants on the scope of local offers for service delivery; and to consult tenants at least once every three years on the best way of involving tenants in the governance and scrutiny of the organisation's housing management service.

2.8 The fire at Grenfell tower last June occurred in a block of flats managed by a Tenant Management Organisation (TMO). Since the fire, residents of the TMO have stated that they raised concerns about fire safety and other issues which were ignored by their landlord.

2.9 Informed commentators are now suggesting that the Government may act as a result of this to ensure that tenant involvement is given higher priority by RPs, in future, and cite the roadshows undertaken by the previous Minister with responsibility for Housing, Alok Sharma, as evidence of this (Campbell, 2018). In addition, there are suggestions that the regulatory framework is

likely to be amended to strengthen the requirement for RPs to organise meaningful engagement with tenants.

3.0 PROPOSED CHANGES TO THE POLICY

3.1 The proposed changes to the existing Tenant Involvement policy are shown in Appendix 1 as tracked changes.

3.2 Members will note that only a few changes have been made.

3.3 The revised draft policy more closely reflects the strategy set out in the revised draft Tenant Involvement Strategy, also on the agenda for decision at this meeting.

3.4 In particular, reference has been made in the revised draft policy, to the use of new technologies for engaging with tenants, in the summary at paragraph 8. The world has changed since 2015 and we are aware that technological advances will continue. The way in which many people access the news, for example, has changed, with many people using social media channels such as Twitter and Facebook to do this (Wakefield, 2016). For this reason, the Housing Service intends to continue using social media, and any other new channels which may be developed in the future, for promoting matters deemed to be of importance to tenants.

3.5 This approach has been working; the insights tool on Facebook gives us some useful information regarding posts on our MDDC Housing page. There are 579 people following the page. We advertise homes for rent using the tag line: "Property of the Week". These posts routinely reach 400 - 700 Facebook users. A post on 9 April 2018 regarding scams also reached approximately 1800 people.

3.6 Further changes to the revised draft policy can be found in section 9 which relates to Equality and Diversity. This section now includes reference to the Tenant's Expenses Scheme and other adjustments which can be made to enable people from different sections of society to participate in tenant involvement activity.

4.0 CONSULTATION

4.1 The Tenants Together group will be consulted on the new draft strategy at their meeting on 10 May 2018 and the Group Manager for Housing will update the PDG as part of her verbal report on it, at the meeting on 23 May 2018.

Contact for more Information: Claire Fry, Group Manager for Housing, Telephone 01884 234920 cfry@middevon.gov.uk

Circulation of the Report:

List of Background Papers:

The Tenant Involvement and Empowerment Standard

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/628396/Tenant Involvement and Empowerment Standard.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/628396/Tenant_Involvement_and_Empowerment_Standard.pdf)

Social media “outstrips TV” as news source for young people – Jane Wakefield, BBC website, 15 June 2016

<http://www.bbc.co.uk/news/uk-36528256>

How should social housing landlords change after Grenfell? – Comment by Greg Campbell, Social Housing, 10 January 2018

<https://www.socialhousing.co.uk/comment/comment/how-should-social-housing-landlords-change-after-grenfell-53861>

Mid Devon District Council

Tenant Involvement

Policy Number: HSG v4

April 2018

Version Control Sheet

Title: Tenant Involvement Policy

Purpose: To inform residents of our approach to tenant involvement

Owner: **Group Manager for Housing Services_**
cfry@middevon.gov.uk
Telephone number 01884 234920

Date: April 2018

Version Number: v4

Status: Review of Policy

Review Frequency: 4 yearly

Next review date: **April 2018**

Consultation **This document was sent out for consultation to the following:**

Cabinet Member for Housing
Tenants Together Group
Leadership Team
Homes PDG

Document History

This document obtained the following approvals.

Title	Date	Version Approved
Director of Operations		
Cabinet Member for Housing		
Tenants Together Group		
Leadership Team		
Homes PDG		
Cabinet		

1. INTRODUCTION

All registered providers of social housing must meet the consumer standards contained within the regulatory framework for social housing. One of these standards is the Tenant Involvement and Empowerment standard. The regulatory framework for social housing, operated by the Regulator for Social Housing requires outcomes for this standard in relation to:

- Customer service
- Choice and complaints, Involvement and empowerment
- Understanding and responding to the diverse needs of tenants

2. SCOPE

This policy applies to how we will develop greater involvement of tenants in the decision-making processes of the Housing Service leading to service improvement and improved tenant satisfaction.

3. RELATED DOCUMENTS

- Tenancy Agreement
- Section 105 of the 1985 Housing Act
- The regulatory framework for social housing in England
- The Housing Service Tenant Involvement Strategy

4. The POLICY

This policy demonstrates our commitment to tenant involvement and to providing better homes and communities. The aim of this policy is to ensure that the structure adopted by the Council delivers effective involvement with tenants, and this includes leaseholders, in developing and improving services to meet their needs, ensuring that tenants have a chance to scrutinise the work of the Housing Service, and to strengthen our communities.

- This policy has been developed to ensure that relevant legislation and the regulatory framework informs the work of the Housing Service. We will demonstrate this by:
- Working in partnership with tenants in all aspects of housing management, by offering a menu of involvement shaped around the diverse needs of our tenants and by offering opportunities to review the work of the Housing Service and to make recommendations to elected members
- Creating and developing a culture of mutual trust, respect and partnership between all parties at all levels
- Making the best use of the resources available being mindful of the need to spend funds available wisely
- We will involve tenants in housing management by a wide range of methods including:

- Making information easy to access, written in Plain English and, where possible, jargon free

- Acknowledging that many tenants do not wish to get involved and respecting their right not to do so. We will provide formal involvement methods, whilst promoting maximum inclusion through other less formal methods
- Finding the most appropriate way to consult individually and collectively and being clear about the choices on offer

5. INFORMATION

Tenants will be provided with information in a variety of ways, regarding the following:

- Issues affecting their homes and tenancies
- Housing management policies and practice
- Any proposals for change
- Rent increases

6. CONSULTATION

The Council is obliged to consult secure tenants on certain aspects of housing management. The Housing Service issues a variety of different tenure types. The majority of our tenants have secure tenancies but may have flexible tenancies which are a form of secure tenancy. Section 105 of the Housing Act 1985 requires public sector landlords to have arrangements to inform and consult secure tenants who are likely to be affected by some proposed changes in matters of housing management. We also have a commitment to keeping tenants informed about other matters and to offering choices and opportunities to make recommendations to elected members. We will therefore provide information about:

- Major improvement or repair programmes
- Changes to policy and strategies
- Performance targets and priorities
- Activities for tenant involvement
- The timetable for newsletters
- How the Housing Service is meeting the requirements of the regulatory framework for social housing

7. PARTICIPATION

Tenants will have ample opportunity to participate and play an integral part in:

- Scrutinising and challenging how services are managed and provided
- Giving us their opinion on how to improve service delivery
- Reviewing policies and strategies
- Meeting Councillors to discuss service delivery

8. SUMMARY

Establishing meaningful involvement is not always about attending a meeting or saying yes to every idea put forward. It is about working in partnership to make better decisions in the work that we do to improve our Housing Service for all tenants. Tenants will be able to give us their views by various methods.

- Social Media and email
- Face to face
- Telephone
- Written
- Tenant involvement events

We will use new technologies to increase access to information and to receive feedback, ideas and information and this may include, but is not limited to, use of the web, mobile apps, email lists, text SMS, as well as social media.

9. EQUALITY AND DIVERSITY

As a registered provider of social housing, the Council has an equality duty and is bound by the provisions of the Equality Act 2010. This means that the Housing Service must ensure that there will be no discrimination or unfair treatment on the grounds of gender (or gender reassignment), background (e.g. gypsies and travellers, asylum seekers) race, colour, ethnicity or national origin, faith, sexual orientation, marital/civil partnership status, age, disability, social position, politics, trade union membership or social disadvantage. We will not tolerate any discriminatory remarks or actions and will challenge anyone who behaves in that manner. Tenants will be excluded from any further involvement if they continue to behave in an offensive or discriminatory manner.

The Housing Service understands that some tenants may find it difficult to participate due to issues relating to travel and caring responsibilities. There is a tenant expenses scheme and reasonable costs can be reimbursed to enable those tenants interested in getting involved to do so.

In addition, reasonable adjustments can be made to remove barriers to involvement and these might include changing the time of meetings to enable them to be more inclusive, ensuring that there are vegetarian options available if food is to be provided for tenant representatives and that all the venues for meetings are accessible.

10. REVIEW

This Policy has been written in line with and meets current relevant legislation. Unless there are changes to such legislation beforehand, the next review of this policy is due 2022

HOMES POLICY DEVELOPMENT GROUP 22 MAY 2018

THE HOUSING OPTIONS SERVICE – COMMUNITY LED HOUSING FUND GRANT POLICY

Cabinet Member(s): Councillor Ray Stanley
Responsible Officer: Claire Fry, Group Manager for Housing

Reason for Report: In 2016/2017 Mid Devon District Council was allocated £131,359 from the Department of Communities and Local Government (DCLG) Community Housing Fund. The Council will use this ring-fenced funding to work in partnership with local communities to develop Community Led Housing across the District.

RECOMMENDATION: That the Cabinet recommends to Council that:

- 1) **The Community Led Housing Fund Grant Policy is adopted and endorsed so that it can be used within the Council's District.**
- 2) **That members support the framework for the allocation of grants as presented within the report.**
- 3) **Should any disagreements occur then the final decision should be delegated to the Director of Operations in conjunction with the Cabinet Member.**

Relationship to Corporate Plan: MDDC Visions priority 1 & 2. The Council is committed to building more homes in the District and to facilitating the housing growth that Mid Devon needs, including affordable homes in rural parishes, by working with local communities to encourage them to support themselves and working with town and parish councils.

Community-led housing will increase the supply of housing across Mid Devon including affordable housing for rent and shared ownership. It will help to support economic growth and keep communities vibrant.

Community-led housing also has the potential to promote health, wellbeing and independence. Through this type of scheme there are also opportunities for communities to develop schemes to help local people (including older and vulnerable people) to retain their independence. It will also offer local people opportunities to gain knowledge and new skills relating to, for example, project management, housing development and consultations.

Financial Implications: The Community-Led Housing Fund grant of £131,359 is ring-fenced for delivery of Community Led Housing. The Government has advised that grant funding will be available for a further three years but the level of funding and how this will be allocated has yet to be confirmed. There is no assurance that the grant will come to local authorities in future years. The policy will therefore need to be reviewed before the end of the financial year (2019/20) to ensure that it is still relevant and appropriate.

The Community Led Housing Fund Allocation policy includes criteria and grant caps for each funding stage, which requires applicants to demonstrate Value for Money and to seek match funding from other sources to mitigate financial risks. Communities are also subject to providing a service level agreement (SLA) with the local authority.

Legal Implications: Grant recipients may be required to repay the grant should their use of the award fail to comply with the conditions set out by the Council.

Risk Assessment: Failure to have an efficient and effective process in place for administering the fund could result in adverse publicity for the Council.

Equality Impact Assessment: Community-led housing will help to support the needs of vulnerable people, including older people, and reduce inequality by helping to provide the right type of housing solutions to meet the needs of local communities.

1.0 Introduction

- 1.1 In 2016, the Government announced a new annual £60 million fund to help almost 150 councils to tackle the problem of high levels of second homeownership in their communities. The monies were available to support the development of community-led housing.

South Hams	Devon	£1,881,307
West Dorset	Dorset	£1,365,432
East Devon	Devon	£1,210,418
Purbeck	Dorset	£910,456
North Devon	Devon	£667,869
Teignbridge	Devon	£581,303
West Somerset	Somerset	£574,760
Sedgemoor	Somerset	£485,174
Torridge	Devon	£448,434
Weymouth & Portland	Dorset	£430,315
Christchurch	Dorset	£417,229
South Somerset	Somerset	£263,222
West Devon	Devon	£247,620
North Dorset	Dorset	£238,057
East Dorset	Dorset	£158,034
Mid Devon	Devon	£131,359

- 1.2 The Community-Led Housing Fund offers local groups opportunities to lead on, and help them to deliver, affordable housing aimed at first-time buyers in response to the problem second homes can cause in reducing supply.
- 1.3 The funding will be targeted at the community-led housing sector and distributed to groups via local Councils. The rationale for this is that local authorities have the relevant knowledge to enable them to deliver the sort of housing needed in communities in their areas.
- 1.4 Allocating the funding to these housing organisations will place local communities in a position to identify what type of housing is most needed in each area. It will also offer an income stream to community organisations, in turn allowing them to reinvest in more housing or in other activities or services which will benefit their areas.
- 1.5 Local authorities will work closely with community-led housing groups and other stakeholders which is likely to include the Community Land Trusts network or the Home and Communities Agency, to ensure that the necessary infrastructure and support is available to ensure efficient delivery of new houses in subsequent years.
- 1.6 Community-led housing has many benefits. Planning applications from this sector are currently approved more often than other applications. Local concerns about building new homes can be allayed more easily because of local involvement from the start.
- 1.7 The groups can also be an important link between the community and local authorities, as they can increase credibility among residents and directly represent the needs of the community.
- 1.8 In 2016/2017 Mid Devon District Council was allocated half of the allocated funding of £131,359 from the DCLG Community Housing Fund. To receive the second tranche

of funding the Council had to explain how it would use the funds, to receive the remaining monies. The Council submitted its explanation and the remaining funds were awarded.

- 1.9 The Council will use this ring-fenced funding to work in partnership with local communities to develop Community Led Housing across the District. Further grant funding may be allocated over the next four years.
- 1.10 Implications on existing staffing capacity to secure, deliver and oversee the funds that are allocated to the Council will be monitored and, if insufficient, this will be reported as part of an overall monitoring report.
- 1.11 The Policy governance will be overseen by the Community Housing Fund Project Group chaired by the Cabinet Member for Housing. The group will comprise of Cabinet Member for Housing and three other Cabinet Members. The group will receive recommendations from Group Manager for Housing, Housing Options Manager and the S151 Officer or designated representative from finance. The Group will meet on a monthly basis to discuss the progress of community groups and consider applications for funding.

2.0 **Scope**

- 2.1 The purpose of this report is to seek approval for the Council's Community-led Housing Fund Grant Policy which will set out the criteria for the allocation of this funding to communities and organisations involved in the delivery of Community Led Housing schemes across Mid Devon over the next four years.
- 2.2 The Council is using £3250 (per year, over 4 years) of the funding to continue the joint working with Wessex Community Housing. The Council already has a proven track record with Wessex Community Housing arising from the successful Community Land Trust project in Hemyock. This will enable Wessex Community Housing to provide additional community development support, to work with the Council and communities to deliver more developments with Community Land Trusts.
- 2.3 The Wessex Community Housing Project is also tasked to generate interest and lead a dialogue with other community groups across Mid Devon around Community-led Housing as an additional step towards delivering additional housing on housing development sites and rural exception sites across the District.
- 2.4 The remaining grant allocation will be used to offer support to communities seeking to progress a Community-Led Housing scheme. The fund will be used to support local communities to set up a community organisation, undertake initial feasibility work and to cover project management costs.
- 2.5 The Community-Led Housing Fund Allocation policy sets out who is eligible to apply for this funding, what will be funded and how applications will be assessed and funding awarded.
- 2.6 The Community-Led Housing Fund will be available to communities to allow them to succeed in building new homes in the community. The criteria which grant applications will be assessed will be stringent. It will require applicants to:
 - Demonstrate how the project meets the Council strategic objectives
 - Evidence that other avenues have been explored
 - Provide a business case for the CLT
 - Report to the Council on the progress of the development/project

- 2.7 The impact of the programme will be monitored and evaluated by officers in the Housing Options Team and a report will be presented to the Homes PDG as and when required.
- 2.8 Appendix A sets out the Guidance and Criteria to help communities apply for the grants together with the application forms.

Contact for more Information: Mike Parker, Housing Options Manager
Telephone: 01884 234906 mparker@middevon.gov.uk

Circulation of the Report: Councillor Ray Stanley, Cabinet Member for Housing

Appendix A Community Led Housing Fund Guidance and Criteria – (2018-2020)

1. About Community-Led Housing

- 1.1 Community-led housing is intended to bring social and economic benefits to local communities through the provision of housing developed by members of the local community with support. The community must be integrally involved throughout the process in key decisions. It does not necessarily have to initiate and manage the development process, or build the homes itself, although it may choose to do so.

2. About the Grant

- 2.1 Mid Devon District Council was awarded £131,359.00 from a Government Fund aimed at helping local authorities to respond to high levels of second home ownership in their areas. Community-led housing includes all types of housing including homes for outright sale, rent and shared ownership
- 2.2 The Community Housing Fund will be available to communities looking to develop new housing and/or purchase, refurbish and bring back into effective use, empty properties. Any funding provided is used to benefit the local area and/or specific community on a clearly defined and legally protected way in perpetuity. Communities will be expected to work with Registered Providers as development partners. However, there may be situations where the community works with another development partner to deliver a community-led scheme.

3. Who Can Apply – Eligibility Criteria

- 3.1 **Community Organisations:** These will be community groups based in communities involved in the development of a community-led housing scheme. Community groups will need to be constituted to receive direct funding. The community group could be an existing charitable trust or development trust or similar body. Examples of community-led housing organisations include Community Land Trusts; Cohousing schemes; housing cooperatives and other similar organisations.

Where a new community group is established to develop a scheme, then funding will be provided to help establish the group.

Communities also have access to a wider range of other grant funding sources, which can assist in the delivery of Community Led Housing

schemes. These grants are not available to Registered Providers or other public sector bodies. Support and advice will be provided to communities both through the Council and specialist advisors on these alternative sources of funding.

3.2 Community Organisations will need to:

- Be a legal entity, or be part of a legally constituted consortia agreement
- Be appropriately constituted (examples might include; a registered charity, community interest company or charitable incorporated organisation, not for profit company or Industrial and Provident Societies for the Benefit of the Community).
- Have stated community benefit objectives
- Be non-profit distributing; any surpluses must be reinvested to further its social aims/community benefits

3.3 Registered Providers: Funding will be provided to Registered Providers who are involved in the development of an identified community-led scheme. Funding for Registered Providers can be in the form of a grant. Funding from the Community Housing Fund for Registered Providers can be made available in addition to funding from the Housing and Communities Agency (HCA) Shared Ownership and Affordable Homes Programme (SOAHP).

3.4 Registered Providers can be involved in a community-led housing scheme in a number of ways. These can range from acting as purely a development partner and providing a design and build service to a community through to leading on the development of the scheme and providing the on-going management of the housing. However, it is essential that whatever role a Registered Provider has in a community-led scheme that the community takes a long-term role in the ownership, management or stewardship of the homes, for it to be a genuine community-led housing scheme.

3.5 Other development partners: In most cases, communities will be expected to work with Registered Providers as development partners. However, there may be situations where the community works with another development partner to deliver a community-led scheme. The Council may provide direct funding to alternative development partners in certain circumstances.

(If you are applying for a Community Development / Set up Grant) Where no constituted body has yet been created, then the Council will accept applications from one of the following:

- The Parish or Town Council for that area;
- The appointed Community Support Organisation; or
- Another agency with strong links to the local community

4. What the grants are for

4.1 Community Development Work: Funding will be used to support community engagement work with local communities to enable them to set up a community organisation and to develop the organisation. Specific community capacity working could include:

- Set up costs for the group including legal structures and governance
- Advising the group on community-led housing models and the most appropriate models and approaches for their community/development
- Any training requirements
- Identifying other funding opportunities
- Assistance with funding applications and other support
- Longer term group and business development
- Any other specialist support

4.2 Initial Feasibility Work: Funding will be allocated to undertake initial feasibility work to identify the potential to develop a community-led housing scheme. Initial feasibility work could include:

- Feasibility studies
- Identifying and assessing potential sites and opportunities, costs and values
- Local Housing Needs Surveys
- Developing the initial project proposal
- Advice on early project planning/management and business plan development

4.3 Project management costs: Project management costs will cover any work undertaken on a specific site prior up to and including start on site of a scheme. This will include:

- All professional costs: Design and Architectural costs, Quantity Surveyor, site surveys and investigations etc.
- Planning fees and any specialist planning advice
- Legal costs

- Procurement costs
- Site Management costs
- Site acquisition
- Any abnormal costs: e.g. contamination, site clearance etc.

4.4 Other costs: The Council will consider use of the fund for specific one-off costs for a particular site, without which the scheme could not be developed or be viable, including gap funding.

4.5 Other organisations: Funding will be provided to other organisations to fund specific pieces of work. These can include funding to consultants for feasibility work, business planning, planning consultants, supporting housing needs surveys etc.

4.6 Items Which Will Not Qualify

The fund cannot be used for the following:

- Any development which does not meet the basic principles for a community-led housing scheme as set out previously
- Any organisation that does not meet the criteria listed previously
- Any development that has already commenced
- Any retrospective costs, which have already been incurred by the organisation

5. How much money can we apply for?

5.1 Amount of Funding to be Allocated

The Council currently has a sum of £131,359 available. The level of funding available in the future will be determined by the amount of grant allocated to the council by Central Government.

There are three grants available:

- Community Development / Set-Up Grant
- Feasibility Grant
- Development Grant

The grant funding available for each stage of a scheme is set out below. This is capped and it is expected that community organisations will also access other funding streams.

5.2 Community Development / Set-Up Grant

Grant funding of up to £3,000 per community (in addition to support from Wessex Community Housing Project) is available to help develop a group to the stage where it is constituted and to undertake initial community consultation. This funding is only available to groups with a clear community focus and an interest in providing housing which meets the needs of their local community.

This funding can support:

- Room hire for meetings and consultation events;
- Housing need survey materials;
- Training requirements;
- Identification of other funding opportunities;
- Fact finding visits to other community-led housing schemes; and
- Secretariat time to support the group;
- Advice on constituting a community-led housing body
- Administrative/legal costs required to set up a group

5.3 Stage 2: Feasibility Fund

Before accessing this fund, community groups will be expected to have been formed and constituted. They must also be able to demonstrate a good level of community support for the project and have clear evidence of the local housing needs that any proposed housing scheme is intended to meet.

In addition, potential site(s) will have been identified that may be suitable for a community housing scheme.

(If the organisation has accessed a Community Development / Set-Up Grant then) A statement of all setup grant expenditure will need to be prepared and 'signed off' by the Council prior to the submission of a (Feasibility grant) application.

Grant funding from £5,000 up to £15,000 per scheme (in addition to support from Wessex Community Housing Project) can be made available to support a feasibility appraisal and to develop a project plan. In exceptional circumstances requests for funding greater than the £15,000 limit may be considered if the applying community can demonstrate a clear rationale why additional funding is required, how it offers value for money and that the

funding cannot be secured by other means. At this stage, the type of work which funding could support could include:

- Feasibility study (this is an essential component of the application);
- Commissioning of a development agent to progress the scheme to a planning application;
- Identification and initial assessment of site/sites;
- Development of project plan, including a financial plan and identification of match funding;
- 'Pre application' planning advice;
- Scheme design including all relevant drawings appropriate for a planning application;
- Preparation of surveys and reports in advance of a formal planning application;
- Identification of any abnormal costs or site specific issues which would require further exploration; and
- Further community engagement.

To access this funding, groups are required to submit an application form (Annex A).

The funding can be used to fund work, reports and surveys that can progress a scheme all the way through to the stage prior to a full planning application. A date for the production of the feasibility study will be agreed with the applicant at the time the application is approved. It should be noted that at least 20% of all costs must be accessed from an alternative source to the Community Housing Fund.

The Council reserves the right to incorporate some of the development costs incurred at this stage into the total scheme costs identified at stage 3.

5.4 Stage 3: Development Fund

Grant up to £15,000 may be available either to top up public subsidy or provide gap funding for capital costs to contribute towards project management costs and construction costs.

Before accessing this fund community groups will be expected to have produced a project plan, have an identified site/sites and a clear understanding of the people (e.g. elderly/young adults etc.) who will benefit from the scheme.

Funding is only available to the following types of organisations:

Fully constituted community groups – the group can be an existing charitable organisation or similar body, social enterprise or set up specifically for this project.

Registered housing provider or non-registered housing association – as long as there is clear community involvement in the scheme (as set out in the policy statement)

6. How we assess applications - What we look for

6.1 Basic eligibility criteria

The applicant must be a legally constituted organisation (see above)

The scheme must clearly demonstrate that it meets local needs (evidence of recent Housing Needs Survey or equivalent)

The scheme must be community-led

For a scheme to be 'community-led' it will need to meet the following criteria:

- The community must be integrally involved throughout the process in key decisions. It does not necessarily have to initiate and manage the development process, or build the homes itself, although it may choose to do so;
- There will be a presumption in favour of community groups that demonstrate in their applications that they are taking a long-term, formal role in the ownership, management or stewardship of the homes; and
- Any funding provided is used to benefit the local area and/or specific community on a clearly defined and legally protected way in perpetuity

6.2 The applicant will also need to demonstrate:

- Strong governance arrangements by operating through open and accountable, co-operative processes, with strong performance and management systems
- Appropriate skills and capacity exist within the organisation, or available to the organisation to undertake the project
- Clear, realistic financial plans for the development of the housing scheme where applicable
- Clear, realistic financial plans for the future management of the housing scheme

- The scheme offers good value for money, in particular that the scheme is accessing other sources of funding and finance (see below)
- Community support for the proposals
- How the organisation will comply with any relevant legislation and statutory requirements

Assessment for a Development Grant will be subject to a more detailed appraisal process, which will include the following, on top of those already listed:

- Deliverability
- Allocations Policy
- How the scheme will be managed and maintained
- Robustness of the business model and financial viability

7. Value for money

7.1 Applications for Community Housing Fund

Applications for Community Housing Fund Stage 1 and 2 funding will need to demonstrate how the group intends to spend the money and provide a breakdown of costs.

Applications for Community Housing Fund Stage 3 funding will require the submission of a financial plan, outlining what revenue and capital support is required. The project plan should also outline what professional support is required to deliver the scheme and how this will be procured.

Community Housing Fund Project Plans will be expected to outline where match funding will be sourced from to make the scheme viable. The Community Housing Fund Group expects groups to demonstrate they have taken appropriate measures to reduce the amount requested from the Fund and will expect evidence that the applicant has considered the following alternative funding streams (where applicable):

Borrowing on rental income; this is capital funding borrowed over the long term, (typically 25 years), using projected rental income streams to service the debt

Sales receipts: this is capital funding secured from the proceeds of projected house sales

Homes England; this is grant made available from the HCA (soon to be renamed Homes England) in accordance with their Affordable Housing funding programmes

Land donations or use of existing community land; this is land offered at 'nil' or below market value

Local authority commuted sum fund; this is capital funding taken from the fund which accounts for financial contributions from developers in lieu of 'on-site' affordable housing

8.0 How to Apply

8.1 Requests for funding

Requests for Community Housing Fund Stage 1 and 2 funding should be sent to the Group Manager (Housing Services) using the appropriate application form (attached at Annex A).

Requests for Community Housing Fund stage 3 funding must be made through a completed project plan covering:

- the legal constitution of the group and the principal contacts
- evidence of community engagement
- a financial plan, identifying the sources of funding for the project
- identification of a site/sites
- a basic site designing indicating the number of types of housing to be delivered through the project
- an outline of who the new homes will be for and how that meets a local need
- what professional support is required to take the project forward and how these professionals will be appointed/procured
 - what role the community group will play once the homes are complete

9. Supporting Documents

9.1 Annex A must contain the supporting documents as detailed in section 8.1

10. How to Submit

10.1 Applications must be sent to the Group Manager (Housing Services) at Mid Devon District Council, Phoenix House, Phoenix Lane, Tiverton, Devon, EX16

6PP. Applications must be supported by the relevant documentation as detail above.

11. What happens after you submit your application

11.1 Requests for **Community Development / Set-Up grant** will normally be considered by the Group Manager (Housing Services) within 10 working days of receipt of the completed application form (unless otherwise agreed) (see Annex A).

Requests for **Feasibility Grant** will normally be considered by the Community Housing Fund Project Group within 30 working days of receipt of the application form (see Annex A). Please note that this may generate further questions or requests for clarification prior to a written decision being sent out to the group to inform them whether they have been successful or not.

Request for a **Development Grant** will also be considered by the Community Housing Fund Project Group following receipt of a project plan. An initial check of the project plan will be undertaken within 10 working days by the Group Manager (Housing Services). Should it be deemed to require further detail, applicants will be notified accordingly and asked to resubmit. Subject to any additional questions or requests for clarification, the group will receive written notification of whether they have been successful or not.

The policy will be overseen by the Community Housing Fund Project Group chaired by the Cabinet Member for Housing that will comprise of:

- Cabinet Member for Housing
- Three Cabinet Members

The group will be supported by the following group after receiving recommendations from

- Group Manager (Housing Services)
- Housing Options Manager
- S151 Officer or designated representative from finance

The Group will meet on a monthly basis to discuss the progress of community groups and consider applications for funding.

11.2 Payment of Grant

11.3 Stage 1: Community development set-up grant

Grant payments will normally be paid following the agreement of the Community Housing Fund Project Group with receipt of grant claim form and invoices for works carried out; payment of grant will be paid after 30 days of being approved. However, it is recognised that some community groups may not yet be fully constituted or have very limited cash resources.

11.4 Stage 2: Feasibility fund

Grant payments will normally be paid on receipt of grant claim form and invoices for work carried out.

11.5 Stage 3: Development fund

Payments from the Development Fund will normally be made on a staged basis as follows:

- 50% to be paid on start on site of the scheme 50% to be paid on scheme completion
- The Council will consider alternative staged payments in certain cases where there may be cash flow issues. However, it is expected that applicants will have sufficient development finance in place to ensure that they are able to manage their cash flow throughout the duration of the project.
- Where the grant funding is being used to provide gap funding, then payment will normally be made to the applicant once that cost has been met by the applicant and upon receipt of evidence of payment of the cost by the applicant.
- There will be no funding available for cost overruns.

11.6 Grant Agreement

Grant recipients will be required to enter into a standard grant agreement with the Council, which will stipulate a number of requirements including:

11.7 Monitoring Arrangements: We will require grant recipients to provide regular monitoring information as per the grant agreement.

11.8 Use of Grant and details of works required: The grant agreement will set clear what the grant can be used for and details of the works required.

11.9 Withholding, suspending and repayment of grant: The grant agreement will also set out the circumstances in which grant may be withheld, suspended or repaid. This will include disposal of the properties within a certain timescale, use of grant for purposes other for which the grant has been awarded etc. This list is not exhaustive and there may be other examples the Council will use its discretion.

11.10 Monitoring and Clawback

Groups awarded Community Housing Fund Stage 1 funding will be monitored by the Wessex Community Housing Project, who will report back to the Community Housing Fund Project Group on a regular basis.

Groups awarded Community Housing Fund Stage 2 and Stage 3 funding will be expected to submit a brief update report at least once every two months. They will also be monitored by the Wessex Community Housing Project, who will report back to the Community Housing Fund Project Group.

The Council reserves the right to seek repayment of any grant awarded, should any homes provided through this programme be taken out of community ownership within 10 years of the completion of the scheme, unless written permission is given by the Group Manager (Housing Services).

MID DEVON DISTRICT COUNCIL
COMMUNITY HOUSING FUND COMMUNITY DEVELOPMENT/SET-UP FUND

PLEASE READ THE CRITERIA AND GUIDANCE NOTES BEFORE COMPLETING THIS FORM
FOR MORE INFORMATION, PLEASE CONTACT THE HOUSING OPTIONS MANAGER ON 01884 234906

Application for Community Development/Set Up Funds – Stage 1

Name of Existing/Proposed Organisation	
Contact Details/Name:	
Contact email:	
Contact Address:	
Contact Tel no(s):	
Position Held:	
Correspondence Address:	
Organisation Details: Type of existing/proposed organisation	

Organisation bank account? (Please provide bank account name, address, sort code & account number.)	Account Name:	Sort Code:	Account No:
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Are you an established organisation with legal documents to establish that you have legal authority? (For example a Parish Council, Community Land Trust) What is the legal form of the organisation?	
--	--

Scheme Details: Please provide details about your project? (eg What are you proposing to build – how many houses, type of tenure? Why are you seeking support from the Community Housing Fund? How will this help you with your next steps? What will the Housing Fund help you to do which you are not able to achieve otherwise? Is this within a Neighbourhood Plan area?)	
--	--

Funding requirements - Please set out the funding you need to progress this scheme to Stage 2 (Feasibility)	
--	--

Type of funding	Estimated Cost	Details (including name of service provider/consultant/contractor if known)

<p>Have you identified a site? Please provide information (eg condition of the site, current use, the address of the site)</p>	
---	--

<p>Have you carried out any consultation with the wider community about your proposals (not including members of your group)? What level of support or opposition have you received (for example Parish Council, local authority, other local voluntary or business groups.)? We understand that all schemes have their objectors, and detailing any opposition you have had to your proposals will not prejudice your application for support.</p>	
--	--

<p>Have you had any engagement or discussion with a Registered Provider/Housing Association about your proposals? What response have you had?</p>	
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Are you receiving specialist advice about this project (ie Wessex Community Housing Project)? Please provide their name & contact details.

Equalities

Under the Equalities Act 2010 the Council has a legal duty to ensure that different groups are not disadvantaged from applying for or receiving our grants funding. We also want to ensure that people who benefit from our grants programme represents the makeup of the local population.

Please indicate which (if any) of the following groups will particularly benefit from your project and give details where you think this is relevant

- People with physical disabilities
- People with mental health problems
- Older people
- Unemployed people
- People who are gay, lesbian, bisexual or transgender
- People from a particular ethnic background
- Younger people
- Carers

Checklist

- Completed all sections of the application form []
- Provided Bank Account details []
- Provided details of the legal identity []
- Provided details of funding costs []

Declaration

The information you have provided will be used by the Council to assess and process your application and to enable us to contact you about your application. Your information will be held securely within the Council and only passed to others within the Council for the purposes of assessing this grant application. Information will be destroyed in line with the Council's Information Retention Policy.

I declare that, to the best of my knowledge and belief, all the information in this application form is true and complete.

Signature _____

(This can be your group's chairman, treasurer, secretary or equivalent post)

Date _____

Print Name

Position held in group

Enclosures

- Copy of governing document
- Accounts/Bank statement

Return to:

MID DEVON DISTRICT COUNCIL
PHOENIX HOUSE, PHOENIX LANE
TIVERTON, DEVON EX16 6PP

<p>Certification I certify that this funding required is directly associated with the development of a community led housing scheme(s) and that the information contained within this application form is, to the best of my knowledge, accurate and reliable.</p>	<p>Signature:</p> <p>Date:</p> <p>On behalf of:</p>
---	--

If the certification has not been completed by a recognised signatory of the proposed community housing organisation then please indicate the organisation that person represents

Application for Development/ Feasibility fund – Stage 2/3

Name of Existing Organisation	
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Contact Details/Name:	
------------------------------	--

Contact email:	
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Contact Address:	
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<p>Organisation Details: Type of organisation: Date of incorporation:</p> <p>(please provide a copy of your constitution or other documentary evidence of your governance arrangements)</p> <p><i>Please note that your organisation must normally have a minimum of 5 members (from different addresses in your community) and have either an open membership policy (or one which has restrictions that help to fulfil its overall aims and objectives)</i></p>	
--	--

Please provide a brief summary of the organisation's aims and objectives:	
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Bank account: (Please provide bank account name, address, sort code & account number.)	Account Name:	Sort Code:	Account No:
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Application for Development/ Feasibility fund – Stage 2 / 3

Declaration

The information you have provided will be used by the Council to assess and process your application and to enable us to contact you about your application. Your information will be held securely within the Council and only passed to others within the Council for the purposes of assessing this grant application. Information will be destroyed in line with the Council's Information Retention Policy.

I declare that, to the best of my knowledge and belief, all the information in this application form is true and complete.

Signature _____

(This can be your group's chairman, treasurer, secretary or equivalent post)

Date _____

Print Name

Position held in group

Enclosures

- Copy of supporting documents

Return to:

MID DEVON DISTRICT COUNCIL
PHOENIX HOUSE, PHOENIX LANE
TIVERTON, DEVON EX16 6PP

<p>Certification I certify that this funding required is directly associated with the development of a community led housing scheme(s) and that the information contained within this application form is, to the best of my knowledge, accurate and reliable.</p>	<p>Signature:</p> <p>Date:</p> <p>On behalf of:</p>
---	--

If the certification has not been completed by a recognised signatory of the proposed community housing organisation then please indicate the organisation that person represents

ELIGIBILITY CHECK

Application for Community Development/Set Up Funds – Stage 1 / 2 / 3

CLT Details	
Contact Name	
Parish	
Grant Stage	
Grant Requested	

Evidence Support	Of	Yes / No	Documentation Supplied	
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Eligibility

	Yes	No	?	Comment(s)
Is the application form complete and all relevant information supplied?				
Is the organisation eligible to apply?				
Are the project objectives eligible for funding?				
Is there sufficient detailed breakdown of costs so we know what the funding will be spent on?				
Is there evidence of support from at least one local parish / town Council?				
Is the amount higher than the eligible costs?				
Does the scheme / project warrant additional funding?				
Has the project already received funding?				
Is the project able to proceed with funding?				

Supplementary Questions / Clarifications Needed:

--

SCORING CHECK

Need	Comments <i>Please score from 1 to 5 1 being lowest – does not fulfil a local need 5 being highest – completely fulfils a local need</i>	Score
Is there a Housing Need in village/Parish?		
Is this back by the community/Parish?		
Is the organisation working with Wessex?		
Has a housing need survey been completed?		

RECOMMENDATION

Recommendation	£	Comments
Fund in Full		
Fund in Part		
Fund with Conditions		
Defer		
Do not fund		

Comments/Notes

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CABINET
14 June 2018

REVENUE AND CAPITAL OUTTURN 2017/18

Cabinet Member Cllr Peter Hare-Scott
Responsible Officer Director of Finance, Assets & Resources: Andrew Jarrett

Reason for Report: To present the revenue and capital outturn figures for the financial year 2017/18.

RECOMMENDATION(S): That Cabinet -

1 - Note the General Fund outturn achieved in 2017/18 which shows an overall underspend of £159k. This surplus is proposed to be transferred to the Property Maintenance reserve to provide further resilience.

2 - Approve the net transfers to earmarked reserves of £909k detailed in the General Fund service budget variance reports shown in Appendix 1 & 2 and summarised in Appendix 4.

3 - Note the positive position achieved on the Housing Revenue Account which shows an annual saving of £255k and approve the “earmarking” of the extra £255k shown in paragraph 3.3, as well as specific items totalling £3.002m and the utilisation of items totalling £484k identified in Appendix 4.

4 - Approve the carry forward of £5.874m from the 2017/18 capital programme (see paragraph 5.2) as all of the schemes will be delivered in 2018/19 or later years.

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 carried forward from 2017/18. All future spending will be closely linked to key council pledges from the updated corporate plan.

Financial Implications: Good financial management and administration underpin the entire document.

Legal Implications: None.

Risk Assessment: Regular financial monitoring information mitigates the risk of over or underspends at year end and allows the Council to direct its resources to key corporate priorities.

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

Executive Summary of 2017/18 Income and Expenditure

The table below gives an overview of the movements during the year on the key useable reserves of the Council. The balances assume that the proposed recommendations are approved as outlined at the beginning of this report.

	31 March 2017	In year movement	31 March 2018
	£k	£k	£k
General Fund	2,241	0	2,241
Housing Revenue Account	2,000	0	2,000

1.0 Introduction

- 1.1 Members of the Cabinet should note that the outturn report is basically a set of management reports that show the final cash related position on all service areas. The Finance Team then have to turn these management reports into the statutory financial statements which are subject to a wide number of complex accounting rules that often significantly change the final picture of a service's financial position for the year. However, it is important to note that the bottom-line profit or loss for the year remains constant.
- 1.2 The Council has continued its strategic decision to reduce costs, without adversely affecting service delivery. This year we have reclassified our CCLA investment which we had previously been advised to treat as Cash and Cash Equivalents. This was not technically correct and the restatement (reflected in our Statement of Accounts) has provided further resources and we have received a significant surplus in Business Rates due to growth and the benefits of "pooling". This has seen us deliver an overall General Fund (GF) surplus of £159k (see Appendix 1).
- 1.3 During the budget setting process we continue to ensure that revenue budgets are set on a robust basis and take a prudent view of the likely levels of income and expenditure.

2.0 The General Fund Reserve

- 2.1 This 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 £2.241m as at 31/03/17. In 2017/18 the previous two years' CCLA "losses" were reclassified as an unusable reserve and this meant that we could add back £360k to the General Fund Reserve which we had charged to it in previous years. The surplus of £159k incorporates this £360k.
- 2.2 Detailed budget monitoring reports were provided to both senior managers and Members throughout 2017/18. This monitoring focused on significant budget variances (+/- £10k), included remedial action where necessary and estimated an overall outturn position. The final written monitoring report

considered by the Cabinet gave a detailed position as at 31 December 2017 and predicted an end of year deficit of £182k for the General Fund. Therefore the final position improved by £341k.

2.3 The table below shows the overall budget, actual and variance, summarised for 2017/18.

	2017/18 Budget £	2017/18 Actual £	Variance £
Total Cost of Services	10,049,790	9,830,016	(219,774)
Other Income and Expenditure	(1,518,720)	1,095,786	2,614,506
TOTAL BUDGETED EXPENDITURE	8,531,070	10,925,802	2,394,732
TOTAL FUNDING	(8,531,070)	(11,084,755)	(2,553,685)
Net Income and Expenditure	0	(158,953)	(158,953)

2.4 A detailed explanation of all the key variances is shown in Appendix 2, service by service. Inevitably, within a service, there are often variances which compensate. Some areas may create savings which in turn can be partly or fully offset by overspends elsewhere. In this report we have tried to highlight the major movements to enable Members to appreciate the more significant trends within each service area.

Note – where any of the above variances were deemed to be recurring, the 2018/19 budget was adjusted accordingly.

2.5 The overall effect of the 2017/18 financial year would result in a General Fund Balance of £2.400m which is higher than the Council's own minimum requirement of £8.531m (Net Budgeted Expenditure) x 25% = **£2.133m** (agreed by Full Council) if it was not transferred to reserves.

2.6 In addition to the GF Balance, the Council holds a number of Earmarked Reserves (EMRs) which are used to help fund anticipated future expenditure commitments. The net movement of £909k into these reserves and the end of year balances held on them are shown in Appendix 4.

2.7 Market Walk and Fore Street Shops, Tiverton

Members will no doubt be keen to see the third year's result's following the acquisition of the shops in March 2015. The return on investment has dropped compared to 2016/17 (4.1%) due to an increase in vacant units during 17-18. The various elements are shown in different areas of the Income and Expenditure account but the overall position is as follows:

	<u>£k</u>
Net rental income after expenses	
(Shown within property Services committee)	(247)
Interest payable on Public Works Loan Board loan	102
Statutory Capital Financing (over 50 years)	83

Net income for year	(62)
	=====

This income equates to an approximate return of **1.5%** (62k ÷ 4,173k), net of borrowing costs. (£4,173k = Principal)

3.0 Housing Revenue Account (HRA)

- 3.1 This is a ring-fenced reserve in respect of the Council's housing landlord function. It is increased or decreased by the surplus or deficit generated on the HRA in the year. For 2017/18 the outturn is a net surplus of £255k and Members are requested to approve a transfer to HRA reserves to bring this to zero.
- 3.2 This surplus is explained in paragraph 3.4 and the effect of it on the HRA Balance is shown below.

HRA Balance

	£m
HRA balance @ 31/03/17	(2.000)
Budget saving achieved in 2017/18	(0.255)
Additional transfer to 30yr modernisation programme	0.255
HRA balance @ 31/03/18	(2.000)

- 3.3 After the strong closing financial position delivered in 2017/18, it is recommended to transfer a sum of £255k into the Housing Maintenance Fund earmarked reserve. This is in addition to the £2.182m already. The above position leaves an HRA balance of £2.0m as at 31 March 2018.
- 3.4 The main budget variances during 2017/18 that give rise to the figure of £255k were the £89k underspend generated by the Repairs team (comprising savings on the gas servicing contract and other planned works as well as some overspends in the DLO, including materials, contractors and vehicle purchase), the £83k underspend from the Tenancy teams and the £38k underspend on Alarms. For further details, please see the HRA Outturn Summary for 2017/18, which is attached as Appendix 3 to this report.
- 3.5 In addition to the above, the HRA hold a number of earmarked reserves. The movements on these during 2017/18 and their closing balances are shown on Appendix 4. This money is effectively "ring fenced" and will be held to meet expenditure on projects during 2018/19 and beyond.

4.0 The Collection Fund

- 4.1 Mid Devon is a collection authority for council tax and national non-domestic rates, and as such, is required to produce a collection fund account for the Mid Devon area. The Council collects council tax on behalf of Devon County Council, Devon Fire and Rescue Service, Devon & Cornwall Police and the Town/Parish Councils.

- 4.2 The council tax collection rate for 2017/18 was 98.0% (98.1% in 2016/17). This demonstrates how effective our Revenues section has been in collecting the annual charge in extremely challenging economic times. The Non Domestic Rates collection rate improved to 99.2% for 2017/18 (99.2% in 2016/17).

5.0 Capital Outturn

- 5.1 A capital outturn summary is attached as Appendix 5 to this report. The revised capital budget for 2017/18 amounted to £24.315m. At the year-end we had spent £8.523m leaving the capital programme underspent in total by £15.792m.

Capital receipts of £2.439m (this includes general useable capital receipts and ring-fenced replacement homes capital receipts) were applied to finance the programme with the balance of the expenditure met by a combination of borrowing, external grants and contributions from reserves.

- 5.2 As shown in Appendix 5 there are capital projects totalling £5.874m which have not been completed as at the 31 March 2018. This expenditure, therefore, needs to be rolled forward to be included in the 2018/19 capital programme. These schemes are still fully funded by either unspent capital grants or by provisions held within capital earmarked reserves. In addition there is £426k relating to Affordable Housing and Private Sector Housing Grants.
- 5.3 The Capital Receipts Reserve (note this includes general useable capital receipts and ring-fenced replacement homes capital receipts) is used to part fund the capital programme - the movement on this account for the year is given below:

	£m
Balance at 1 April 2017	(2.438)
• Sale of Council Houses - 26	(2.084)
• General Fund Sales	(1.639)
• Pooling of Housing Capital Receipts to Government.	231
• Capital Receipts applied in year	2.439
Balance at 31 March 2018	(3.501)

Note – the remaining balance of £3.501m is committed in order to fund any slippage, specific projects in ICT and Private Sector Housing and to balance the Capital Medium Term Financial Plan.

- 5.4 The Capital Earmarked Reserve has been set aside from Revenue to fund capital projects; the balance on this reserve now stands at £441k made up by the following transactions:

	£k
Balance at 1 April 2017	(471)
Funding required to deliver the 2017/18 Programme	30
Balance at 31 March 2018	(441)

Note – the remaining balance of £441k is committed in order to fund any slippage and to balance the Capital Medium Term Financial Plan.

- 5.5 The Council also holds New Homes Bonus which can be used for either Revenue or to support future Capital Programmes, the balance held at 31 March 2018 is £2.673m; again much of this remaining balance is committed to fund any slippage and to balance the Capital Medium Term Financial Plan.

6.0 Treasury Management

- 6.1 A review of the 2017/18 investment performance, including the details of interest payable, are included within the separate 2017/18 Treasury Outturn Report.

7.0 Conclusion

- 7.1 Members are asked to note the revenue and capital outturn figures for the financial year 2017/18 and agree the proposed earmarking of surplus funds generated by in year savings from both the GF and the HRA. In addition, Members need to approve the incomplete projects on the 2017/18 capital programme be rolled forward into the 2018/19 capital programme.

Contact for more information:

Andrew Jarrett
01884 23(4242)
ajarrett@middevon.gov.uk

Background Papers:

Circulation of the Report:

Cllr Peter-Hare-Scott
Leadership Team

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18

	Budget 2017/18	Actual 2017/18	Variance
	£	£	£
Community Development	268,090	399,996	131,906
Corporate Management	1,428,300	1,499,055	70,755
Car Parks	(237,790)	(144,661)	93,129
Customer Services	37,300	(10,298)	(47,598)
Environmental Services	1,444,570	1,324,747	(119,823)
Finance & Performance	7,020	(18,378)	(25,398)
Grounds Maintenance	27,410	75,845	48,435
General Fund Housing	261,490	149,493	(111,997)
Human Resources	46,210	55,389	9,179
I.T.Services	47,820	76,961	29,141
Legal & Democratic Services	916,880	899,040	(17,840)
Planning & Regeneration	1,580,840	747,037	(833,803)
Property Services	10,250	387,344	377,094
Revenues & Benefits	667,940	583,086	(84,854)
Recreation and Sport	1,020,890	1,239,516	218,626
Waste Services	2,522,570	2,565,844	43,274
TOTAL COST OF SERVICES	10,049,790	9,830,016	(219,774)
OTHER INCOME & EXPENDITURE			
PWLB bank loan interest payable & finance lease interest	143,680	143,818	138
Interest from funding provided for HRA	(54,000)	(56,573)	(2,573)
Interest received on investments	(254,000)	(342,341)	(88,341)
Reversal of capital charges reflected in services	(1,675,800)	(1,724,596)	(48,796)
Capital grants unapplied	0	1,750,595	1,750,595
Capital financing of finance leases	84,790	85,205	415
MRP for capital funding and loan repayments	313,580	268,883	(44,697)
New Homes Bonus	(1,721,980)	(1,726,976)	(4,996)
Transfers to & from earmarked reserves, including earmarked reserves used to fund capital programme 2017/18	1,645,010	908,678	(736,332)
EMR used to fund 2017/18 capital programme	0	2,149,622	2,149,622
Reclassification of CCLA Fund	0	(360,529)	(360,529)
TOTAL OTHER INCOME & EXPENDITURE	(1,518,720)	1,095,786	2,614,506
TOTAL BUDGETED EXPENDITURE	8,531,070	10,925,802	2,394,732
FUNDED BY:-			
Revenue Support Grant	(497,550)	(497,553)	(3)
NNDR Revenue	(2,265,210)	(2,952,656)	(687,446)
Assumed NNDR Pooling Growth		(106,582)	(106,582)
Capital Grants & Cont'S Rec'D	0	(1,750,595)	(1,750,595)
CTS Funding parishes	46,960	46,768	(192)
Collection Fund Surplus	(52,860)	(52,857)	3
Council Tax - (Band D at £182.15)	(5,356,390)	(5,356,390)	0
Other non-ringfenced gov grants	(31,510)	(40,381)	(8,871)
Rural Services Delivery Grant	(374,510)	(374,509)	1
TOTAL FUNDING	(8,531,070)	(11,084,755)	(2,553,685)
NET INCOME AND EXPENDITURE	0	(158,953)	(158,953)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Community Development

		2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
Code	Community and Development					
1000	Employees	62,600	60,091	(2,509)	-4.0%	
2000	Premises	45,420	46,912	1,492	3.3%	
3000	Transport	0	397	397		
4000	Supplies and Services	101,500	174,529	73,029	72.0%	
	Total Direct Expenditure	209,520	281,930	72,410	34.6%	
7000	External Income	(92,400)	(143,728)	(51,328)	-55.5%	
	Net Direct Expenditure	117,120	138,203	21,083	18.0%	(a)
5000	Support Services	108,110	108,110	0		
6500	Depreciation	42,860	153,683	110,823		
	Total Indirect Expenditure	150,970	261,793	110,823		
	Total Community & Development Expenditure	268,090	399,996	131,906		
	Community & Development - Service units					
CD200	Community Development	134,450	152,088	17,638		
CD205	HO Communities & Gov	1,960	1,656	(304)		
CD206	HO Communities & Gov Rech	0	0	0		
CD210	Community Services Unit	0	0	0		
CD211	Community Services Unit Rech	0	0	0		
CD300	Markets	137,820	251,707	113,887		
CD305	Market Special Events	(6,140)	(5,456)	684		
	Total Community & Development Expenditure	268,090	399,996	131,906		
				£	£	
	Total Expenditure Variation				131,906	(a)
	Major Cost Changes					
CD200	Utilise ear marked reserve for grant awards (see EMR note below)			5,430		
CD200	Town and Parish Fund, grant awards (see note in income levels)			56,820		
CD300	Please refer to Capital Programme Appendix 5. Project no longer to be undertaken			10,550		
					72,800	
	Major Cost Savings					
					0	
	Major Changes in Income Levels					
CD200	DCC Contribution to Town and Parish Fund (see EMR note below)			(58,840)		
CD300	Market income			5,500		
					(53,340)	
	Minor Variations				1,623	
	Total Expenditure Variation				21,083	(a)
	EARMARKED RESERVES					
	Utilised 2017/18					
CD200	Partial grant earmarked reserve released			(5,430)		
	Proposed contribution c/fwd to 2018/19					
CD200	Town and Parish Fund grant awards			2,019		
	Net movement in earmarked reserves				(3,411)	
	Total Expenditure variation after Earmarked Reserves				17,672	

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Corporate Management

		2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
Code	Corporate					
1000	Employees	1,432,100	1,457,430	25,330	1.8%	
2000	Premises	0	0	0	N/A	
3000	Transport	1,500	3,325	1,825		
4000	Supplies and Services	154,140	197,870	43,730	28.4%	
	Total Direct Expenditure	1,587,740	1,658,625	70,885	4.5%	
7000	External Income	(60)	(190)	(130)	-216.1%	
	Net Direct Expenditure	1,587,680	1,658,435	70,755	4.5%	(a)
5000	Support Services	(159,380)	(159,380)	0	0.0%	
6500	Depreciation	0	0	0		
	Total Indirect Expenditure	(159,380)	(159,380)	0		
	Total Corporate Expenditure	1,428,300	1,499,055	70,755		
	Corporate Management Service Units					
CM100	Leadership Team	511,710	547,319	35,609	7.0%	
CM199	Leadership Team Recharge	(500,930)	(500,930)	0	0.0%	
CM210	Performance, Governance & Data	0	55,626	55,626		
CM300	Corporate Fees/charges	504,590	490,851	(13,739)	-2.7%	
CM340	Unison	10,320	9,064	(1,256)	-12.2%	
CM310	Corporate Performance	1,100	1,100	0	0.0%	
CM600	Pension Backfunding	901,510	896,026	(5,484)	-0.6%	
	Total Corporate Expenditure	1,428,300	1,499,055	70,755		
				£	£	
	Total Expenditure Variation				70,755	(a)
	Major Cost Increases					
	Contribution to construction of new theatre in Tiverton			25,000		
	New cost centre for Performance, Governance & Data (partially funded from savings in Internal Audit)			55,626		80,626
	Major Cost Savings					
	Savings on external audit fees and Apprenticeship Levy			(13,739)		(13,739)
	Major Changes in Income Levels					
	None					0
	Minor Variances					3,869
	Total Expenditure Variation				70,755	
	EARMARKED RESERVES					

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18

Corporate Management

				£		
	Utilised 2017/18					
	None					
	Proposed contribution c/fwd to 2018/19					
	None					
	Net movement in earmarked reserves				0	
	Total Expenditure variation after Earmarked Reserves				70,755	

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18

Car Parks

Code	Car Parks	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	0	2,633	2,633	0.0%	
2000	Premises	174,720	187,612	12,892	7.4%	
3000	Transport	0	0	0		
4000	Supplies and Services	32,340	31,500	(840)	-2.6%	
	Total Direct Expenditure	207,060	221,745	14,685	7.1%	
7000	External Income	(799,450)	(748,759)	50,691	6.3%	
	Net Direct Expenditure	(592,390)	(527,014)	65,376	-11.0%	(a)
5000	Support Services	163,830	163,830	0		
6500	Depreciation	190,770	218,523	27,753		
	Total Indirect Expenditure	354,600	382,353	27,753		
	Total Car Park Expenditure	(237,790)	(144,661)	93,129		
	Car Park - Service units					
CP510	Market Car Park	(158,840)	(146,943)	11,897		
CP520	Multi-Storey Car Park	140,250	175,096	34,846		
CP530	Amenity Car Parks	27,730	37,625	9,895		
CP540	Paying Car Parks	(246,930)	(210,439)	36,491		
	Total Car Park Expenditure	(237,790)	(144,661)	93,129		
				£	£	
	Total Expenditure Variation					93,129 (a)
	Major Cost Changes					
CP520	Salary overspend due to MSCP mobile patrols during school holidays			2,633		
CP530	Maintenance overspend on Amenity Car Parks will be off-set by resurfacing EMR			10,000		
CP	General Maintenance overspend across Parking Services			4,000		
CP540	New Enforcement System to be off-set by underspend on Capital Programme			26,000		
CP540	Car park machine maintenance budgets underspend due to new P&D machines			(7,340)		35,293
	Major Cost Savings					
CP540	Increased income from PCN's			(19,731)		(19,731)
	Major Changes in Income Levels					
CP	P&D Income down against budget which includes impact from transaction fee removal from our tariffs & bad weather conditions during March - MSCP £13K, Market Tiv £10k, Station Rd Cull £8.7k & William St Tiv £5k			45,000		
CP	Permit Income down against budget			3,000		48,000
	Minor Variations					1,810
	Total Expenditure Variation					65,372 (a)
	EARMARKED RESERVES					
	Utilised 2017/18			£		
CP540	Amenity Car Park resurfacing works			(10,000)		
	Proposed contribution c/fwd to 2018/19					
	Net movement in earmarked reserves					(10,000)
	Total Expenditure variation after Earmarked Reserves					55,372

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Customer Services

		2017/18 Budget	2017/18 Actual	Variance	Variance	
Code	Customer Services	£	£	£	%	
1000	Employees	716,090	679,280	(36,810)	-5.1%	
2000	Premises	0	0	0	0.0%	
3000	Transport	2,880	2,372	(508)		
4000	Supplies and Services	75,330	65,123	(10,207)	-13.5%	
	Total Direct Expenditure	794,300	746,775	(47,525)	-6.0%	
7000	External Income	0	(77)	(77)	0.0%	
	Net Direct Expenditure	794,300	746,698	(47,602)	-6.0%	(a)
5000	Support Services	(759,220)	(759,220)	0		
6500	Depreciation	2,220	2,224	4		
	Total Indirect Expenditure	(757,000)	(756,996)	4		
	Total Customer Services Expenditure	37,300	(10,298)	(47,598)		
	Customer Services - Service units					
CS200	Communications	136,370	141,029	4,659		
CS299	Communications Rech	(134,170)	(134,170)	0		
CS500	Messenger Services	65,400	64,201	(1,199)		
CS599	Messenger Services Rech	(65,430)	(65,430)	0		
CS900	Central Photocopying	21,820	21,592	(228)		
CS901	Central Photocopying Rech	(21,810)	(21,810)	0		
CS902	Central Postage	23,470	16,957	(6,513)		
CS903	Central Postage Rech	(23,460)	(23,460)	0		
CS910	Customer Services Admin	162,070	154,033	(8,037)		
CS915	Customer Services Admin Rech	(159,870)	(159,870)	0		
CS930	Customer First Management	197,000	219,545	22,545		
CS931	Customer First Management Rech	(195,500)	(195,500)	0		
CS932	Customer First	626,980	591,334	(35,646)		
CS933	Customer First Rech	(626,980)	(626,980)	0		
CS938	Digital Strategy Staffing	31,410	8,231	(23,179)		
	Total Customer Services Expenditure	37,300	(10,298)	(47,598)		
				£	£	
	Total Expenditure Variation				(47,598)	(a)
	Major Cost Changes					
						0
	Major Cost Savings					
	Digital Strategy-post unfilled			(25,000)		
	Various other salary savings from vacant posts			(11,810)		
	Franked mail-savings on budget			(6,500)		

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18

Customer Services

						(43,310)
	Major Changes in Income Levels					0
	Minor Variations					(4,288)
	Total Expenditure Variation					(47,598) (a)
	EARMARKED RESERVES					
	Utilised 2017/18				£	
CS900	Sinking Fund				(9,110)	
CS910	Sinking Fund				(7,000)	
	Proposed contribution c/fwd to 2018/19					
CS902	Sinking Fund				1,000	
CS932	Sinking Fund				3,000	
	Net movement in earmarked reserves					(12,110)
	Total Expenditure variation after Earmarked Reserves					(59,708)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Environmental Services

Code	Environmental Services	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %
1000	Employees	1,004,950	930,690	(74,260)	-7.4%
2000	Premises	90,140	80,484	(9,656)	-10.7%
3000	Transport	44,570	42,133	(2,437)	
4000	Supplies and Services	131,020	160,866	29,846	22.8%
	Total Direct Expenditure	1,270,680	1,214,174	(56,506)	-4.4%
7000	External Income	(361,580)	(408,820)	(47,240)	-13.1%
	Net Direct Expenditure	909,100	805,354	(103,746)	-11.4%
5000	Support Services	456,220	456,220	0	
6500	Depreciation	79,250	63,173	(16,077)	
	Total Indirect Expenditure	535,470	519,393	(16,077)	
	Total Environmental Services Expenditure	1,444,570	1,324,747	(119,823)	
	Environmental Services - Service units				
ES100	Cemeteries	119,870	106,436	(13,434)	
ES110	Bereavement Services	76,940	82,123	5,183	
ES112	Bereavement Services Rech	(76,940)	(76,940)	0	
ES200	CCTV Initiatives	15,110	15,337	227	
ES250	Community Safety	73,170	69,775	(3,395)	
ES251	Community Safety recharge	(8,390)	(8,390)	0	
ES252	Building Safer Community Fund	0	(40)	(40)	
ES256	Community Safety Partnership	0	(2,676)	(2,676)	
ES260	Food Protection	123,840	116,973	(6,867)	
ES270	Water Quality Monitoring	66,100	66,303	203	
ES349	Private Sector Housing team Rech	(55,350)	(55,350)	0	
ES354	Private Sector Housing	204,960	580,036	375,076	
ES360	Dog Warden	47,980	46,680	(1,300)	
ES361	Public Health	46,750	43,863	(2,887)	
ES450	Parks & Open Spaces	386,300	367,024	(19,276)	
ES455	Amory Park	22,850	(2,160)	(25,010)	
ES460	Play Areas	158,930	181,492	22,562	
ES500	Emergency Planning	0	0	0	
ES550	Licensing	44,820	46,403	1,583	
ES580	Pool Car Running Costs	1,350	(549)	(1,899)	
ES600	Pest Control	13,740	17,400	3,660	
ES650	Contaminated Land	0	0	0	
ES660	Control of Pollution	39,220	37,066	(2,154)	
ES670	Local Air Pollution	97,540	96,127	(1,413)	
ES720	ES Management	0	1	1	
ES730	Environmental Enforcement	288,420	247,952	(40,468)	
ES731	Environmental Enforcement Rech	(288,410)	(288,410)	0	
ES733	Environmental Health	455,490	421,766	(33,724)	
ES734	Environmental Health Rech	(415,670)	(415,670)	0	
ES740	Licensing Unit	114,410	127,771	13,361	
ES741	Licensing Unit Rech	(114,410)	(114,410)	0	
ES760	Health & Safety Officer	0	0	0	
PS480	MDDC Footpaths & Railway Walks	5,950	6,259	309	
	Total Environmental Services Expenditure	1,444,570	1,712,191	267,621	

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Finance and Performance

		2017/18	2017/18	Variance	Variance
		Budget	Actual		
Code	Finance and Performance	£	£	£	%
1000	Employees	547,760	470,451	(77,309)	-14.1%
2000	Premises	0	0	0	0.0%
3000	Transport	1,930	1,734	(196)	
4000	Supplies and Services	42,930	103,715	60,785	141.6%
	Total Direct Expenditure	592,620	575,900	(16,720)	-2.8%
7000	External Income	0	(8,678)	(8,678)	0.0%
	Net Direct Expenditure	592,620	567,222	(25,398)	-4.3% (a)
5000	Support Services	(585,600)	(585,600)	0	
6500	Depreciation	0	0	0	
	Total Indirect Expenditure	(585,600)	(585,600)	0	
	Total Finance and Performance Expenditure	7,020	(18,378)	(25,398)	
	Finance and Performance - Service units				
FP100	Accountancy Services	380,410	386,433	6,023	
FP199	Accountancy Services Rech	(375,630)	(375,630)	0	
FP200	Internal Audit	160,930	143,891	(17,039)	
FP299	Internal Audit Rech	(159,170)	(159,170)	0	
FP300	Procurement	112,080	98,866	(13,214)	
FP399	Procurement Rech	(111,590)	(111,590)	0	
FP400	Purchase Ledger	64,360	64,146	(214)	
FP499	Purchase Ledger Rech	(64,370)	(64,370)	0	
FP500	Sales Ledger	98,430	97,476	(955)	
FP599	Sales Ledger Rech	(98,430)	(98,430)	0	
	Total Finance and Performance	7,020	(18,378)	(25,398)	
	Total Expenditure Variation			£	£
					(25,398) (a)
	Major Cost Changes				
FP200	Devon Audit Partnership costs (see note in major costs savings)			54,750	
FP100	New subscriptions for Treasury Management & Capital Financing and Software costs that were not budgeted for			5,000	
					59,750
	Major Cost Savings				
FP200	Salary savings as now part of Devon Audit Partnership (see note in cost changes)			(70,850)	
FP300	Salary saving due to reduced working hours			(5,000)	
					(75,850)
	Major Changes in Income Levels				
FP300	Procurement income from Partnership working with Torridge DC			(8,700)	
					(8,700)
	Minor Variations				(598)
	Total Expenditure Variation				(25,398) (a)
	EARMARKED RESERVES				
	Utilised 2017/18				
	Proposed contribution c/fwd to 2018/19				
	Net movement in earmarked reserves				0
	Total Expenditure variation after Earmarked Reserves				(25,398)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Grounds Maintenance

Code	Grounds Maintenance	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %
1000	Employees	460,550	485,957	25,407	5.5%
2000	Premises	24,640	20,672	(3,968)	-16.1%
3000	Transport	72,630	90,284	17,654	
4000	Supplies and Services	34,330	95,463	61,133	178.1%
	Total Direct Expenditure	592,150	692,376	100,226	16.9%
7000	External Income	(51,000)	(102,792)	(51,792)	-101.6%
	Net Direct Expenditure	541,150	589,584	48,434	9.0% (a)
5000	Support Services	(517,810)	(517,810)	0	
6500	Depreciation	4,070	4,071	1	
	Total Indirect Expenditure	(513,740)	(513,739)	1	
	Total Grounds Maintenance Expenditure	27,410	75,845	48,435	
	Grounds Maintenance - Service units				
GM960	Grounds Maintenance	619,980	668,415	48,435	
GM961	Grounds Maintenance Rech	(592,570)	(592,570)	0	
	Total Grounds Maintenance Expenditure	27,410	75,845	48,435	
				£	£
	Total Expenditure Variation				48,434 (a)
	Major Cost Changes				
GM960	Salary overspend due to agency staff required to carry out GM duties and Ad-hoc works			15,000	
GM960	Training overspend for Tree works team to be off-set by EMR			10,000	
GM960	Overspend on vehicle & plant running costs due to aging vehicles and plant equipment			17,000	
GM960	Overspend on equipment budget is for the purchase of Grave shoring equipment which is funded from EMR			11,000	
GM960	Insurance excesses to replace plant equipment stolen			30,000	
GM960	Overspend on Equipment budget			5,000	
GM960	Overspend on material stock issues and plants & shrubs budget			6,000	
					94,000
	Major Cost Savings				
	Major Changes in Income Levels				0
GM960	Recharge to HRA for additional works carried out during 17-18			(47,000)	
					(47,000)
	Minor Variations				1,434
	Total Expenditure Variation				48,434 (a)
	EARMARKED RESERVES				
				£	
	Utilised 2017/18				
GM960	Tree works team training			(10,000)	
GM960	Grave shoring equipment			(11,000)	
	Proposed contribution c/fwd to 2018/19				
	Net movement in earmarked reserves				(21,000)
	Total Expenditure variation after Earmarked Reserves				27,434

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
General Fund Housing

Code	General Fund Housing	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	207,260	207,647	387	0.2%	
2000	Premises	5,300	4,438	(862)	-16.3%	
3000	Transport	11,840	11,757	(83)		
4000	Supplies and Services	199,640	227,792	28,152	14.1%	
	Total Direct Expenditure	424,040	451,633	27,593	6.5%	
7000	External Income	(172,700)	(312,671)	(139,971)	-81.0%	
	Net Direct Expenditure	251,340	138,963	(112,377)	-44.7%	(a)
5000	Support Services	9,530	9,530	0	0.0%	
6500	Depreciation	620	1,000	380	-61.3%	
	Total Indirect Expenditure	10,150	10,530	380		
	Total General Fund Housing Services Expenditure	261,490	149,493	(111,997)		
	General Fund Housing - Service units					
HG320	Housing & Homelessness Advice	261,490	145,305	(116,185)	44.4%	
HG340	Community Land Trusts	0	3,125	3,125	N/A	
HG373	Homelessness & Enabling Team	268,560	269,624	1,064	-0.4%	
HG379	Homeless & Enabling Team Rech	(268,560)	(268,560)	0	0.0%	
	Total General Fund Housing Services Expenditure	261,490	149,493	(111,997)		
				£	£	
	Total Expenditure Variation				(111,997)	(a)
	Major Cost Changes					
	New instances of DARS higher than budgeted			8,820		
	Cost of using temporary accommodation higher than budgeted			16,309		
					25,129	
	Major Cost Savings					
	Court costs lower than budgeted this year			(7,850)		
					(7,850)	
	Major Changes in Income Levels					
	Homelessness Act Set Up Grant (transferred to earmarked reserves below)			(33,766)		
	Flexible Homeless Support Grant (transferred to earmarked reserves below)			(57,759)		
	DARS repayments higher than budgeted			(10,084)		
	Temporary accommodation income higher than budgeted			(12,196)		
	Discretionary rent allowances higher than expected			(9,661)		
					(123,466)	
	Minor Variations				(5,810)	
	Total Expenditure Variation				(111,997)	(a)
	EARMARKED RESERVES					
	Utilised 2017/18					
	Community Land Trusts			(3,125)		
	Proposed contribution c/fwd to 2018/19					
	Homelessness Act Set Up Grant			33,766		
	Flexible Homeless Support Grant			57,759		
	Net movement in earmarked reserves				88,400	
	Total Expenditure variation after Earmarked Reserves				(23,597)	

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18

Human Resources

Code	Human Resources	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %
1000	Employees	387,530	377,421	(10,109)	-2.6%
2000	Premises	0	0	0	0.0%
3000	Transport	3,120	2,124	(996)	
4000	Supplies and Services	25,710	45,967	20,257	78.8%
	Total Direct Expenditure	416,360	425,511	9,151	2.2%
7000	External Income	(250)	(222)	28	11.2%
	Net Direct Expenditure	416,110	425,289	9,179	2.2% (a)
5000	Support Services	(369,900)	(369,900)	0	
6500	Depreciation	0	0	0	
	Total Indirect Expenditure	(369,900)	(369,900)	0	
	Total Human Resources Expenditure	46,210	55,389	9,179	
	HR - Service units				
HR100	Human Resources	254,400	288,649	34,249	
HR199	Human Resources Rech	(244,200)	(244,200)	0	
HR200	Staff Development Training	47,300	50,922	3,622	
HR210	CPD Training	0	0	0	
HR220	Post Entry Training	0	0	0	
HR230	Health & Safety Training	0	(222)	(222)	
HR300	Payroll	75,890	72,585	(3,305)	
HR399	Payroll Rech	(75,380)	(75,380)	0	
HR400	Learning & Development	61,470	48,467	(13,003)	
HR499	Learning & Development Rech	(73,530)	(73,530)	0	
HR600	Health & Safety Officer	73,420	61,258	(12,162)	
HR699	Health & Safety Officer Rech	(73,160)	(73,160)	0	
	Total Human Resources Expenditure	46,210	55,389	9,179	
				£	£
	Total Expenditure Variation				9,179 (a)
	Major Cost Changes				
HR100	Employee Counselling costs higher then budgeted			6,000	
HR100	Increased Salary costs due to new Group Manager			7,000	
HR100	Increase software costs for HR, Payroll & L&D systems			12,000	
HR100	Overspend on HR consultancy budget			2,500	
					27,500
	Major Cost Savings				
HR	Salary underspend across Learning & Development & Health & Safety is a result of reduced hours			(20,000)	
					(20,000)
	Major Changes in Income Levels				
	Minor Variations				1,679
	Total Expenditure Variation				9,179 (a)
	EARMARKED RESERVES				
	Utilised 2017/18			£	
	Net movement in earmarked reserves			0	0
	Total Expenditure variation after Earmarked Reserves				9,179

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
ICT Services

Code	ICT Services	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	499,090	509,087	9,997	2.0%	
2000	Premises	0	0	0		
3000	Transport	1,550	457	(1,093)		
4000	Supplies and Services	358,810	353,937	(4,873)	-1.4%	
	Total Direct Expenditure	859,450	863,481	4,031	0.5%	
7000	External Income	0	(1,429)	(1,429)		
	Net Direct Expenditure	859,450	862,052	2,602	0.3%	(a)
5000	Support Services	(852,030)	(852,030)	0		
6500	Depreciation	40,400	66,939	26,539		
	Total Indirect Expenditure	(811,630)	(785,091)	26,539		
	Total ICT Services Expenditure	47,820	76,961	29,141		
	ICT - Service units					
IT100	Gazetteer Management	78,720	76,144	(2,576)		
IT199	Gazetteer Management Rech	(78,690)	(78,690)	0		
IT200	Information Management & T Gov	0	0	0		
IT300	Central Telephones	67,170	69,653	2,483		
IT399	Central Telephones Rech	(53,990)	(53,990)	0		
IT400	ICT Network & Hardware	262,140	283,071	20,931		
IT499	ICT Network & Hardware Rech	(228,130)	(228,130)	0		
IT500	ICT Software Support & Maint.	572,180	586,065	13,885		
IT599	ICT Software Support & Maint. Rech	(572,160)	(572,160)	0		
IT600	ICT Staff Unit	544,850	551,064	6,214		
IT699	ICT Staff Unit Rech	(544,310)	(544,310)	0		
IT700	PSN COMPLIANCE	0	(115)	(115)		
IT800	Phoenix House Printing	29,460	17,780	(11,680)		
IT899	Phoenix House Printing Rech	(29,420)	(29,420)	0		
	Total ICT Services Expenditure	47,820	76,961	29,141		
				£	£	
	Total Expenditure Variation				29,141	(a)
	Major Cost Changes					
IT600	Salary overspend due to JE regrades and Officers joining the pension scheme			18,700		
IT500	Computer software costs - windows server data releases			13,000		
	Major Cost Savings				31,700	

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18

ICT Services

IT600	CPD training not spent due to staffing restructure (see EMR note below)		(8,750)		
IT400	To offset computer software costs - computer hardware budget not fully spent		(10,000)		
IT800	Phoenix House reduced printing costs		(10,000)		
				(28,750)	
	Major Changes in Income Levels				
	Minor Variations			(346)	
	Total Expenditure Variation			2,604	(a)
	EARMARKED RESERVES				
	Utilised 2017/18				
	Proposed contribution c/fwd to 2018/19				
IT600	CPD training		8,750		
	Net movement in earmarked reserves			8,750	
	Total Expenditure variation after Earmarked Reserves			11,354	

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Legal and Democratic Services

Code	Legal and Democratic Services	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	473,020	652,287	179,267	37.9%	
2000	Premises	0	23,830	23,830	N/A	
3000	Transport	18,100	16,379	(1,721)		
4000	Supplies and Services	406,150	506,236	100,086	24.6%	
	Total Direct Expenditure	897,270	1,198,733	301,463	33.6%	
7000	External Income	(65,500)	(384,803)	(319,303)	487.5%	
	Net Direct Expenditure	831,770	813,930	(17,840)	-2.1%	(a)
5000	Support Services	85,110	85,110	0	0.0%	
	Total Indirect Expenditure	85,110	85,110	0		
	Total Legal and Democratic Services	916,880	899,040	(17,840)		
	Legal & Democratic Services - Service units					
LD100	Electoral Registration	213,180	210,647	(2,533)	-1.2%	
LD199	Electoral Registration Rech	(610)	(610)	0	0.0%	
LD200	Election costs	0	(7,037)	(7,037)	N/A	
LD300	Democratic Rep & Management	697,800	682,702	(15,098)	-2.2%	
LD400	Committee Services	135,970	141,859	5,889	4.3%	
LD499	Committee Services Rech	(135,170)	(135,170)	0	0.0%	
LD600	Legal Services	316,200	317,138	938	0.3%	
LD699	Legal Services Rech	(310,490)	(310,490)	0	0.0%	
	Total Legal and Democratic Services	916,880	899,040	(17,840)		
				£	£	
	Total Expenditure Variation				(17,840)	(a)
	Major Cost Changes					
	*Please note, cost of employees and supplies appear high due to the running of non-MDDC elections during the year, for which additional funding is received to cover costs					
						0
	Major Cost Savings					
	Various small underspends across member costs, including allowances, training and hospitality.			(15,098)		
						(15,098)
	Major Changes in Income Levels					
	*Please note, income appears high due to the funding received to cover election costs					
						0
	Minor Variations					(2,743)
	Total Expenditure Variation					(17,840) (a)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18

Legal and Democratic Services

	EARMARKED RESERVES					
	Utilised 2017/18					
	None					
	Proposed contribution c/fwd to 2018/19					
	None					
	Net movement in earmarked reserves (other than budgeted)					0
	Total Expenditure variation after Earmarked Reserves					(17,840)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Planning and Regeneration

PR200	S106 Monitoring Fee Income		(10,000)		
PR400	Contribution from other Authorities for EHOD Growth Support Programme (see major cost changes)		(33,700)		
					(48,200)
	Minor Variations				(14,676)
	SERVICE MOVEMENT BEFORE STATUTORY ADJUSTMENTS				(363,672)
PR200	Net S106 receipts & grants (see EMR below)				(35,146)
PR225	Garden Village Funding				(399,500)
PR600	Brownfield Register funding				(5,485)
PR810	Custom Build Grant				(30,000)
	Total Expenditure Variation				(833,803) (a)
	EARMARKED RESERVES				
				£	
	Utilised 2017/18				
PR220	Tiverton Eastern Urban Extension funding of full year spend from Capacity Funding		(63,696)		
PR400	High Street Innovation grant		(8,981)		
PR400	Town Centre Manager post - New Homes Bonus released		(9,000)		
PR400	Business advice and town project spend - New Homes Bonus released		(86,316)		
PR400	Reserve no longer required		(4,000)		
PR400	Grand Western Canal grant - New Homes Bonus released		(45,000)		
PR810	New Homes Bonus funding for local plan		(103,480)		
	Net movement in earmarked reserves				(320,474)
	Proposed contribution c/fwd to 2018/19				
PR200	Net S106 receipts transferred to earmarked reserves		35,146		
PR200	Salary savings earmarked to fund 18mth GESP salary post 2018-2020		50,000		
PR225	Garden Village New Capacity Funding less funding of 17-18 spend		313,367		
PR600	Brownfield Register New Burdens Funding 17-18		5,485		
PR810	Custom Build Grant 2017-2018 DCLG funding		30,000		
PR810	Contribution towards future local plan		130,000		
					563,998
	Net movement in earmarked reserves				243,524
	Total Expenditure variation after Earmarked Reserves				(590,278)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Property Services

Code	Property Services	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	431,830	387,578	(44,252)	-10.2%	
2000	Premises	470,090	599,426	129,336	27.5%	
3000	Transport	22,000	23,821	1,821		
4000	Supplies and Services	80,830	287,439	206,609	255.6%	
	Total Direct Expenditure	1,004,750	1,298,265	293,515	29.2%	
7000	External Income	(785,900)	(720,917)	64,983	8.3%	
	Net Direct Expenditure	218,850	577,348	358,498	163.8%	(a)
5000	Support Services	(491,160)	(491,160)	0		
6500	Depreciation	282,560	301,156	18,596		
	Total Indirect Expenditure	(208,600)	(190,004)	18,596		
	Total Property Services Expenditure	10,250	387,344	377,094		
	Property Services - Service units					
PS140	3 RIVERS DEVELOPMENT	0	2,434	2,434		
PS141	3 RIVERS - THREWSTONE CLOSE	0	4,565	4,565		
PS142	3 RIVERS - BURLESCOMBE	0	0	0		
PS150	Surplus Sites for Disposal	340	7,345	7,005		
PS350	Public Conveniences	108,610	155,266	46,656		
PS400	Flood Defences and Land Drainage	62,810	44,891	(17,919)		
PS600	Street Naming & Numbering	15,250	14,072	(1,178)		
PS810	Phoenix House	443,800	444,664	864		
PS815	Phoenix House Rech	(368,280)	(368,280)	0		
PS820	DCC Library	(1,240)	20	1,260		
PS830	Town Hall	55,840	118,762	62,922		
PS840	Crediton Office Building	26,820	42,479	15,659		
PS850	Old Road Depot	74,520	85,502	10,982		
PS855	Old Road Depot Rech	(74,510)	(74,510)	0		
PS860	Station Yard Depot	(1,440)	12,740	14,180		
PS870	Lords Meadow Depot	350	(1,617)	(1,967)		
PS880	Bus Station Maintenance	(7,610)	(11,170)	(3,560)		
PS890	10 Phoenix Lane	(11,350)	(3,847)	7,503		
PS970	Office Building Cleaning	72,640	72,871	231		
PS971	Office Building Cleaning Rech	(78,910)	(78,910)	0		
PS980	Property Services	530,800	510,531	(20,269)		
PS981	Property Services Rech	(464,580)	(464,580)	0		
PS990	30/38 Fore Street	(32,270)	(30,018)	2,252		
PS991	Industrial Units	(53,060)	(63,460)	(10,400)		
PS992	Market Walk	(277,060)	51,121	328,181		
PS993	Lowman Green Unit	(9,220)	(75,051)	(65,831)		
PS994	Moorhayes Community Centre	(2,000)	(645)	1,355		
PS995	COGGANS WELL	0	(7,831)	(7,831)		
	Total Property Services	10,250	387,344	377,094		
				£	£	
	Total Expenditure Variation				377,094	(a)
	Major Cost Changes					
PS350	Overspend on external contractors works due to Hemyock PC refurb, off-set by EMR			20,000		
PS350	External cleaning of PC has resulted in an overspend			18,000		
PS810	Maintenance overspend due to lift repairs, office moves and general repairs			30,000		
PS810	External contractors overspend due to office moves, reception alteration and security			24,000		
PS830	Completion works on the Town Hall			41,700		
PS830	Works to the rear of Town Hall now to be taken on by 3 Rivers. Off-set with underspend in the Capital programme			82,000		
PS840	Maintenance overspend due to caretaking costs and general repairs			10,000		

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Revenues and Benefits

Code	Revenues and Benefits	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	704,800	714,568	9,768	1.4%	
2000	Premises	0	0	0		
3000	Transport	6,400	3,011	(3,389)		
4000	Supplies and Services	169,820	199,220	29,400	17.3%	
	Housing Benefit Payments	18,225,770	17,005,503	(1,220,267)	-6.7%	
	Total Direct Expenditure	19,106,790	17,922,301	(1,184,489)	-6.2%	
	Income from Housing Benefit Subsidy	(18,300,770)	(17,185,315)	1,115,455	-6.1%	
	All other Income	(549,840)	(565,660)	(15,820)	2.9%	
7000	External Income	(18,850,610)	(17,750,975)	1,099,635	5.8%	
	Net Direct Expenditure	256,180	171,326	(84,854)	-33.1%	(a)
5000	Support Services	411,760	411,760	0		
6500	Depreciation	0	0	0		
	Total Indirect Expenditure	411,760	411,760	0		
	Total Revenues and Benefits Expenditure	667,940	583,086	(84,854)		
	Revenues and Benefits - Service units					
RB100	Collection Of Council Tax	524,910	582,750	57,840		
RB199	Collection Of Council Tax Recharge	(98,690)	(98,690)	0		
RB200	Collection Of Business Rates	16,520	6,143	(10,377)		
RB300	Housing Benefit Admin	333,720	273,569	(60,151)		
RB340	Local welfare assistance scheme	0	39,999	39,999		
RB350	Universal Credit Partnership	(9,920)	0	9,920		
RB360	FERIS fraud scheme	0	(11,118)	(11,118)		
RB399	Housing Benefit Admin Recharge	(24,990)	(24,990)	0		
RB400	Housing Rent Allowances	(75,000)	(179,812)	(104,812)		
RB410	Council Tax Benefit	0	(6,971)	(6,971)		
RB600	Revenues Recovery Team	126,320	127,137	817		
RB699	Revenues Recovery Team Recharge	(124,930)	(124,930)	0		
	Total Revenues and Benefits Expenditure	667,940	583,086	(84,854)		
				£	£	
	Total Expenditure Variation				(84,854)	(a)
	Major Cost Changes					
	(1) Local Welfare Assistance (LWA) Scheme covered by EMR (see below)			39,999		
					39,999	
	Major Cost Savings					
	(2) The demand for Housing Benefit in 17/18 was lower than budgeted (see decreased subsidy income detailed below)			(1,220,267)		
	Savings in Revenues on Postage & Bank Charges			(11,200)		
					(1,231,467)	
	Major Changes in Income Levels					
	(2) Decreased 17/18 Housing Benefit Subsidy related to decreased costs detailed above			1,115,455		

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Revenues and Benefits

Various New Burdens grants from DWP in respect of Housing Benefits - initiatives delivered within existing resource	(41,100)			
Universal Credit Delivery Partnership Grant - No longer available	9,920			
(3) FERIS scheme grant - to EMR (see below)	(11,118)			
NNDR New Burdens Grant	(12,000)			
Adjustment to CTB entitlement (re pre 01/04/13 CTB old scheme) not required to be repaid to DCLG	(6,971)			
Additional contributions from Preceptors to assist in collection of C/Tax & Administration of CTR schemes lower than budgeted	17,500			
Single Occupancy Discount Penalties exercise will be completed in 18/19	14,000			
Income received on Court Costs lower than budgeted	17,400			
				1,103,086
Minor Variations				3,526
Total Expenditure Variation				(84,856) (a)
EARMARKED RESERVES				
Utilised 2017/18				
Release of EMR to partially mitigate Salary growth from 16/17 to 17/18	(20,000)			
(1) Release of remaining LWA EMR to cover above spend	(42,900)			
NNDR EMR reserve no longer required	(10,000)			
LCTS New Burdens EMR no longer required	(12,150)			
Proposed contribution c/fwd to 2018/19				
(3) FERIS Scheme DWP grant to EMR	11,180			
Net movement in earmarked reserves				(73,870)
Total Expenditure variation after Earmarked Reserves				(158,726)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Leisure Services

Code	Leisure Services	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	1,853,510	1,802,688	(50,822)	-2.7%	
2000	Premises	707,030	752,994	45,964	6.5%	
3000	Transport	4,380	5,794	1,414		
4000	Supplies and Services	274,780	348,668	73,888	26.9%	
	Total Direct Expenditure	2,839,700	2,910,144	70,444	2.5%	
7000	External Income	(2,793,060)	(2,612,659)	180,401	6.5%	
	Net Direct Expenditure	46,640	297,485	250,845	537.8%	(a)
5000	Support Services	339,900	339,900	0		
6500	Depreciation	634,350	602,131	(32,219)		
	Total Indirect Expenditure	974,250	942,031	(32,219)		
	Total Leisure Services Expenditure	1,020,890	1,239,516	218,626		
	Leisure Services - Service units					
RS100	Leisure Facilities Maintenance & Equipment	266,800	261,620	(5,180)		
RS110	Leisure Management & Administration	(84,600)	69,204	153,804		
RS140	Exe Valley Leisure Centre	282,807	438,337	155,530		
RS145	Market Walk Gym	0	6,543	6,543		
RS150	Lords Meadow Leisure Centre	305,703	255,874	(49,829)		
RS160	Culm Valley Sports Centre	250,180	207,937	(42,243)		
	Total Leisure Services Expenditure	1,020,890	1,239,516	218,626		
				£	£	
	Total Expenditure Variation				218,626	(a)
	Major Cost Changes					
	(All sites) Utilities/Rates: Unit cost/annual charge above expectations			37,000		
	Advertising/Marketing spend over budget mainly on targeted campaigns			13,000		
	(EVLC) Equipment overspend: Lease buy-out and dance studio kit replacement			37,000		
	(All sites) IT overspends: Replacement hardware and licence costs			5,000		
	(All sites) Promo packs for new members			4,000		
	(All sites) Various unanticipated equipment repairs			4,000		
	EVLC: Gym blinds in new extension			1,000		
	EVLC&LMLC: Pool overshoes			10,000		
	(All sites) Telephony overspend against budget			3,000		
	Various other minor overspends			6,865		
					120,865	
	Major Cost Savings					
	(All sites) Underspend against annual training budget			(10,000)		
	(All sites) Salary savings due to vacant posts and Manager transfer to different service			(40,000)		
					(50,000)	
	Major Changes in Income Levels					
	Revised growth target based upon 16/17 outturn			137,560		
	(All sites) Fitness Class pay- as-you-go income below expectations			3,841		
	(All sites) Fitness Studio pay-as-you-go income below budget			6,700		
	(All sites) Junior Activities Income down on budget			6,000		
	(All sites) Estimated impact of closures due to adverse snow and flooding			26,300		
					180,401	
	Minor Variations					
	Total Expenditure Variation				251,266	(a)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18**Leisure Services**

	EARMARKED RESERVES					
	Utilised 2017/18					
	Proposed contribution c/fwd to 2018/19					
	Net movement in earmarked reserves					0
	Total Expenditure variation after Earmarked Reserves					251,266

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Waste Services

Code	Waste Services	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	2,203,570	2,114,069	(89,501)	-4.1%	
2000	Premises	173,350	674,316	500,966	289.0%	
3000	Transport	774,160	848,251	74,091		
4000	Supplies and Services	844,410	746,050	(98,360)	-11.6%	
	Total Direct Expenditure	3,995,490	4,382,687	387,197	9.7%	
7000	External Income	(2,396,570)	(2,653,489)	(256,919)	-10.7%	
	Net Direct Expenditure	1,598,920	1,729,198	130,278	8.1%	(a)
5000	Support Services	524,950	524,950	0		
6500	Depreciation	398,700	422,091	23,391		
	Total Indirect Expenditure	923,650	947,041	23,391		
	Total Waste Services Expenditure	2,522,570	2,676,239	153,669		
	Waste Services - Cost Centres					
WS650	Street Cleansing	527,770	535,643	7,873		
WS700	Refuse Collection	1,045,210	1,017,056	(28,154)		
WS710	Trade Waste Collection	(48,690)	(26,299)	22,391		
WS725	Kerbside Recycling	977,410	973,204	(4,206)		
WS740	16 Shop-Recycling	0	0	0		
WS750	Waste Management Staff Unit	233,550	208,939	(24,611)		
WS760	Waste Management Staff Unit Rech	(212,680)	(212,680)	0		
WS770	Unit 3 Carlu Close	179,900	360,276	180,376		
WS780	UNIT 3 CARLU CLOSE RECHARGE	(179,900)	(179,900)	0		
	Total Waste Services Expenditure	2,522,570	2,676,239	153,669		
				£	£	
	Total Expenditure Variation				153,669	(a)
	Major Cost Changes					
WS770	Depot works - fire suppression and installation of weighbridge (see EMR below)			39,500		
WS770	Depot costs, repairs, maintenance and increased electricity costs			53,000		
WS770	Waste Transfer Station build costs paid for by Devon County Council			324,601		
All	Vehicle hire costs (see EMR note below and also major cost savings note)			85,000		
WS700	Purchase of two ex-demo refuse vehicles (see EMR note below)			12,420		
WS770	Cost of Grounds maintenance move to Carlu Close			83,000		
						597,521
	Major Cost Savings					
All	Salaries - vacant post and timing of starters and leavers			(90,000)		
All	Vehicle fuel costs - new refuse vehicles			(12,000)		
WS700	Only 6 month hire of additional telehandler for Waste Transfer Station (see EMR below)			(9,100)		
WS700	Contractor costs, no longer paying a contractor to collect electronic waste			(20,000)		
WS710	Trade waste disposal charges, please see major changes in income levels			(31,000)		
WS725	Saving on skip contractors as hiring own skip truck			(10,000)		
WS725	Price of glass better than anticipated, less haulage costs. See note in income levels			(30,000)		
						(202,100)
	Major Changes in Income Levels					
WS770	Waste Transfer Station costs paid by Devon County Council			(324,601)		
WS710	Trade waste income due to loss of one big customer, part offset by disposal costs			35,000		
WS725	Recycling income - tonnage and prices better than budgeted			(18,000)		
WS700	Garden Waste - uptake slightly less than budgeted			8,000		
WS700	Devon County Council shared disposal saving scheme, less than estimated			45,000		
						(254,601)
	Minor Variations					(10,542)
	Total Expenditure Variation				130,278	(a)

GENERAL FUND REVENUE ACCOUNT OUTTURN SUMMARY 2017/18

Waste Services

	EARMARKED RESERVES					
	Utilised 2017/18					
WS770	Fire suppression works			(18,500)		
WS770	Installation of weighbridge			(15,100)		
WS650	Utilise vehicle sinking fund for vehicle hire			(9,600)		
WS700	Utilise vehicle sinking for vehicle purchases			(12,420)		
WS725	Depot Bay Works			(10,000)		
					(65,620)	
	Proposed contribution c/fwd to 2018/19					
WS725	Bottle bank refurbishment			10,000		
WS725	Recycling vehicle refurbishment			10,000		
WS700	Purchase additional telehandler for Waste Transfer Station			9,100		
WS700/725	Response costs			5,000		
					34,100	
	Net movement in earmarked reserves				(31,520)	
Total Expenditure variation after Earmarked Reserves						67,238

HOUSING REVENUE ACCOUNT OUTTURN SUMMARY 2017/18
Housing Revenue Account

Code	Housing Revenue Account	2017/18 Budget £	2017/18 Actual £	Variance £	Variance %	
1000	Employees	2,250,580	2,462,732	212,152	9.4%	
2000	Premises	165,030	177,333	12,303	7.5%	
3000	Transport	407,960	403,116	(4,844)		
4000	Supplies and Services	8,489,060	9,078,911	589,851	6.9%	
	Total Direct Expenditure	11,312,630	12,122,092	809,462	7.2%	
7000	External Income	(13,535,610)	(14,610,483)	(1,074,873)	-7.9%	
	Net Direct Expenditure	(2,222,980)	(2,488,392)	(265,412)	11.9%	
5000	Internal Recharges	1,245,730	1,245,730	0	0.0%	
6500	Capital Charges	977,250	987,123	9,873	1.0%	
	Total Indirect Expenditure	2,222,980	2,232,853	9,873	-0.4%	
	Total HRA Expenditure	0	(255,539)	(255,539)	N/A	(a)
	Income					
SHO01	Dwelling Rents Income	(12,368,590)	(12,387,165)	(18,575)	0.2%	
SHO04	Non Dwelling Rents Income	(571,420)	(589,800)	(18,380)	3.2%	
SHO07	Leaseholders' Service Charges	(21,640)	(27,025)	(5,385)	24.9%	
SHO08	Contributions Towards Expenditure	(36,470)	(81,416)	(44,946)	123.2%	
SHO09	Alarm Income - Non Tenants	(209,520)	(211,418)	(1,898)	0.9%	
SHO10	H.R.A. Investment Income	(40,000)	(38,319)	1,681	-4.2%	
SHO11	Miscellaneous Income	(19,350)	(8,894)	10,456	-54.0%	
SHO11	Capital Grants & Contributions relating to Palmerston Park and Burlescombe	0	(217,639)	(217,639)		
	Services					
SHO13A	Repairs & Maintenance	3,448,240	3,359,029	(89,211)	-2.6%	
SHO17A	Housing & Tenancy Services	2,082,370	1,999,315	(83,055)	-4.0%	
SHO22	Alarms expenditure	117,510	79,271	(38,239)	-32.5%	
	Accounting entries 'below the line'					
SHO27	Depreciation	2,000,000	(2,589,476)	(4,589,476)	-229.5%	
SHO29	Bad Debt Provision Movement	25,000	52,696	27,696	110.8%	
SHO30	Share Of Corporate And Democratic	298,300	297,403	(897)	-0.3%	
SHO32	H.R.A. Interest Payable	1,214,500	1,213,267	(1,233)	-0.1%	
SHO34	H.R.A. Transfers to earmarked reserves	2,952,820	3,257,329	304,509	10.3%	
SHO34	Utilisation of earmarked reserves	0	(483,602)	(483,602)		
SHO35	Reversal of depreciation	(2,000,000)	1,319,763	3,319,763	-166.0%	
SHO36	Financing of capital expenditure	1,009,250	1,008,577	(673)	-0.1%	
SHO36	Revenue contribution to capital operations (funded from earmarked reserves)	0	483,602	483,602		
SHO37	Capital Receipts Reserve Adjustment	(26,000)	2,049,890	2,075,890	-7984.2%	
SHO38	Major Repairs Allowance	2,275,000	2,273,075	(1,925)	-0.1%	
SHO42	Accumulated absences adjustment	0	7,782	7,782		
SHO44	Capital Grants & Contributions relating to Palmerston Park and Burlescombe reversal	0	217,639	217,639		
SHO45	Renewable Energy Transactions	(130,000)	(169,905)	(39,905)	30.7%	
	Total HRA Expenditure	0	813,978	813,978		

Code	Scheme	Approved Capital Programme 2017/18 £000's	Total Slippage B/fwd & Adj to Approved Capital Programme 17/18 £000's	Adjusted Capital Programme 2017/18 £000's	Total Actual Spend to 31/03/18 £000's	Variance to budget £000's	Slippage to be carried forward to 2018/19 £000's	To Earmarked Reserve £000's
General Fund Projects								
Lords Meadow leisure centre								
CA624	Main car park resurfacing		50,000	50,000	46,160.00	-3,840.00	0	
Exe Valley leisure centre								
CA630	Exe Valley Leisure Centre - Replenish sand filters	25,000	0	25,000	22,840.00	-2,160.00	0	
CA627	EVLC - Pressure set replacement Hot/Cold		50,000	50,000	0.00	-50,000.00	20,000	
CA626	EVLC - Fitness extension		819,000	819,000	816,583.96	-2,416.04	0	
Culm Valley Leisure Centre								
CA631	CVSC replace end of life AC for fitness Gym	30,000	0	30,000	0.00	-30,000.00	0	
Pannier Market								
CA509	Pannier Market - Improvement Project back log maintenance	60,000	0	60,000	43,842.00	-16,158.00	0	
CA507	Tiverton Pannier Market Piggins		70,000	70,000	0.00	-70,000.00	0	
CA508	Pannier Market Clock Tower		12,000	12,000	28,255.80	16,255.80	0	
MSCP Improvements								
CA709	MSCP improvements (refer to Matrix condition report)		139,000	139,000	0.00	-139,000.00	139,000	
MDDC Shops / Industrial Units								
CA510	Energy Assessment works - new legislation - Indust Units/Shops/Mkt Walk	50,000	0	50,000	0.00	-50,000.00	35,000	
Play Areas								
CA632	Play area refurbishment District wide - Amory Park Tiverton	50,000	0	50,000	0.00	-50,000.00	50,000	
CA628	Play area refurbishment - West Exe Recreation Ground Tiverton		50,000	50,000	0.00	-50,000.00	50,000	
Other Projects								
CA460	Stilton Office - Structural improvement work	30,000	0	30,000	0.00	-30,000.00	20,000	
CA461	1 junction to facilitate Eastern Urban Extension (funded by s106)	1,750,000	0	1,750,000	0.00	-1,750,000.00	0	
CA455	Lawrence Green Project		30,000	30,000	0.00	-30,000.00	30,000	
CA570	Sagans Well building acquisition		268,000	268,000	268,176.00	176.00	0	
CA468	Replacement Car park Machines		69,000	69,000	63,912.00	-5,088.00	0	
CA571	30 Fore Street Tiverton		386,000	386,000	386,133.18	133.18	0	
CA572	30-38 Fore Street Tiverton		739,000	739,000	777,270.00	38,270.00	0	
CA573	100 Mkt walk		71,000	71,000	71,474.24	474.24	0	
CA637	EVLC Extension Gym Equipment				206,778.00	206,778.00	0	
General Fund Development Schemes								
CA462	Rear of Town Hall development site (6 Houses, 24 Apartments)	5,114,000	0	5,114,000	0.00	-5,114,000.00	0	
ICT Projects								
CA433	Unified Communications/telephony	107,000	0	107,000	0.00	-107,000.00	107,000	
CA456	Digital Transformation - replacement of CRM	50,000	50,000	100,000	0.00	-100,000.00	100,000	
CA463	Secure Wifi replacement	50,000	0	50,000	0.00	-50,000.00	50,000	
CA464	Parking System Replacement (enforcement)	40,000	0	40,000	0.00	-40,000.00	40,000	
CA465	Replacement Queue System	30,000	0	30,000	0.00	-30,000.00	30,000	
CA466	Core System Refreshes - Revs / Bens	20,000	0	20,000	0.00	-20,000.00	20,000	
CA467	Replacement Estates / Property systems	50,000	0	50,000	0.00	-50,000.00	50,000	
CA421	Replacement of PC estate 330s		31,000	31,000	32,685.82	1,685.82	0	
CA423	Continued replacement of WAN/LAN		60,000	60,000	0.00	-60,000.00	60,000	
CA425	Server farm expansion/upgrades		96,000	96,000	12,233.05	-83,766.95	84,000	
CA437	Digital Transformation		61,000	61,000	0.00	-61,000.00	61,000	
CA439	Mobile Working NDL MX		7,000	7,000	7,000.00	0.00	0	
CA444	SQL/Oraclres refreshes		21,000	21,000	0.00	-21,000.00	17,000	
Replacement Vehicles								
CA714	Medium Sweeper (Street Cleansing)	70,000	0	70,000	0.00	-70,000.00	70,000	
CA715	Van Tipper (Grounds Maintenance)	26,000	0	26,000	0.00	-26,000.00	26,000	
CA716	Ransomes mower (Grounds Maintenance)	35,000	0	35,000	0.00	-35,000.00	35,000	
CA712	Iveco Tipper (or equivalent)		24,000	24,000	0.00	-24,000.00	24,000	
CA814	Dennis Eagle Terberg RCV 22-26t (or equivalent)		160,000	160,000	169,299.50	9,299.50	0	
CA821	5 Refuse Vehicles with Food waste capability		900,000	900,000	825,113.13	-74,886.87	0	
CA822	7.5T Tipper		100,000	100,000	0.00	-100,000.00	100,000	
CA825	3.5T Tipper		25,000	25,000	0.00	-25,000.00	25,000	
CA827	3.5T Tipper		25,000	25,000	0.00	-25,000.00	25,000	
		7,587,000	4,313,000	11,900,000	3,777,756.68	-8,122,243.32	1,268,000.00	0.00
Private Sector Housing Grants								
CG217	Empty homes and enforcement	104,000	0	104,000	0.00	-104,000.00		104,000
CG201	Disabled Facilities Grants-Private Sector	490,000	174,000	664,000	440,935.94	-223,064.06		223,000
		594,000	174,000	768,000	440,935.94	-327,064.06	0.00	327,000.00
Affordable Housing Projects								
CA200	Grants to Housing Associations to provide units (funded by commuted sum)	115,000	0	115,000	15,803.72	-99,196.28		99,000
		115,000	0	115,000	15,803.72	-99,196.28	0.00	99,000.00
Total General Fund Projects		8,296,000	4,487,000	12,783,000	4,234,496	-8,548,504	1,268,000	426,000

Code	Scheme	Approved Capital Programme 2017/18	Total Slippage B/fwd & Adj to Approved Capital Programme 17/18	Adjusted Capital Programme 2017/18	Total Actual Spend to 31/03/18	Variance to budget	Slippage to be carried forward to 2018/19	To Earmarked Reserve
HRA Projects								
CA100	Major repairs to Housing Stock	2,278,000	87,000	2,365,000	2,273,074.98	-91,925.02	0	
CA111	Renewable Energy Fund Spend	100,000	0	100,000	99,477.00	-523.00	0	
CG200	Disabled Facilities Grants - Council Houses	299,000	0	299,000	299,814.00	814.00	0	
CA135	Land acquisition for affordable housing	2,100,000	0	2,100,000	0.00	-2,100,000.00	2,100,000	
CA112	Birchen Lane - re development of unit for housing conversion (4 units)		238,000	238,000	168,156.53	-69,843.47	70,000	
CA119	Palmerston Park Tiverton - affordable dwellings (26 units)		2,694,000	2,694,000	1,333,580.12	-1,360,419.88	1,360,000	
CA124	Queensway (Beech Road) Tiverton (3 units)		298,000	298,000	4,908.00	-293,092	293,000	
CA120	Burlescombe (6 units)		776,000	776,000	62,419.00	-713,581.00	714,000	
CA125	Waddeton Park - (70 units)		1,991,000	1,991,000	0.00	-1,991,000.00	0	
CA126	Sewerage Treatment Works - Washfield		25,000	25,000	0.00	-25,000.00	25,000	
CA127	* Stoodleigh - Pending feasibility (4 units)		520,000	520,000	0.00	-520,000.00		
HRA ICT Projects								
CA132	Repairs mobile replacement	30,000	0	30,000	25,853.75	-4,146.25	4,000	
CA133	Tenancy Mobile	40,000	0	40,000	0.00	-40,000.00	40,000	
HRA Replacement vehicles								
CA134	Van Tipper 4.5T (Responsive Repairs)	32,000	0	32,000	0.00	-32,000.00	0	
CA122	Iveco Tipper 3.5t (or equivalent)	0	24,000	24,000	21,454.93	-2,545.07	0	
		4,879,000	6,653,000	11,532,000	4,288,738.31	-7,243,261.69	4,606,000.00	0.00
Total	2017/18 CAPITAL PROGRAMME GRAND TOTAL	13,175,000	11,140,000	24,315,000	8,523,235	-15,791,765	5,874,000	426,000

Code	Funding Stream	Approved Capital Programme Funding 2017/18 £000	Total Slippage B/fwd & Adj to Approved Capital Programme 17/18 £000	Adjusted Capital Programme Funding 2017/18 £000	Total Actual Funding to 31/03/18 £000
General Fund Projects					
9801	S106 & Affordable Housing Contributions	1,865,000	0	1,865,000	15,803.72
9990	General Capital Reserve	71,000	153,000	224,000	93,160.06
9701	Grant (DCLG)	490,000	17,000	507,000	440,935.94
9727	New Homes Bonus (GF)	450,000	1,454,000	1,904,000	1,186,462.39
9954	Contribution from CGU - Non Specific	0	21,000	21,000	21,094.70
9957	Private Sector Housing Grants EMR	104,000	157,000	261,000	0.00
9990	Contribution from Sinking Funds	95,000	927,000	1,022,000	870,000.00
9990	Contribution from Sinking Funds	107,000	-51,000	56,000	0.00
9980	Useable Capital Receipts General	0	1,809,000	1,809,000	1,607,039.53
9942	PWLB Borrowing	5,114,000	0	5,114,000	0.00
	Total General Fund Projects	8,296,000	4,487,000	12,783,000	4,234,496.34
HRA Projects					
9980	* Useable Capital Receipts General to be generated in 2016/17	629,000	68,000	697,000	325,667.75
	* Contribution from existing Useable Capital Receipts £279k				
	* Balance to be generated in 2016/17 £350k				
9710	MRA Reserve	2,278,000	87,000	2,365,000	2,273,074.98
9727	New Homes Bonus (HRA)	21,000	21,000	42,000	0.00
9980	1-4-1 receipts reserve	0	1,436,000	1,436,000	467,299.80
9990	Renewable Energy Fund	100,000	0	100,000	99,477.00
9990	Housing Maintenance Fund	1,851,000	1,998,000	3,849,000	277,701.40
9990	Affordable Rents Surplus	0	107,000	107,000	106,423.13
9801	S106 & Affordable Housing Contributions	0	361,000	361,000	500,000.00
9942	PWLB Borrowing	0	1,832,000	1,832,000	0.00
9990	HRA EMR	0	25,000	25,000	0.00
9990	HRA Reserve	0	24,000	24,000	21,454.93
9704	Homes & Communities Agency Grant (HCA)	0	694,000	694,000	217,639.32
	Total HRA Projects	4,879,000	6,653,000	11,532,000	4,288,738.31
2017/18 CAPITAL PROGRAMME GRAND TOTAL FUNDING		13,175,000	11,140,000	24,315,000	0
					8,523,235

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Cabinet
14 May 2018

Annual Treasury Management Review 2017/18

Cabinet Member: Councillor Peter Hare-Scott
Responsible Officer: Director of Finance, Assets & Resources, Andrew Jarrett

Reason for Report: To provide Members with a review of activities and the actual prudential treasury indicators for 2017/18.

Recommendations(s):
That Members note the treasury activities for the year.

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 manages the risk associated with the Council's treasury management activity.

1. Introduction

1.1 The Council is required by regulations issued under the Local Government Act 2003 to produce an annual treasury management review of activities and the actual prudential and treasury indicators for 2017/18. This report meets the requirements of both the CIPFA Code of Practice on Treasury Management, (the Code), and the CIPFA Prudential Code for Capital Finance in Local Authorities, (the Prudential Code).

1.2 During 2017/18 the minimum reporting requirements were that the Council should receive the following reports:

- an annual treasury strategy in advance of the year (Cabinet 02/03/2017)
- a mid-year treasury update report (Cabinet 23/11/2017)

- an annual review following the end of the year describing the activity compared to the strategy (this report)
- 1.3 The regulatory environment places responsibility on Members for the review and scrutiny of treasury management policy and activities. This report is, therefore, important in that respect, as it provides details of the outturn position for treasury activities and highlights compliance with the Council's policies previously approved by Members.

2. The Economy and Interest Rates

- 2.1 During the calendar year of 2017, there was a major shift in expectations in financial markets in terms of how soon Bank Rate would start on a rising trend. After the UK economy surprised on the upside with strong growth in the second half of 2016, growth in 2017 was disappointingly weak in the first half of the year, which meant that growth was the slowest for the first half of any year since 2012. The main reason for this was the sharp increase in inflation caused by the devaluation of sterling after the EU referendum, feeding increases into the cost of imports into the economy. This caused a reduction in consumer disposable income and spending power as inflation exceeded average wage increases. Consequently, the services sector of the economy, accounting for around 75% of GDP, saw weak growth as consumers responded by cutting back on their expenditure. However, growth did pick up modestly in the second half of 2017. Consequently, market expectations during the autumn rose significantly that the MPC would be heading in the direction of imminently raising Bank Rate. The minutes of the MPC meeting of 14 September indicated that the MPC was likely to raise Bank Rate very soon. The 2 November MPC quarterly Inflation Report meeting duly delivered by raising Bank Rate from 0.25% to 0.50%.
- 2.2 The 8 February MPC meeting minutes then revealed another sharp hardening in MPC warnings on a more imminent and faster pace of increases in Bank Rate than had previously been expected.
- 2.3 Market expectations for increases in Bank Rate, therefore, shifted considerably during the second half of 2017-18 and resulted in **investment rates** from 3 – 12 months increasing sharply during the spring quarter.
- 2.4 **PWLB borrowing rates** increased correspondingly to the above developments with the shorter term rates increasing more sharply than longer term rates. In addition, UK gilts have moved in a relatively narrow band this year, (within 25 bps for much of the year), compared to **US treasuries**. During the second half of the year, there was a noticeable trend in treasury yields being on a rising trend with the Fed raising rates by 0.25% in June, December and March, making six increases in all from the floor. The effect of these three increases was greater in shorter terms around 5 years, rather than longer term yields.

2.5 The major UK landmark event of the year was the inconclusive result of the **general election** on 8 June. However, this had relatively little impact on financial markets.

3. Overall Treasury Position as at 31 March 2018

3.1 At the beginning and the end of 2017/18 the Council's treasury, (excluding borrowing by PFI and finance leases), position was as follows:

TABLE 1	31 March 2017 Principal	31 March 2018 Principal
Total external debt	£43.9m	£42.4m
CFR	£50.6m	£49.4m
Over / (under) borrowing	(£6.7m)	(£7m)
Total investments	£23m	£26m
Net debt	£20.9m	£16.4m

4. The Strategy for 2017/18

4.1 The expectation for interest rates within the treasury management strategy for 2017/18 anticipated that Bank Rate would not start rising from 0.25% until quarter 2, 2019 and then only increase once more before 31 March 2020. There would also be gradual rises in medium and longer term fixed borrowing rates during 2017/18 and the two subsequent financial years. Variable, or short-term rates, were expected to be the cheaper form of borrowing over the period. Continued uncertainty in the aftermath of the 2008 financial crisis promoted a cautious approach, whereby investments would continue to be dominated by low counterparty risk considerations, resulting in relatively low returns compared to borrowing rates.

4.2 In this scenario, the treasury strategy was to postpone borrowing to avoid the cost of holding higher levels of investments and to reduce counterparty risk.

4.3 During 2017/18, longer term PWLB rates were volatile but with little overall direction, whereas shorter term PWLB rates were on a rising trend during the second half of the year.

5. The Borrowing Requirement and Debt

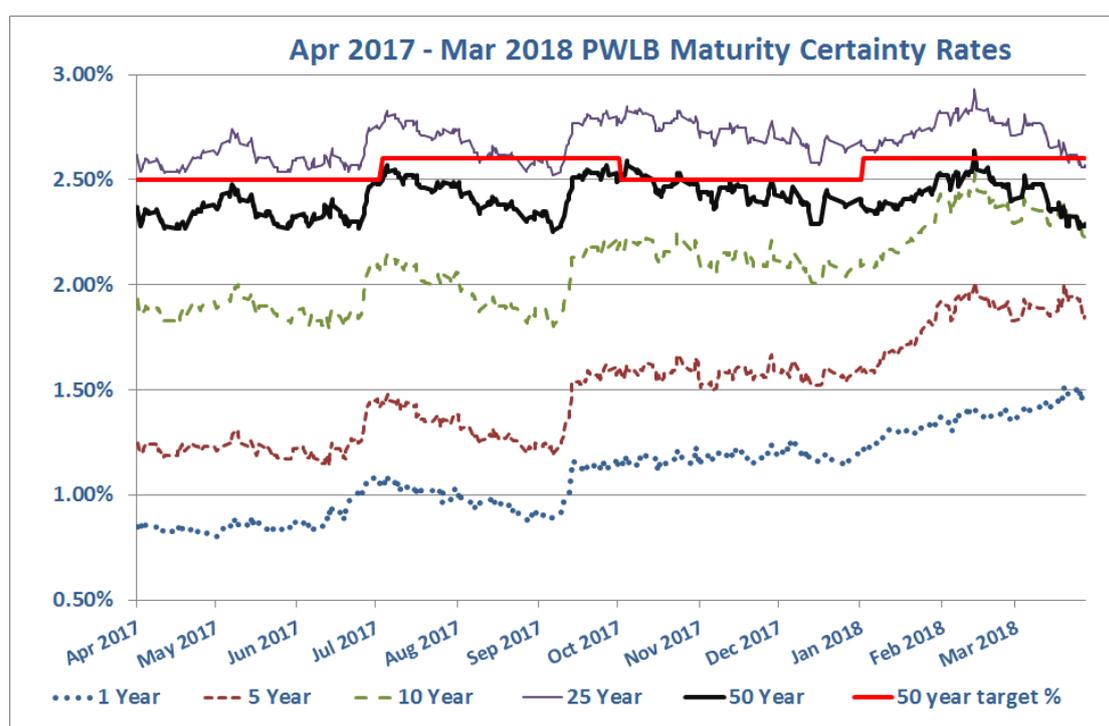
5.1 The Council's underlying need to borrow to finance capital expenditure is termed the Capital Financing Requirement (CFR).

	31 March 2017 Actual	31 March 2018 Actual
CFR General Fund (£m)	6.5	6.3
CFR HRA (£m)	44.1	43.1
Total CFR	50.6	49.4

6. Borrowing Rates in 2017/18

6.1 PWLB certainty maturity borrowing rates. As depicted in the graph and tables below 25 and 50 year rates have been volatile during the year with little consistent trend. However, shorter rates were on a rising trend during the second half of the year and reached peaks in February / March.

6.2 During the year, the 50 year PWLB target (certainty) rate for new long term borrowing was 2.50% in quarters 1 and 3 and 2.60% in quarters 2 and 4. The graphs and tables for PWLB rates show, for a selection of maturity periods, the average borrowing rates, the high and low points in rates, spreads and individual rates at the start and the end of the financial year.



7. Borrowing Outturn for 2017/18

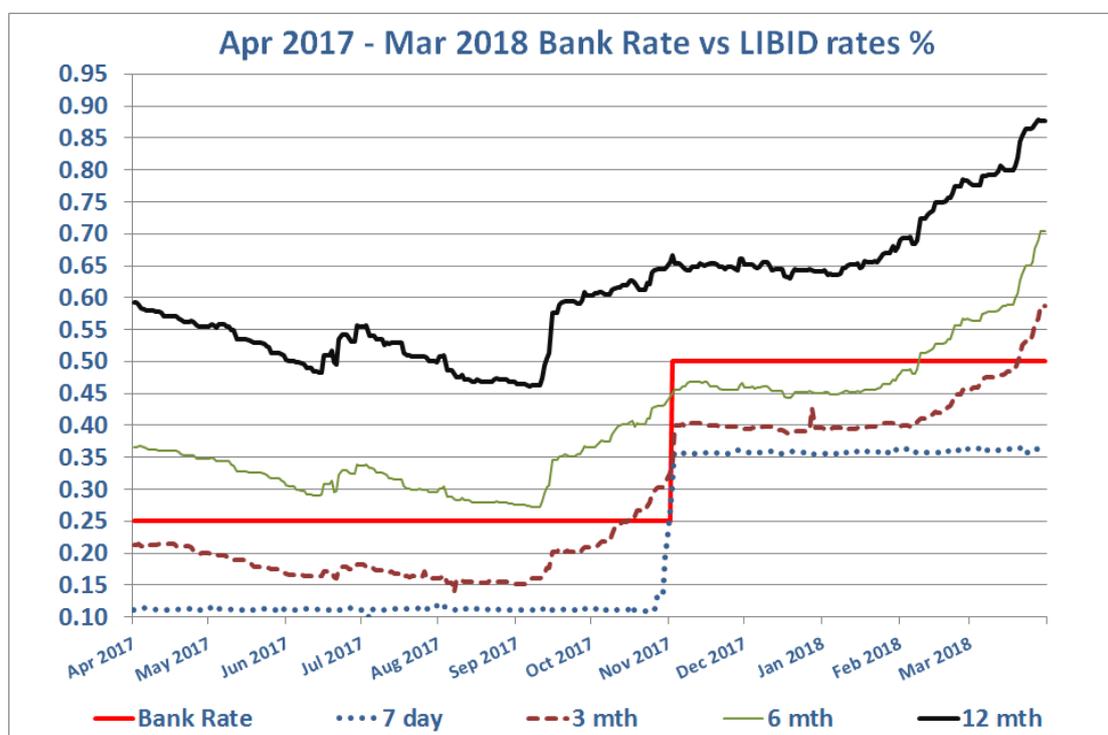
7.1 **Borrowing** – the following loans were taken during the year:-

Lender	Principal	Type	Interest Rate	Maturity
PWLB	0.207M	Annuity	1.70%	5

7.2 **Rescheduling** - no rescheduling was done during the year as the average 1% differential between PWLB new borrowing rates and premature repayment rates made rescheduling unviable.

8. Investment Rates in 2017/18

8.1 Investments rates for 3 months and longer have been on a rising trend during the second half of the year in the expectation of Bank Rate increasing from its floor of 0.25%, and reached a peak at the end of March. Bank Rate was duly raised from 0.25% to 0.50% on 2 January 2017 and remained at that level for the rest of the year. However, further increases are expected over the next few years. Deposit rates continued into the start of 2017/18 at previous depressed levels due, in part, to a large tranche of cheap financing being made available under the Term Funding Scheme to the banking sector by the Bank of England; this facility ended on 28 February /18.



9. Investment Outturn for 2017/18

- 9.1 **Investment Policy** – the Council's investment policy is governed by MHCLG guidance, which has been implemented in the annual investment strategy approved by the Cabinet on 2 March 2017. This policy sets out the approach for choosing investment counterparties, and is based on credit ratings provided by the three main credit rating agencies, supplemented by additional market data, (such as rating outlooks, credit default swaps).
- 9.2 The investment activity during the year conformed to the approved strategy, and the Council had no liquidity difficulties.
- 9.3 **Investments held by the Council** - the Council maintained an average balance of £19m of internally managed funds. The internally managed funds earned an average rate of return of 0.58%. The comparable performance indicator is the average 7-day LIBID rate, which was 0.36%. The Council held £5m invested in CCLA property funds earning dividends of 4.47% in 17/18.

10. Other Issues

10.1 Revised CIPFA Codes

- 10.1.1 In December 2017, the Chartered Institute of Public Finance and Accountancy, (CIPFA), issued a revised Treasury Management Code and Cross Sectoral Guidance Notes, and a revised Prudential Code.
- 10.1.2 A particular focus of these revised codes was how to deal with local authority investments which are not treasury type investments e.g. by investing in purchasing property in order to generate income for the Authority at a much higher level than can be attained by treasury investments. One recommendation was that local authorities should produce a new report to Members to give a high level summary of the overall capital strategy and to enable Members to see how the cash resources of the Authority have been apportioned between treasury and non-treasury investments. Officers will report to members when the implications of these new codes have been assessed as to the likely impact on this Authority.

10.2 Markets in Financial Instruments Directive II (MiFID II)

- 10.2.1 The EU set the date of 3 January 2018 for the introduction of regulations under MIFID II. These regulations govern the relationship that financial institutions conducting lending and borrowing transactions will have with local authorities from that date. This has had little effect on this Authority apart from having to fill in forms sent by each institution dealing with this Authority and for each type of investment instrument we use, apart from for cash deposits with banks and building societies.

Contact for more information: Andrew Jarrett 01884 234242 / ajarrett@middevon.gov.uk / John Paul Mclachlan 01884 234944 / jpmlachlan@middevon.gov.uk

Background papers: Link Annual Treasury Management Review template

Circulation of the report: Councillor Peter Hare-Scott, Leadership Team, Group Manager for Finance

Appendix 1: Prudential and Treasury Indicators

During 2017/18, the Council complied with its legislative and regulatory requirements. The key actual prudential and treasury indicators detailing the impact of capital expenditure activities during the year, with comparators, are as follows:

Actual prudential and treasury indicators	2016/17	2017/18
	Actual £000	Actual £000
Capital expenditure		
• General Fund	816	4,234
• HRA	4,477	4,288
• Total	5,293	8,522
Capital Financing Requirement:		
• General Fund	6,479	6,310
• HRA	44,144	43,166
• Total	50,623	49,476
Gross borrowing	44,454	42,825
Investments		
• Longer than 1 year	5,000	5,000
• Under 1 year	18,000	21,000
• Total	23,000	26,000
Net borrowing	21,454	16,825

Gross borrowing and the CFR - in order to ensure that borrowing levels are prudent over the medium term and only for a capital purpose, the Council should ensure that its gross external borrowing does not, except in the short term, exceed the total of the capital financing requirement in the preceding year (2017/18) plus the estimates of any additional capital financing requirement for the current (2018/19) and next two financial years. This essentially means that the Council is not borrowing to support revenue expenditure. This indicator allows the Council some flexibility to borrow in advance of its immediate capital needs in 2017/18.

The authorised limit - the authorised limit is the “affordable borrowing limit” required by s3 of the Local Government Act 2003. Once this has been set, the Council does not have the power to borrow above this level. The table below demonstrates that during 2017/18 the Council has maintained gross borrowing within its authorised limit.

The operational boundary – the operational boundary is the expected borrowing position of the Council during the year. Periods where the actual position is either below or over the boundary is acceptable subject to the authorised limit not being breached.

Actual financing costs as a proportion of 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.

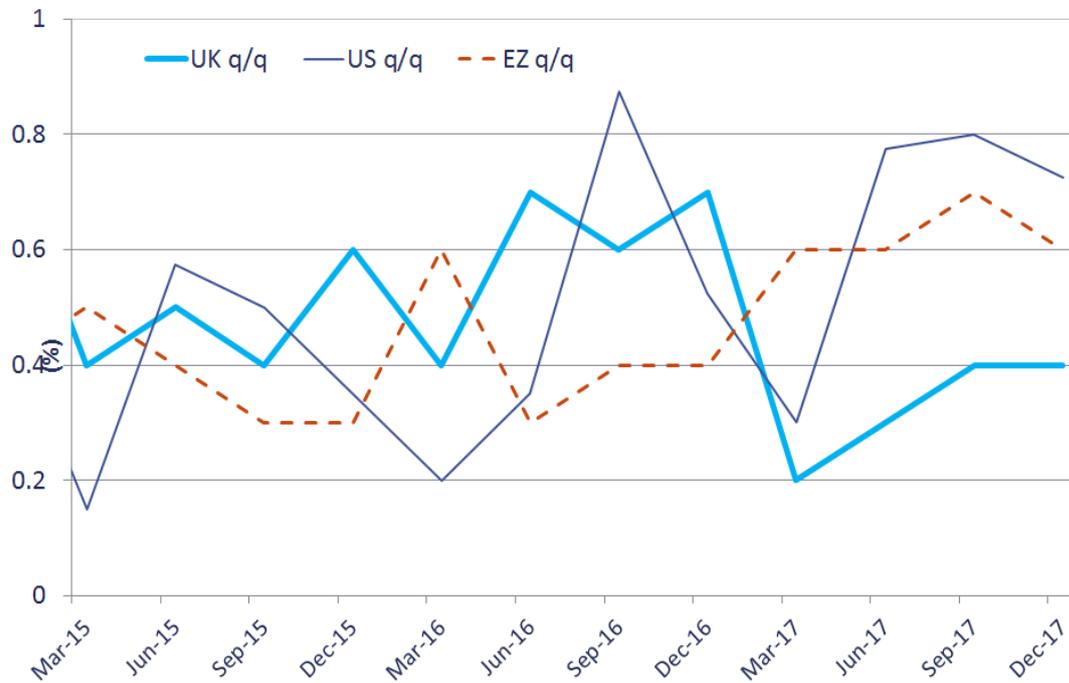
	2017/18
Authorised limit	£55.0m
Maximum gross borrowing position	£43.7m
Operational boundary	£50.0m
Average gross borrowing position	£43.37m
Financing costs as a proportion of net revenue stream (GF)	1.64%
Financing costs as a proportion of net revenue stream (HRA)	16.82%
Interest paid on borrowing (GF)	£0.144m
Interest paid on borrowing (HRA)	£1.213m
Interest Receivable (incl dividends) (GF)	£0.344m
Interest Receivable (HRA)	£0.038m

The maturity structure of the debt portfolio was as follows:

	31 March 2017 Actual(£m)	31 March 2018 Actual(£m)
Under 12 months	1.73	1.73
12 months and within 24 months	1.69	1.78
24 months and within 5 years	5.36	5.63
5 years and within 10 years	9.92	10.19
10 years and within 20 years	24.62	22.68
Over 20 years	0.66	0.44

Appendix 2: Graphs

UK, US and EZ GDP growth



Inflation UK, US, Germany and France



CABINET
14 JUNE 2018

REVENUES AND HOUSING BENEFITS PERFORMANCE 2017/18

Cabinet Member Cllr Peter Hare-Scott
Responsible Officer Andrew Jarrett – Director of Finance, Assets & Resources

Reason for Report: To report on Council Tax, Non Domestic Rates and Housing Benefit performance for 2017/18.

RECOMMENDATION(S): That the Report be noted.

Relationship to Corporate Plan: In line with good practice and value for money. Poor performing services can have a detrimental effect on the well being of the community.

Financial Implications: Maintaining a good in year collection rate for Council Tax and Business Rates is essential to cash flow management, to ensure that the Billing Authority meets all our own commitments and our commitments to precepting authorities. We must also ensure benefit payments are made in an accurate and timely manner to avoid loss of subsidy.

Legal Implications: No issues.

Risk Assessment: Low cash flow collection could result in the Authority not achieving its financial income targets. Poor performance and increased demand on the Benefit service could have significant impact on the income of the Authority.

1.0 Introduction

1.1 The commentary below gives an overview of the performance of the Revenues and Housing Benefits Services in 2017/18.

2.0 Overview

2.1 2017/18 saw some minor changes to our Council Tax Reduction Scheme, a slight relaxing in some of the preceptors ability to increase their share of the Council Tax and a delay in the local roll-out of Universal Credit. These challenges have been well managed within these two service areas and we still have seen excellent levels of performance regarding both collection levels and speed of response times.

3.0 Revenues performance in 2017/18

3.1 The Revenues team has successfully managed to maintain a high collection rate on both Council Tax and Business Rates in 2017/18 and continue to

investigate more electronic processes to further streamline operations, these measures include e-billing and increasing direct debit customers.

- 3.2 Table 1 below gives Members an overview of the amount collected during the financial year for both Council Tax and Business Rates.

Table 1 – Collection of Council Tax and Business Rates

	2016/17	Collection Rate	2017/18	Collection Rate
Council Tax Collected inc arrears	£47.3m	98.1%	£49.7m	98.0%
Council Tax net Arrears – from previous year	£1.782m		£2.006m	
Business Rates Collected inc arrears	£15.9m	99.2%	£13.8m	99.2%
Business rates net Arrears – from previous year	£0.217m		£0.157m	

Note – collection rate figures rounded to 1 decimal place.

4.0 Housing Benefit Performance in 2017/18

- 4.1 The Housing Benefit Team continues to perform well in terms of payment times against national comparative data. This is really encouraging when taking account the continued pressures of welfare reform changes, the volume of work required to prepare for the roll-out of Universal Credit (UC) and dealing with the Local Welfare Assistance scheme.

Speed of Processing

- 4.2 The 2017/18 average time for processing new claims was 15.75 days and changes of circumstance (CoC) was 6.5 days. Both of these times are well below national averages of 21 days and 9 days respectively (based on data upto Q3). This places our processing performance in the top quartile nationally.

	Q1	Q2	Q3	Q4	YEAR
NEW	15	16	17	15	15.75
CoC	9	9	5	3	6.5

For information purposes processing times for Council Tax Reduction (CTR) claims were 17.3 days for new claims and 6.3 days for CoC's.

Caseload

- 4.3 The numbers of Housing Benefit (HB) and Council Tax Reduction (CTR) claims have both fallen from the levels experienced in 2016/17. This is partially down to new single person claims being dealt with under UC by the DWP.

16/17	Q1	Q2	Q3	Q4
HB	4,038	3,943	3,890	3,868
CTR	4,435	4,363	4,301	4,251

Total Housing Benefit paid to date

- 4.4 The table below shows the total sum of Housing Benefit paid during 2017/18.

17/18	Q1	Q2	Q3	Q4
£ million	4.8	9.9	14.1	17.8

Note – The above shown figures are cumulative.

5.0 Conclusion

- 5.1 Both teams have continued to perform well despite the extra pressures being placed on them as a direct consequence of Central Government imposed legislation.

Contact for more Information: Andrew Jarrett 01884 234242

Revenues: John Chumbley 01884 234301 (jchumbley@middevon.gov.uk)
Benefits: Team Supervisors (Benefits@middevon.gov.uk)

Circulation of the Report: Cllr Peter Hare-Scott and Management Team

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AGENDA ITEM

**CABINET
14TH JUNE 2018**

REPORT OF THE HEAD OF PLANNING, ECONOMY AND REGENERATION.

TIVERTON EASTERN URBAN EXTENSION: RESULTS OF PUBLIC CONSULTATION. ADOPTED MASTERPLAN SUPPLEMENTARY PLANNING DOCUMENT (AREA A)

Cabinet Member: Cllr Richard Chesterton
Responsible Officer: Mrs Jenny Clifford, Head of Planning, Economy & Regeneration

Reason for Report: To update Members on the outcome of the public consultation regarding the proposal to amend the adopted Masterplan Supplementary Planning Document (SPD) by removing housing land parcels on the southern side of West Manley Lane (within Area A) and to seek approval to revise the adopted Masterplan SPD accordingly.

RECOMMENDATIONS:

- 1. That Cabinet note the results of the public consultation; and**
- 2. Recommends to Council :**
 - i) That the Tiverton Eastern Urban Extension Masterplan Supplementary Planning Document be amended to encompass the proposed changes as set out in Appendix B and adopted; and**
 - ii) That the April 2014 Tiverton Eastern Urban Extension Masterplan Supplementary Planning Document be revoked.**

Relationship to Corporate Plan: The adopted Tiverton EUE Masterplan SPD provides guidance on the planning and delivery of a strategic site for Mid Devon. It directly relates to all four Corporate Plan priorities of economy, homes, community and environment.

Financial Implications: The adopted Masterplan SPD was produced by consultants and the Council through the Council working collaboratively with promoters. Revising the adopted masterplan text and associated plans will incur additional cost to the Council from capacity funding.

Legal Implications: Any revision to the existing Masterplan SPD requires a period of public consultation in accordance with the requirements of the Council's Statement of Community Involvement. Whilst the adopted Masterplan SPD does not form part of the Development Plan, the SPD and any revisions adopted would be a

material consideration in the determination of planning applications relating to the site.

Risk Assessment: The existing Masterplan SPD for the site has been through a process incorporating two stages of public consultation and formal adoption following Council resolution. Any changes to it need to be justified in planning terms.

Equality Impact Assessment: There are no equality issues identified in this report.

1.0 INTRODUCTION

1.1 The Council adopted the Tiverton Eastern Urban Extension (EUE) Masterplan as a Supplementary Planning Document (SPD) in April 2014. SPDs are used where they can help applicants make successful applications and/or aid infrastructure delivery (NPPF, para 153). As such they should build upon and provide more detailed guidance on the policies of the Local Plan and not add unnecessarily to the financial burdens of the development.

2.0 BACKGROUND

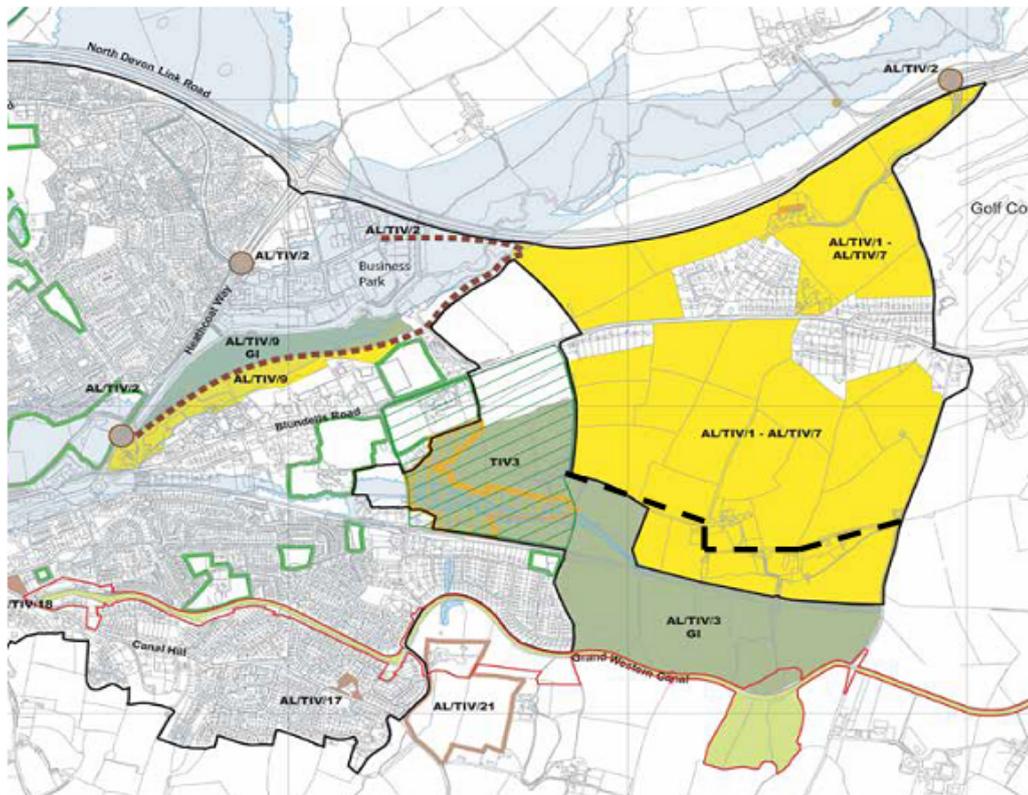
2.1 The Mid Devon Core Strategy sets out the strategic planning policy framework for Mid Devon District over the period 2006 to 2026. The Allocations and Infrastructure Development Plan Document (AIDPD) provides further guidance on how the strategic policies in the Core Strategy are to be applied including the identification of sites for development. One such site is the 153 hectare EUE. Policy AL/TIV/1 sets out how the EUE is allocated for a mixed use development.

2.2 Policy AL/TIV 7 describes how 'before a planning application is made, the Local Planning Authority will carry out a major public consultation exercise into the masterplanning of the site, leading to the adoption of a Supplementary Planning Document. A masterplanning exercise for the urban extension site as a whole was completed in 2013/14 and the Masterplan SPD was adopted by the Council in April 2014. This was the culmination of approximately three year's work and involved two periods of public consultation upon the scope of the masterplan and draft version respectively. It dealt with the north and western parts (Area A) of the site in detail. A copy of the SPD as adopted is attached at **Appendix 1**.

2.3 SPDs are produced to support the adopted Local Plan as a means to help applicants make successful applications by clarifying requirements and setting out expectations. They contain clear and reasoned justification for the guidance within them and explain their relationship with the development plan.

2.4 Cabinet requested a report (4th January 2018) to understand options available to it in the event that changes were to be made to the Adopted Masterplan. This request was specifically in relation to development land parcels to the south of West Manley Lane.

2.5 The Allocations and Infrastructure Development Plan Document (AIDPD) (Local Plan Part 2, Policies Map) includes the residential and employment areas of the EUE within the settlement limit of Tiverton. The southern part of these areas follows the line of West Manley Lane for some distance, before extending south of it towards the former railway line. The principal of development is established within the allocated site. The allocation plan also identifies areas as Green Infrastructure (GI), mainly between the former railway line and the canal.



Tiverton EUE allocation site (West Manley Lane marked - - - - -)

2.6 The Masterplan SPD takes the AIDPD identifies the main areas of development as north of West Manley Lane and those south of West Manley Lane as areas of GI. However the Illustrative Framework Plan of the Masterplan SPD indicates three low density housing clusters on three small land parcels south of West Manley Lane. Together they have the potential to provide up to 15 units (shown circled by a dashed line).



2.7 Outline planning permission (with signed S106) was approved 9th June 2017 for development on the Chettiscombe Trust land including 700 houses. The area of low density land parcels south of West Manley Lane initially formed part of the red line area of the application. The application was subsequently amended at the request of Planning Committee to remove it from the red line boundary. Whilst this removed the land parcels from the planning application, it did not amend the way that the area was treated within the adopted Masterplan SPD. Cabinet at its meeting on the 4th January 2018 resolved to amend the masterplan through the removal of the land parcels south of West Manley Lane and to undertake public consultation on this revision.

3.0 PUBLIC CONSULTATION

3.1 A period of public consultation was undertaken between 22nd February and 5th April 2018. 66 comments were received (with a further 2 comments received after the closure date for comments). Comments received were as follows:

1 in support of the retention of the housing clusters in the SPD.

1 of no comment- Devon County Council

67 in support the removal of the housing clusters from the SPD for the following reasons

- Protecting the setting of the railway walk and Grand Western Canal
- Providing a protective corridor to Tidcombe Fen and potential discharge of surface waters to it
- Mitigation against flooding, foul water and sewage
- Protection of this green and scenic area that is enjoyed by walkers and cyclists
- Loss of open countryside
- Aligning the permitted planning application and Adopted Masterplan SPD

- Ecological value of retaining the landscape with no development
- West Manley Lane acts a clear and well defined boundary to development
- Cabinet resolved (26 October 2017) that development within Area B should not extend beyond West Manley Lane
- Protection of important hedgerows

3.2 It can be concluded that there is over whelming support for the removal of the three housing clusters south of West Manley Lane.

3.3 Officers have reviewed the Adopted Masterplan SPD and identified the changes that would be required. A schedule of changes proposed to the masterplan is attached at **Appendix 2**. The document incorporating these changes will require a resolution from Council in order that it be readopted.

4.0 CONCLUSION

4.1 The results of the public consultation indicate support for the proposed changes to the SPD. Officers accordingly advise that in accordance with the Cabinet resolution of 4th January 2018, the necessary amendments are made to the adopted SPD Masterplan to remove the housing clusters south of West Manley Lane (within Area A) as detailed in Appendix B.

Contact for more Information: Christie McCombe, Area Planning Officer (Tiverton Eastern Urban Extension) 01884 234277
cmccombe@middevon.gov.uk

List of Background Papers: The adopted policies relating to the Tiverton Eastern Urban Extension may be viewed in the AIDPD at
<https://new.middevon.gov.uk/residents/planning-policy/mid-devon-local-plan/part-2-aidpd/>

The Adopted Tiverton EUE Masterplan may be viewed at
<https://www.middevon.gov.uk/residents/planning-policy/masterplanning/>

Cabinet 17th April 2014, 7th April 2016, 26th October 2017, 4th January 2018

Circulation of the Report: Members of Cabinet

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Tiverton's Eastern Urban Extension

Masterplan Supplementary Planning Document

Adopted April 2014

Page 155

CliftonEmerydesign

in partnership with



Foreword

This Supplementary Planning Document (SPD) concerns the Tiverton East Urban Extension. It has been prepared on behalf of the two principal landowners; Chettiscombe Trust and Waddeton Park Ltd, in partnership with Mid Devon District Council (MDDC).

The document provides guidance about how the urban extension should be designed and developed. It is informed by extensive survey work and analysis that has been undertaken in relation to the two principal land holdings and the NHS land north of Blundell's Road. Whilst it has been prepared to provide a comprehensive approach across the whole allocation, it is proposed that further work will be completed to inform the shape of the south eastern area of the site which is in other multiple ownerships. As such, this document provides comprehensive guidance in relation to the two principal land holdings and the NHS land. It represents stage one of a two stage masterplanning approach for land in the south east area of the allocation.

The SPD has been prepared in response to local planning policies within the Mid Devon Development Plan and has been informed by extensive consultation with key stakeholders and people in the local community.

This document was adopted by MDDC in April 2014 as a Supplementary Planning Document (Policy AL/TIV/7) to guide the shaping of *Tiverton's Eastern Urban Extension*.

Refer to 1.6 About the document for more information

Contents

Setting the scene

Explaining the policy background to the SPD, the purpose of the document, its terms and how it should be read and used.

- 1.0 Introduction
- 1.1 Introduction
- 1.2 The purpose and role of the document
- 1.3 Meeting planning policy objectives
- 1.4 The Supplementary Planning Document
- 1.5 Consultation
- 1.6 About the document
- 1.7 Design process

- 2.0 About the site
- 2.1 The site and its location
- 2.2 Land ownership
- 2.3 Site context
- 2.4 Site constraints and opportunities

Achieving a quality place

Setting out the vision, guiding principles, concepts and design principles for achieving a quality of place and how those are going to be implemented and phased.

- 3.0 Development, vision and concept
 - 3.1 The vision
 - 3.2 Development concept
 - 3.3 Guiding principles

- Making the strategy work*
- 4.0 Creating the structure
 - 4.1 Masterplan
 - 4.2 Amount and use (land use budget)
 - 4.3 Movement
 - 4.4 Land use
 - 4.5 Landscape and open space

- 5.0 Creating the place
 - 5.1 Reinforcing the structure

- 6.0 Delivering the place
 - 6.1 Infrastructure planning and delivery
 - 6.2 Assumptions about the rate of housing delivery
 - 6.3 Approach to development phasing
 - 6.4 Infrastructure requirements
 - 6.5 Development phasing and infrastructure
 - 6.6 Delivery, monitoring and review
 - 6.7 Requirements for future planning applications

- Copyright and team

A garden neighbourhood

The overall design of the masterplan is based around a series of design principles that seek to create a new garden neighbourhood with a character and appearance inspired by the defining characteristics of Tiverton and its immediate surroundings and that is reminiscent of a garden city environment. Whilst the plan is designed around modern requirements and standards (including making efficient use of land for the provision of new homes) and takes account of sustainability objectives; it seeks to establish a firm foundation for a place that is green, leafy with generous private gardens, making the most of sunlight and natural daylighting, and creating opportunities for community recycling and food production.

“ As the designer walks over the ground to be planned, he will picture to himself what would be natural growth of the town or district if left to spread over an area. He will try to realise the direction which the main lines of traffic will inevitably take, which proportions of the ground will be attractive for residences, and which will offer inducements for the development of shops, business premises, or industries... there will arise in his imagination a picture of the future community with its needs and its aim...”



1.1 Introduction

Tiverton's new garden neighbourhood at Post Hill

“Before a planning application is made, the Local Planning Authority will carry out a major public consultation exercise in the masterplanning of the site. There will be full involvement of relevant stakeholders, leading to the adoption of a Supplementary Planning Document”.

Mid Devon Allocations and Infrastructure Development Plan Document (AIDPD) AL/TIV/7

This Supplementary Planning Document has been prepared in response to Planning Policies AL / TIV / 1-7 of the Mid Devon Allocations and Infrastructure Development Plan Document (AIDPD). Policy AL / TIV / 7 requires that a masterplanning exercise be undertaken to inform the design of the Tiverton Eastern Extension. The document sets out the District Council's expectations on masterplanning, design quality and infrastructure requirements. It has been prepared by Clifton Emery Design, with expert advice from PCL Planning and Barton Willmore, on behalf of two principal landowners; Chettiscombe Trust and Waddeton Park Ltd; and in partnership with Mid Devon District Council (MDDC).

Background

In Mid Devon the Development Plan comprises the following documents:

- The Mid Devon Core Strategy, adopted July 2007 (Local Plan Part 1);
- The Allocations and Infrastructure Development Plan Document (AIDPD), adopted October 2010 (Local Plan Part 2);
- The Development Management Policies Development Plan Document adopted October 2013, (Local Plan Part 3).

The Mid Devon Core Strategy sets out the overarching strategic policy framework for Mid Devon over the period 2006 – 2026. The Core Strategy identifies a number of corporate policies and objectives that are to be achieved but also makes provision for specific policy requirements and targets. In particular, the Core Strategy makes provision for an overall District wide requirement for both housing and employment. However, the objective is not simply to meet those targets but to plan for and deliver attractive and sustainable places.

The AIDPD provides more detailed policy guidance as to how the corporate priorities, objectives and specific policy requirements, set out in the Core Strategy, should be achieved. In particular, the AIDPD identifies areas of land where development should be located and allocates this land subject to specific policy requirements. These requirements seek to control, amongst other things, the type and quantum of development proposed as well as the delivery of specific infrastructure items required

to support new development including community facilities, green infrastructure and highway improvements, where these are deemed to be necessary.

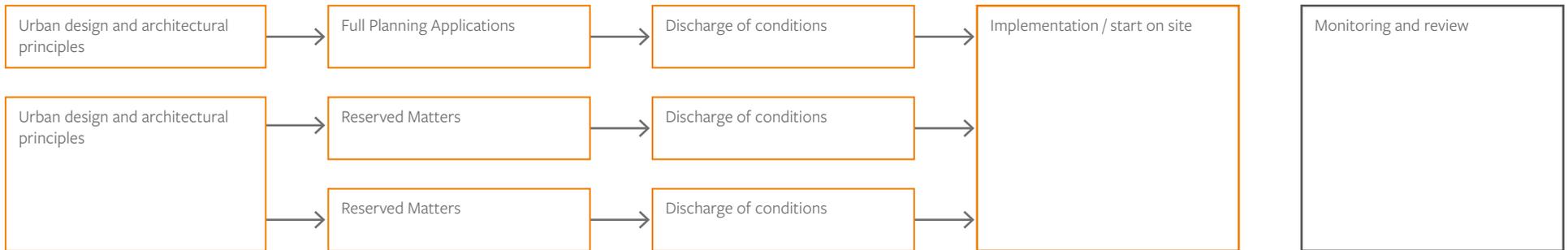
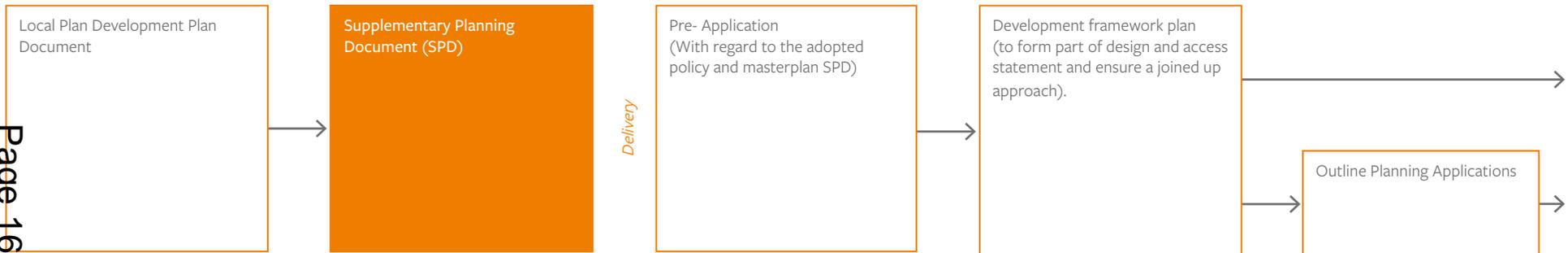
In this regard, Policies AL/TIV/1 to AL/TIV/7 relate specifically to the allocation of the Tiverton Eastern Extension and it is these policies that this document elaborates upon (in line with other policy provisions contained within the Core Strategy and Development Management Policies Development Plan Document).

Under policy AL/TIV/1, this site of 153 hectares is allocated for mixed use development as follows:

- a) From 1550 - 2000 dwellings;
- b) A proportion of affordable housing (subject to further viability assessment) including at least five pitches for gypsies and travellers;
- c) From 95,000 - 130,000 sqm of employment floorspace;
- d) Transport provision to ensure appropriate accessibility for all modes;
- e) Environmental protection and enhancement;
- f) Community facilities to meet local needs arising;
- g) Carbon reduction and air quality improvements;
- h) An agreed phasing strategy to bring forward development and infrastructure in step and retain overall development viability;
- i) A public masterplanning exercise (before any planning application is made).

Local planning

Development process



Development process

1.2 The Purpose and Role of the Document

Purpose and role of the document

“the purpose of the document is to bridge the gap between high level policy aspirations and delivery on the ground in order to ensure high quality design and quality of place”...

The document has been prepared and is adopted as a Supplementary Planning Document (SPD) and as such is a material consideration to be assessed when determining planning applications.

The main objective of the document is to set out the key principles that planning applications will need to have regard to if they are to be considered acceptable by MDDC. Accordingly, the purpose of the document is to bridge the gap between policy aspiration and implementation in order to ensure high quality design and the delivery of a successful place. Another important role of the document is to co-ordinate the different phases of development and the delivery of infrastructure.

The flow diagram opposite illustrates where the SPD sits in the development process.

The guidance will inform developers and their designers when preparing planning applications, MDDC when considering proposals, and stakeholders and people in the local community when reviewing and responding to emerging schemes.

So that the guidance retains its legitimacy over time and is able to adapt to different proposals and changing circumstances, it has been designed to be inherently flexible. It identifies what is likely to be acceptable by MDDC.

The SPD therefore sets out guiding principles on a range of high level design matters that are intended to structure the urban extension. Further, more detailed guidance, concerning issues such as street and public realm design and the character of the development, would be set out in a more detailed framework plan and in a series of urban design and architectural principles to guide detailed proposals. These will elaborate upon the principles within this SPD and clarify design expectations that are important to the overall character and appearance of the new neighbourhood.

The overriding objective of the document is to improve the quality of proposals and the resulting developments, ensure that infrastructure and phases are co-ordinated and strategic policy aspirations are met. It should provide a foundation for improving the speed, efficiency and effectiveness of the pre-application and determination processes.

The content that will be expected by MDDC in submitted planning applications is explained in 1.7 Design process.

The document provides guidance about how the urban extension should be designed and developed. It is informed by extensive survey work and analysis that has been undertaken in relation to the two principal land holdings and the NHS land. Whilst this document has been prepared to guide a comprehensive approach across the whole allocation it is proposed that further work will be required to inform proposals in the south eastern area of the site which is in multiple ownerships. Within this south eastern area, further survey work and studies will be required. A second stage of strategic masterplanning work will be required in this area before a planning application is made for this part of the site. As such, as has already been identified, this document provides comprehensive guidance in relation to the two principal land holdings and the NHS land and represents stage one of a two stage masterplanning approach for land to the south east of the allocation.

1.3 Meeting Planning Policy Objectives

Background

The preparation of this masterplan SPD is a requirement of AL/TIV/7 and sets out to respond to this and other associated planning policies, including AL/TIV/1-6.

The document provides guidance about how the objectives of the policies can be delivered. It also identifies where the masterplan could deviate from policy. A table identifying the relationship with planning policy is within appendix 1 of the separate appendix document (section 3).

With the benefit of extensive survey work and analysis that was not available at the time of policy formulation, it has become clear that the identified quantum of development will be difficult to achieve.

In particular, it is likely that the level of housing will be closer to the lower end of the identified range and the quantum of employment will be significantly less. This has been informed by site constraints and in respect of employment development by the findings of the council's employment land review which recommends more, smaller employment allocation sites. There will also be variations in the timing and delivery of transport and community infrastructure in response to viability and technical issues. These are set out in 6.1 Implementation and Phasing.

Due to significant site constraints, such as those associated with topography, ecology, trees and hedgerows, archaeology, cultural heritage and hydrology including the Tidcombe Fen SSSI (Site of Special Scientific Interest), housing and employment numbers will

be lower as there is less developable land than anticipated. It will also be necessary to build at appropriate densities which further constrains the quantum of development.

A summary of the relationship with key policies and where there is significant deviation from them proposed is at appendix 1 of the separate appendix document (section 3).

Policy AL/TIV/1 proposes:

From 1550 to 2000 dwellings:

The masterplan identifies that around 1520 dwellings will be possible, subject to further design development and analysis.

From 95,000 to 130,000sqm of employment floorspace:

The masterplan identifies that approximately 30,000sqm of employment floorspace will be achievable.

The plan proposes an appropriate level of housing, a realistic amount of employment space and provision of community facilities and infrastructure to ensure a balanced community.

Policy AL/TIV/2 Transport Provision proposes:

Provision of a new access road linking the site to Heathcoat Way:

The masterplan identifies that a secondary strategic access onto Heathcoat Way will not be required until beyond 2000 dwellings and so is not included within this document. The traffic to be generated from the development within this document is to be managed by careful consideration of the location of uses, early

delivery of the new junction onto the A361 and traffic calming environmental enhancement of Blundell's Road and other highway improvements.

Closure to through-traffic [of Blundell's Road]:

The SPD proposes environmental improvements and traffic calming measures along Blundell's Road. Transport analysis has clarified that closure of part of the road is not desirable because of the important role it plays in the wider movement network. The impact of additional traffic will be mitigated.

Policy AL/TIV/3 Environmental protection and green infrastructure proposes:

The provision and transfer of 47 hectares of strategic green infrastructure on the western and southern edges. The SPD proposed green infrastructure mainly to the south and south west of the site area to meet these requirements.

Areas of equipped and laid out public open space, totalling 2 hectares of children's play, 8 hectares of sports pitches and 2 hectares of allotments:

The masterplan identifies publicly accessible informal open space in excess of that required by the policy, but with formal play and recreation provision calculated against the lower level of housing.

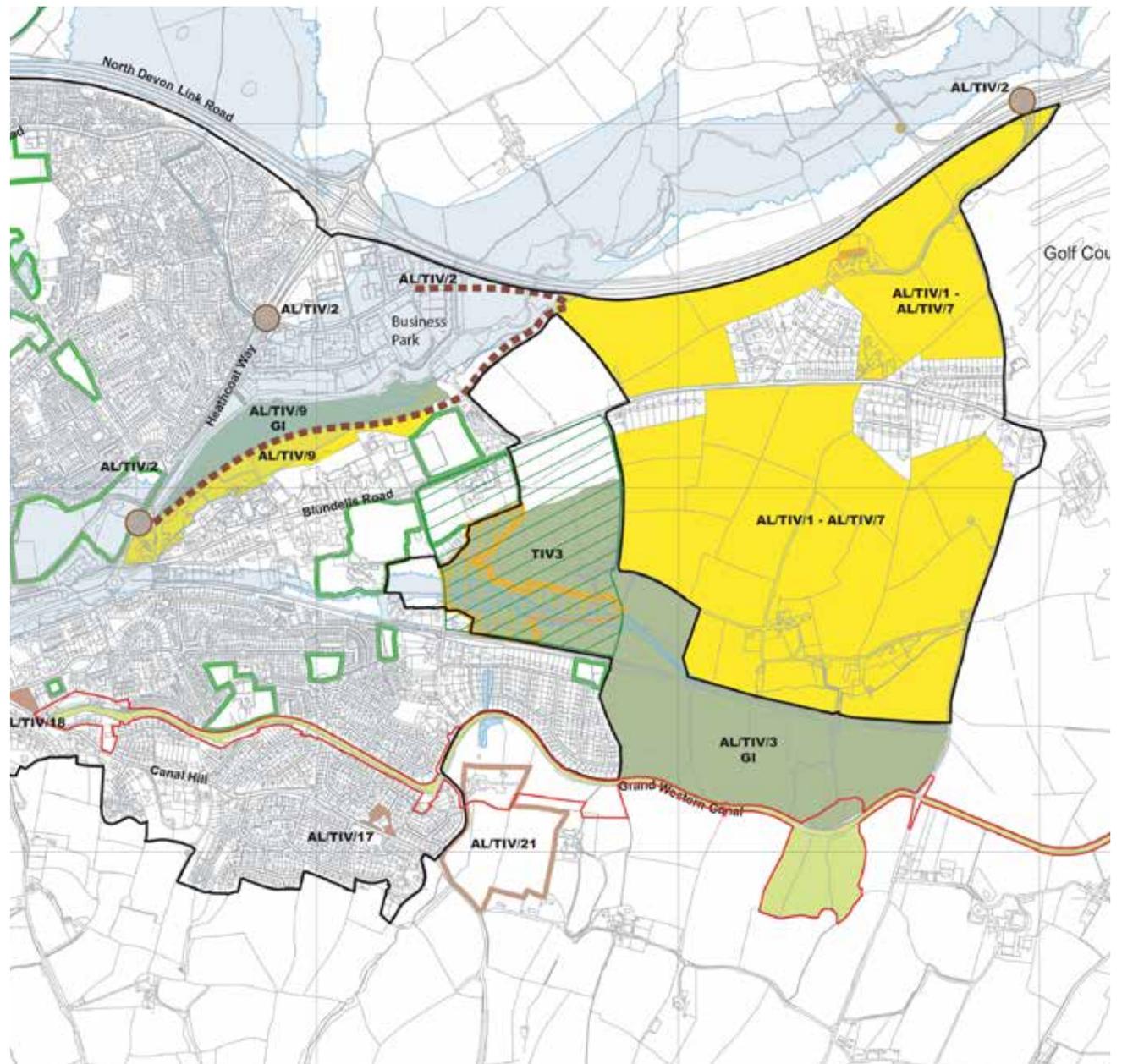
Policy AL/TIV/4 Community facilities, requires a 1.9 hectare site for a primary school and a 2 hectare site for a shopping and community centre. The masterplan identifies the location of these facilities.

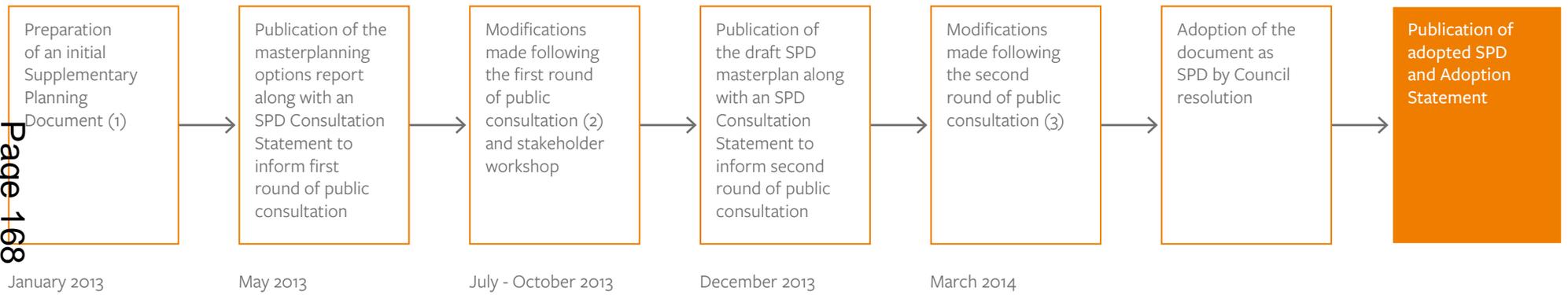
Policy AL/TIV/5 Carbon reduction and air quality, requires measures to minimise the carbon footprint of the development, provision of sources of decentralised on-site renewable or low carbon energy and that impact upon air quality is acceptable. This SPD identifies a series of guiding principles for energy and resource efficiency and suggests a suitable site for an Energy from Waste facility should this option be deliverable.

Policy AL/TIV/6 Phasing, requires that “a phasing strategy be developed for the Eastern Urban Extension to ensure that the development and infrastructure come forward in step” taking account of a number policy objectives which set out thresholds for the timing of delivery of associated infrastructure, facilities and amenities:

In order to ensure the development is viable and that technical highway requirements are suitably met, it is necessary to change the phasing thresholds identified within the policy. Proposals for phasing and delivery are set out in chapter 6.

Other planning policies within the Core Strategy (Local Plan Part 1), Allocations and Infrastructure Development Plan Document (Local Plan Part 2) and Development Management Policies (Local Plan Part 3) will also need to be addressed by all planning applications.



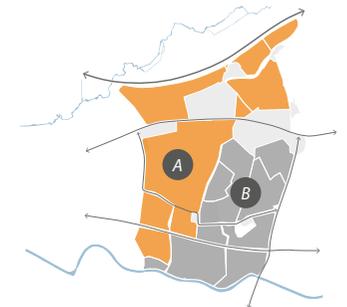


1. In accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012 and MDDC's Statement of Community Involvement.

2. Pursuant to Section 23(1) of the Planning and Compulsory Purchase Act 2004 including publication of a summary setting out the issues raised and accordingly, modifications made.

3. Pursuant to Section 23(1) of the Planning and Compulsory Purchase Act 2004 including publication of a summary setting out the issues raised and accordingly, final modifications made.

- Area A: Principal land holdings and NHS
- Area B: Land in multiple ownership



1.4 The Supplementary Planning Document

Adoption of the Supplementary Planning Document

The document has been prepared having regard to national policies and government advice, the Council's Community Strategy, Statement of Community Involvement and all other Local Plan Development Plan Documents that have been adopted by the Council. The SPD contains clear and reasoned justification for the guidance contained within it and its relationship with the Development Plan. It has been prepared against the background of the Development Plan requirements for the site and to be in broad conformity with these. In some instances the approach taken within this document varies from specific points in the Development Plan. Planning policies are required to be flexible and to respond to changing circumstances where this SPD differs from policy, justification is given for this.

Sustainability has been tested during the preparation and examination of the adopted Development Plan, including the AIDPD to which the document primarily relates. Accordingly, it is consistent with the higher-level sustainability testing of the AIDPD and the anticipated effects of the SPD are in line with those predicted.

In accordance with policy requirements there have been two rounds of public consultation, liaison with key stakeholders including a stakeholder workshop to inform the content of the SPD. The document has been modified to take account of views expressed and representations received as well as other relevant matters.

Such changes include the location of formal play provision, the approach to West Manley Lane, the amount of employment floorspace as a result of adjusting the proposed A361 junction. Residential area boundaries have also been adjusted in places.

A statement specifying the date of SPD adoption will be made available. This will identify the date by which representations upon its adoption must be made and received.

The diagram opposite provides a summary of the procedure followed.

A robust evidence base and two stage process

The SPD masterplan is based upon a thoroughly researched evidence base. This has comprised analysis involving detailed survey work across the majority allocated area forming the principal land holdings and the NHS land (Area A). Further, more detailed work will be required for the south eastern area of the allocation (Area B), this may lead to refinement of the plan. For this reason a two stage masterplanning approach is proposed for Area B. The shape of the masterplan in relation to the south eastern area is based upon an overview of site constraints but these need to be explored in more detail. Accordingly a second stage of masterplanning work will be required in Area B before planning applications are made for this part of the site.

Within Area A where more thorough analysis has been undertaken a number of definite site constraints have been

identified. These have informed the evolution and design of the plan. The studies include consideration of;

- Ecology, trees and hedgerows
- Archaeology and Heritage
- Flood risk and drainage
- Noise and air quality
- Transport and highways
- Topography
- Services, utilities and energy
- Landscape, character and visibility
- The relationship with existing dwellings and other land uses

By understanding the implications of these constraints it has become evident that the capacity of the site to deliver the quantum of development identified in the AIDPD AL/TIV/1 is less than originally anticipated.

The findings of the studies and their subsequent impacts upon the shape of the plan are explained in the introduction of the separate appendix document (Section 3) - Analysis.



Above: Photographs and sketch plans from the stakeholder workshop

1.5 Consultation

The consultation process

The content of the masterplan SPD has been informed by extensive public and stakeholder consultation. The comments and their influence upon the shape of the masterplan are set out in detail within appendix 2 of the separate appendix document (section 3). The following provides a brief overview of the key issues raised.

Summary of consultation 1

Five consultation events were held between the 3rd and 31st of May 2013.

141 written representations were received in response to these events. Whilst many individual issues were raised in the representations, a number of issues were more common than others. For example concerns were expressed about:

- The impact of additional traffic and the timing of new transport infrastructure;
- The effects of development upon existing flora and fauna, including the impacts on Tidcombe Fen and the Grand Western Canal;
- The size and amount of housing;
- Whether the provision for education was sufficient;
- Impact upon existing dwellings and other land uses.

Respondents also highlighted the importance of achieving the highest possible quality of design and a good mix of community facilities in the neighbourhood centre. Generally people concurred with the position of the neighbourhood centre and the employment area. Moreover, the general arrangement of the masterplan options were considered to be appropriate.

Stakeholder liaison and workshop

A series of ongoing meetings with key stakeholders has informed the development of the SPD. A stakeholders workshop was held on the 5th August 2013 at Tiverton Town Hall, attended by approximately 36 delegates.

Attendees included representatives from:

- Mid Devon District Council;
- Devon County Council;
- Tiverton Town Council;
- Halberton Parish Council;
- Natural England;
- Environment Agency;
- Blundell's School.

There was considerable interest and many comments and ideas were raised which generated a meaningful debate on important site features to be incorporated within the SPD plan.

The key findings and principles generated from the workshop are set out below. These ideas and suggestions have been taken forward to inform the emerging SPD masterplan:

- Early provision of junction onto A361 to improve traffic management and provide for construction access;
- Traffic calming on Blundell's Road including improvements at Blundell's School;
- Creation of a village green at the heart of the existing and new community;
- Consider if the southern green infrastructure area is the best place for formal sports pitches;
- Ensure biodiversity enhancement throughout the site and in particular in relation to Tidcombe Fen;
- Consider a new connection from Manley Lane to Blundell's Road;
- Emphasise green links from the neighbourhood centre to the area around the Grand Western Canal;
- Ensure easy access to allotments and play areas from all housing;
- Ensure that high quality design is achieved throughout the new neighbourhood.

There appeared to be a consensus about the general arrangement of the emerging plan in relation to land use distribution and quantum of development. The vision was also supported as a means for maintaining an appropriate level of aspiration.

1.5 Consultation

Page 172

A Masterplan for the Tiverton Eastern Urban Extension

Tiverton's New Neighbourhood at Post Hill

Mid Devon District Council is carrying out a second consultation on the Masterplan for the Tiverton Eastern Urban Extension planned for the Post Hill area.

This second stage of consultation will take place from 9 December to 1 February and is another opportunity for residents to have their say.

Find out more at public exhibitions:

- Sunday 14 December**
Council Chamber, Tiverton Town Hall
10am - 4pm
- Monday 16 December**
Jubilee Room, Halberton Village Hall
2pm - 8pm
- Thursday 19 December**
Council Chamber, Tiverton Town Hall
2pm - 8pm
- Thursday 9 January**
Crystal Suite, Tiverton hotel
2pm - 8pm
- Saturday 11 January**
Council Chamber, Tiverton Town Hall
10am - 4pm
- Wednesday 19 January**
Jubilee Room, Halberton Village Hall
10am - 2pm

The full Masterplan document, a summary and associated reports will be available to view from 9 December on the website and at our offices in Phoenix House, Tiverton.

Mid Devon District Council

Visit our website: www.middevon.gov.uk/masterplanning Enquiries: 01237 800000, 01247 22000 Deadline for responses: 01 February 2014



How to get involved

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Mid Devon District Council

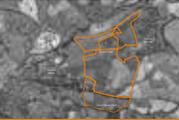
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A Masterplan for the Tiverton Eastern Urban Extension

Tiverton's New Neighbourhood at Post Hill

The design team has been chosen for the design of the new neighbourhood at Post Hill. The design team will be working with the Council to develop a detailed masterplan for the new neighbourhood.

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Summary of consultation 2

Six consultation events were held in Tiverton and Halberton, spread between December 2013 and January 2014. The consultation closed on 1st February 2014 and a total of 158 written responses, many detailed, were received. A number of key themes emerged from the representations received.

1. Principle of Development:
 - Some concern at the principle, location and size of the proposal;
 - Whether the development would be better at Junction 27 M5.
2. Density:
 - Housing size / design should meet local needs including those of the elderly and growing families;
 - Housing density should reflect the area;
 - The appropriateness of the second stage masterplan exercise in Area B was questioned.
3. Layout:
 - The location of the main employment area was generally agreed;
 - A road link through the former Post Hill NHS site was generally supported as a means of reducing potential impact upon Uplowman Road and Putson Lane;
 - The character of West Manley Lane should be retained with no housing to its south;



Above: Examples of the material from the consultation 2 events

- The location of sports pitches adjacent to Glebelands is inappropriate;
- The former railway line should be safeguarded;
- Mixed views on whether more links be created between the former railway line and the canal.

4. Highways:

- A new A361 junction was generally accepted in order to reduce construction and commercial traffic from passing through residential areas. It was not favoured by residents living nearby to the proposed location who expressed concern at proximity, impacts and wished reconsideration of other options. Some respondents wanted a northern route to Heathcoat Way;
- Concern at increased traffic, noise and pollution and whether roads will be able to cope;
- Traffic calming on Blundell's Road is necessary for safety reasons and to reduce development impact, will require careful design and should also be extended to include Tidcombe Lane. Other respondents wished Blundell's Road to be closed upon opening of the new A361 junction;
- Tidcombe Lane is narrow. Additional traffic from sports pitches off Glebelands was a concern;
- Additional traffic in the Uplowman Road, Putson Lane and Fairway area was a concern;
- The impact of additional traffic upon Halberton and beyond was raised by residents in these areas;

- Phasing should require highway works early to reduce traffic impact.

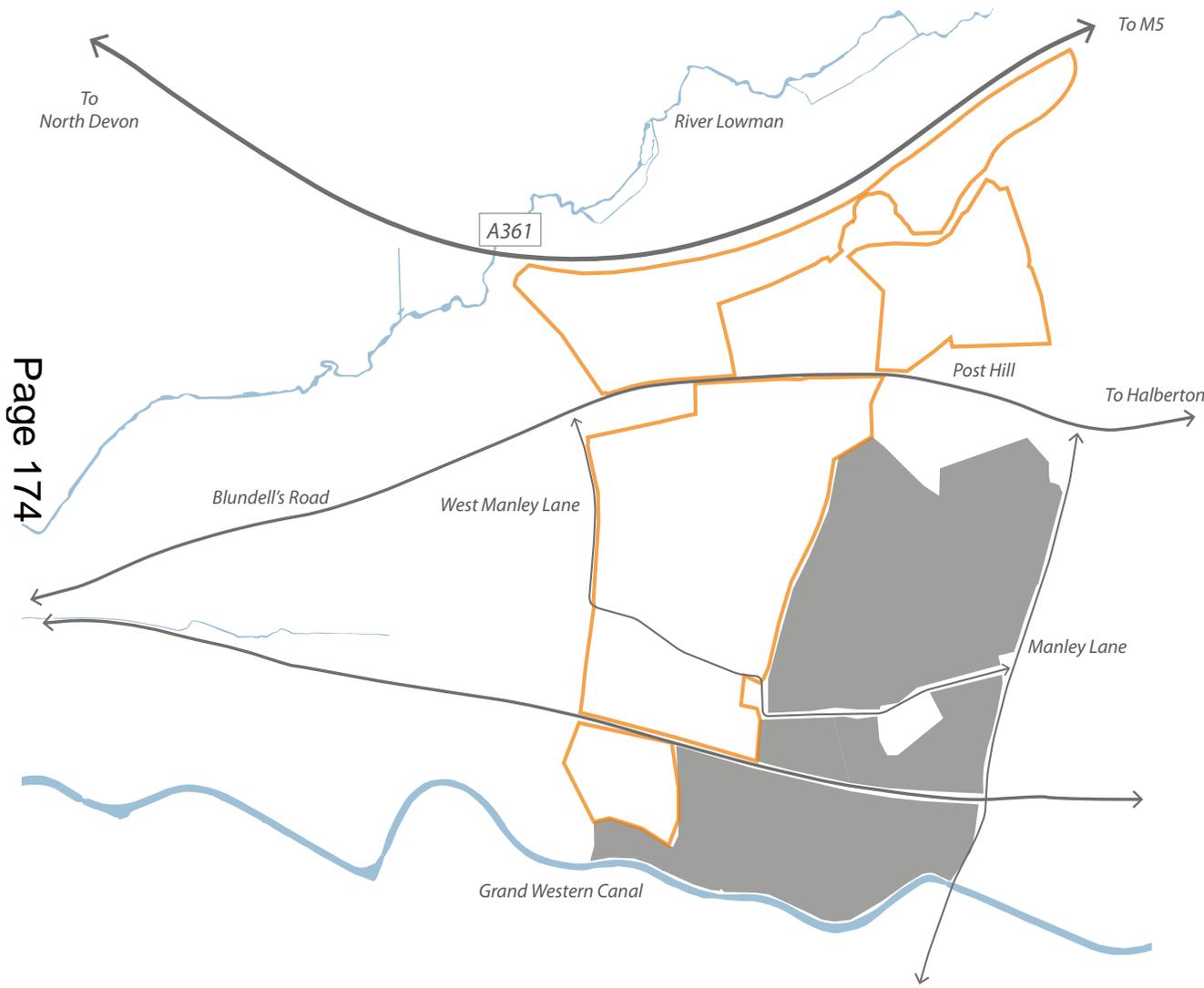
5. Other issues:

- There was concern over the principle and location of the waste to energy proposal. Is the new A361 junction needed without it?
- How will infrastructure be funded and delivered?
- Impact upon the setting of Knightshayes needs consideration;
- How will the secondary school cope without new provision on-site?
- Phasing should secure southern open space and the community facilities earlier;
- Flooding, drainage and impact upon Alsa brook and Tidcombe Fen SSSI were of concern;
- Sewerage upgrades will be required to accommodate the development together with improved sewage works access.

MDDC has analysed the representations and produced a summary document, together with a written reply to the main issues and themes that emerged. The masterplan has been reviewed in light of these representations:

- The vision for the scheme has been revised and its intention to form a new garden neighbourhood for Tiverton has been clarified;
- A361 junction has been adjusted to reduce residential impact with less employment floorspace as a result;

- A northern access route from Gornhay Cross has been considered, but found neither suitable nor deliverable;
- Tidcombe Lane has been incorporated into the study area for traffic calming and environmental enhancement with Blundell's Road;
- A vehicular link through NHS site at Post Hill will be sought as a preferred access route in order to reduce impact upon Putson Lane and Uplowman Road. The masterplan approach in the NE area has been revised to take this route into account;
- Highway infrastructure phasing and triggers have been reviewed in light of comments, but retained to balance early provision with deliverability.
- Residential land parcels have been reviewed and housing has been drawn back away from the western and southern fringes to give a more rural edge;
- Sports pitch provision close to Glebelands has been removed. Enhanced sports pitch facilities are included on the school / neighbourhood centre site together with off-site enhancements to formal sports provision within the Tiverton area;
- A West Manley Lane character area has been added and residential areas to its south west have been reviewed and reduced;
- Triggers for green infrastructure areas have been clarified. Early provision of GI to the south is not deliverable.
- The importance and sensitivity of Tidcombe Fen SSSI and its catchment have been emphasised.



A two stage masterplan

The document provides guidance about how the urban extension should be designed and developed. It is informed by extensive survey work and analysis that has been undertaken in relation to the two principal land holdings and the NHS land (Area A). Whilst it has been prepared to guide a comprehensive approach across the whole allocation, it is proposed that further work will be completed to inform the shape of the south eastern area of the site which is in multiple ownerships (Area B). This two stage approach is also set out in section 1.4. As such, this document provides comprehensive guidance in relation to the two principal land holdings and the NHS land and represents stage one of a two stage masterplanning approach for land to the south east of the allocation.

Above: Plan showing Area A and Area B of the masterplan

Single stage (Area A)
 Two stage (Area B)

1.6 About the document

The structure of the document

The document has been arranged in two sections so that it can be easily read and understood. Section 1 provides an introduction and identifies the purpose and role of the SPD within the overall planning policy framework and section 2 illustrates key guiding principles which would be expected to inform more detailed proposals. The separate appendix document (section 3) provides a summary of the analysis, survey work and associated considerations that have informed the guiding principles and shape of the plan.

SPD contents

The key elements of the SPD include:

- A design strategy comprising a design process summary, a vision, guiding principles and a development concept;
- Guidance on making that strategy work, including a masterplan and its components and more detailed guidance about creating the place envisaged;
- An implementation and phasing plan.

The document provides information about the scope, scale, extent, form and type of development that is likely to be considered appropriate and acceptable. Moreover, the document sets out a framework for delivery.

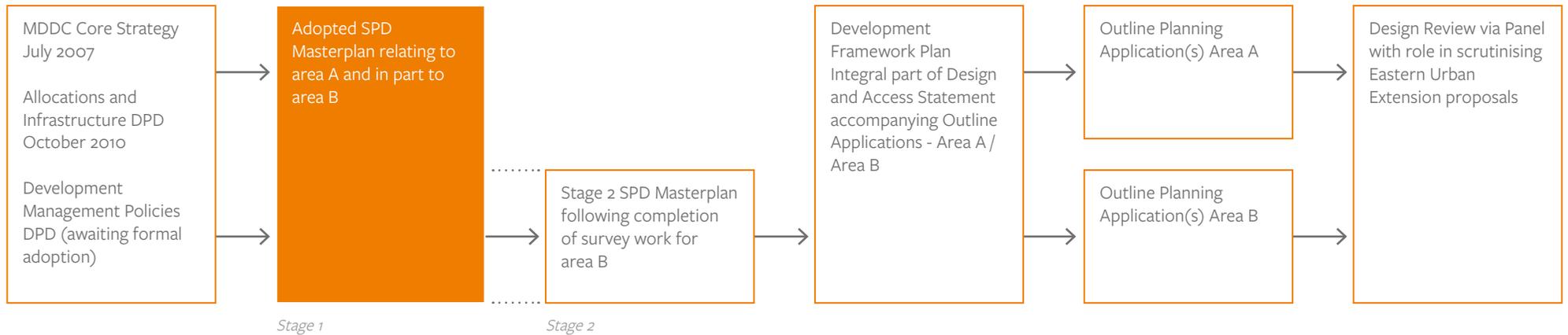
As such, the masterplan is underpinned by a series of design principles and guidelines, within which a number of different

solutions are possible. It is expected that planning applications will be prepared in accordance with the design principles as set out in this document.

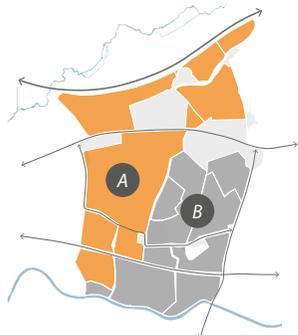
The reasons for any significant departure from the masterplan would need to be demonstrated. It should be made clear how the design principles set out in this document would be met and a quality development achieved.

Developers are encouraged to go beyond these requirements in terms of achieving a quality development and would be expected to apply any new standards as they arise in the future. The Government is currently undertaking a review of housing standards.

The masterplan SPD forms one part of a design process that is intended to ensure that the new garden neighbourhood is designed to be a quality and successful place. The design process is illustrated in 1.7 Design process.



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Masterplan SPD
One stage in relation to principal land holdings and NHS

Content
Vision
Concept
Guiding principles
Masterplan
Phasing and delivery

Consultation
2 stage public consultation
Stakeholder workshop and liaison



SPD Masterplan

Two stage masterplan – two stage in relation to multiple ownerships in the SE area

Content
Masterplan guided by more detailed survey and analysis

Future consultation
1 public consultation
Stakeholder workshop and liaison



SPD Masterplan

Framework Plan

Content
1:2500 scale
2 separate plans covering the entirety of Area A and the entirety of Area B respectively.

The development framework plan shall illustrate a further level of resolution in terms of development form for the relevant area of the development (Area A or B).



Development Framework Plan

Outline Planning applications

Content
Illustrative plan
EIA as appropriate, Design and Access Statement to include proposed character areas, street / space typologies, alternative design approaches, sample blocks and key areas
Identify how masterplan principles are met MDDC validation requirements

Consultation
Pre application consultation
Planning application consultation



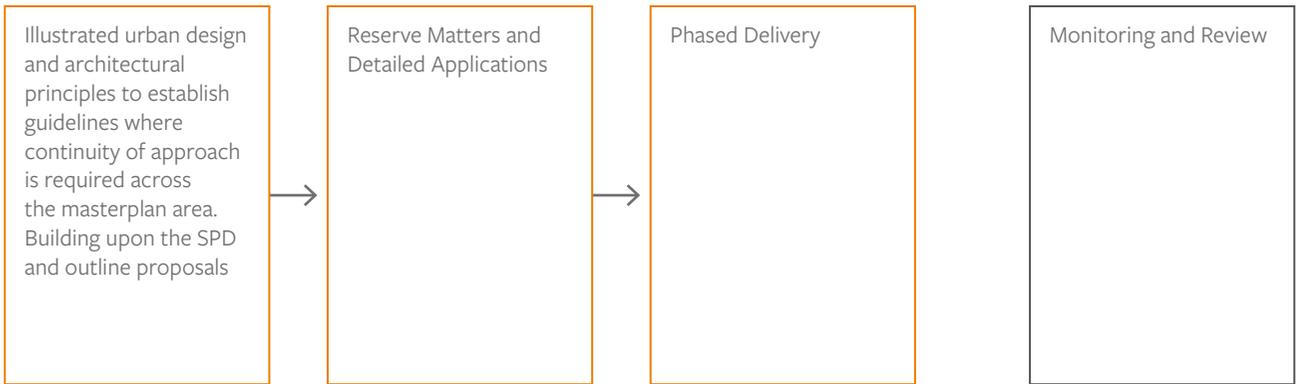
Outline Application

Design Review Panel

In order to ensure that the quality of design remains consistently high throughout the period of delivery it is important that the different stages in the design process are scrutinised by suitably qualified design professionals.

Design review should have a role in overseeing the content of the design principles and in reviewing detailed development proposals to ensure that they are consistent with the objectives of policy, the SPD masterplan (Design review might also be considered during the Outline Application process).

1.7 Design Process



Background

A clear design process that ensures continuity, a comprehensive approach to design, and a focus upon quality, is an important pre requisite of ensuring that a successful neighbourhood is designed and built. This will require attention and flexibility throughout the period of delivery.

The design process outlined here proposes an approach for achieving these objectives and therefore a better foundation for securing a successful new place.

The preparation of more detailed design information comprising urban design and architectural principles prior to the submission of detailed proposals will ensure that there is a consistent approach to the design of key structuring elements across the EUE area. These elements will build upon the principles established in this document and come together to shape the overall character and appearance of the area. The detailed design information referred to above will not necessarily restrict variety if it is felt to be appropriate but will ensure that the area feels like an integrated community.

The involvement of a Design Review Panel in scrutinising the quality of detailed designs as they come forward, at one or more stages in the design process, will provide invaluable support to MDDC as they make planning decisions. MDDC will expect landowners and developers to follow the prescribed design process which is adopted as an integral part of this SPD.

The development framework plan will illustrate development form at a greater degree of resolution for the whole of Area A / Area B as relevant.

Urban design and architectural principles - Illustrative content

Reinforcing the structure
Block types and principles, parking, boundaries, public realm codes for character areas, architectural guidelines

Consultation

Public consultation
Stakeholder workshop and liaison



Urban Design Principles

Reserve matters and full planning application

Content
Detailed design in accordance with MDDC validation requirements
Demonstration of compliance with policy, SPD masterplan, and the urban design and architectural principles

Consultation

Pre application consultation
Planning application consultation



Reserved Matters / Full

Phased delivery

To be developed in a number of phases in accordance with agreed phasing programme and delivery of community and transport infrastructure

Monitoring and review

Review effectiveness of design process to ensure that successful built development is being achieved. Adapt guidance as appropriate and in accordance with changing circumstances

“ In the early C18th Defoe could still describe Tiverton as the greatest manufacturing centre in the county, and surviving C18th and early C19th houses show that the town remained comfortably prosperous.”

The Buildings of England, Devon.
Nikolaus Pevsner

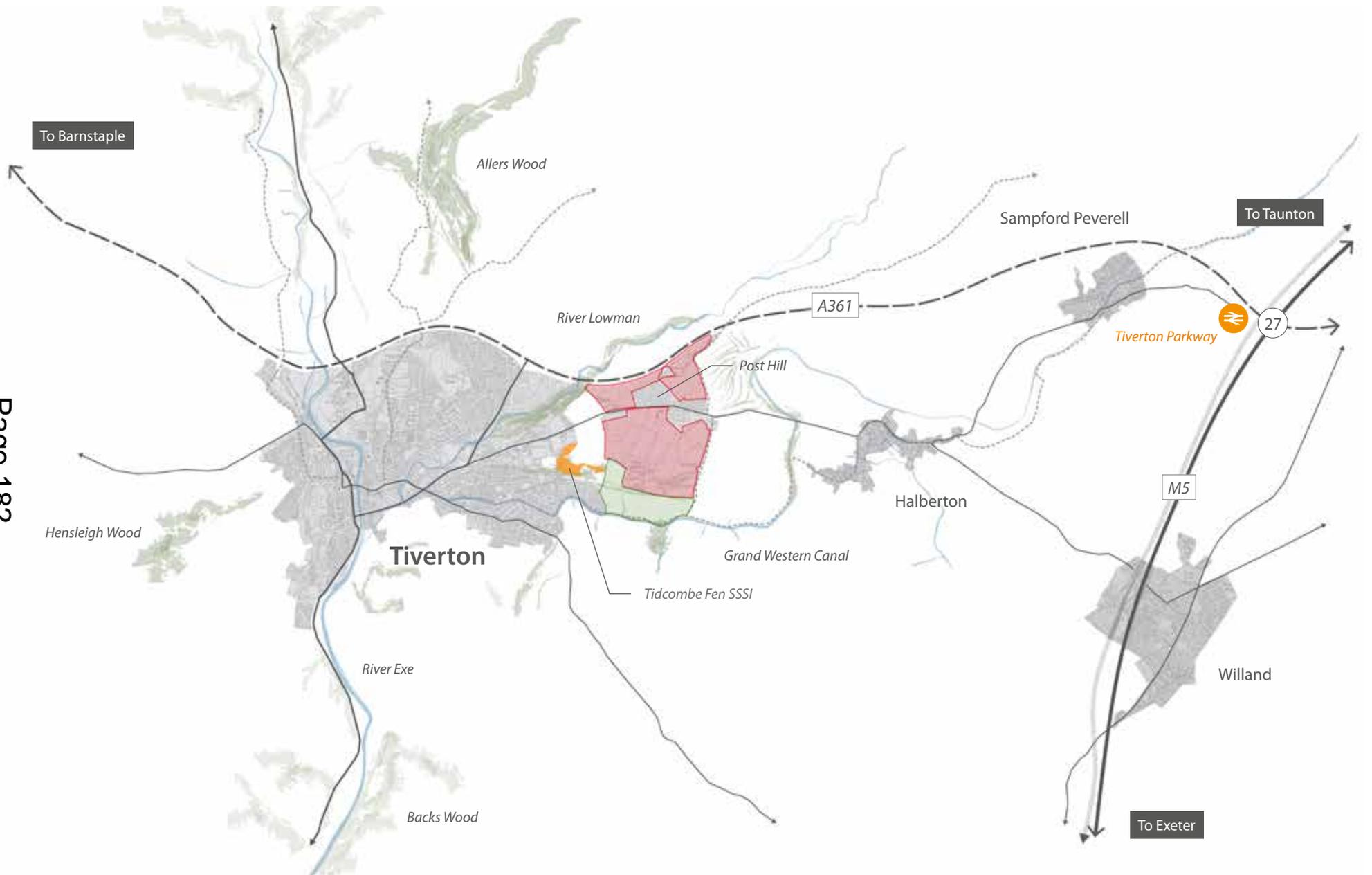
Setting the scene

2.0 About the site





Site of new neighbourhood
in relation to town and countryside



Above: The site in context

 Eastern Urban Extension Area AL/TIV/1-7

 Green Infrastructure Area AL/TIV/3GI



2.1 The Site and its Location

Site in context

Tiverton is well connected and accessible with good links via the A361 to North Devon and the M5 to Exeter, Plymouth (via A38), Taunton and Bristol. The site is well positioned in relation to Tiverton Parkway Station and the Grand Western Canal, the River Lowman corridor, disused railway (a Sustrans route) and numerous footpaths, bridleways and cyclepaths connecting back to Tiverton and into the countryside.

The site comprises about 200ha of land and is located on the eastern fringe of the built up area of Tiverton. The land can be broadly divided into three areas; a parcel to the north of Blundell's Road, a larger parcel to the south and a final area further south again between the disused railway and the Grand Western Canal.

Blundell's School and its land holdings including sports pitches lies immediately to the west and the site wraps around the existing residential area of Post Hill. Further to the east is the village Halberton. Sampford Peverell is some 3 miles further to the east, near to Tiverton Parkway Railway Station and Junction 27 of the M5.

The site

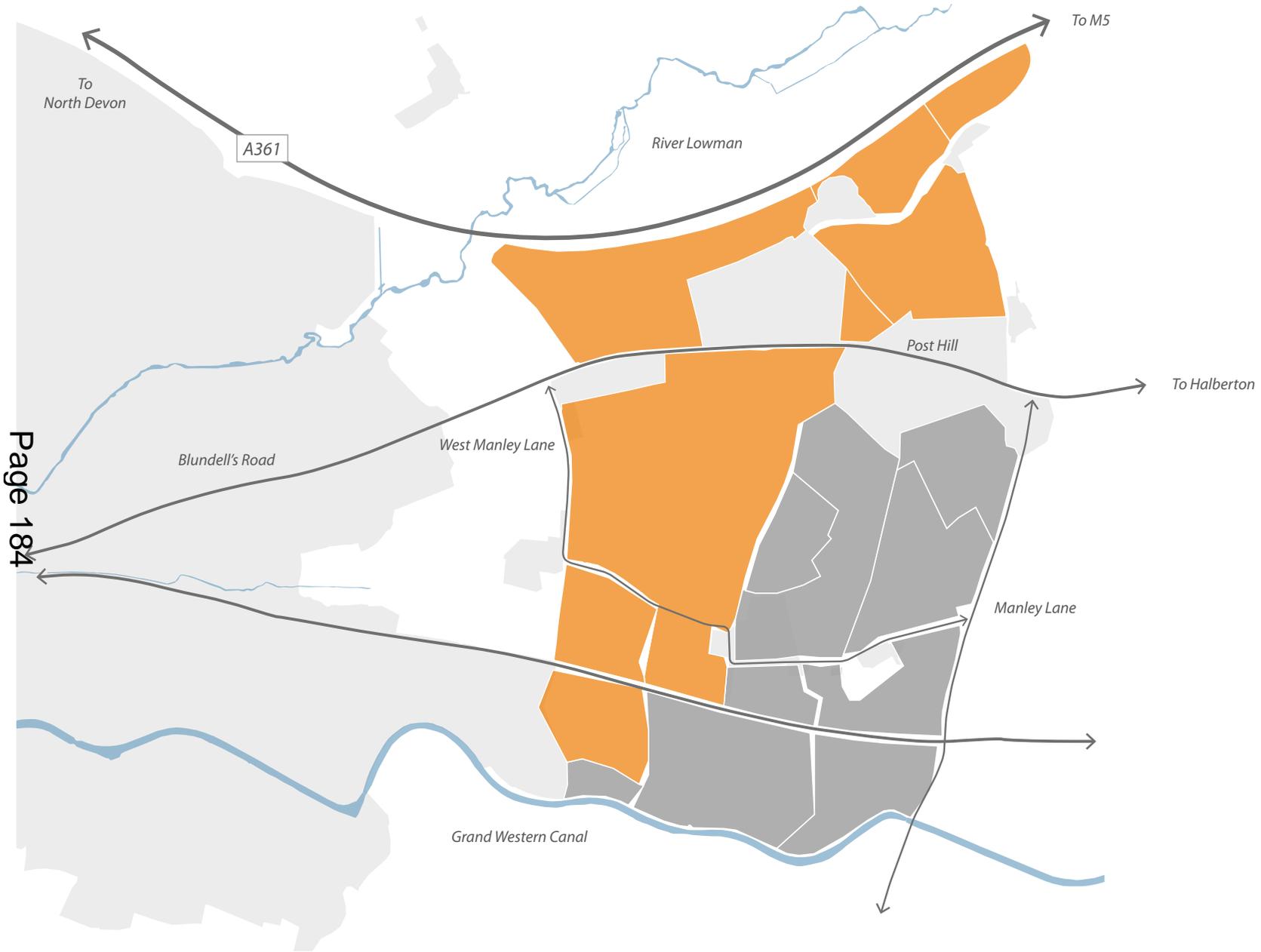
The area between the A361 and Blundell's Road can be further subdivided into two distinct parcels separated by Blundell's Road.

North of Blundell's Road: The land to the west comprises three relatively levels fields laid to pasture, bounded to the north by the A361, to the east by detached housing of Post Hill and a

Long Barrow (a Scheduled Ancient Monument), to the south by Blundell's Road and to the west by Blundell's School. The land to the east of the area north of Blundell's Road straddles Uplowman Road and is bounded by a lane, with Tiverton Golf Course to the east and housing fronting onto Fairway to the south. A mature belt of trees forms the western boundary and the A361 defines the northern boundary. The landform is generally steeper in this area than in the western parcel.

South of Blundell's Road: The land comprises a series of irregular shaped fields, divided by hedgerows with trees. To the north the area is bounded by residential development around Post Hill and Blundell's Road, to the east by Manley Lane, and to the south by the disused railway. West Manley lane runs from east to west across the southern area of the parcel and forms the western boundary. The land form is undulating with a distinct band of steeper ground running from north east to the south west. To the west of the site lies Tidcombe Fen - a hydrologically sensitive Site of Special Scientific Interest.

Between the disused railway and Grand Western Canal are a series of irregular shaped fields divided by hedgerows. These are allocated for an area of Green Infrastructure to support the new neighbourhood.



2.2 Land ownership

The allocated area currently falls into 9 different ownerships, with the Chettiscombe Trust being the largest single land owner. The majority of land to north of Blundell's Road falls within the ownership of Chettiscombe Trust and Waddeton Park Ltd. To the south east the landownership is more complicated. The central and western areas fall within Chettiscombe Trust with the eastern and southern areas in multiple smaller ownerships.

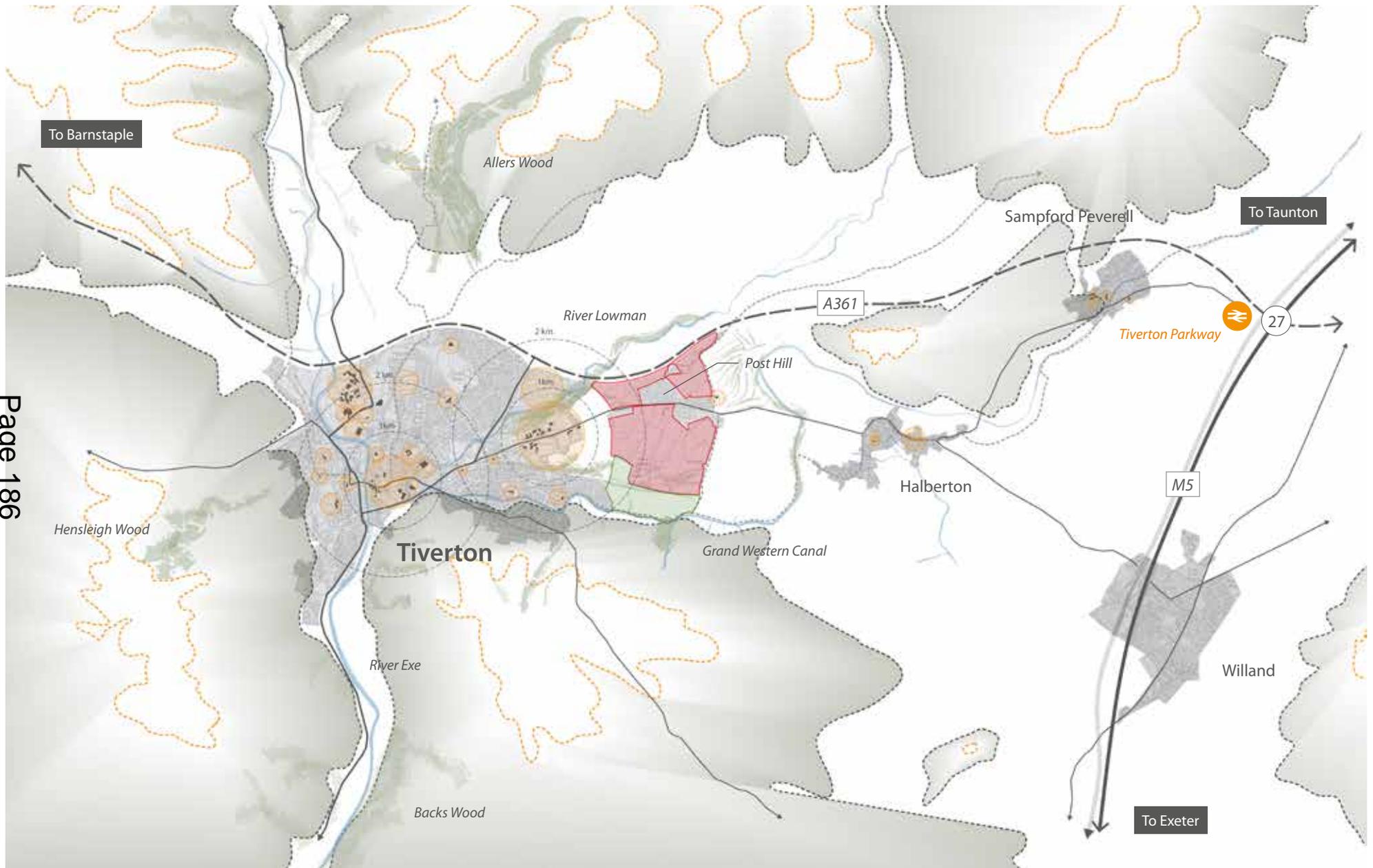
Whilst the pattern of land ownership is diverse, the masterplan provides a framework within which each parcel of land can contribute towards the delivery of the wider whole. In order for this to be successful different land owners will need to have regard to the role of their land within the wider masterplan and the need to achieve a coordinated approach to the development and delivery of associated infrastructure. Vital to this is an integral approach to phasing and implementation of the development. Proposals for this are set out in chapter 6.1.

In order to deliver a successful new neighbourhood for Tiverton, this document provides land owners and future developers with a clear understanding of what will be expected of them by MDDC when they prepare their proposals.

Note

As discussed in 1.6 (About the document), this SPD represents stage one of a two stage process in relation to land within Area B.





Above: Key constraints and opportunities at a wider scale

Local facilities

High areas

Low areas

Eastern Urban Extension Area AL/TIV/1-7

Green Infrastructure Area AL/TIV/3GI



2.3 Site Context

An appropriate location

The site is considered to be the most appropriate and sustainable location for developing an urban extension to Tiverton. This has been demonstrated by sustainability assessment and examination in front of a planning inspector as part of the allocation adoption process (Allocations and Infrastructure Development Plan Document). This is manifest by the sites location in relation to topography and other environmental constraints, transport connections and infrastructure, accessibility to facilities and amenities and proximity to existing employment centres.

Topography and visual sensitivity

Whilst there are many complex localised layers to landform in the area, broadly speaking Tiverton is surrounded on three sides by hills with the landscape opening to a wide valley floor and the town lies within this plateau at the confluence of the Rivers Exe and Lowman. The site lies to the east of the town and as such is likely to be visible from a number of elevated vantage points in the surrounding hills.

From most viewpoints it is possible to view Post Hill and therefore likely that the development will be seen in this context.

Connections, access and movement

The site is well positioned with access to all modes of transport locally and regionally. Very good road and bus links exist to all local amenities. There is excellent access to a range of pedestrian and cycle routes including a Sustrans route, footpath and bridleways. Many of these routes connect directly to the town

centre. Access to the rail network is available nearby at Tiverton Parkway Station near Sampford Peverell. Wider connections by both road and rail make journeys to regional centres and beyond quick and easy.

Facilities and amenities

Tiverton has a wide range of easily accessible facilities and amenities including; shops, healthcare (hospital, surgeries, dentists and pharmacies), education (nurseries, primary, secondary and further education) and leisure opportunities.

Tiverton Town Centre and the area to the north west in the area of Kennedy Way are centres for facilities in the town.

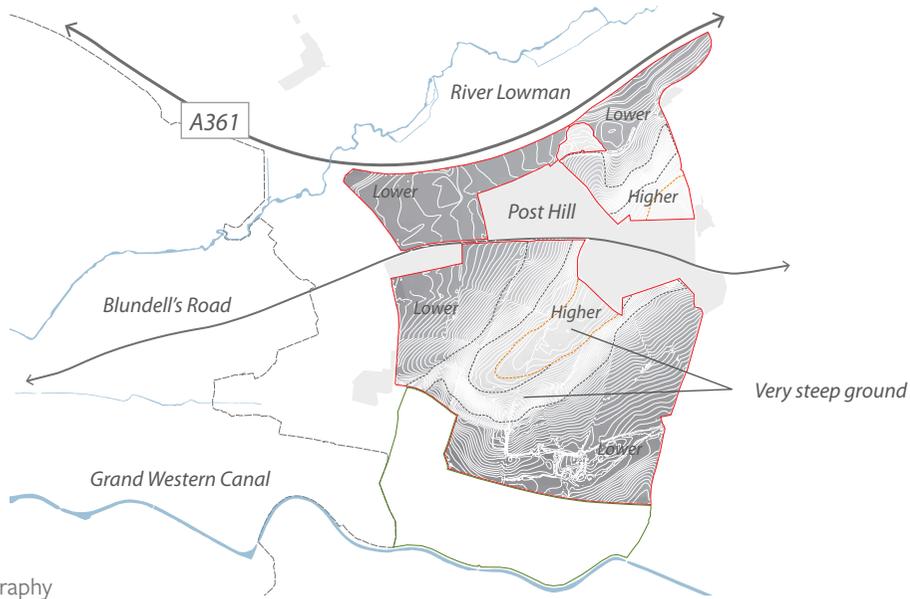
The main outlying villages (Halberton and Sampford Peverell) also have a number of local community facilities.

All of these facilities and amenities are within easy reach of the site by a range of transport modes.

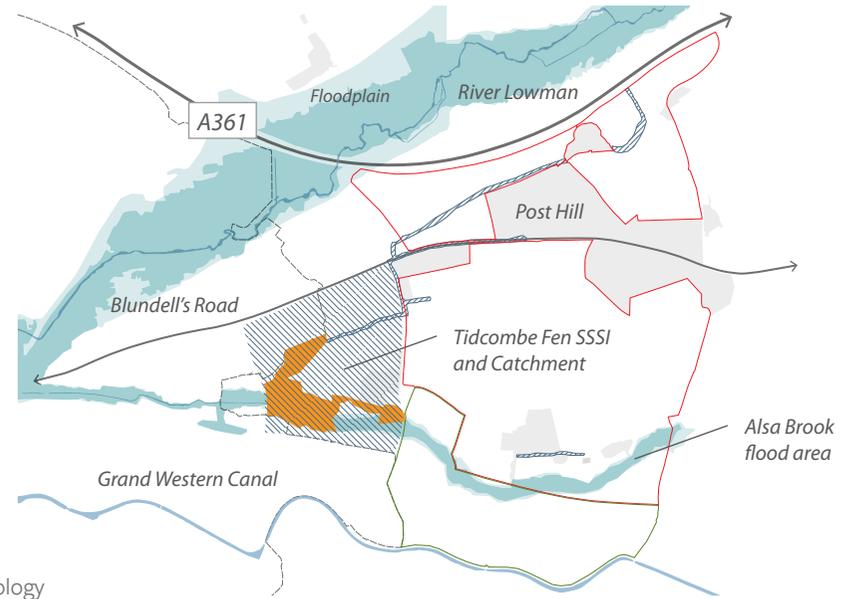
Employment

Tiverton has a range of employment locations and opportunities which vary in scale and sector. These are primarily focused within the urban area of the town. All are easily accessible from the site by a range of modes of transport.

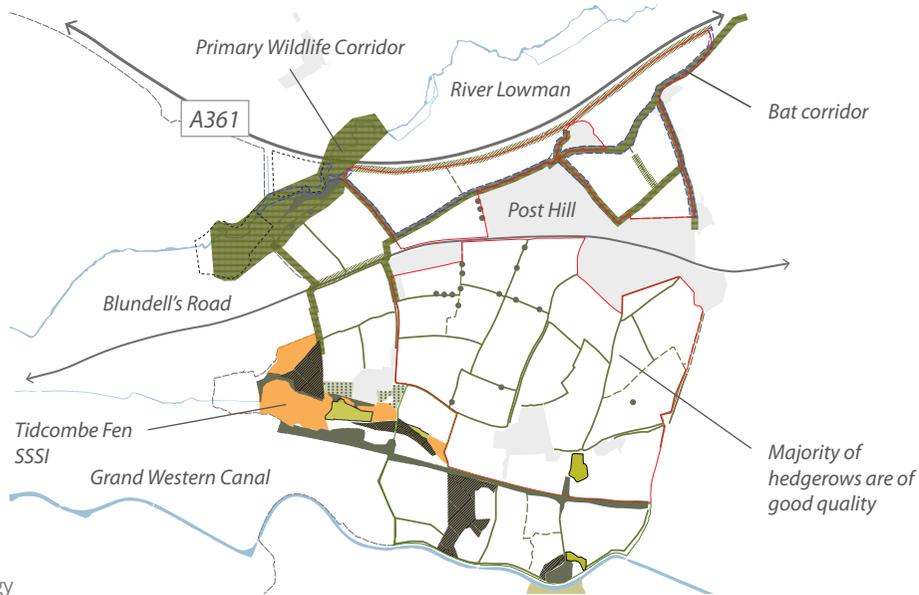
The Council's Employment Land Review provides more information on employment provision and opportunities within the Tiverton area.



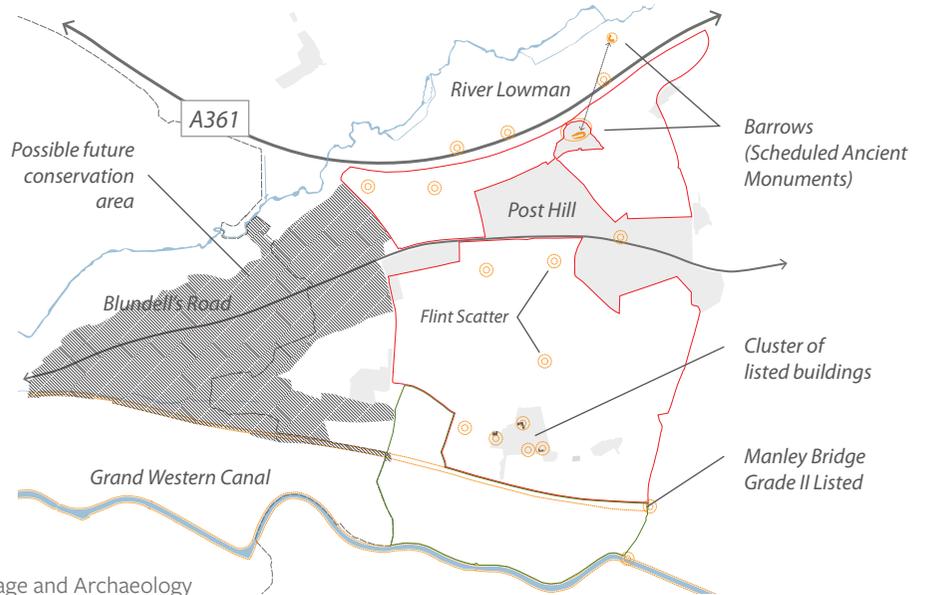
Topography



Hydrology



Ecology



Heritage and Archaeology



2.4 Site Constraints and Opportunities

A suite of studies has been commissioned and undertaken on the principal land holdings and the NHS land comprising Area A. Further work is required on the other areas (Area B) in order to inform stage two of the masterplanning process in the south east area.

Of the studies undertaken (see 1.3 and separate appendix document (section 3), chapter 1) the following are of particular note because they have the most significant impact upon the overall shape of the plan and amount of development that can reasonably be achieved.

Topography

Topography varies greatly across the site, with gradients ranging from 1:5 to 1:20+. The north eastern area falls steeply (between 1:10 and 1:7) but at easily developable consistent gradients. The north western area is relatively level, sloping to the north east down towards the Lowman River corridor and A361.

The southern area (to the south of Blundell's Road) represents the most challenging part of the site. It has the steepest gradients and an undulating and complex land form. Post Hill sits on an intermediate ridge which extends from north east to south west across this area. As a result the area is locally elevated with steep south east facing slopes, falling dramatically at its south western tip (gradients of 1:5). Development on these slopes would be technically challenging, costly to deliver and compromise an important landscape feature of the locality. This masterplan SPD has taken this into account.

Hydrology

The majority of the development site falls outside of areas at risk of flooding. However, the scale of the proposal will have the potential to increase surface water runoff. A series of attenuation ponds across the site are likely to be required as part of a Sustainable Urban Drainage scheme for the site as a whole.

Rivers and Streams

The flood zone associated with the Lowman River is almost entirely outside of the site, with the exception of the far north western corner. The Alsa Brook and its flood plain meanders through the south of the site, north of and broadly parallel with the SUSTRANS route which makes use of the former railway line.

Surface Water

Surface water flooding has been recorded in the northern area of the site, along Blundell's Road and Uplowman Road where topography and boundary features combine to channel and contain surface water run off. Similar circumstances result in part of West Manley Lane also being susceptible to surface water flooding.

Tidcombe Fen

Tidcombe Fen Site of Special Scientific Interest (SSSI) is a wetland habitat and a catchment area - both are very sensitive to hydrological change. This adjoins the site on its western boundary. Any development would need to take account of the unique ecological and hydrological characteristics of the Fen.

Ecology

Ecological constraints across the site will be important in shaping the location, form and density of development.

The surveys undertaken have identified a number of protected and notable species and habitats. Of these the Tidcombe Fen SSSI and its catchment, the Grand Western Canal County Wildlife Site (along part of the southern boundary), dormice, protected birds and bats, badgers and the native species rich hedgerows are most important. A number of veteran trees are within the extensive network of hedgerows and within fields.

Heritage and Archaeology

Two Scheduled Ancient Monuments (SAM's) are recorded within the study area comprising a Neolithic Long Barrow to the north of the site and a Bronze Age Bowl Barrow around 340m to the north. The Neolithic Long Barrow is located within the allocation area. No development is proposed of its site and regard has been had to its setting. There are no Grade I or Grade II* listed buildings within the study area. There are 8 Grade II listed buildings either in the site or in the locality; The 16th Century Pool Anthony Farm House is located on the south western edge just outside the site, the remaining Grade II listed building are located in the south east of the site. Some of the bridges over the former railway line and Grand Western Canal are listed. The Grand Western Canal itself is a designated conservation area. The setting of Knightshayes Park and Garden, within which the site lies is also important. The Blundell's Road area is a non-designated heritage asset that is being considered for Conservation Area status.

Section 2

Achieving a quality place

“The Government attaches great importance to the design of the built environment. Good design is a key aspect of sustainable development, is indivisible from good planning and should contribute positively to making places better for people...”

Paragraph 56
National Planning Policy Framework
Dept. Communities and Local Government
March 2012



3.1 The vision

The overarching ambition of this project is to ensure that an attractive and well-designed garden neighbourhood creates a positive future for the east of Tiverton and Post Hill.

2035. Living in the garden neighbourhood at Post Hill means being able to enjoy the best of Devon rural living, whilst also being close to the heart of Tiverton - which is a couple of miles away. Post Hill is within a lovely rural parkland setting and is a sought after place to live. It is a place that offers a healthy and sustainable lifestyle where local facilities are an easy walk away. Today, the generous green spaces provide a fabulous resource wrapping around the new neighbourhood. The new parkland extends from the Tidcombe Fen and Grand Western Canal to the Lowman River corridor.

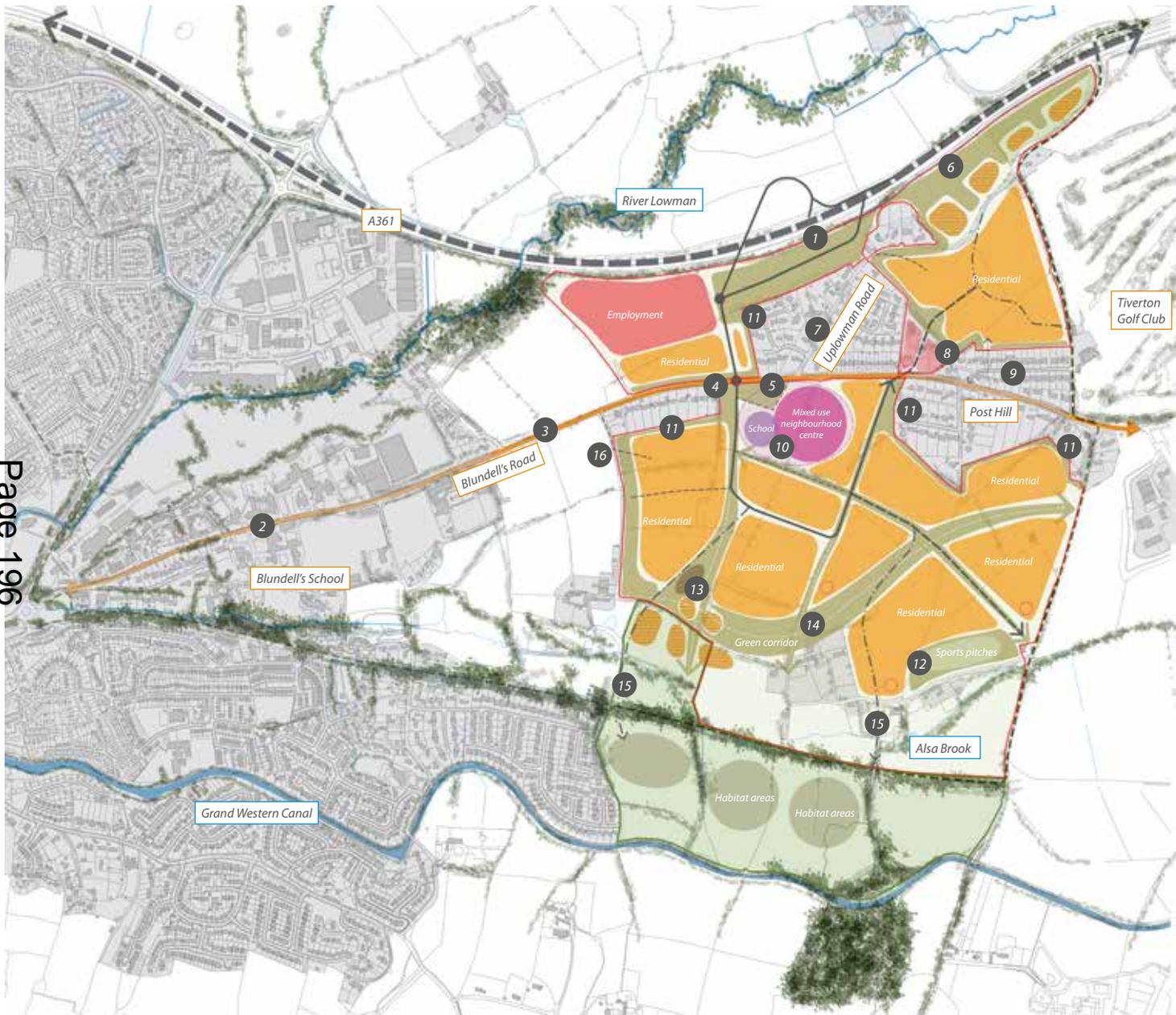
Post Hill is unique because of its outstanding natural assets. The diverse local green spaces which dominate its character have established a great backdrop for the new housing; this has been innovatively designed to be modern, comfortable, in keeping with local traditions and to minimise its impact on the planet.

At Post Hill, it is possible to live a life where all aspects of everyday living are available nearby. Residents can work from home or in one of the many supported local business spaces; go to the local primary or Blundell's School; walk, cycle or catch a bus into town or to the Railway Station for a train to Exeter, Bristol or London; visit the doctor or dentist at the local medical centre; shop at the Post Hill stores and post office; grow food in

the numerous local allotments and community orchards – including the re-established orchards which used to be a feature of the area.

What really sets Post Hill apart is the ability for people to live a modern lifestyle in an area that is part of Tiverton and where a parkland scene meets the countryside. This is made possible by the interplay of the landscape, the country park, and the leafy residential community. New energy efficient homes in Post Hill are sought after by people of all ages. People are choosing to live in what has become a mature and thriving garden neighbourhood set within a quintessentially Devon landscape in the heart of Mid-Devon.

Today's Post Hill is modern, green, vital with local flora and fauna, and really convenient. It is a stunning addition to Tiverton's built environment and today represents a model of how to design a new community in a market town. Its success is borne out by the pride that local residents have in where they live.



Legend

- 1 New junction onto the A361
- 2 Traffic calming at Blundell's School
- 3 Environmental enhancements along Blundell's Road
- 4 New junction on Blundell's Road linking to A361
- 5 Shared space and village green at neighbourhood centre
- 6 Open space with attenuation ponds
- 7 Highway improvements to Uplowman Road
- 8 Possible link to north eastern area
- 9 Possible link onto Fairway
- 10 Mixed use neighbourhood centre including school, shops and employment space
- 11 Green buffer to existing properties
- 12 Sports pitches
- 13 Allotments
- 14 Greenspace on steep ground
- 15 Links to southern area of Green Infrastructure
- 16 Possible secondary link to Blundell's Road

- Eastern Urban Extension Area AL/TIV/1-7
- Green Infrastructure Area AL/TIV/3GI
- Employment
- Employment (care home)
- Satellite Employment
- Residential
- Residential with rural character
- Education
- Open space and landscape
- Mixed use centre
- Playing fields
- Existing development
- Primary route
- Secondary routes
- Tertiary
- Other routes and connections

Above: Plan highlighting the key development concepts

3.2 Development concept

Development concept

A new garden neighbourhood for Tiverton

The concept layout for the new garden neighbourhood has five key land use components which, structured appropriately, will help to achieve the vision and meet the policy objectives. The components are:

A mixed use neighbourhood centre – at the heart of the area, well connected and easily accessible by existing and new residents.

The mixed use neighbourhood centre will have a public space focused around Blundell's Road, with shops, community uses and bus stops for routes into town and to the railway station;

A new primary school with community sports pitch – closely linked to the heart of the neighbourhood and easily accessible. It should be directly related to new areas of public open space for both recreational and learning benefits as well as enabling the school to be safely accessible by foot and bicycle from the whole neighbourhood. It should be positioned on relatively level ground and have suitable areas for sports pitches and play space;

Employment areas – should be on the most level ground and in locations visible from the road, that are directly accessible from the A361 following provision of the new junction. This will help to make them attractive to businesses and avoid lorries needing to gain access through residential areas. Smaller scale 'satellite' light employment should be considered within residential areas in order to provide opportunities for a range of employment types on a mixed use basis. The opportunity for employment in the local centre should also be considered;

Public open space – should be multifunctional – retaining and enhancing the existing valued landscape and ecological features of the area, have informal and formal recreation opportunities and help to create a setting and identity for the new garden neighbourhood. Public open space should be used to link the various parts of the neighbourhood together, encouraging walking and cycling. The green space within the development should be complementary to and link with the parkland area to the south.

Open space is arranged to help retain and enhance the landscape and ecological assets of the site and provide links to the Green Infrastructure area, the Grand Western Canal, county wildlife site and wider landscape. Public open space will create a green network connecting the neighbourhood together and will help to give it a distinct identity.

Residential development – Residential development should be located around the other facilities and amenities in order that jobs, the school, shops and open space are all easily accessible. Development densities should reflect location, constraints and distance to the neighbourhood centre. The arrangement of uses should encourage sustainable modes of transport such as walking cycling and use of public transport;

A variety of housing types and tenures should be provided helping to meet local housing need and ensure that a balanced community is developed.

The concept layout

The layout is arranged around the identified constraints and opportunities with the mixed use neighbourhood centre at the heart of the neighbourhood on Blundell's Road. It is closely linked to the school and has higher density housing, community and employment uses. This location will enable the neighbourhood centre to become a hub and a focus for the community, easily accessible by all. The school is positioned alongside the neighbourhood centre with a green outlook. Open space is arranged so that residents can access the neighbourhood centre and school via green spaces from the whole garden neighbourhood. This will help to encourage walking and cycling rather than car use.

The employment area has been located so that it is in easy walking distance of the neighbourhood centre and can be accessed by vehicle from the new junction onto the A361.

The concept plan provides for approximately 30,000sqm of employment space, up to about 1520 dwellings, a school, open space and recreational areas and a neighbourhood centre with various community facilities and shops.



Above: Aerial photograph highlighting structuring elements of the Post Hill area

3.3 Guiding Principles



This chapter draws together the planning policy aspirations and the key messages from the vision into a series of guiding principles from which the development concept and subsequent masterplan will be drawn.

A. Character

A. Establishing a garden neighbourhood character

The new neighbourhood will be an extension to the existing town and as such it is important that its character and appearance is derived from Tiverton and most especially Post Hill.

An overarching guiding principle is that the new place establishes a mature garden neighbourhood that takes its cues and inspiration from the character of the locality.

A defining character of Post Hill is the simple arrangement of houses in gardens set within a mature landscape setting. Originally developed during the inter war years, many of the design principles that guided the development of the area were taken from those of the garden city movement - these were responsible for new towns such as Letchworth and Bourneville.

More remote housing in the area such as the residential clusters on West Manley Lane have a more traditional rural character.

The challenge is to create a garden neighbourhood that is inspired by the best of the past and yet is relevant to today's requirements - this means creating a place with suitable densities,

guided by sustainable design principles and responsive to the character of the site and the locality.

In order to secure a garden neighbourhood the following characteristics of Post Hill and garden city design should be considered in by designers in shaping the new place:

A1 Structuring elements

A united and cohesive layout - making the most of natural contours and features - a green and leafy open character - a clear overall structure to streets and spaces - views to the surrounding countryside - straight roads - straight hedgerows - consistent and straight building lines - simple rectilinear geometry - the layout of houses creates a rhythm with regular spacing and regular gaps - cul-de-sacs - single and two storey buildings - detached houses in gardens - landscape dominated streets - glimpse views of houses through landscaped front gardens - wide frontage housing - informal layout in some areas - privates lanes - retention of existing routes - detached, semi detached and terraces set in front gardens - grid street patterns - open spaces and recreational areas - tree lined streets - grass verges - existing trees and hedgerows -landscape dominated streets - streets radiating from the centre - meandering country lanes - rural character in more remote areas - individual houses in the countryside -farm complexes on West Manley Lane



Above: Images representing different characteristics of the Post Hill area



3.3 Guiding Principles

A2 Detailed design

Architecture inspired by local design and the arts and crafts movement – gables – garden city aesthetic – white render – red brick – variety in architectural styles – grass verges – tree lined streets – stands of trees – timber – devon banks – hipped roofs – chimneys – beech hedges – stones walls – individual trees – some mature evergreen trees – rural lanes – slate roofs and clay tiles – hedges – painted timber



3.3 Guiding Principles



B. Urban Design - Placemaking and quality design

Building for Life and Safer Places

The new garden neighbourhood should be designed in accordance with best practice in urban and rural design and as such should respond to Building for Life 12 and Safer Places criteria. These represent a tangible measure for determining how successfully a new neighbourhood has been designed with emphasis on creating a community.

Integrating into the neighbourhood

B1 Connections

The scheme should integrate into its surroundings by reinforcing existing connections and creating new ones; whilst also respecting existing buildings and land uses along the boundaries of the development site.

B2 Facilities and services

The development should provide (or be close to) community facilities, such as shops, schools, workplaces, parks, play areas, pubs or cafés appropriate to the scale of the development.

B3 Public transport

The scheme should have good access to public transport to help reduce car dependency.

B4 Meeting local housing requirements

The development should have a mix of housing types and tenures that suit local requirements and need.

Creating a place

B5 Character

The neighbourhood should create a place inspired by the defining characteristics of Tiverton and its immediate surroundings with the aim of achieving a high quality environment.

B6 Working with the site and its context

The scheme should take advantage of existing topography, landscape features (including watercourses), wildlife habitats, existing buildings, site orientation and microclimate.

B7 Creating well defined streets and spaces

New buildings should be designed and positioned with landscaping to define and enhance streets and spaces. They should also be designed to turn street corners well.

B8 Easy to find your way around

The development should be designed to make it easy to find your way around.

Street & Home**B9 Streets for all**

Streets should be designed in a way that will encourage low vehicle speeds and allow them to function as social spaces.

B10 Car parking

Resident and visitor car parking should be sufficient and well integrated so that it does not dominate the street and building frontages.

B11 Public and private spaces

Public and private spaces should be clearly defined and designed to be attractive, well managed and safe.

B12 External storage and amenity space

Adequate external storage space for bins, recycling, vehicles and cycles should be properly considered.

Safer Places

The Planning System and Crime Prevention

The seven attributes of sustainable communities that are particularly relevant to crime prevention are:

B13. Access and movement

The scheme should have well defined routes, spaces and entrances that provide for convenient movement without compromising security;

B14. Structure

The neighbourhood should be structured so that different uses do not cause conflict;

B15. Surveillance

Proposals should ensure that all publicly accessible spaces are well overlooked;

B16. Ownership

The development should promote a sense of ownership, respect, territorial responsibility and community;

B17. Physical protection

The neighbourhood should include necessary, well-designed security features;

B18. Activity

The scheme should be designed to ensure that the level of human activity is appropriate to the location and creates a reduced risk of crime and a sense of safety at all times;

B19. Management and maintenance

The place should be designed with management and maintenance in mind, to discourage crime in the present and the future.

3.3 Guiding Principles

C. Movement - transport

Policy AL/TIV/2 sets out requirements for transport provision to support the proposed EUE. The policy includes provision of a new junction onto the A361 along with other enhancements. Appendix 1 identifies where the masterplan deviates from policy.

Higher levels for the provision of highway infrastructure and routes have been reappraised based upon greater understanding of the likely highway impacts of the development. The revised triggers have set out in 6.1 Implementation and Phasing.

The major change is the lack of provision for a second strategic highway connection (to Heathcoat Way) within this masterplan. DCC Highway Authority has confirmed that with the expected traffic generation and highway mitigation works proposed, this second link is not needed until 2000 houses are completed. This is beyond the amount of development now proposed. A northern route from Gornhay Cross has been investigated, but is not suitable nor deliverable.

With the exception of identified areas of deviation, MDDC expects that policy and the following guiding principles will be met.

C1. The new garden neighbourhood will have a network of movement corridors and connections with the existing town that ensures the promotion of sustainable modes of transport and the reduction of the need to travel by private motor car.

C2. The structure of the development should create a well connected and walkable neighbourhood focused around a mixed use neighbourhood centre. This should include good pedestrian

and cycle connections throughout the area and provision for public transport.

C3. The new neighbourhood should have a clear and legible hierarchy of streets and spaces to respond to different travel and movement needs.

C4. There should be strong links and connections between the existing community, adjacent neighbourhoods, Tiverton town centre and the new community.

C5. Where appropriate streets should be designed to provide pedestrian priority.

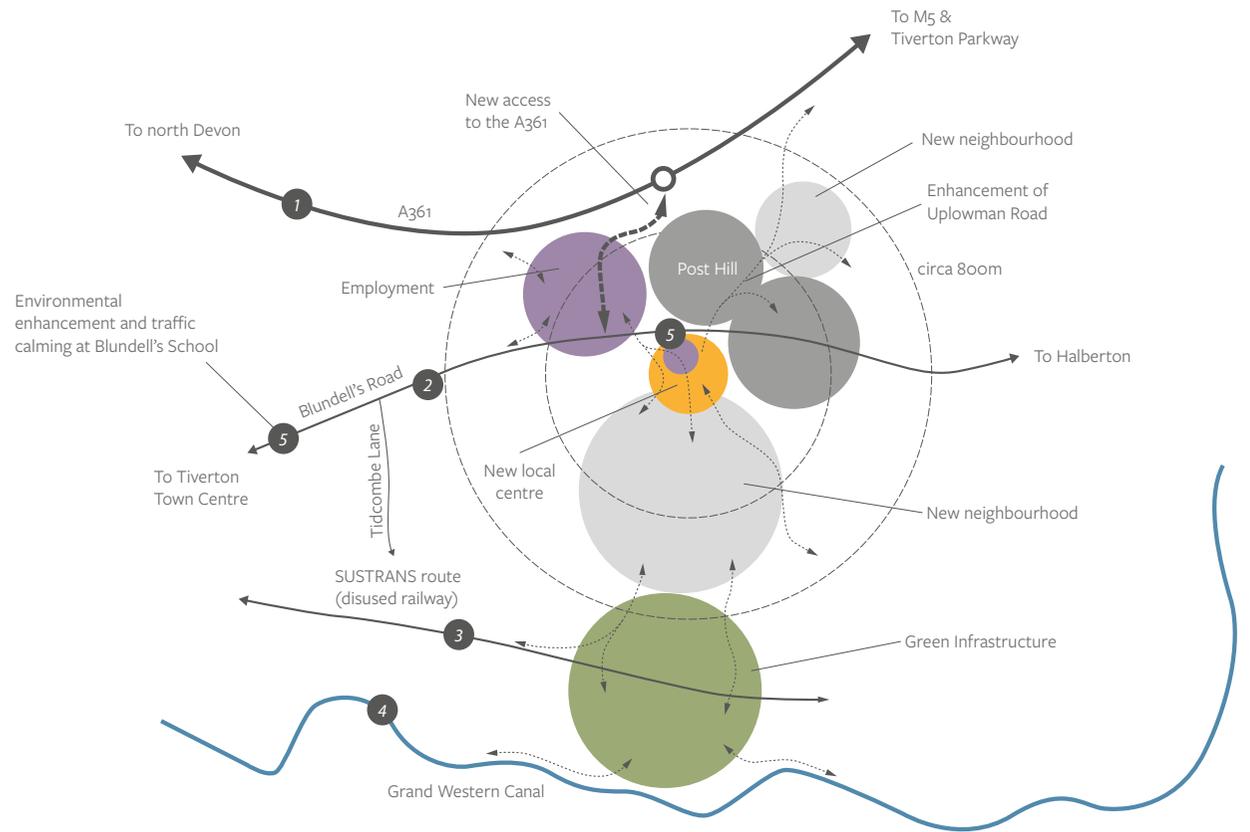
C6: Provision should be made to enhance connections and the ability to travel by cycle.

C7. Environmental enhancements and traffic calming should be introduced on Blundell's Road at the neighbourhood centre. This should include a village green focused on local facilities and give consideration to Tidcombe Lane.

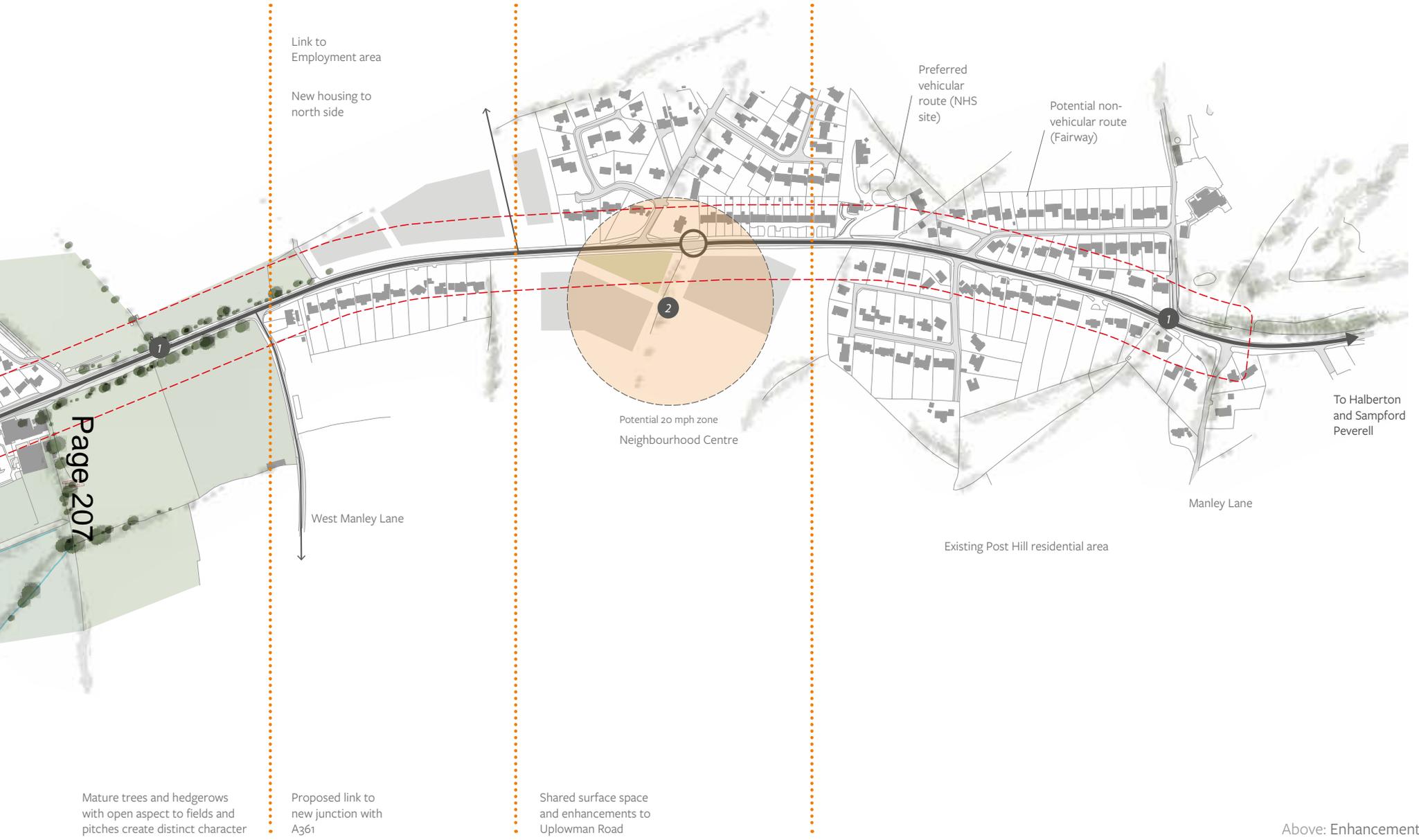


- 1 A361 to North Devon, the M5 and Tiverton Parkway
- 2 Local road connections to Tiverton and villages
- 3 Pedestrian and cycle routes to town and countryside
- 4 Pedestrian and cycle routes to town and countryside
- 5 Shared surface, 20mph zone at key locations

- Neighbourhood centre
- Employment
- Green Infrastructure and open space
- Proposed development
- Existing development
- Existing routes
- Grand Western Canal
- Walk distances
- Connections



Above: A well connected & walkable neighbourhood focused around the neighbourhood centre



Page 207

Mature trees and hedgerows with open aspect to fields and pitches create distinct character

Proposed link to new junction with A361

Shared surface space and enhancements to Uplowman Road

Above: Enhancements to the Blundell's Road corridor

3.3 Guiding Principles

D. Landscape, open space and recreation

Policy AL/TIV/3 sets out policy requirements for green infrastructure including open space, sports and recreation provision and environmental protection and enhancement, to support the proposed EUE. Appendix 1 in the separate appendix document (section 3) identifies these requirements and areas where the masterplan deviates from policy. The new garden neighbourhood will comprise significant areas dedicated to landscape, open space, Sustainable Urban Drainage Systems (SUDS) and wildlife habitats commensurate to the scale of development.

Policy AL/TIV/6 sets out policy expectations for the delivery of infrastructure as part of the overall approach to the phasing of the development. This includes triggers for the provision of areas of green infrastructure. Based upon deliverability and the likely sequence of build, variation from these green infrastructure triggers is required as set out in 6.1 Implementation and Phasing. Proposed areas of public open space within the first phases of the development will need to be supplemented by temporary public open space potentially within the local centre area until main areas of green infrastructure to the south and the school can be accessed and delivered.

With the exception of identified areas of deviation, MDDC expects that policy and the following guiding principles will be met.

D1. The structure of the development should be shaped around the existing character and features of the landscape, reinforcing the qualities of the neighbourhood.

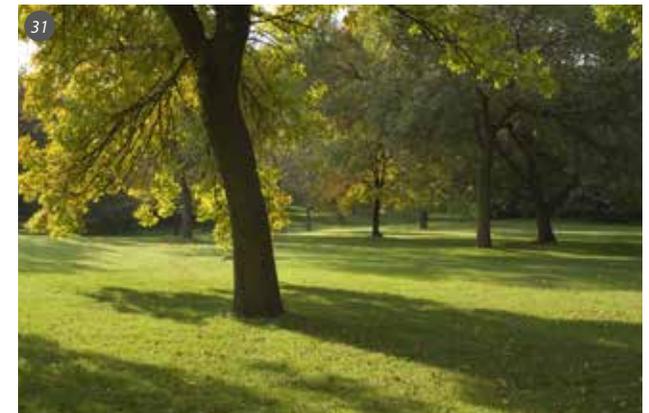
D2. Development should protect and enhance existing important fauna and flora across the site.

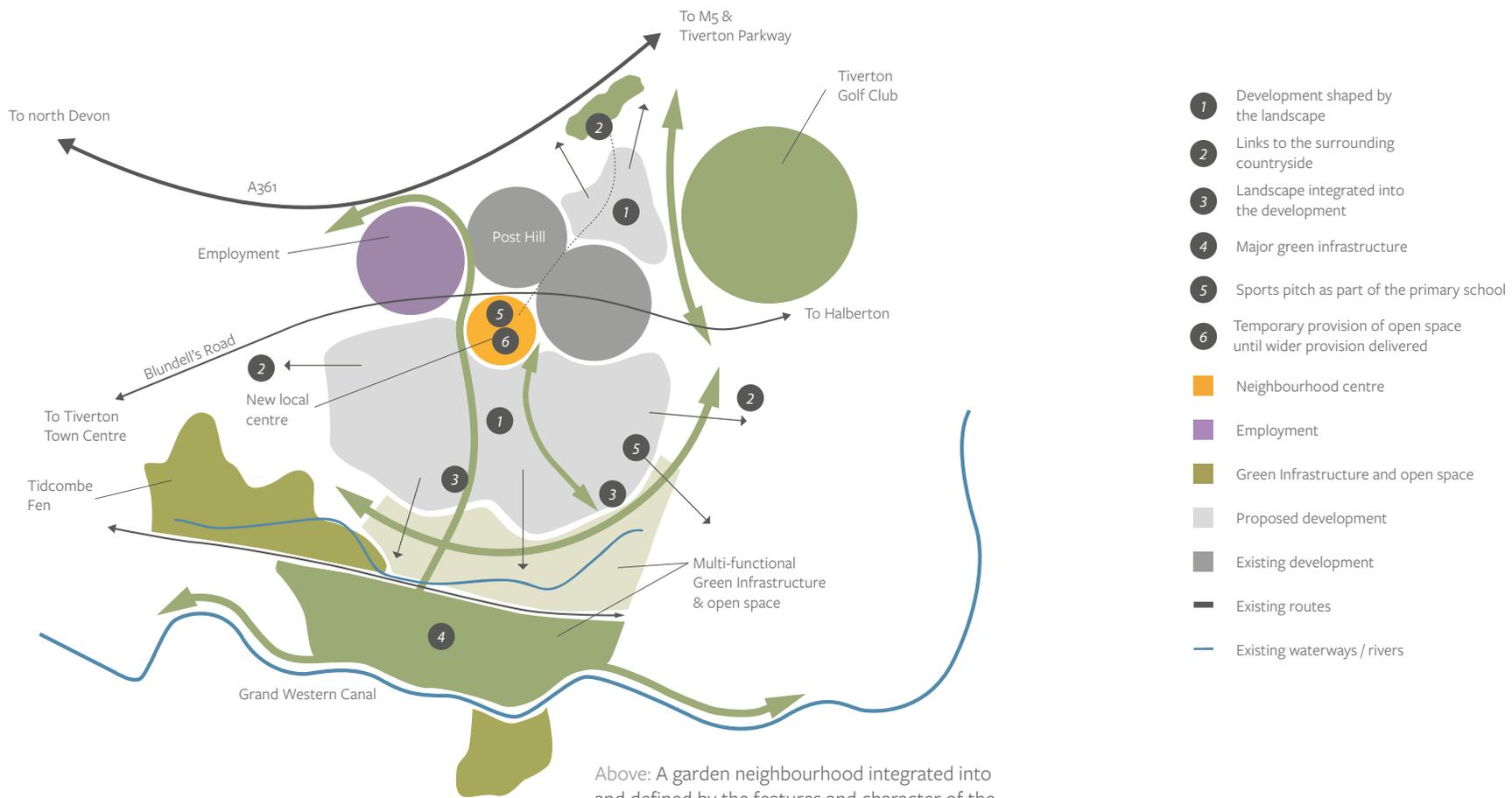
D3. Development should ensure that landscape and open space is integrated into the new community, and is used to connect the various parts of the neighbourhood together, creating strong green links and corridors into the wider landscape.

D4. The landscape and greenspaces should be multi-functional, incorporating water attenuation (SUDS), food growing (allotments and orchards), informal, formal and children's play and recreation.

D5. Provision should be made for appropriate management regimes to be put in place to ensure ongoing maintenance and stewardship of the landscape areas and SUDS.

(Tidcombe Fen, its catchment and buffer zone to the west of Pool Anthony Railway Bridge is identified as GI (Green Infrastructure) in the AIDPD - no change is proposed to this area).





Above: A garden neighbourhood integrated into and defined by the features and character of the landscape. Green links connecting the community and landscape together.

3.3 Guiding Principles

E. Socially equitable

The role of the EUE will be as a new neighbourhood for Tiverton that is self sustaining, respectful of the existing Post Hill community and part of the wider town. The new neighbourhood should be designed to be equitable, balanced and fair.

E1. In the new neighbourhood there should be access for all to employment opportunities - either within the community or within easy reach.

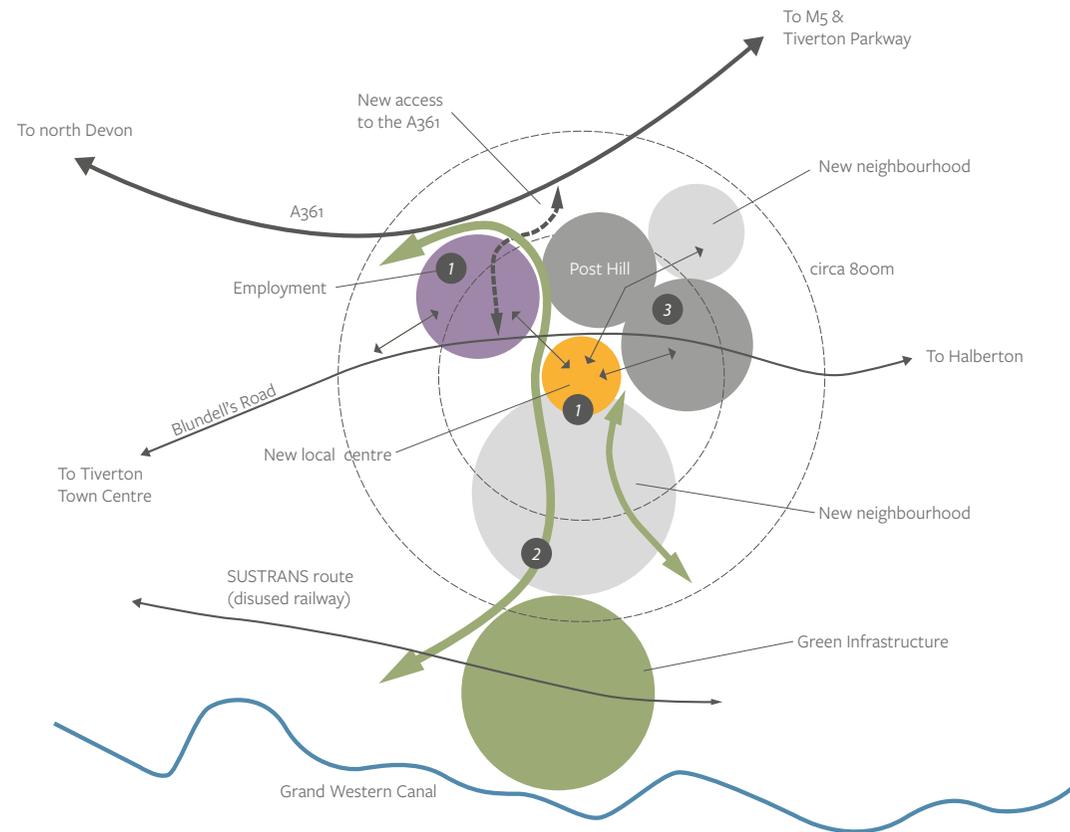
E2. There should be access for all to nursery and primary education. Wider opportunities should be available for secondary, further and adult education.

E3. In the new neighbourhood there should be access for all to health facilities, either within the community or within easy reach.

E4. Open space and landscape should be an integral part of the new community. Opportunities for food growing, safe walking and cycling, sports and play should be available to everybody.

E5. The new neighbourhood should have a suitable a balance and distribution of housing comprising homes of all types and tenures including; affordable housing (target of 35% subject to viability) intermediate (shared equity) and social rented and at least 5 pitches for gypsies and travellers.

E6. The neighbourhood should be designed so that it respects and integrates positively with existing communities and so that they share the benefits.



Above: A balanced neighbourhood where everyone is able to access facilities and services

- 1 Employment, services and facilities accessible by all
- 2 Open space and landscape integrated into the development
- 3 Existing communities at Post Hill

- Neighbourhood centre
- Employment
- Green Infrastructure and open space
- Proposed development
- Existing development
- Existing routes
- Grand Western Canal
- Walk distances
- Connections



3.3 Guiding Principles

F. Economy and employment

Policies AL/TIV/1 & 6 set out a requirement for between 95,000sqm and 130,000sqm of employment floorspace to be provided during the plan period and phased in relation to the delivery of housing and infrastructure.

The quantum of floorspace identified in the policy cannot be achieved whilst also maintaining appropriate levels of residential land and supporting community and transport infrastructure. As a consequence the level of employment has been rebalanced in line with the revised scale of housing and infrastructure.

The Mid Devon Employment Land Review (January 2013), recommends that the EUE provide 10ha of employment land adjacent to the A361. Whilst this is possible in theory, due to the requirements of the A361 junction design and various other site constraints this quantum cannot be met. The reduced level of employment provision (approximately 30,000 sqm) also takes into account the need to create a high quality, attractive approach to Tiverton along the Blundell's Road corridor.

Appendix 1 of the separate appendix document (section 3) identifies where the masterplan deviates from policy. With the exception of identified areas of deviation, MDDC expects that policy and the following guiding principles will be met. Whilst the major of employment land will be provided north of Blundell's Road adjacent to the new A361 junction opportunity also exists to provide small 'satellite' clusters within the proposed residential areas.

It is important that the character and appearance of the employment area contributes positively to the sense of place of the new neighbourhood. The following guiding principles should be considered in shaping the form and character of the area.

Integrating into the neighbourhood

F1 Visibility and connections

The scheme should integrate into its surroundings by reinforcing existing connections and creating new ones; ensuring employment land is located to give businesses the best chance of success. The scheme should provide accessible employment land in a high quality environment at the heart of the community.

F2 Facilities and services

The employment land should be located (or be close to) residential areas, community facilities and amenities in the neighbourhood centre as well as being well connected to services in the wider town.

F3 Public transport

Employment land should be positioned so that businesses will be directly linked to the new and existing communities in order that people can walk, cycle and use public transport to get to work.

F4 Meeting local employment requirements

Enterprises in the new neighbourhood should where possible support existing business and the wider Tiverton economy helping to meet local requirements and need. The new neighbourhood should provide a varied range of employment opportunities from different sectors and at different scales.

Creating a place

F5 Character

The employment area should create a place that is locally distinctive and complements the wider neighbourhood.

F6 Working with the site and its context

Employment land should be located on land that is generally flat to ensure that the larger floor plates of buildings can be accommodated satisfactorily from an environmental and viability perspective.

F7 Creating well defined streets and spaces

New employment buildings should be designed and positioned with landscaping to define and enhance streets and spaces. They should also be designed to turn street corners well.

F8 Easy to find your way around

The employment area should be designed to make it easy to find your way around.

Street & workplace

F9 Streets for all

Streets should be designed to take account of all transport modes and servicing and access requirements within an attractive public realm.

F10 Car parking and servicing

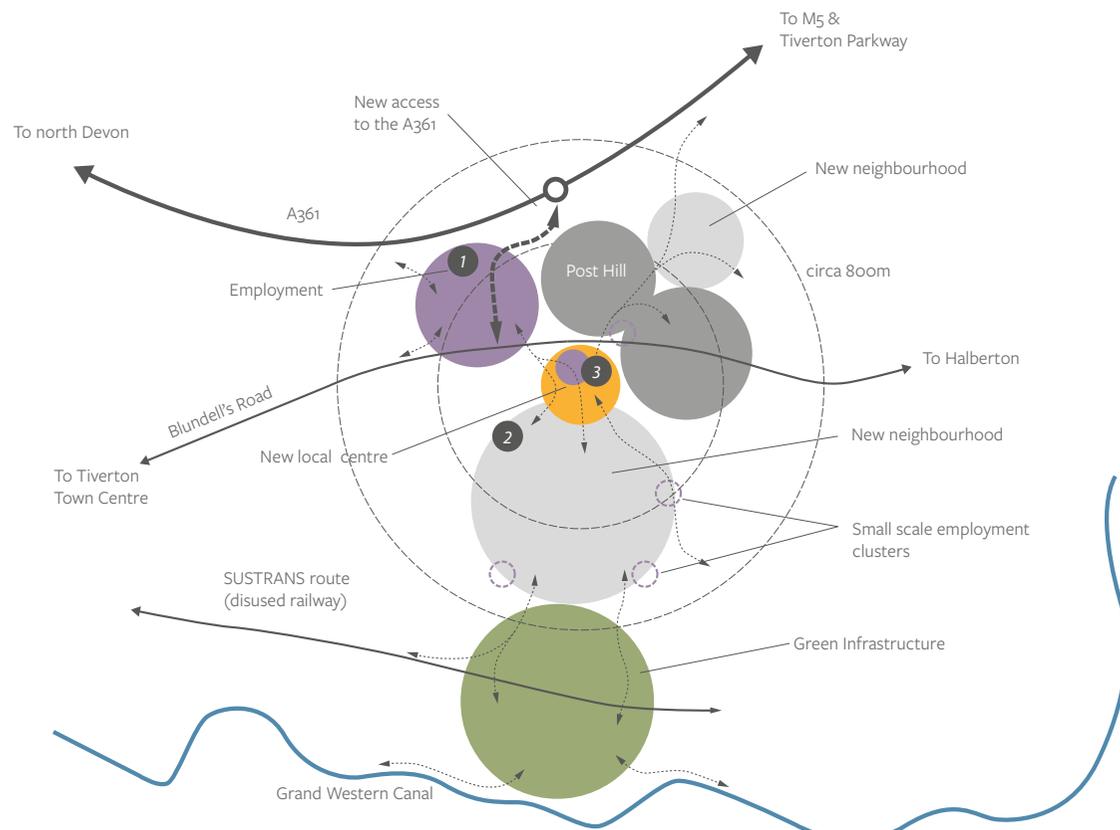
Car parking and servicing arrangements should be sufficient and well integrated so that it does not dominate the street and building frontages.

F11 Public and private spaces

Public and private spaces should be clearly defined and designed to be attractive with well managed and safe service areas.

F12 External storage and amenity space

Adequate external storage space for bins, recycling, vehicles and cycles should be properly considered.



Above: Employment integrated into the heart of the neighbourhood, located to ensure the best chance of success

1 Employment with excellent access in a prominent location

2 Employment directly link to existing and new residential areas

3 Employment at the heart of the new community



Above: Energy and resource efficiency

3.3 Guiding Principles

G. Energy and resource efficiency

Policies AL/TIV/5 and AL/IN/6 set out the requirements for carbon footprint reduction. MDDC expects that policy and the following guiding principles will be met. Appendix 1 of the separate appendix document (section 3) identifies relationship between policy and this SPD.

The policies require that 10% (rising incrementally to 20% by 2020) of the energy to be used in the development comes from decentralised on site renewables and / or low carbon sources.

At the time of preparing this SPD Devon County Council is considering options for the provision of an Energy from Waste facility to serve North and Mid Devon. One option is for this to be provided within the EUE area. The potential for this facility on the site will need to be assessed and if deliverable and viable, associated infrastructure will need to be provided in step with development.

It is anticipated that reduced carbon levels will be achieved across the site through a combination of enhanced building fabric and provision on site renewables e.g. solar thermal and photovoltaic panels, where appropriate.

The new neighbourhood should be designed to be as energy and resource efficient as possible - across the development time line and in full life cycle terms. Planning applications will need to include a sustainability and energy assessment.

G1. Development layout and massing should be designed to maximise solar access for domestic properties - allowing passive heating and maximising natural day lighting.

G2. Streets, blocks, plots and buildings should be designed to maximise the ability for renewable energy technologies to be introduced. This can be achieved for example by providing south facing roof slopes, large south facing gardens and larger windows on the south facing elevations.

G3. Consider the design of streets and buildings to enable passive solar control - avoiding summer overheating and permitting the benefits of solar gain in winter.

G4. Better buildings - consider the adoption of high standards of fabric efficiency to reduce the requirement for space heating.

G5. Consider the introduction of energy efficiency controls so that they are user friendly and can operated as they are intended by residents. For example provision of solar hot water.

G5. A water management strategy should be put in place across the new neighbourhood that ensures that SUDS and attenuation ponds are provided reducing flood risk and retaining run off within the site.

G6. Water harvesting and reuse should considered.

G7. Opportunities to provide permeable surfacing of streets and landscape should be maximised.

G8. Neighbourhood wide initiatives to minimise Co² emissions within the new and existing communities including the development of an Energy from Waste facility should be considered together with the provision of associated infrastructure.

G9. The new neighbourhood should be designed to reinforce the importance of waste recycling and the efficient treatment of waste.

G10. The masterplan should be designed and delivered to ensure that residents and employees are encouraged to travel in the most sustainable ways. This should be achieved by distributing land uses, residential densities, public transport, pedestrian and cycle routes and community facilities in convenient and inter-related locations. Applications will need address these issues and submit a comprehensive travel plan. Electric vehicle charging points should be incorporated. Proposals should also consider a wide range of green travel initiatives. This may include the provision of a car club scheme.

“... by so laying out a garden city that, as it grows, the free gifts of nature - fresh air, sunlight, breathing room and playing room - shall be still retained in all needed abundance.”

Page 113
Garden Cities of To-morrow
1902 Edition
Ebenezer Howard



Legend

- | | |
|------------------------------|----------------------------------|
| A A361 | Residential |
| B Blundell's Road | Residential with rural character |
| C Post Hill | Employment |
| D Grand Western Canal | Employment (care home) |
| E Blundell's School | Mixed-use |
| F Tiverton Golf Club | School & sports pitch |
| G River Lowman | Landscape |
| H Als Brook | Fen, catchment & buffer zone GI |
| I Tidcombe Fen | Area B |

Urban interventions

- 1** Neighbourhood centre
- 2** Primary school
- 3** Community facilities and shops
- 4** Employment at the heart of the community
- 5** Employment uses
- 6** A new junction onto the A361
- 7** Residential development at a varied densities
- 8** A clear hierarchy of streets and spaces
- 9** Possible location for Energy from Waste plant
- 10** Possible location for gypsy / traveller pitches
- 11** Preferred vehicular link through NHS site
- 12** Potential non-vehicular link through Fairway

Landscape interventions

- 13** Pedestrian and cycle connections
- 14** The Sustrans cycle route
- 15** Green Infrastructure area
- 16** Wetland habitat areas
- 17** Woodland
- 18** Sports and recreation areas
- 19** Children's play areas
- 20** Green corridors and routes formed around retained hedgerows
- 21** Landscape community hubs - a focus for the multi-functional landscape
- 22** Landscape spine
- 23** Buffer to Post Hill properties
- 24** Neighbourhood allotments
- 25** Community orchards
- 26** Attenuation ponds throughout the area

800m from neighbourhood centre



4.1 Masterplan

Masterplan

The Masterplan provides a spatial representation of the Tiverton's new garden neighbourhood at Post Hill – a physical illustration of how the character areas, streets, parks and open spaces, land uses and transport corridors could be arranged in order to ensure that the vision, concept and guiding principles are delivered in the right way.

The plan is designed around a number of structuring elements that will define the quality and sense of place of the new neighbourhood. These are shaped and knitted together by the guiding principles.

In respect of Area B there will be a further stage in the development of the masterplan following more detailed survey and analysis of that part of the allocation. Refer to 1.7 Design process.

Terms of the masterplan

The plan is illustrative and as such is designed to provide guidance about the quantity and location of different land uses as well as where key connections should be made throughout the neighbourhood. The plan is intended as a flexible tool so that the shape of different aspects of the new garden neighbourhood can be designed in many ways to respond to different circumstances. The actual position and alignment of routes, shape of blocks, streets and open space will of course vary from what is illustrated in the plan.

A neighbourhood centre*

The plan is focused on a mixed-use centre at the heart of the neighbourhood. The centre would be an important focal point for life in the area, it could comprise a new primary school, shared community facilities, crèche, café, bar, hair dressers, hot food takeaway, shops, some smaller scale employment opportunities, new homes and public open space - this would include formal sports and recreation provision. The new 'village green' would provide a defined entrance into the area and a respectful landscape adjacent to existing houses on the north side of Blundell's Road. With a combination of town houses and apartments, the residential density here would be in the region of 40 - 50dph. The neighbourhood centre would also be a hub for bus services into the town centre.

Walkable neighbourhood

The residential community has been designed so that all homes are in easy walking distance of the neighbourhood centre, other community amenities and facilities and in turn to the wider town. Most homes are within 800m or a 10 - 15 minute walk of the neighbourhood centre and employment opportunities on the north side of Blundell's Road, and within a 2 minute walk to local allotments, parks, play areas and orchards. There are safe and attractive parkland and green street and lane walks linking residential streets to all amenities and public transport facilities. The plan ensures that Blundell's Road, the Great Western Canal and the cycle routes into the town centre are all easily accessible. The plan sets out to promote the walking, cycling, and the use of public transport ahead of car use.

An important structuring element of the walkable neighbourhood is that the neighbourhood centre and employment areas at the heart of the new community have strong and easy connections to the whole of the new neighbourhood and the surrounding countryside.

A garden neighbourhood

The overall design of the masterplan is based around a series of design principles that seek to create a new garden neighbourhood with a character and appearance inspired by the defining characteristics of Tiverton and its immediate surroundings and that is reminiscent of a garden city environment. Whilst the plan is designed around modern requirements and standards (including making efficient use of land for the provision of new homes) and takes account of sustainability objectives; it seeks to establish a firm foundation for a place that is green, leafy with generous private gardens, making the most of sunlight and natural daylighting, and creating opportunities for community recycling and food production.

The plan has been designed so that all of the developed areas have an easy, safe and attractive relationship with the beautiful surrounding Devon countryside.

A hierarchy of streets

The masterplan illustrates a clear hierarchy of streets, lanes, tracks, footpaths and public open spaces that connect the neighbourhood centre and employment area with the

4.1 Masterplan

surrounding residential areas and in turn, to the parkland that forms an integral and defining part of the new community.

The principal street in the area hierarchy would be Blundell's Road with a secondary vehicular 'loop' in the vicinity of the neighbourhood centre providing access to the residential areas in the southern part of the site. An access from Blundell's Road



to the north connects through the employment area to a new junction onto the A361. A series of streets radiate out from the neighbourhood centre to the parkland area in the southern section of the site and there is also a connection from the centre to new housing in the northern area along Putson Lane and through the former NHS site. This framework of streets provides the structure for the new place - a network of inter-connected residential streets forms the finer grain of the residential community.

Clarity in the hierarchy of street types is important as it establishes a richer townscape and landscape that is easier for people to orientate within (find their way around). The resulting plan is permeable; providing lots of choices for pedestrians, and legible; creating memorable and recognisable public spaces.

Changes in density

Changes in density are an important structuring element that contributes to the sustainability of the settlement, reinforces the sense of place of character areas across the neighbourhood, and ensures that there is a variety and balance of housing types throughout.

In general, the neighbourhood is designed so that the highest density residential areas are closest to local facilities, the school, employment opportunities and public transport services, and the lowest density areas are furthest away. In response to this simple strategy, the neighbourhood has been designed assuming

that densities in the neighbourhood centre would be about 40 - 50dph and that densities would reduce outward towards the parkland to densities of around 15 - 20dph in some edge of neighbourhood areas in the southern section of the site. Many of the intermediate housing areas would comprise residential streets with densities of between 25 and 40dph.

The proposed densities would enable a townscape and landscape to be structured with a strong parkland character.

A new parkland

The new parkland open space will provide a defining characteristic of the garden neighbourhood and for this reason the masterplan has been designed so that the residential communities feather into it and are intertwined with it.

The parkland would have the character of a country park providing a landscape resource comprising: wetland areas; woodland areas; areas of pasture; retained veteran trees; new tree planting in streets, open spaces and in the parkland; flat landscaped areas and steeper areas such as the landscaped spine that cuts through from south west around Tidcombe Fen to the north east towards Manley Lane; attenuation ponds and other SUDS features; allotments and orchards throughout the parkland providing easy access from all parts of the community; informal areas for play and recreation; enhanced biodiversity; and retained ecology and enhanced hedgerows.

The masterplan identifies the Tidcombe Fen, its catchment and buffer zone to the west of Pool Anthony Railway Bridge as Green Infrastructure. There is no change proposed to this area.

Some areas of the park will feel remote from housing and others will be overlooked directly. The new parkland will provide a fabulous resource for the community and the town, as well as a beautiful setting for the new neighbourhood.

Making the most of local features

The masterplan has been designed so that the new place is responsive to the specific character of Tiverton and its locality. There are many features of the site that have been incorporated into the masterplan to ensure that the new community is established out of the character and qualities of the existing place. This is important in creating a richer environment, making the most of existing assets and so that the collective community memory that knows the area well and has done for many years, is a factor that shapes the new community. The proposal will also need to respect the existing dwellings in Post Hill and on West Manley Lane.

Establishing a new community of the scale that is proposed can be a challenging process involving significant change – ensuring that there is some continuity and that existing features of the landscape are maintained and respected is an important aspect of the plan.

The plan has sought to work with many of the existing features and designations that characterise the site. These include: the setting of Pool Anthony House and other listed buildings; the possibility of a new conservation area centred around Blundell's Road; the setting of existing houses and gardens in Post Hill; the setting of the long barrows around the northern area of the site; water courses; local landform; the network of hedgerows and veteran trees; wetland areas; features of local historic significance such as the bridge over the former Bristol and Exeter Railway; the Grand Western Canal; buildings on Manley Lane, West Manley Lane, Upwoman Road and Blundell's Road; and the historic drovers track.

Local employment

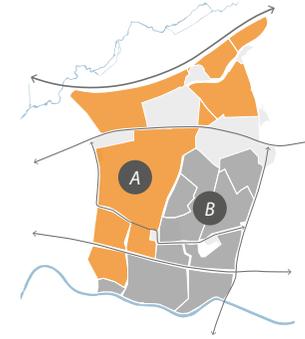
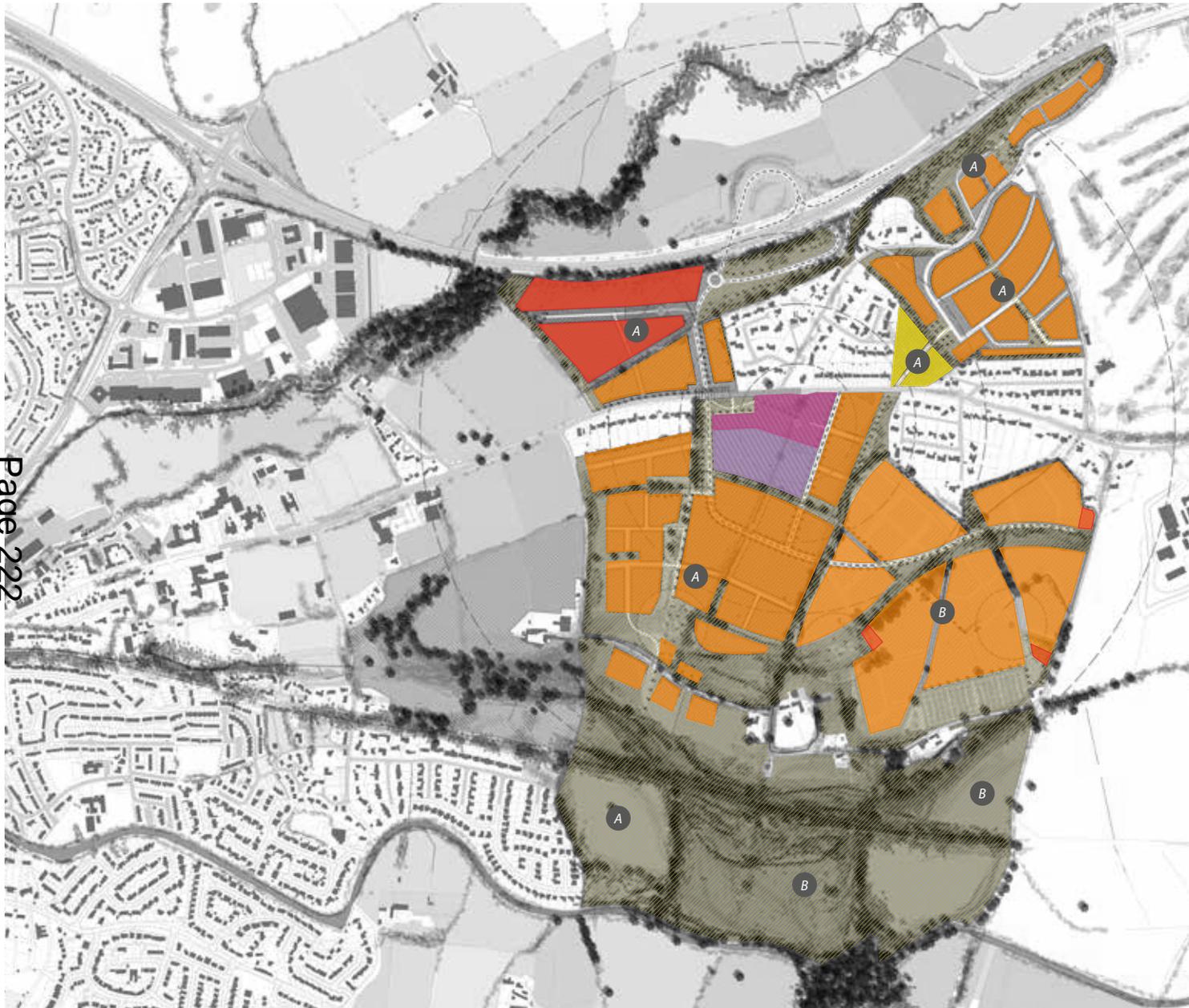
The masterplan has been structured in order that an appropriate level of employment space is at the heart of the community so that; it is in close proximity to the neighbourhood centre, can be easily accessed from the A361, is visible from the A361, is on level ground, is close to facilities at the neighbourhood centre to bus routes connecting with the town centre and other parts of Tiverton.

The plan provides for different employment types and opportunities in part of the area north of Blundell's Road and south of the A361. Provision has also been made for some employment space within the neighbourhood centre, employment associated with a care home on the NHS land and as smaller satellite provision in residential areas.

A sustainable settlement

The plan has been shaped so that it provides a suitable foundation for achieving a sustainable development form. This is manifest in a number of the key characteristics of the proposed neighbourhood:

- The land uses are distributed so that the neighbourhood centre and employment area are in easy walking distance of housing;
- The neighbourhood centre is well served by buses;
- A school and community facilities are at the heart of the neighbourhood;
- Housing is arranged in different densities with the highest near the centre and lowest furthest out;
- Opportunities are provided for community food production close to home;
- Play, sports pitches and attractive parkland areas provide the basis for a healthy lifestyle;
- Proposals to enhance biodiversity throughout the plan area are numerous;
- Sustainable water management is proposed;
- Streets, plots and open spaces have been designed to maximise the potential to utilise sunlight and daylight positively in the design of the new neighbourhood;
- Opportunities for community energy and sustainable waste disposal are under consideration; and
- The site is in a sound and sustainable location that is well connected to the wider community of Tiverton and beyond.



-  Neighbourhood centre, shops and community and employment
-  Employment
-  Employment (care home)
-  Education
-  Residential
-  Satellite employment
-  Open space and landscape
-  Area A
-  Area B



4.2 Amount and use (land use budget)

Tiverton Eastern Urban Extension						
Area B						
Area A	Phase 1a	Phase 1b	Phase 1c	Total	Total	Total
Residential	5.9ha	10.6ha	9.54ha	26.04ha	16.26ha	42.3ha
Avg resi density 36dph	200 dwellings (34dph)	445 dwellings (42dph)	324 dwellings (34dph)	969 dwellings	553 dwellings (34dph)	1522 dwellings *
Employment	4000sqm (circa 0.8ha @ 50%)	8,500sqm (circa 1.7ha @ 50%) [§]	15,000sqm (circa 3ha @ 50%)	27,500sqm (5.5ha) [§]	2,500sqm (0.5ha)	30,000sqm (6ha) [§]
Neighbourhood centre	n/a	0.5ha	1.5ha [‡]	2ha [‡]	n/a	2ha [‡]
School (inc sports pitch)	n/a	1.93ha (land / delivery of 1 st part)	(build out continues)	1.93ha	(build out continues)	1.93ha
Total	6.7ha	14.73ha	14.04ha	35.47ha	16.76ha	52.23ha
Allotments	n/a	n/a	2.25ha	2.25ha	0.2ha	2.45ha
POS including children's play	1ha	5.38ha	19.74ha	26.12ha	28.33ha	54.45ha
Formal sports	0	On school site (circa 0.4ha) accounted for above	0	0	2.23ha	2.23ha
Water attenuation	1ha	0.4ha	0.78ha	2.18ha	0.72ha	2.9ha
Infrastructure	2ha	1.5ha	2.6ha	6.1ha	2.06ha	8.16ha
Total	4ha	7.28ha	25.37ha	36.65ha	33.54ha	70.19ha
Grand total	10.7ha	22.01ha	39.41ha	72.12ha	50.3ha	122.42ha

* Target quantum. Actual number delivered may vary subject to detailed understanding of constraints. Figure includes 5 gypsy pitches. More information on phasing is at 6.3 Approach to development phasing

[§] Assumes 2500sqm care home on NHS land

[‡] Refer to 4.4 Land use. Quantum to be reviewed subject to market demand



- 1 New junction to A361
- 2 Neighbourhood centre potential zomph zone.
- 3 Blundell's School potential shared surface zomph zone
- 4 Grand Western Canal tow path
- 5 Sustrans cycle route
- 6 Environmental enhancement and traffic calming on Blundell's Road & Tidcombe Lane
- 7 Link to employment area from Blundell's Road
- 8 Enhancement to Blundell's Road roundabout
- 9 Enhancement of Uplowman Road & Putson Lane
- 10 Preferred vehicular link through the NHS site
- 11 Proposed non-vehicular link through Fairway to north eastern site*
- 12 Secondary connection onto Blundell's Road via the end of West Manley Lane

- Primary route (existing)
- - - Secondary route (existing)
- Secondary route (proposed)
- Tertiary route
- Green route
- ... Footpaths
- - - Cycle routes



4.3 Movement

The plan for transport and movement is to encourage walking, cycling and public transport ahead of car use, whilst ensuring that the masterplan is pragmatic and designed to ensure that cars are catered for sensibly in the illustrative layout.

The masterplan is based upon walkable neighbourhood principles where all facilities are within easy reach of all houses. The development is focused upon the neighbourhood centre and buses connected to the wider town will be available from here.

The neighbourhood is positively connected to a number of strategic pedestrian and cycle routes. The development site is in an accessible location in relation to amenities and facilities in the Tiverton and as such is considered to be in a sustainable location.

A new junction is proposed from the A361. This will provide additional capacity and enable access to the employment sites in the north west of the area. Its early delivery (in part) can also act as a primary access for construction vehicles (The primary construction access from the A361 will be subject to highway safety assessments).

Strategic transport proposals

Policy AL/TIV/2 sets out strategic transport proposals that are required in support of the new neighbourhood. The masterplanning process has identified a number of interventions that need to be carried out to make the development acceptable and ensure that transport is properly managed on site and in the surrounding area.

This work has identified the need for:

- A new junction onto the A361;
- Traffic calming and environmental enhancement of Blundell's Road including potential shared surface and 20mph zones at Blundell's School and the neighbourhood centre, study area to also include Tidcombe Lane;
- Provision of bus, pedestrian and cycle routes;
- Cycle and pedestrian links to the Railway Walk, Grand Western Canal and nearby public rights of way;
- Bus service enhancements;
- New and improved off site pedestrian and cycle links including improvements to the wider green infrastructure network;
- Improvement to roundabouts on Heathcoat Way;
- Enhancements to M5 Junction 27 (signalisation).

Alternative routes for strategic access have been investigated and found to be not suitable nor deliverable.

With the level of development proposed the following are not required:

- A new access road linking to Heathcoat Way;
- Closure of Blundell's Road to through traffic other than to cycles and buses.

MDDC will expect those proposals that are required to be implemented in accordance with agreed trigger points as set out in 6.1 Implementation and phasing.

Blundell's Road and Tidcombe Lane

The masterplan proposes a number of traffic calming and environmental enhancement measures to improve transport management along Blundell's Road. These are identified in 3.3 Guiding principles - movement and 5.1 Reinforcing the structure.

Local connections

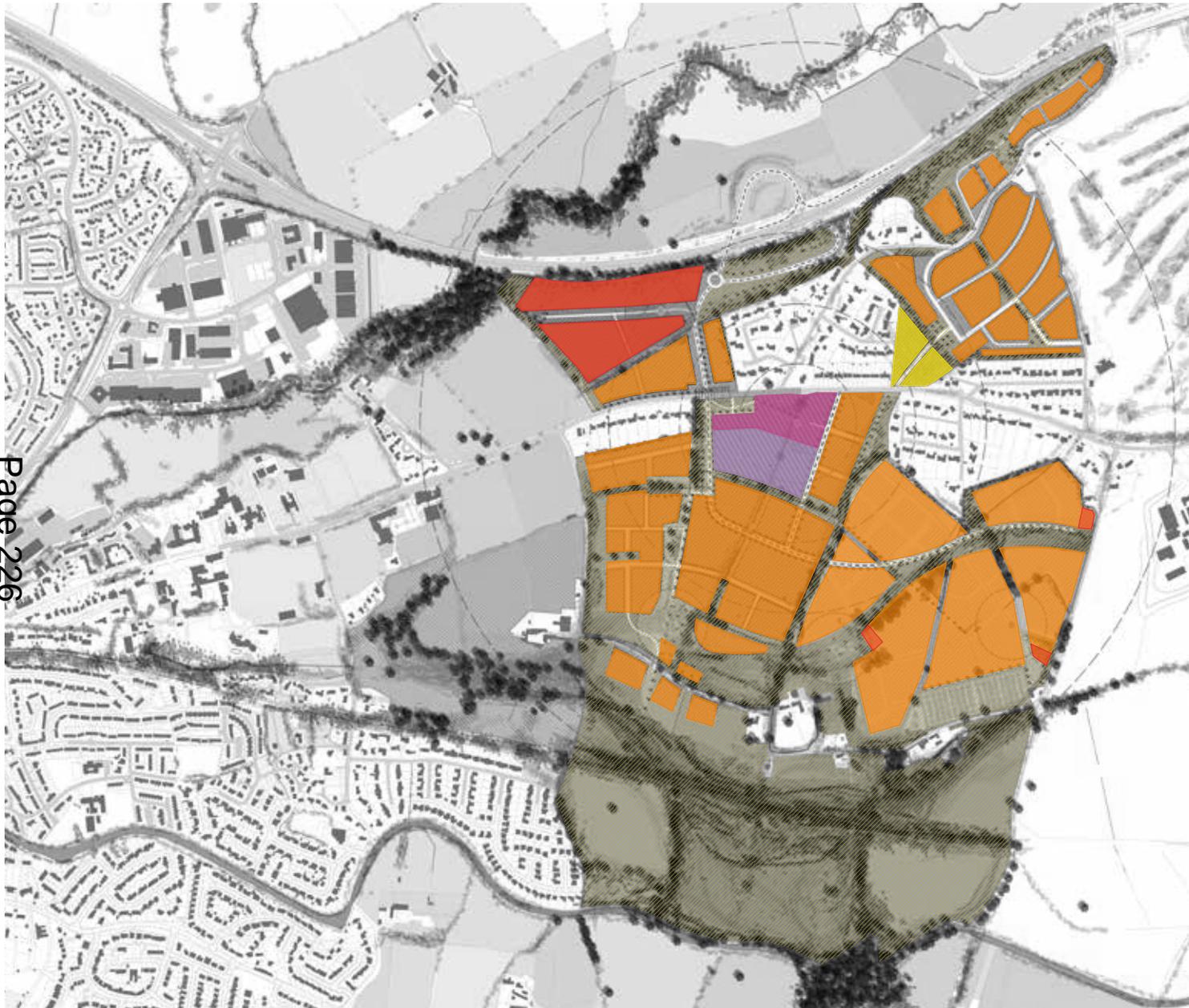
There are a number of new local connections and works that will help to link the new neighbourhood with its surrounding area and in turn the wider town. These will reduce the impact of the development and include:

- Enhancement of Uplowman Road and Putson Lane;
- Provision of a vehicular link through the NHS site (preferred);
- Provision of a non vehicular link from the north east parcel through Fairway to the neighbourhood centre*;
- A secondary access to Blundell's Road via the end of West Manley Lane;
- New pedestrian links between Railway Walk, Grand Western Canal, nearby rights of way and the new neighbourhood;
- Changes to Manley Lane and West Manley Lane to restrict access;

Policy

There are a number of other policy requirements of AL/TIV/2 which MDDC will expect developments to bring forward as part of their proposals. These include improvements to walking, cycling and public transport provision, as well as travel plan implementation to reduce carbon footprint and air quality impacts.

* Not required once NHS link provided



- Neighbourhood centre, shops and community and employment
- Employment
- Employment (care home)
- Education
- Residential
- Satellite employment
- Open space and landscape



4.4 Land use

The masterplan defines a new development that will establish a well-balanced community that is positively integrated with existing facilities in the town.

The garden neighbourhood will include:

Residential

A mix of housing types and tenures including affordable housing at a variety of densities, associated community infrastructure, at least five gypsy and traveller pitches will also need to be located within the site as part of the overall affordable housing provision. An affordable housing target of 35% will be sought, subject to viability. Whilst the average residential density is calculated at 37dph (giving circa 1520 units), housing will be developed at different densities across the area in response to site circumstances. For example housing in the neighbourhood centre will be developed at densities of between 40dph and 50dph, whilst housing on the park edge is likely to be developed at around 15 - 20dph. The number of houses should be considered as a target that may be less subject to a more detailed understanding of constraints;

Employment

Areas for new and relocated businesses which will principally fall within uses classes B1a and B1c are proposed within development parcels with a typical plot ratio of between 40% and 50% (achieving circa 25,000sqm). In addition a further 5,000sqm of space is envisaged in small clustered satellite areas within the neighbourhood centre and residential areas and through the provision of a care home on the NHS site (2,500sqm).

Neighbourhood centre - mixed use (primary school and community buildings)

Primary school site of 1.93ha and mixed use community centre with local shops, community buildings and facilities of 2ha. There are also opportunities for small scale employment within the centre of the community and some residential on upper floors on a mixed use basis.

Uses / facilities within the centre could include a community hall and meeting rooms, local health care (such as a GP outreach surgery), café/ bar, pub, convenience store and other local shopping, crèche, hairdressers and hot food takeaway. Recreation, formal sport and play facilities will also be expected within the area. (This list is not intended to be exhaustive. Other community uses and facilities will be considered).

The scale of this provision is in accordance with the requirements of policy AL/TIV/4 and assumes opportunities for shared sports facilities (at least 90m x 45.5m[§], under 17 / under 18 / senior football pitch) between the school and the community. This will need to be clarified once arrangements for the school are known. It is also proposed that community needs in terms of the land take for community buildings and facilities be reassessed in relation to other uses during phase 1c and at the start of phase 2a. In the event that the full 2ha of land allocated for community uses is not required*, alternative uses including additional small scale employment and residential will be considered.

Green infrastructure

A new multi functional parkland comprising - community orchards and allotments, informal publicly accessible areas, children's play areas, habitat areas and water attenuation ponds;

Energy from Waste

The site is considered in the Devon County Council Waste Local Plan as an option for the location of an energy from waste facility. If selected it is most likely that it would be located in the employment area towards the north west of allocation, close to the new A361 junction.

Refer to 4.2 Amount and use

* In assessing the extent of community uses that are required deliverability and market demand will be important considerations

§ Dimensions exclude run off area



- 1 Landscape and community hub
- 2 Green links and connections
- 3 Allotments and orchards
- 4 Play areas
- 5 Retained hedgerows and trees
- 6 Sports pitches
- 7 Enhanced and new areas of woodland
- 8 Retained and enhanced wetland and marshy areas
- 9 Open parkland on steep ground
- 10 Areas for informal recreation
- 11 Attenuation pond



4.5 Landscape and public open space

Green Infrastructure

The principal defining feature of the garden neighbourhood will be the extent and quality of public open space within the developed areas and the extensive multi-use parkland that wraps around the southern boundary of the scheme incorporating the area of Green Infrastructure identified in policy AL/TIV/3.

The developed area will be characterised by a green and leafy character inspired by garden city principles of placemaking. As such the area will comprise tree lined streets, streets with front gardens, green lanes, allotments, orchards, wooded areas, formal green spaces, retained species rich hedgerows and veteran trees, incidental green spaces, and attenuation areas.

Public open space will provide a multi-functional green space in easy reach of all homes in the garden neighbourhood and existing communities. The extent of greening across the area is in response to the identified landscape and site features that currently exist and other constraints such as topography. The majority of retained hedges have been incorporated into public open space. Some hedgerows may need to be removed within developed areas but should be retained wherever possible and integrated into the development.

The open space is proposed to take the form of a parkland setting and will be a local landscape that has a variety of complementary recreational and ecological functions:

- Wetland areas;
- Woodland areas and retained veteran trees;
- Areas of pasture;
- Flat landscapes and steeper areas;
- Areas for informal recreation;
- Attenuation ponds and other SUDS area;
- Allotments and orchards;
- Formal and informal play areas – including a NEAP, LEAPS and LAPS;
- Sports pitches*;
- Enhanced biodiversity;
- Enhanced hedgerows including historic and species rich hedgerows;
- Green corridors.

Strategic planting

There will be a number of areas of strategic planting across the allocated area. These include:

- Landscape buffer planting to the A361;
- Landscape buffer planting between existing housing at Post Hill and proposed residential areas;
- Planting around the proposed junction onto the A361;
- Strengthening of hedgerows and other landscape features and habitats;
- Areas of ecological mitigation.

Tidcombe Fen

Tidcombe Fen is a Site of Special Scientific Interest (SSSI). It is a rare type of wetland habitat comprising a variety of plant species and rare fauna.

The masterplan seeks to take account of the environmental and ecological sensitivities of the Fen. It will need to be demonstrated at the application stage that the SSSI and its hydrological catchment area will not be adversely affected by development. The plan is designed in mind of the Fen, its catchment, the Alsa Brook and the marshy areas to the south of the site that feed the wetland.

Planning applications will be expected to demonstrate how green infrastructure areas will be managed and maintained. Specific arrangements may vary according to the type of space and its function but are expected to include access and management agreements with landowners and the creation of a management company. Local organisations may also come forward to manage some of the areas for public benefit.

It is important that the delivery of green infrastructure areas takes place in step with the development. 6.1 phasing and implementation deals with this issue. Due to the likely sequence of phasing, temporary public open space will need to be provided at the neighbourhood centre or in an alternative location until the permanent areas to the south can be delivered and accessed.

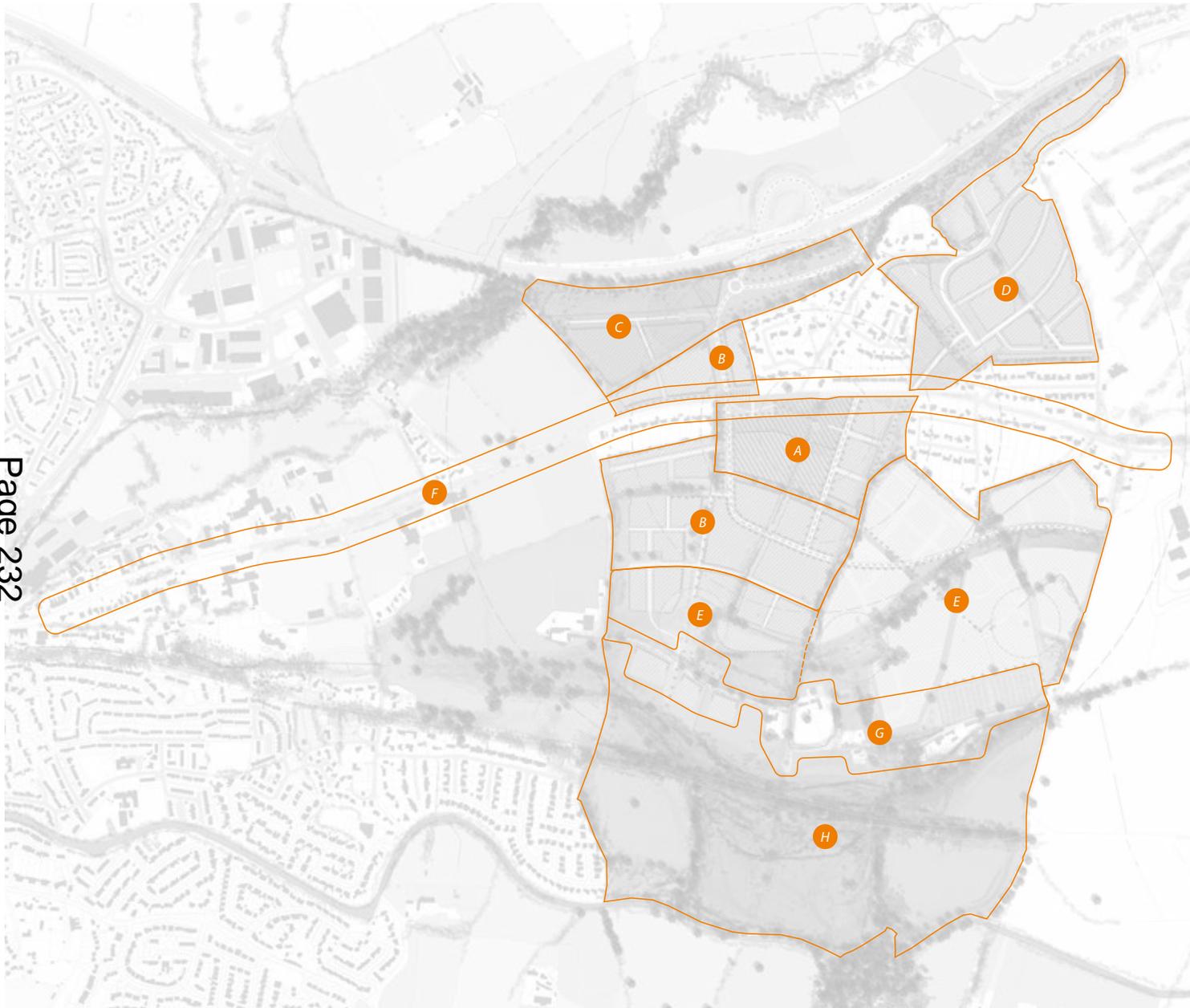
* It is envisaged that the requirements for formal sports provision will be partly met on site and partly through off-site enhancement and expansion of existing facilities within the Tiverton area

“ the way in which public space has been organised has in all periods exercised a powerful influence on the design of private houses.”

Urban Space
Rob Krier

Achieving a quality place

5.0 Creating the place



- A** Neighbourhood centre including primary school
- B** Residential core
- C** Employment area
- D** North east area
- E** The park edge and south east area
- F** Blundell's Road
- G** West Manley Lane
- H** The Parkland



5.1 Reinforcing the structure

The masterplan can be sub divided into eight areas that have a distinctive character of their own and which will come together to define the wider whole. Whilst it is important that the neighbourhood has a continuity and definable sense of place, the character areas respond in different ways to their particular role and location within the development.

Design approach

The proposed character areas are intended to form the foundation for more detailed guidance that will be prepared as part of a coordinated design approach for the new neighbourhood set out in 1.7 design process. This design approach elaborates on the structuring principles that are illustrated in this SPD to ensure that there is a consistent approach to design across the whole area and that individual character areas reflect to their particular role, function and distinctive position within the neighbourhood.

The character areas take into account the existing landscape, ecological and topographical characteristics of the site. As such they will be quite different, ranging for example, from the Blundell's Road corridor to the undeveloped landscape Parkland in the southern area of the allocation. Residential densities and therefore the character and appearance of housing areas will graduate across the site.

The highest densities will be at the heart of the neighbourhood centre (although this would need to take account of relationships with existing low density housing at Post Hill), and lower densities

on the edges of the park allowing the built form to feather into the landscape at the edge of the development. The southern edge of the residential area reflects this approach.

The design process and additional design work required in 1.7 should use these character area principles as a starting point for more detailed guidance together with developing a clearer understanding of local building traditions and characteristics.

Character areas

The eight are:

A: The neighbourhood centre

This mixed-use centre will be at the heart of the community fronting onto Blundell's Road comprising the primary school, community facilities, shops, employment space, apartments, town houses, a village green, formal recreational space, bus stops and other associated facilities;

B: The residential core

This predominantly residential area wraps around the southern edges of the neighbourhood centre will be defined by terraced and semi detached houses with gardens. It will also include residential development fronting onto the north side of Blundell's Road to reinforce the character of Post Hill;

C: The employment area

The focus for a variety of employment buildings, the area will comprise principally B1a and B1c classes in a landscaped setting accessed from the proposed A361 junction;

D: The north east area

This residential area is east of Uplowman Road and north of Fairway. Housing and landscaping will need to take account of the more challenging topography and step down with the contours;

E: The park edge and south east area

This predominantly residential area falls between the residential core and the park edge and includes the south east area, large sections of which front onto the parkland. Housing will be designed to be at lower densities comprising mainly semi-detached and detached properties with gardens. The housing edge will be softened to feather into the greenspace beyond.

F: Blundell's Road

This is the primary movement corridor in the area. It has a changing character that will link the new neighbourhood with the town centre. Enhancement works will deliver environmental improvements, especially at the core of Blundell's School;

G: The parkland

This multi purpose landscaped public open space wraps around the southern edge of the built up area.

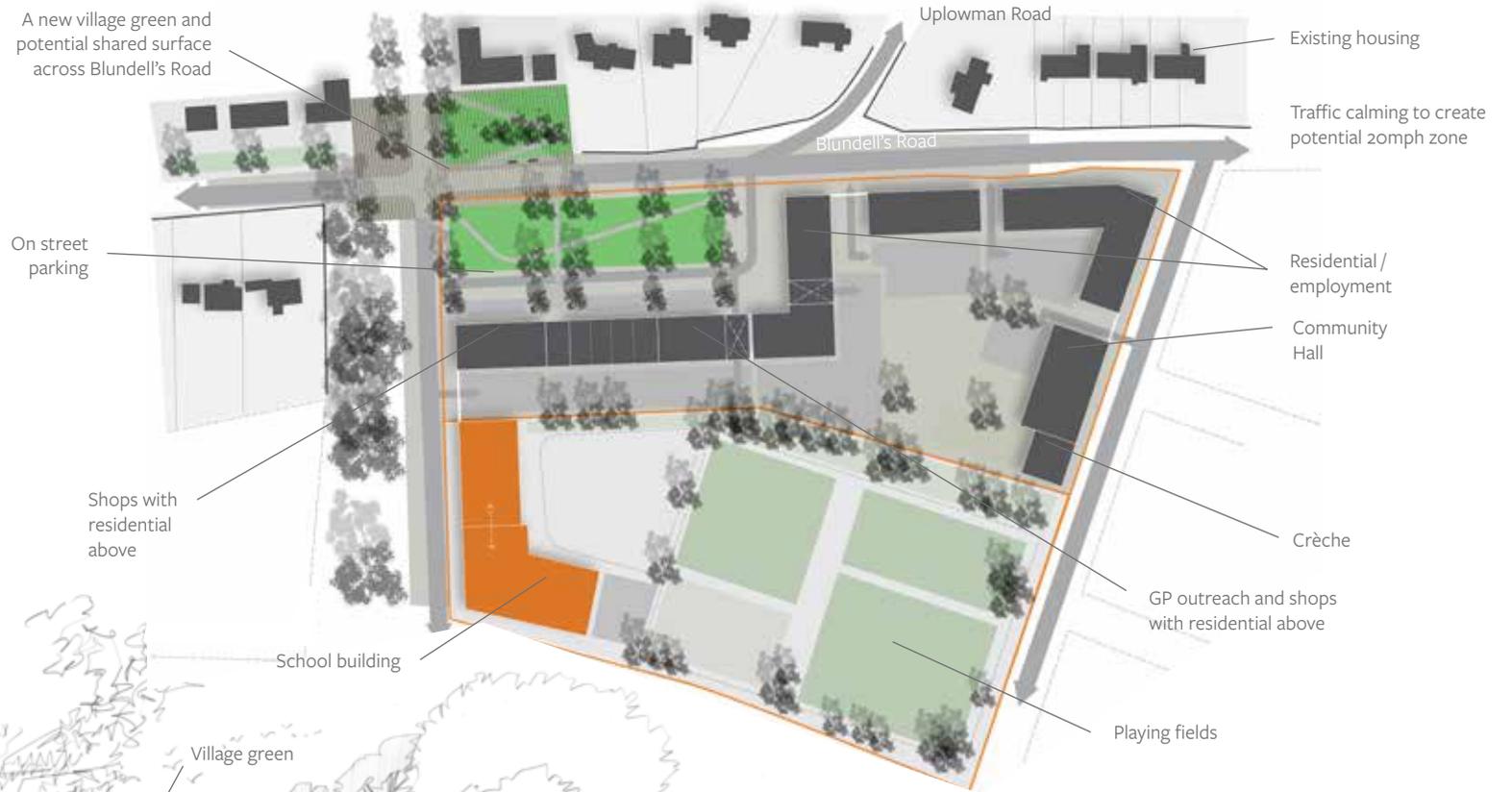
H: West Manley Lane

This existing lane has an enclosed rural character bounded by hedgebanks with clusters of buildings.

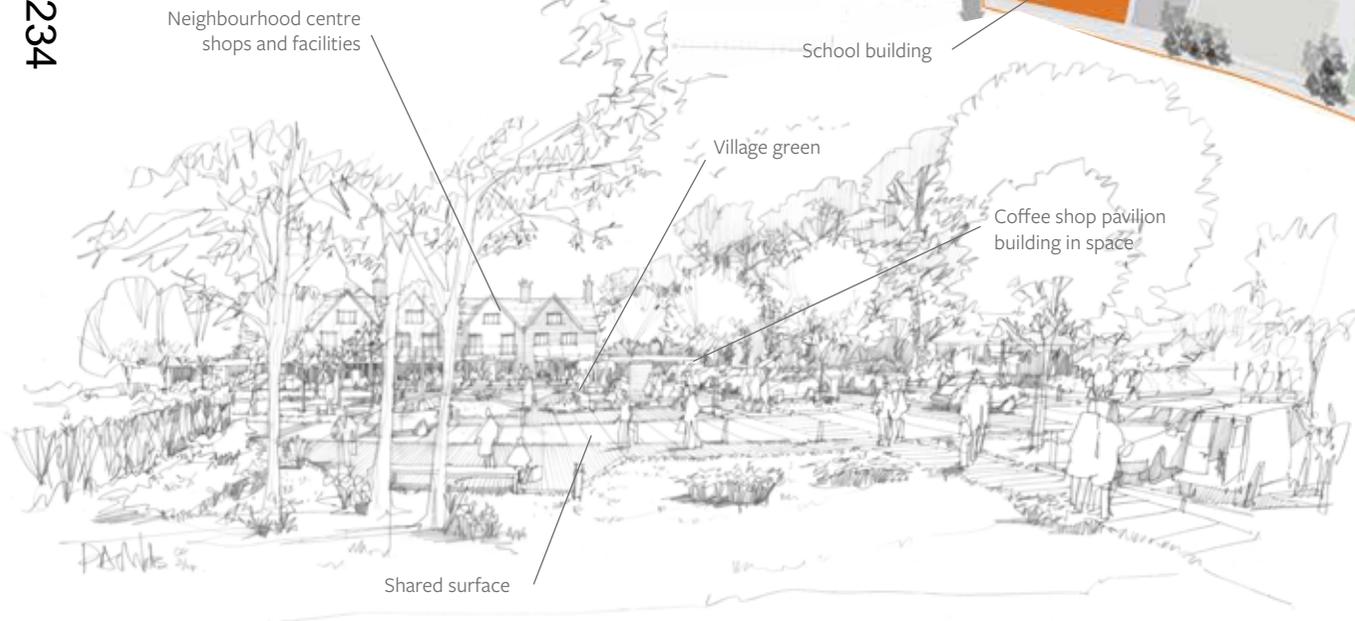
The following chapter provides some guidance about the traits that should define the different character areas.

Illustrative plan

The illustrative plan shows a notional interrelationship between different parts of the neighbourhood centre comprising a 'village green' to Blundell's Road, the position of the primary school at the heart of area, mixed use development blocks enclosing the streets and spaces and the position of existing houses at Post Hill. The plan shows how the scale of development can create enclosure to streets and that active ground floor uses such as shops, café and community uses can be combined with housing and offices in the upper floors of mixed use blocks to create variety, flexibility and vitality.



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Above: An artist's impression looking across the 'village green and potential shared surface space across Blundell's Road into the neighbourhood centre



A: Neighbourhood Centre

The centre would be the focus of community life in the new area. It would comprise a broad mix of land uses that are positioned adjacent to Blundell's Road and clustered around the new primary school and bus services into town. It is envisaged that a new 'village green' space would be introduced onto Blundell's Road and this would mark the heart of the neighbourhood. The centre is likely to comprise town houses, apartments, landscaping, formal sports provision, a small shop, a satellite medical centre, crèche, community facilities, small offices and a café. Green routes from the centre would connect out to the surrounding residential areas and parkland/ countryside beyond.

Layout and density

An urban garden city character centred on a new village green with a density between 40 and 50dph.

Amount and land use

Mixed use comprising residential, primary school, community space, shops and employment space (1.93ha for primary school and 2ha* for community buildings and open space).

Scale and form

Generally two storeys with some elements of three storeys to mark the neighbourhood centre if they are appropriate. Upper floors provide opportunities in terms of community uses and facilities.

Streets, public open space and landscape

Formal streets with trees and good enclosure from buildings. Some active ground floor frontage. Village green space. School / community playing fields. Buildings at back of pavement. Car parking in small courtyards, on street and in public space.

Left: Precedent photographs capturing the character and content that might be possible in the neighbourhood centre



Three storey contemporary housing

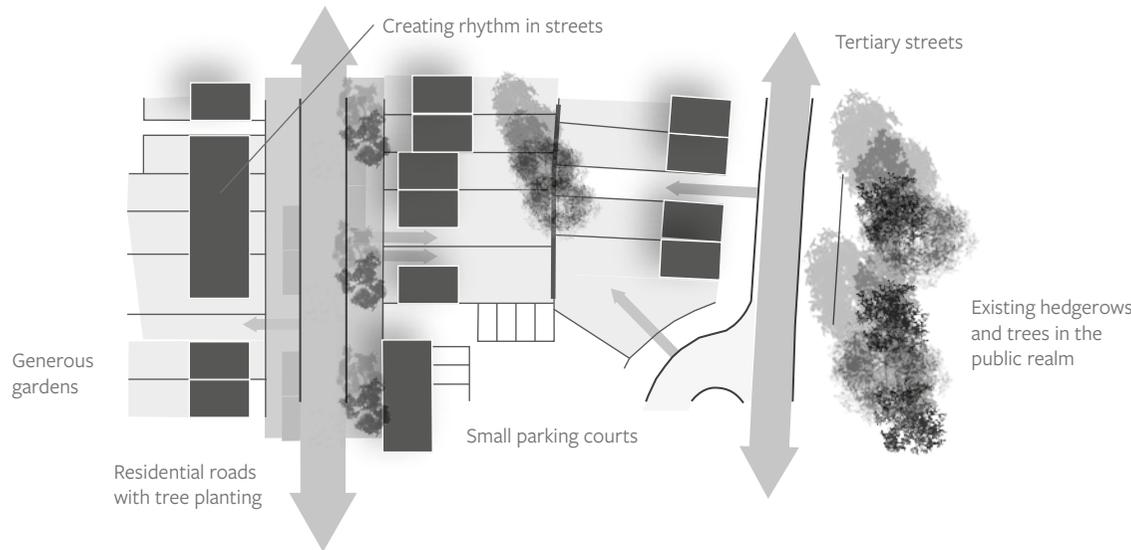
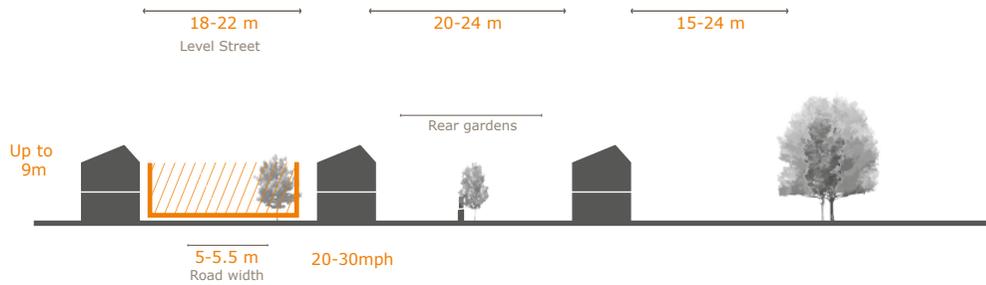
Two storey terraced housing in Tiverton

Existing housing in the locality

Existing local housing

Positive pedestrian and cycle routes

Above: Precedent photographs capturing the character of development that might be possible in the residential core



B: Residential Core

The residential core is located around the neighbourhood centre. Residential accommodation will be delivered mainly in the form of houses with gardens. The housing will be mostly terraced with some semi detached and would be arranged in streets and plots that seek to maximise the benefits of solar access. The area is within a 5 minute walk of local community facilities including the primary school and surrounding parkland. The area would be characterised by residential densities of between 25dph and 40dph with the highest densities closest to the neighbourhood centre.

Layout and density

Housing in gardens with densities of between 25 and 40dph creating an formal garden city character.

Amount and land use

Predominantly housing with some community open space including allotments, orchards, incidental open space and play areas.

Scale and form

Mainly two storey terraced and semi detached houses, some with front gardens and some with no or small front gardens.

Streets, public open space and landscape

Streets with narrow carriageways – potential 20mph. On street, on plot and limited courtyard car parking. Some incidental green space.



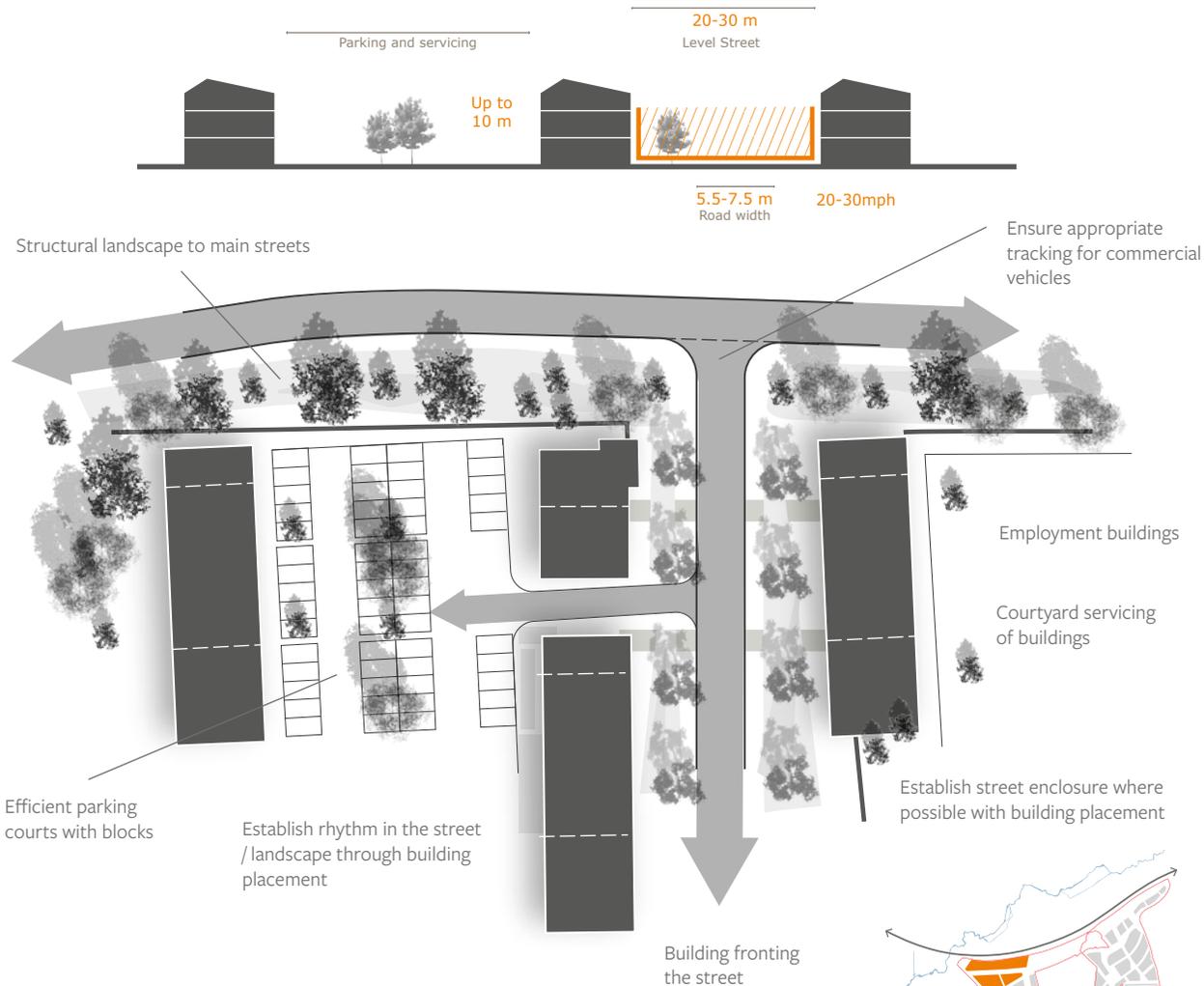
Illustrative plan and section

The illustrative plan shows how housing in this area might be laid out with mainly terraced housing and some semi-detached housing fronting onto streets. The plan shows good sized front gardens and opportunities for parking in streets, on-plot and in small courtyards.

The illustrative section gives an idea of the sort of street widths, enclosure and back to back distances that might be appropriate in some parts of the residential core.



Above: Photographs from elsewhere capturing opportunities to create an attractive employment environment



C: Employment

The employment area lies north of Blundell's Road and adjacent to the new junction on to the A361. It is the flattest area of the site. Businesses would be in close proximity to bus services, the primary school, crèche, and the neighbourhood centre. This will make it a good location for new and relocated businesses which will principally fall within use classes B1a and B1c. The townscape, landscape and architecture would be designed so that it is simple and structured in a way that is complementary to the adjacent neighbourhood and landscape setting of the town.

Layout and density

Employment buildings of different scales and density with associated car parking and parkland landscaping.

Amount and land use

Principally B1a and B1c employment uses at plot ratios of between 40-50%.

Scale and form

Generally two storey with consistent form and related scale
 Building form varied to respond to different building and user requirements.
 Scope for increased height in some areas subject to review and considered justification.

Streets, public open space and landscape

Tree lined streets and spaces with associated landscaping.
 Permeable surfaces.
 Attenuation ponds.
 Car parking areas adjacent to buildings. Car parking and servicing designed so that they don't dominate the environment.

Refer to 3.3 Guiding Principles - F. Economy and employment

Illustrative plan and section

The illustrative plan for the employment area shows how buildings, spaces, streets and landscape areas could be arranged to ensure that an attractive environment is established. The notional illustrative section shows a possible relationship between street widths, building heights and the position of parking and servicing courts.



Above: Precedent photographs capturing the character that might be possible in the north east area



Illustrative plan and section

The illustrative plan for the north east area indicates detached, semi detached, and short terraces that create structured streetscapes that are attractively landscaped. Housing is set within good sized gardens. The notional section illustrates two storey housing with tree planting on street and in gardens to soften the appearance of the built form. The section shows development on the gradual slope that characterises the north east area.

D: North east area

The north east area of the site lies on sloping terrain with principally north and west facing slopes. The A361 is to the north and is very visible from different vantage points within and around the site. The area is characterised by a mature stand of trees that runs along the western boundary. Housing comprises mainly semi detached and detached properties in gardens. They are positioned along the natural gradient of the land form and come together to establish a leafy residential environment that steps down the site with the contours. Landscaping will need to be structured to visually break up and soften the proposed housing. The Long Barrow provides a point of historic and cultural interest in the north west of the area and its setting must be respected. There are extensive views to the wider countryside north of the A361.

Consideration should also be given to the provision of gypsy and traveller pitches. These will need to be accompanied by good quality landscaping proposals.

Layout and density

Housing in gardens with densities of between 15 and 40dph creating a garden neighbourhood character. Housing to the north of Uplowman Road will have a more rural character.

Amount and land use

Predominantly housing with some community open space including allotments, orchards, landscaping, incidental open space, play areas and surface water attenuation.

Scale and form

Mainly two storey detached and semi detached houses with front and rear gardens, that step down with the contours.

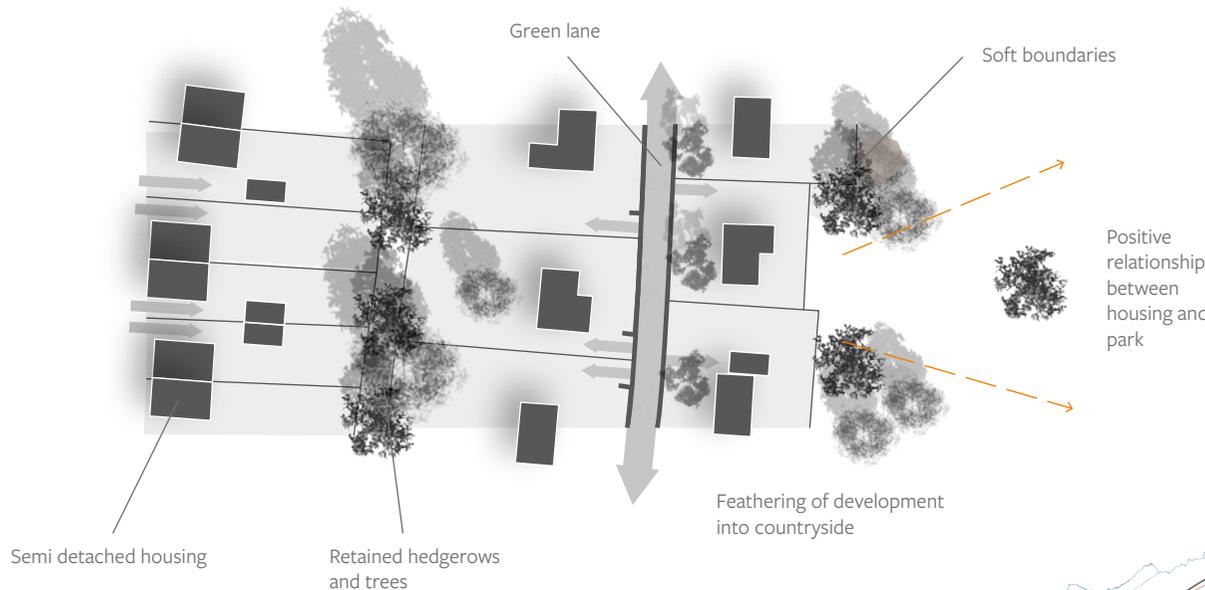
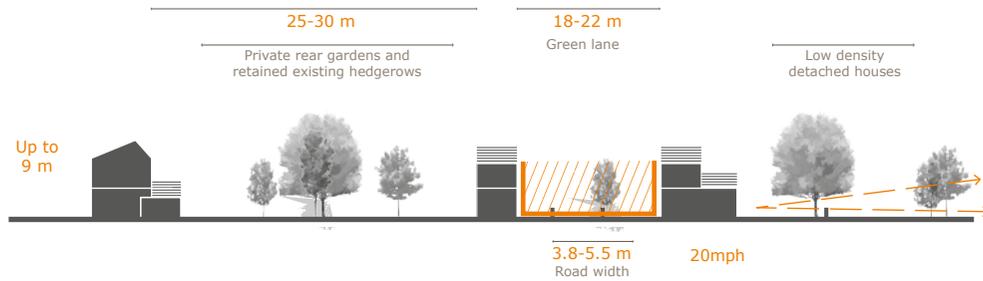
Streets, public open space and landscape

Streets with narrow carriageways – potential 20mph. On street, on plot and limited courtyard car parking. Some incidental green space. Attenuation ponds. Some tree lined streets.





Above: Precedent photographs capturing the possible character of the park edge in the south east area



Illustrative plan and section

The illustrative plan shows a notional area for part of the south east area that would be on the park edge and of a lower density. The possible relationships between street widths, plot layout and building height is illustrated in the section. The character of this part of the south east area is envisaged as green and leafy.



E: The park edge and south east area

This area comprises the park edge, which is characterised by lower density housing (about 15 - 20dph) and the south eastern area comprising a number of different densities. The average density of housing in this area is about 37dph but in some parts where the developed areas meet the parkland public open space, lower densities are recommended as the built up areas feather into the countryside. This area will be subject to a second stage masterplanning process and guidance may change when more is known about the constraints and opportunities.

The park edge residential areas have good rural aspect and are in close proximity to the canal tow-path, the Sustrans cycle route and many countryside walks. The route of the drovers trail begins in the parkland, cuts through the parkland edge and the neighbourhood core into the neighbourhood centre. This is to be utilised to provide convenient access to the neighbourhood centre by foot/ cycle.

Layout and density

Housing in gardens with densities of about 15 - 20dph. Informal organic character.

Amount and land use

Predominantly housing with some satellite employment spaces and community open space including allotments, orchards, incidental open space and play areas.

Scale and form

Mainly two storey detached and semi detached houses in generous front and rear gardens. Houses fronting onto the parkland and other green spaces. Opportunity for bespoke housing design and self-build in some areas. A leafy environment that feathers into the landscape and provides a soft edge onto Manley Lane.

Streets, public open space and landscape

Streets with narrow carriageways – Potentially 20mph. Mainly on plot car parking with limited on street visitor parking. A setting characterised by the adjacent parkland and community open space. Landscaping on plot to reinforce the parkland edge character.



86
Creating a sense of place



87



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Shared surface



89
Existing view of entrance to Blundell's School



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Shared space on a green



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F: Blundell's Road

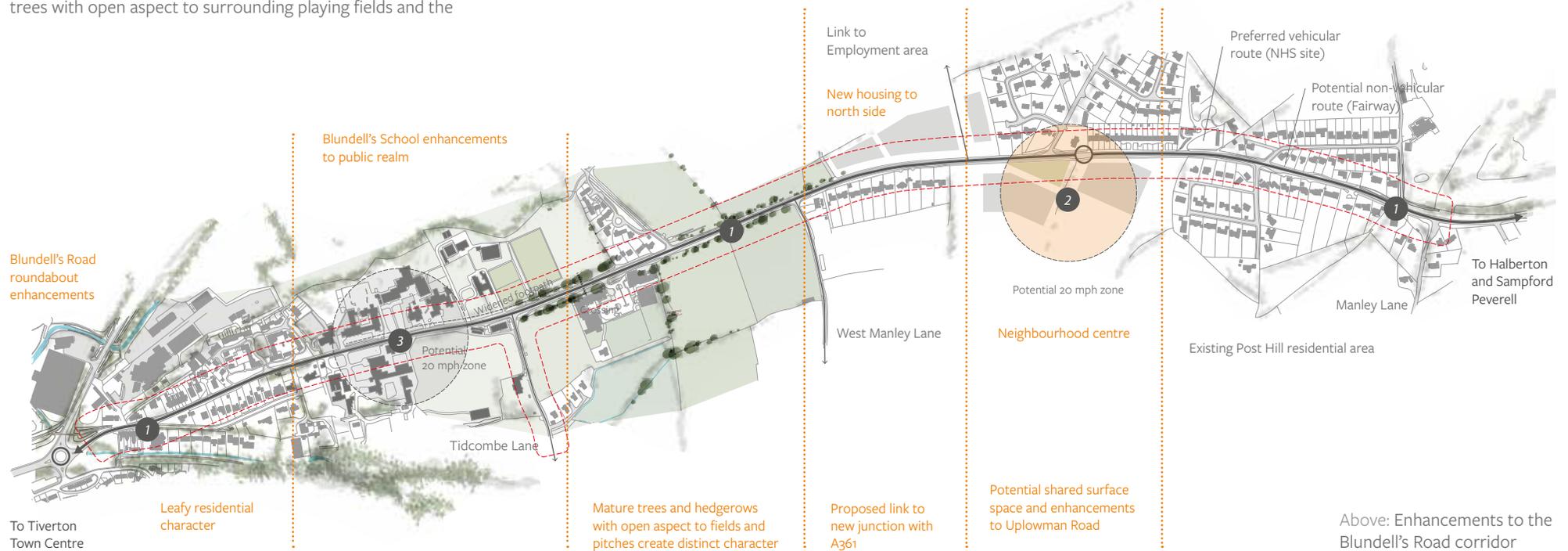
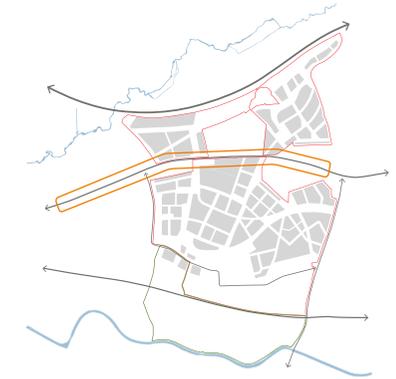
Blundell's Road is an important movement corridor in the area and a key approach into Tiverton from the east. This will remain the case. The corridor has a distinct and varied character along its length - an area centred on Blundell's School is being considered for conservation area status. In order to ensure that it performs a successful role in managing transport in the future, and that the impacts of that traffic are addressed in accordance with Policy AL/TIV/2, a number of environmental enhancement and traffic calming measures are suggested. This may include consideration of 20mph shared surface zones at Blundell's School and at the 'village green' at the centre of the neighbourhood - these could provide incident along an otherwise straight road corridor and will add to the sequence of characters that are distinctive of the route.

There is a sequence of character sub areas which include: Post Hill, the proposed neighbourhood centre, a boulevard of mature trees with open aspect to surrounding playing fields and the

countryside, the Blundell's School entrance 'quad', and the leafy residential area between the school and the roundabout. Other enhancements along the corridor are expected to include an upgraded cycle route, improved pedestrian crossings and the roundabout at the western end of the road.

Enhancement and traffic calming along the length of Blundell's Road (and into Tidcombe Lane) will perform an important role in ensuring that the new neighbourhood relates positively to the town. Enhancement work at Blundell's School and in forming a new open space on Blundell's Road in the new neighbourhood centre will play a significant role in helping to enhance the character of the corridor, achieve a distinctive sense of place and manage transport modes.

The detailed design of the environmental and traffic calming improvements will need to have regard to the character and appearance of the area in light of the proposed conservation area designation.



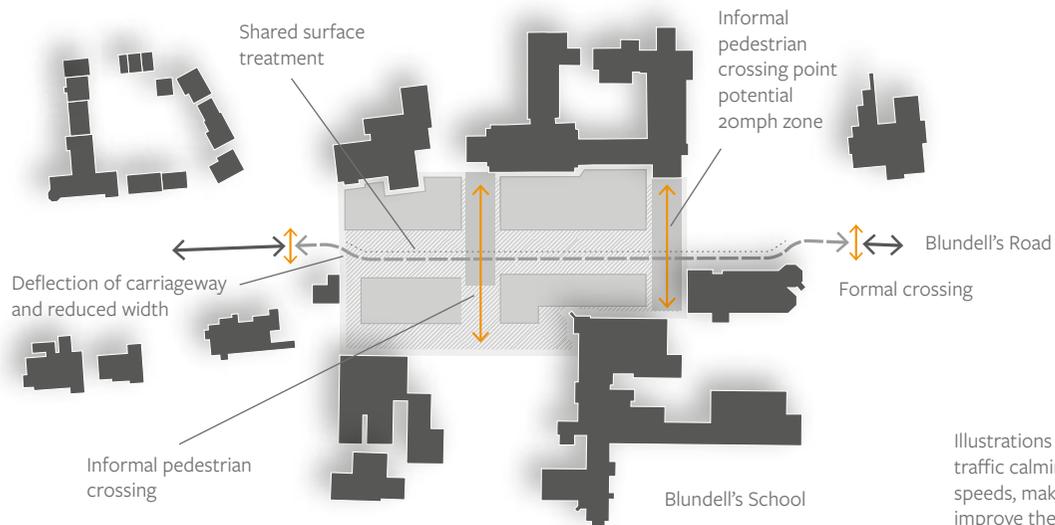
Above: Enhancements to the Blundell's Road corridor



Photograph of the existing Blundell's School



Shared space



Illustrations of the environmental enhancement and traffic calming at Blundell's School to reduce traffic speeds, make a safer pedestrian environment and improve the appearance of the public realm.



Creating a sense of place



Photograph of the existing Blundell's Road



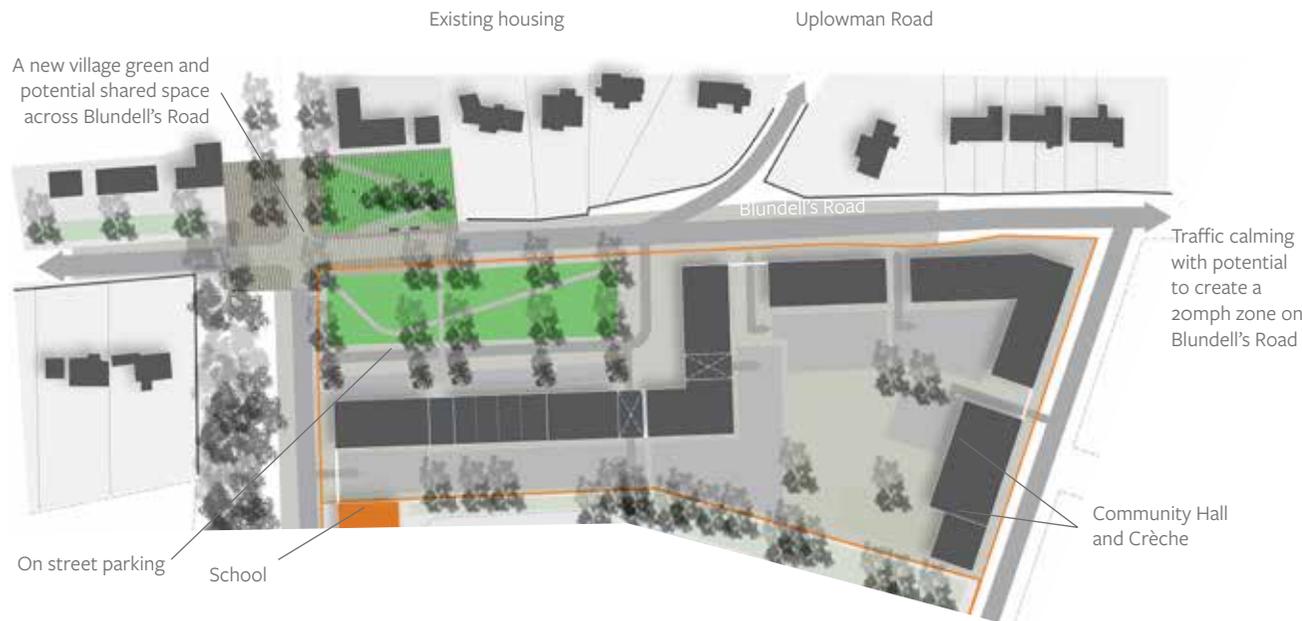
Shared space next to a green

Blundell's School Enhancement

The grouping of historic buildings and the space that they enclose at the entrance to Blundell's School is currently an attractive incident in the townscape/ landscape along the length of the existing road corridor. It is considered an undesignated heritage asset with potential conservation area status. The road carriageway width is very wide and traffic speeds have been recorded to be too high for such an environment. Moreover, the visual impact of the wide road detracts from the quality and historic setting of the school quadrangle. In order to improve this, a range of measures are proposed which will be subject to future detailed design, these could include deflection of the alignment of the road, reduction of its width, introduction of a new surface finish and new crossing points. It is intended that the resulting design when implemented will substantially reduce traffic speeds with potential for a 20mph zone, in order to create a safer pedestrian environment, help to improve accessibility between the north and south sides of the school and a much improved physical environment that is more befitting of the historic setting of the school.

Proposed Neighbourhood Centre

The masterplan illustrates that the neighbourhood centre will be positioned adjacent to Blundell's Road and this will provide a new and distinctive focal point for Post Hill – as such it will perform an important role as a new gateway into Tiverton from the east as well as marking the centre of the neighbourhood. In order to create a clear and distinct sense of place and a safe environment for all, a number of measures are proposed. The centre will be focused upon a new green space and this would be characterised by a broad mix of complementary activities, including for example: housing, a primary school, formal sports provision, community facilities, some small shops, cafés, small offices and associated infrastructure. Measures to breakdown barriers to pedestrian movement between the north and south of Blundell's Road will be proposed. This could take the form of a 20mph zone. These measures will form an integral part of the public space. It is intended that the public space would establish itself as the heart of the community and the plan provides an impression of how the space might be arranged.





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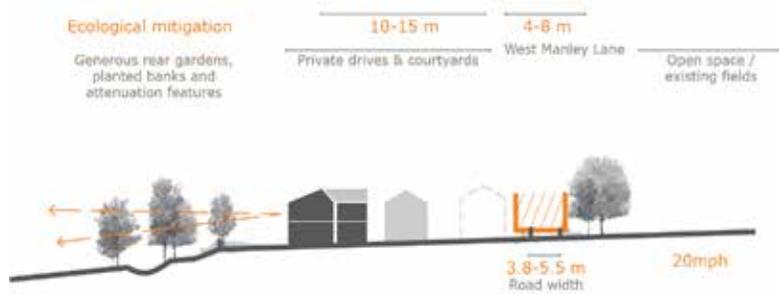


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Above: Precedent photographs capturing the character of development that might be possible along West Manley Lane



Illustrative plan and section

The illustrative plan and section for the West Manley Lane area indicates low-density housing in small groups with large gardens accessed from private roads and courtyards off of West Manley Lane. The plan shows that housing would be two storey and the integrity of the hedgerows on the lane would be maintained.



G: West Manley Lane

The character of the southern extremity of the site around West Manley Lane is different from that of the wider area. It is defined by a more rural landscape dominated appearance made up from mature hedge banks, tree groups and fields enclosed by hedge boundaries. It is also one of the lowest areas of the site and therefore needs to incorporate appropriate measures for water attenuation.

In order to reflect the character of existing development in the area and retain the character of the lane itself, small groups of low-density housing are proposed. The groups would comprise relatively large homes set within generous gardens and around courtyards. New housing should be designed so that it evokes the rural character of existing development in and around the lane.

By introducing small housing clusters, it will be possible to ensure that landscape and ecological mitigation and SUDS measures can be properly incorporated.

Layout and density

Principally detached housing in gardens at low densities of less than 15dph creating a rural character.

Amount and land use

Housing in small clusters with landscape, and ecological mitigation and SUDS.

Scale and form

Up to two storey, detached and semi detached houses arranged in small groups with informal layout and distinctive rural character.

Streets, public open space and landscape

Small private drives accessing courtyards for up to five houses off of West Manley Lane. The existing character of the lane to be retained. The existing character and function of the lane for local access to be retained together with opportunities along it for walking and cycling.



Above: Photographs capturing the character of the parkland landscape



H: The parkland

The parkland wraps around the southern edges of the new garden neighbourhood. The landscape will have the feel of a country park and will be a defining feature of the development.

The parkland will provide a landscape resource comprising; wetland areas; woodland areas; areas of pasture; retained veteran trees; new tree planting; landscaped areas of varying character; attenuation ponds and other SUDS features; allotments and orchards; informal play areas – including a NEAP, LEAPS and LAPS; new sports pitches to the south east; enhanced biodiversity; improved access to the canal and cycle path; and a reinforced network of hedgerows.



Achieving a quality place

6.0 Delivering the place

6.1 Infrastructure planning and delivery

Approach to infrastructure planning and delivery

Policy AL/TIV/6 of the Allocations and Infrastructure Development Plan Document states that a phasing strategy will be required to ensure that the development and infrastructure come forward in step, minimising the impact of the development, yet taking account of the need for development to remain viable. It further states that the phasing requirements of this policy should be taken into account and any variation from them carefully justified. It sets out policy expectations for the phasing of employment and housing, green infrastructure, highway improvements, bus service enhancements, transfer of land and funding for the primary school.

Since the adoption of this policy, further studies and consultation with both statutory bodies and the wider community have taken place. These have resulted in the need to reassess the triggers and sequence of infrastructure delivery set out in the policy. For example the policy requires the delivery of a second strategic highway link prior to the occupation of no more than 1000 dwellings. The Highway Authority now advises that based on the likely quantum of development for the urban extension (up to 1520 dwellings and approximately 30,000 sqm employment) this second strategic road link will not be required until traffic generation reaches the equivalent of 2,000 dwellings. This masterplan SPD therefore no longer includes the provision of a strategic highway link to Heathcoat Way in connection with this development.

The Council has set its Community Infrastructure Levy (CIL) charging rate at £40 per sqm for residential development only and at the time of writing this document is currently expected to start charging CIL from the beginning of June 2014. CIL introduces a new way of financing the delivery of infrastructure across the District as a whole. The Council's Regulation 123 list arising from section 123(2) of the Community Infrastructure Levy Regulations 2010 indicates infrastructure to be funded in whole or part by CIL, as opposed to via site specific S106 agreements. The Council's Regulation 123 list currently indicates that infrastructure of the types required in connection with this development are intended to be funded through CIL. However, whether this remains the best way to deliver the infrastructure required in connection with the development will be reviewed and the Reg 123 list amended as necessary. Important to this review will be an understanding of the likely number of planning applications to be received for the urban extension as a whole due to the limit on the ability to pool S106 contributions for the site's infrastructure delivery. Once the Council has started charging CIL or from April 2015 (whichever is first), no more than five S106 agreements may be entered into for the funding or provision of an infrastructure project or type of infrastructure.

External funding sources will also be identified. A bid has been made by Devon County Council to the Local Transport Board of the Heart of the South West Local Enterprise Partnership for £5.1 million towards the delivery of the new grade separated junction to the A361 and works to junction 27 of the M5 required in connection with this development.

In compiling a list of infrastructure in relation to this allocation, the Council has had regard to the infrastructure tests set out in section 122(2) of the Community Infrastructure Levy Regulations which state that it must be:

- necessary to make the development acceptable in planning terms;
- directly related to the development; and
- fair and reasonably related in scale and kind of development.

The success of the masterplan will ultimately be judged by what is delivered and the approach taken to delivery will therefore be key. It is essential that the development is taken forward in a co-ordinated and cohesive manner with the bigger picture clearly in mind, in this way the overall vision and aims of the area can be achieved.

CIL may be taken via land as an alternative to financial payment and if regulations permit, the provision of infrastructure.

The Council will be undertaking a review of the CIL charge as part of the review of the Local Plan. The CIL charge may change as the development progresses and may also become applicable to other forms of development. Regardless of this review, the CIL charge will rise annually to take account of increases in build costs.

6.2 Assumptions about the rate of housing delivery

Assumptions around the rate of housing delivery

The Allocations and Infrastructure Development Plan Document sets out an expected year on year trajectory for the provision of housing. On this site it anticipates delivery of the first 50 units in 2015-16 rising to 100 units per year between 2016 and 2026. In reflection of the current economic conditions up to 75 units per year is considered to be more realistic up to 2018 / 2019. The expected completion figures assume two or more house builders on site at the same time. Build out of the urban extension is anticipated to be in excess of 10 years and up to, if not beyond 2026.

It is assumed that development could potentially start on site in 2015/2016. The first homes will be provided after the up-front provision of highway infrastructure forming the first part of the new grade separated junction to the A361 and connection road linking it to Blundell's Road.

The sequencing of development and provision of supporting infrastructure set out in this SPD has been structured to provide appropriate flexibility over where and when development takes place. It seeks to ensure that the necessary infrastructure is provided in a timely and viable way in the interests of delivery of the vision and aims of the area in a co-ordinated and comprehensive manner.

Assumptions on housing mix and population profile

The Allocations and Infrastructure Development Plan document does not set a percentage target for affordable housing within policies associated with the urban extension. Instead it establishes

that the development will need to provide a proportion of affordable housing subject to further assessment of viability. The target for this proportion will be 35%. It is recognised that developments must be viable and that affordable housing may make a considerable difference to viability, especially due to the lack of ability to negotiate the CIL charge. This development will need to contribute significant sums towards the cost of infrastructure which will have a significant impact upon viability, particularly in the early phases. Further viability testing and assessment will therefore be needed to establish the level of affordable housing. The Council will also consider whether the provision of affordable housing should be deferred, reduced in early phases or varied between phases as significant transport infrastructure is required to be brought forward early in the development. Once provided, affordable housing should be delivered in step with market housing. Such decisions will need to be based upon the submission of robust viability evidence.

Affordable housing provision will need to have regard to needs assessment within the Tiverton area. The Council has already identified that at least 5 pitches for gypsies and travellers will be needed as part of the affordable housing provision via policy AL/TIV/1 of the AIDPD.

Based on an average household size of 2.3 persons in Mid Devon it is anticipated that up to 1520 dwellings could result in a population up to approximately 3,496.

Residential development on the site must have regard to housing mix in terms of type, size, tenure and location (intermixing of

affordable and market) and be designed so that affordable housing is indistinguishable from market housing. A policy on minimum home sizes is contained within Development Management Policies (Local Plan Part 3).

Tiverton EUE anticipated housing completions		
	Annual completions	Running total
2013 / 2014	-	-
2014 / 2015	-	-
2015 / 2016	12	12
2016 / 2017	75	87
2017 / 2018	75	162
2018 / 2019	75	237
2019 / 2020	150	387
2020 / 2021	150	537
2021 / 2022	150	687
2022 / 2023	150	837
2023 / 2024	150	987
2024 / 2025	150	1137
2025 / 2026	150	1287
2026 / 2027	150	1437
2027 / 2028	83	1520

6.3 Approach to development phasing

Approach to development phasing

The delivery of infrastructure and phasing of the development has been approached in accordance with the following principles:

Infrastructure should be provided in a timely way in order to reduce/mitigate the impact of the development;

Given the scale of the project, there is a need to balance certainty of delivery of key infrastructure with the need to maintain flexibility over the delivery of the development and infrastructure, especially as delivery is likely to take place over a period in excess of 10 years;

- A coherent and coordinated approach to infrastructure delivery, construction management and development phasing is needed between land ownerships in order to ensure that the overall policy aspirations are met;
- Avoiding in so far as possible the creation of parcels of land or pockets of development that do not relate to their surroundings or are isolated from each other;
- The early provision of transport infrastructure is recognised as being a key requirement in order to reduce the impact of the development upon the existing local highway network. However this must be balanced with the need to maintain development viability;

- It is expected that development will first take place to the north of Blundell's Road following the early provision of transport infrastructure associated with the new grade separated junction to the A361 combined with traffic calming improvements to Blundell's Road and improvements to roundabouts on Heathcoat Way. The provision of a construction access off the A361 will be subject to highway safety assessment. It is expected that funding for the provision of half of the cost of the grade separated junction to the A361 will be from external (non-developer) sources. A bid has been made to the Local Transport Board of the Heart of the South West Local Enterprise Partnership. Should that prove unsuccessful, other funding will be sought for the remainder of the cost of the new junction. This will be sought from other external sources. Whether development on the urban extension will be able to afford to fund all the associated infrastructure will need to be robustly demonstrated via viability evidence;
- The need to provide employment development in step with housing will deliver 5ha of serviced employment land (to provide approximately 25,000 sqm floorspace) within the part of the site to the north west of Blundell's Road early in the development. A further 5,000 sqm would be provided in small clusters in later phases of the development within Area B, within the neighbourhood centre and within the NHS land.
- Development is then expected to move sequentially in a southerly direction as access becomes available starting

immediately to the south of Blundell's Road and providing the commencement of the local centre and land for the primary school alongside residential development and other associated infrastructure;

- The final phases of development are expected to be to the south east of the allocated site with access through earlier phases to the north west.

As this development is expected to take place over a period of at least 10 years, it is recognised as important that an element of flexibility is retained in order that the development can respond to changing circumstances over time.

It is expected that a process of monitoring and review of delivery will be undertaken by the District Council in conjunction with the landowners / developers.

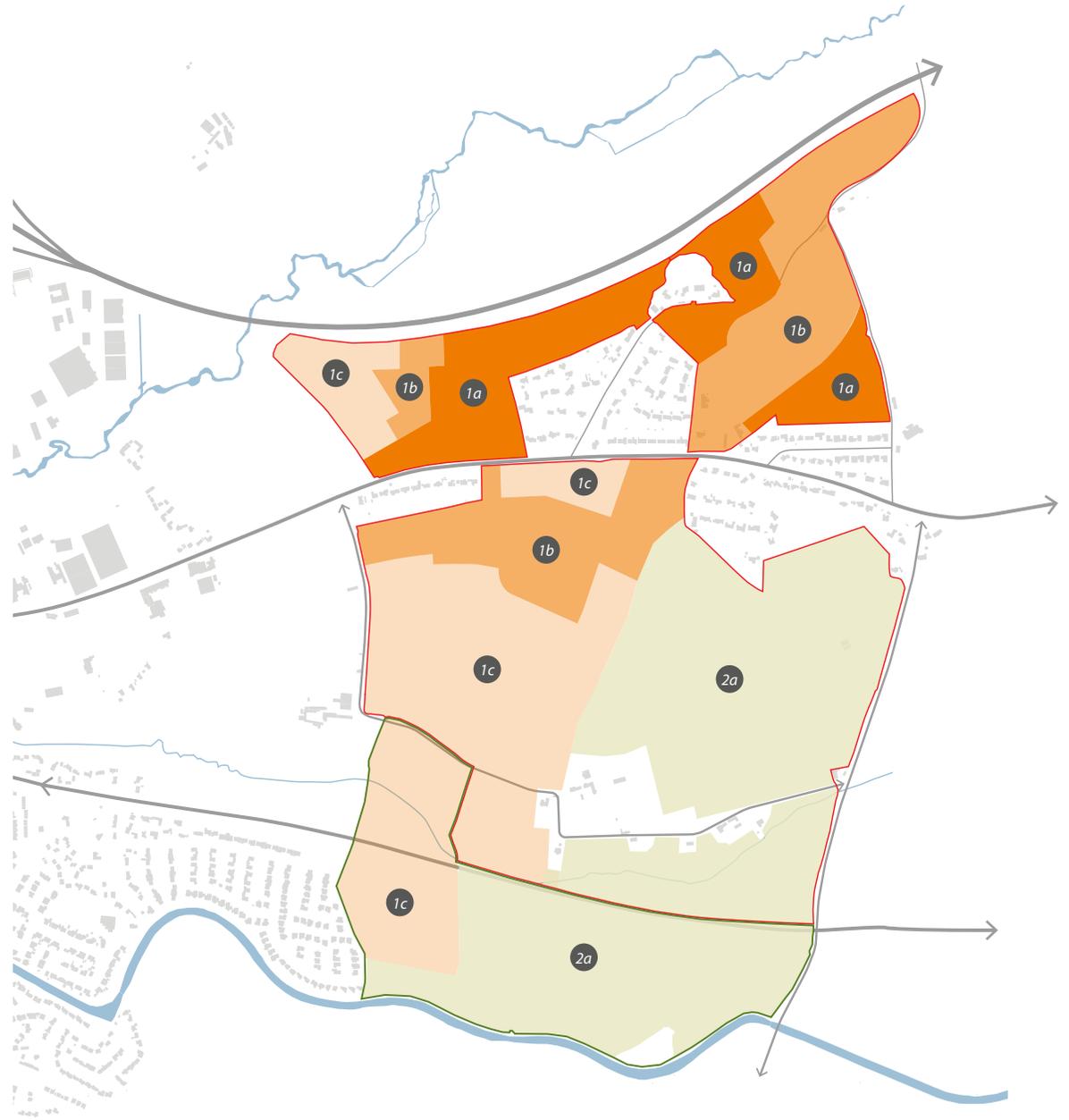
In considering proposals to vary phasing from that set out in this document the District Council will have regard to:

- How the supporting infrastructure specified in this SPD for the specific number of units proposed in the application will be secured;
- How appropriate sustainable access for new residents can be achieved between the housing development and supporting infrastructure (e.g. primary school) where appropriate;

- Whether the development proposed will prejudice delivery of other land holdings within the urban extension or the whole master plan, or result in an unacceptable impact on existing residents;
- How the proposed phasing complies with policy AL/TIV/6 and any subsequent review of the Development Plan in relation to it;
- In the event that delivery of an earlier phase, part of a phase or land holding has stalled, proposals to bring forward later planned phases will be considered provided they do not undermine: delivery elsewhere within the overall site, the provision of supporting infrastructure and mitigation of the impacts of the development as a result of earlier delivery.

The overall approach taken towards phasing and infrastructure delivery in this SPD is to seek to ensure that each phase of development is as self-sufficient as possible whilst delivering necessary strategic elements of infrastructure in a timely manner and not prejudicing the ability of the following phases to do the same.

- 1a Area A Phase 1a
- 1b Area A Phase 1b
- 1c Area A Phase 1c
- 2a Area B Phase 2a



6.4 Infrastructure requirements

Infrastructure required and triggers for delivery *

The key elements of infrastructure required to support the vision and aims of sustainable development at Tiverton's new garden neighbourhood at Post Hill have been based on requirements set out in the Allocations and Infrastructure Development Plan Document together with information collected from stakeholders and the wider community.

The infrastructure necessary to support the urban extension must be delivered in a timely way in order to reduce the impact of the development. The key infrastructure requirements for the urban extension are identified within the Allocations and Infrastructure Development Plan Document. These are listed in the following table in relation to the anticipated phase of development and identified trigger points. This table concentrates upon infrastructure requirements common to different areas and ownerships where coordination over delivery is most required. Further site specific infrastructure will be required on a more local basis, for delivery under individual detailed planning permissions for the relevant phase of the development such as footpaths and streets and non-strategic habitat mitigation. A range of utilities related infrastructure will also be required such as power, water and foul drainage. Provision for these will need to be made in step with the requirements of each phase of development and ensuring that provision is coordinated between phases. It is important that the necessary provision of utilities is borne in mind in considering the viability of the development.

Key infrastructure required	Anticipated phase for delivery and trigger point where known	Lead delivery organisation
Access and transport		
On and off slip roads south side of A361 to form construction access	Prior to any development	DCC
Left in / left out south section of junction to the A361 and highway link between this junction and Blundell's Road	Phase 1a - Prior to the occupation of any development	DCC
Phase 1 of traffic calming scheme at Blundell's School and improvements to roundabouts at Heathcoat Way and Lowman Way	Phase 1a - Prior to the occupation of no more than 200 dwellings or 4,000 sqm employment	Developer/DCC
Completion of full movement grade separated junction to A361 and phase 2 of traffic calming Blundell's Road (between Post Hill and Heathcoat Way)	Phase 1b - Prior to the occupation of no more than 600 dwellings or 10,000 sqm employment	Developer/DCC
M5 Junction 27 enhancements	Phase 1b	DCC/HA
Bus service enhancements	Phase 1b – prior to the occupation of no more than 600 dwellings	Operator / developer
Cycle and pedestrian links to the railway walk, Grand Western Canal and nearby public rights of way	Phased delivery from occupation of first dwelling	Developer

NB. Amounts of development are cumulative from the beginning of phase 1a.

* Some triggers are expressed as 'before no more than a number of dwellings' or 'no more than an amount of employment floorspace'. Breaching either of these limits will trigger the requirement to deliver the infrastructure in question. For clarity, housing numbers and employment floorspace (with associated traffic generation) should not be considered in combination.

Key infrastructure required	Anticipated phase for delivery and trigger point where known	Lead delivery organisation
Education and early years		
Education provision - transfer of land for primary school and it's access to the Local Education Authority	Beginning of Phase 1b - prior to the commencement of construction south of Blundell's Road.	Developer/DCC
Provision of serviced site for primary school	Phase 1b - prior to the first occupation of development south of Blundell's Road	Developer
New primary school provision	Phase 1b - delivery of first phase prior to the occupation of no more than 400 dwellings	Developer/DCC*
Enhancements to/extension of existing secondary school	Phased delivery according to need as development comes forward.	Developer/DCC*
Community infrastructure		
A site of 2ha for a neighbourhood center (local shopping and community facilities including a community centre / hall, youth and child provision)	Phase 1b	Developer
Provision of local shopping and community facilities	Phases 1b and 1c	Developer
Open Space, recreation, play and green infrastructure		
Provision of open space to north of Blundell's Road	Phase 1a / 1b - delivery phased in step with housing	Developer
Provision of temporary open space on future school and neighbourhood centre site	Phase 1b - Prior to the occupation of 400 dwellings (as alternative temporary provision until GI to the south is provided)	Developer
Management / funding arrangements for the fen, catchment and buffer zone GI to the west of Pool Anthony Railway Bridge.	Phase 1c – prior to the occupation of 600 dwellings	Developer
Provision of green infrastructure between Pool Anthony Bridge and Manley Railway Bridge within Area A with necessary management / funding arrangements	Phase 1c – prior to the occupation of 1000 dwellings	Developer
Provision of green infrastructure between Pool Anthony Railway Bridge and Manley Railway Bridge within Area B with necessary management / funding arrangements	Phase 2a – prior to the occupation of 1250 dwellings	Developer
At least 2ha of children's play areas; 8ha of sports pitches (or equivalent); and 2ha of allotments	Phased delivery as development comes forward (formal sports pitches to be delivered partly on-site and partly off-site through enhancement of existing provision)	Developer
Sustainable Urban Drainage Systems (SUDS)	Phased delivery as development comes forward	Developer

* Contributions will be sought in accordance with DCC 'Education s106 infrastructure approach'

6.5 Development phasing and infrastructure

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Area A Phase 1a



Area A Phase 1a

Commencement of development following enabling works phase. Provision of partial A361 junction, residential and employment development and associated infrastructure.

Area A Phase 1b



Area A Phase 1b

Second phase of the development - full junction to A361 completed, employment on NHS site, local centre commenced, further housing development north and south of Blundell's Road. School site laid out as temporary POS. School site transferred and serviced, school started.

Above: Plans showing the illustrative phasing sequence

Neighbourhood centre, shops and community

Employment

Employment (care home)

Education

Residential

Open space

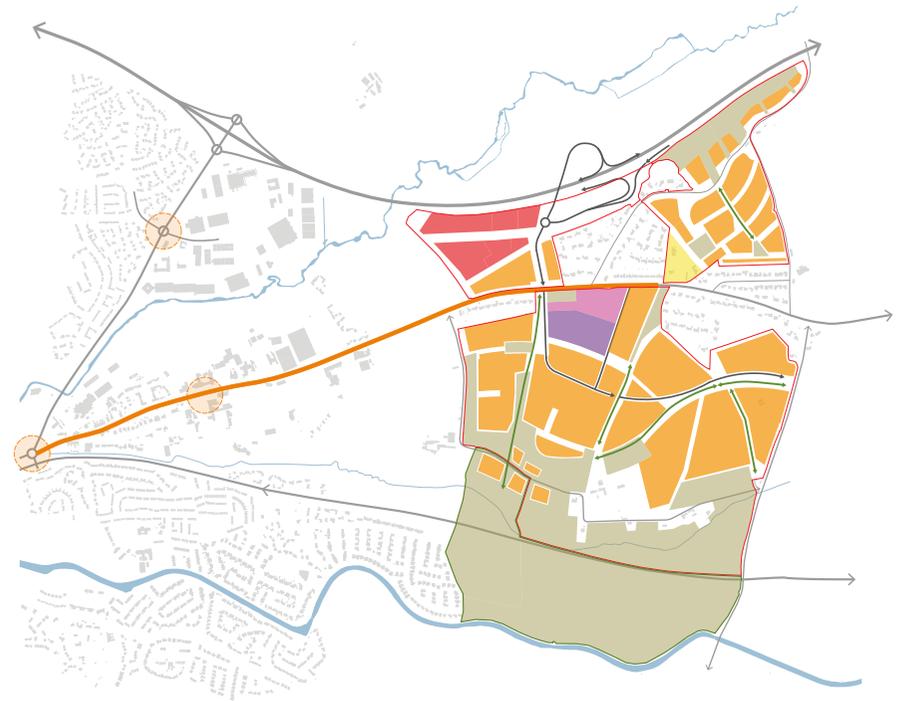


Area A Phase 1c



Area A Phase 1c
Completion of Area A development. Development mainly focused on area south of Blundell's Road and employment land to the north west.

Area B Phase 2a



Area B Phase 2a
Final phase of the development. Subject to review following two stage masterplanning process. The remainder of residential and employment development along with associated open space and infrastructure.



Area A Phase 1a
 Commencement of development following enabling works phase. Provision of partial A361 junction, residential and employment development and associated infrastructure.

Legend

- Neighbourhood centre, shops and community
- Employment
- Education
- Residential
- Open space and landscape

- 1 Left in left out A361 junction
- 2 Highway link from A361 to Blundell's Road
- 3 Up to 200 dwellings
- 4 Public open space (circa 1ha)
- 5 Up to 4000sqm of employment
- 6 Traffic calming at Blundell's School
- 7 Improvements to Lowman Way roundabout
- 8 Improvements to Heathcoat Way roundabout

NB. Amounts of development are cumulative from the beginning of phase 1a.





Area A Phase 1b

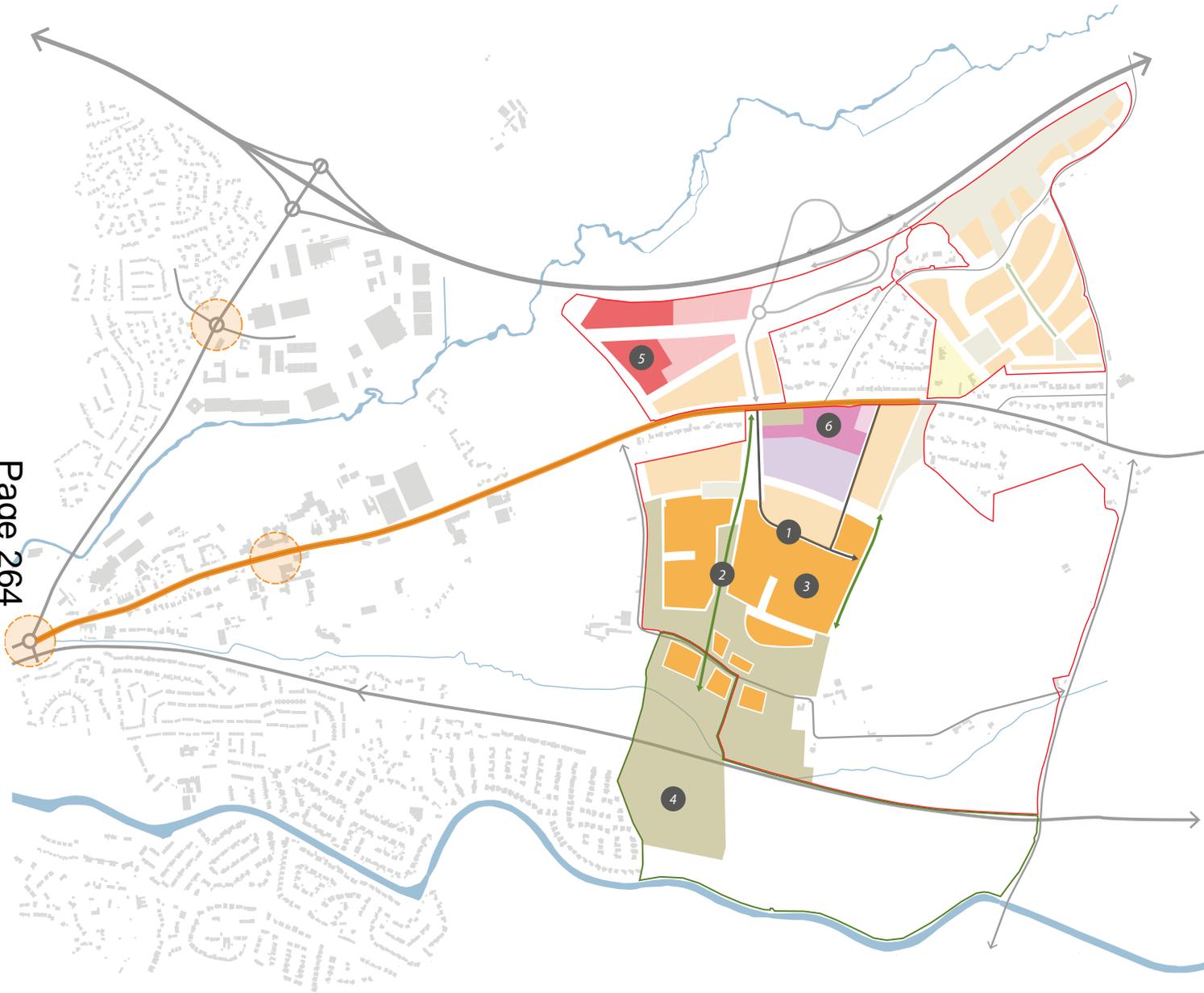
Second phase of the development - full junction to A361 completed, local centre commenced, further housing development north and south of Blundell's Road. Transfer of land for primary school and access prior to first occupation of land south of Blundell's Road, servicing of this site prior to the first development south of Blundell's Road. First phase of school prior to occupation of no more than 400 dwellings.

Legend

- Neighbourhood centre
- Employment (care home)
- Employment (previous phases)
- Residential (Previous phases)
- Open space (Previous phases)

- 1** Full movement junction to A361
- 2** West Manley Lane pedestrian / cycle link to Grand Western Canal and railway Walk
- 3** Up to 600 dwellings and at least 5 gypsy / traveller pitches
- 4** Public open space and school / community sports pitches* (circa 4.38ha)
- 5** Temporary POS on future school site (1.93ha)
- 6** Up to 10,000sqm employment prior to full movement junction, beyond which up to 25,000sqm employment
- 7** Phase 2 traffic calming to Blundell's Road
- 8** Bus service enhancement and start of neighbourhood centre
- 9** Provision of additional 2,500sqm employment land with proposed link

NB. Amounts of development are cumulative from the beginning of phase 1a.



Area A Phase 1c
Completion of Area A development.
Development mainly focused on area south of Blundell's Road and employment land to the north west.

Legend

- Neighbourhood centre
- Neighbourhood centre (previous phases)
- Employment (previous phases)
- Employment (previous phases)
- Residential (Previous phases)
- Open space (Previous phases)

- 1 Internal loop road
- 2 North - south green link
- 3 Up to 1000 dwellings
- 4 Public open space and green infrastructure (26.12ha)
- 5 Up to 27,500sqm of employment
- 6 Completion of mixed use neighbourhood centre

NB. Amounts of development are cumulative from the beginning of phase 1a.





Area B Phase 2a

Final phase of the development. Subject to review following two stage masterplanning process. Build out finishes and school provided, the remainder of residential and employment development along with associated open space and infrastructure.

Legend

- Neighbourhood centre (previous phases)
- Employment (previous phases)
- Employment (previous phases)
- Education
- Residential (Previous phases)
- Open space (Previous phases)

- 1** Up to 1520 dwellings and approximately 30,000sqm employment
- 2** Sports pitch provision (school and community) (circa 2.63ha)
- 3** POS and green infrastructure (circa 54.45ha)
- 4** Continuation of secondary route to south eastern area



NB. Amounts of development are cumulative from the beginning of phase 1a.

6.6 Delivery, monitoring and review

Viability and deliverability

Paragraph 173 of the National Planning Policy Framework emphasises consideration of viability and costs in plan-making and decision-taking – plans should be deliverable. The requirements around infrastructure provision and triggers for delivery set out have therefore been considered in light of this guidance. Viability testing will be reviewed beyond this SPD to ensure that the development envisaged is deliverable as far as is possible given the Council's aspirations for delivery of affordable homes, a highly sustainable development and the need to secure critical infrastructure.

Given the long timescale for delivery of the site and potential for uncertainty about the economy over that period, it will be appropriate to retest the viability of the scheme at later stages, likely when subsequent planning applications are submitted. This may mean that the level and / or timing of affordable housing provision required or the timing of provision of elements of infrastructure as set out in this SPD may need to be revisited. This may have implications for full provision of affordable housing in accordance with the 35% target. Where landowners / developers wish to retest scheme viability, the Council will require an open book approach on scheme viability to be taken. Any viability appraisals and supporting information received will be validated by an independent assessor to be appointed by the council and whose fees will be paid by the landowner / developer. The outcomes and implications of viability testing at application stage will be carefully evaluated by the Council in light of the aspirations and requirements set out in this SPD.

Implementation, delivery and monitoring

The success of the development will depend to a large extent on the continued partnership working of the landowners, the Council, and other key stakeholders to secure delivery of a high quality and sustainable place and supporting infrastructure in a timely way.

It will be possible to approach the further planning and development of the new garden neighbourhood at Post Hill in a number of ways. The SPD has been written to reflect this in terms of the proposed two stage masterplan approach and the related design and approval process outlined in Section 1. This approach has been devised, in part, to reflect the likelihood of the submission of a number of separate outline planning applications by individual landowners/promoters whilst recognising the importance of securing consistency in approach, quality and co-ordination between applications and the delivery of infrastructure in accordance with the provisions of this SPD.

The Council wishes to avoid the submission of planning applications which may prejudice the development of a high quality place in a sustainable fashion underpinned by the infrastructure necessary to support it. In this regard, the Council will expect the following information to be submitted with planning applications:

- To secure comprehensive development of sustainable neighbourhood and place making, the application must be accompanied by a development framework plan for the

entirety of the Area (Area A or Area B) to which it relates that is in accordance with this SPD;

- To secure delivery of comprehensive infrastructure, the application must be accompanied by an Infrastructure Delivery Plan for the Area (Area A or Area B) to which it relates that demonstrates compliance with this SPD;
- To enable transport requirements, traffic impacts and associated appropriate mitigation measures for the development as a whole to be properly assessed, a Transport Assessment for the whole of the SPD area shall be submitted.

The delivery of phases will be overseen by the Council working with landowners / promoters and stakeholders to ensure:

- A coordinated approach to infrastructure delivery in accordance with the relevant infrastructure delivery plans;
- The delivery of a consistently high quality of development in accordance with the guidance and principles set out in this SPD;
- Securing external funding where available to help infrastructure delivery;
- Securing agreement and delivery of long term management and governance arrangements for the development;
- Monitoring delivery in order to inform the Annual Monitoring report.

The Council will monitor implementation of this SPD and the extent to which the strategic policy objectives and vision are being achieved in the Annual Monitoring report. If implementation / delivery is considered to be failing, this will be reported together with an explanation and proposed remedial steps.

Long term management and maintenance

To maintain a high quality of community facilities and green infrastructure across the SPD area it will be important to set in place robust and consistent management arrangements. The Council will seek to prepare and agree a neighbourhood management plan jointly with the applicants prior to the commencement of development. This will be an application requirement. The plan should cover all open spaces and public buildings and cite all management objectives with the aim of establishing medium and long term objectives and arrangements.

This plan will also need to consider a robust governance structure which could take the form of a management trust/company and could also include a role for Tiverton Town Council.

In terms of funding, it is likely that the plan will look to generate revenue from an annual service charge from residents and business occupiers together with the potential for revenue from hire of building/facilities. Revenue will be subsidised by the developer in the early stages and additional revenue sources (grant funding, sponsorship and commercial opportunities) should also be explored.

6.7 Requirements for future planning applications

Requirements for future planning applications

The extension to Tiverton at Post Hill will be delivered over a time period in excess of 10 years and due to multiple land ownerships is likely to come forward as a number of outline and/or full planning applications. Outline applications will be followed by reserved matters applications that may be based on subdivision of the site into smaller sub phases. Each planning application will require the submission of supporting documents and information. Planning permissions granted are also expected to result in planning conditions, the discharge of which are also likely to require the submission and approval of further reports and documents on topics such as the design, construction and management of aspects of the development.

The Council is considering the best mechanism to deliver the required infrastructure associated with this development, whether it be by the Community Infrastructure Levy in whole or part, or via site specific S106 agreements. Important to the decision on which mechanism will be the most effective in delivering the necessary infrastructure will be an understanding of the likely number of planning applications in outline or full likely to be received for the urban extension as a whole. This is due to the limit on the ability to pool more than five S106 contributions for the same project or infrastructure type. In order to ensure that options are kept open for the most effective delivery of infrastructure, that infrastructure is provided in a coordinated and timely manner and that individual applications do not prejudice the ability to provide infrastructure on other parts of the site, the Council will seek to ensure that the whole

of the allocation area together with the green infrastructure area come forward as no more than a total of 5 outline / full planning applications. To this end the Council will encourage the development to come forward as a small number of larger applications in order to ensure that there are no more than 5 S106 agreements in total across the whole of the allocation area. Information forming part of a planning application must meet standard national requirements. In addition the Council's local validation requirements must also be met.

A list of information to be submitted as part of the planning application process for the development of the site is provided below. It should be noted that this list is not exhaustive and further requirements may be identified as a result of pre-application discussions. Some elements may also be more appropriately submitted at reserved matters stage dependent upon the scope of the application made at outline application stage. This list should be read in conjunction with the design process and delivery requirements outlined previously in this SPD.

Theme: Masterplanning and design

- Outline application: Development framework plan to illustrate development form at a greater degree of resolution for the whole of Area A / Area B as relevant to the application location
- Outline application: Design and Access Statement to include proposed character areas, street / space typologies, sample blocks and key areas including the neighbourhood centre referring back to this SPD and development framework

plan above. Conditions are likely to require the approval of illustrated urban design and architectural principles prior to the submission of reserved matters applications. More details are to be found within 1.7 Design process

- Reserved matters: Detailed design proposals for the area applied for. Compliance with this SPD and subsequent masterplanning and design stages above will need to be demonstrated
- Full applications: Will need to meet the requirements of both outline and reserved matters applications. Building for Life 12 self assessment (residential only)

Theme: Planning

- Planning Statement
- Retail Impact Assessment – to include floorspace schedule outlining indicative scale of proposed land uses at the neighbourhood centre
- Draft Heads of Terms for Section 106 Agreement (assuming site specific S106)
- Viability Appraisal and independent review with details to be agreed with Mid Devon District Council
- Affordable Housing Statement
- Statement of Community Involvement (SCI)
- Infrastructure Delivery Plan for relevant area (Area A or Area B)
- Neighbourhood Management Plans – to cover future maintenance of community spaces and buildings

Theme: Sustainability

- Sustainability & Energy Assessment incorporating a carbon reduction strategy – outlining the approach taken to integrate sustainability during the design process. This can include topics such as water use, materials, surface water run-off, waste, pollution, health and wellbeing, management, ecology and transport. This should also include estimated energy loads and consumption as well as predicted CO₂ (carbon) emissions of the overall development, in addition to the submission of design stage BREEAM and Code for Sustainable Homes assessments (the latter being subject to the outcome of current Government review)
- Waste audit statement – to demonstrate how waste will be managed according to the waste hierarchy

Theme: Traffic & Transport

- Whole SPD site Transport Assessment
- Whole SPD site Framework Travel Plan – outlining measures to encourage new residents and employees on site to use sustainable modes of transport
- Traffic pollution assessment – to consider the impact of traffic generated nitrogen oxides upon environmental assets including mitigation measures. (See also air quality assessment below)
- Whole SPD site Public Transport Strategy – outlining a strategy for providing viable sustainable transport options
- Public Rights of Way Statement – assessing the impact on existing access routes

- Highway design report and any other reports & modelling as required in consultation with Devon County Council Highways Department

Theme: Environmental Impact

- Environmental Statement
- Landscape and Visual Impact Assessment
- Arboricultural Survey & Landscape Plan, including tree and hedgerow removal details
- Biodiversity & Ecological Reports including Management Plan
- Archaeology Assessment
- Air Quality Assessment – to include Low Emission Strategy
- Noise Assessment
- Flood Risk Assessment
- Sustainable Drainage Strategy
- Heritage Statement including description of significance of any affected heritage assets
- External Lighting Assessment – to include assessment on habitat areas and where details of high-intensity lighting (e.g. MUGA floodlights) are included or indicatively shown near to sensitive/residential areas
- Land Contamination Assessment
- Site Waste Management Statement
- Construction Management Plans
- Utility Infrastructure Report

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Hydrology

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Ground conditions and contamination

Environ
Air Quality

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Schedule of Changes

Page No.	Adopted Masterplan SPD	Proposed Change
22	Thumbnail extract of Illustrative Framework Plan showing the 3 housing clusters south of West Manley Lane	Amend the extract to remove the 3 housing clusters south of West Manley Lane.
42	Plan highlighting the key development concepts	Amend to remove the 3 housing clusters south of West Manley Lane.
64	Illustrative Framework Plan	Amend to remove the 3 housing clusters south of West Manley Lane.
66	Extract of Illustrative Framework Plan	Amend to remove the 3 housing clusters south of West Manley Lane.
68	Framework Plan for amount and use of development	Amend to remove the 3 housing clusters south of West Manley Lane.
69	Table of amount and use of land (Land Use Budget) Line 1, Column 4: 9.54ha Line 1, Column 5: 26.04ha Line 1, Column 7: 42.3ha	Table of amount and use of land (Land Use Budget) Line 1, Column 4: 8.55ha Line 1, Column 5: 25.05ha Line 1, Column 7: 41.31ha
69	Table of amount and use of land (Land Use Budget) Line 2, Column 4: 324 dwellings (34dph) Line 2, Column 5: 969 dwellings Line 2, Column 7: 1522 dwellings	Table of amount and use of land (Land Use Budget) Line 2, Column 4: 290 dwellings (34dph) Line 2, Column 5: 935 dwellings Line 2, Column 7: 1488 dwellings
69	Table of amount and use of land (Land Use Budget) Line 6, Column 4: 14.04ha Line 6, Column 5: 35.47ha	Table of amount and use of land (Land Use Budget) Line 6, Column 4: 13.05ha Line 6, Column 5: 34.48ha

	Line 6, Column 7: 52.23ha	Line 6, Column 7: 51.24ha
	Table of amount and use of land (Land Use Budget) Line 8, Column 4: 19.74ha Line 8, Column 5: 26.12ha Line 8, Column 7: 54.45ha	Table of amount and use of land (Land Use Budget) Line 8, Column 4: 20.73ha Line 8, Column 5: 27.11ha Line 8, Column 7: 55.44ha
69	Table of amount and use of land (Land Use Budget) Line 12, Column 4: 25.37ha Line 12, Column 5: 36.65ha Line 12, Column 7: 70.19ha	Table of amount and use of land (Land Use Budget) Line 12, Column 4: 26.36ha Line 12, Column 5: 37.64ha Line 12, Column 7: 71.18ha
70	Framework Plan for movement	Amend to remove the 3 housing clusters south of West Manley Lane.
72	Framework Plan for land uses	Amend to remove the 3 housing clusters south of West Manley Lane.
74	Framework Plan for landscape & open space	Amend to remove the 3 housing clusters south of West Manley Lane.
78	Framework Plan Reinforcing the Structure	Amend to remove the 3 housing clusters south of West Manley Lane.
80	Thumbnail extract of Illustrative Framework Plan showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
83	Thumbnail extract of Illustrative Framework Plan showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
85	Thumbnail extract of Illustrative Framework Plan showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
87	Thumbnail extract of Illustrative Framework Plan showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
89	Thumbnail extract of Illustrative Framework Plan	Amend to remove the 3 housing clusters south of West Manley

	showing the 3 housing clusters south of West Manley Lane	Lane.
91	Thumbnail extract of Illustrative Framework Plan showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
95	Illustrative Section	'Hand' the section such that open space / existing fields; West Manley Lane; Ecological mitigation (generous sized plots, planted banks); private drive and courtyards. (Limited number of dwellings to West Manley Lane is on the northern side only).
95	Illustrative Plan	Retain plan but rotate 90 degrees clockwise. Remove point of access onto West Manley Lane, indicate access instead from the north.
95	Illustrative Plan and Section The illustrative plan and section for the West Manley Lane area indicates low-density housing in small groups with large gardens accessed from private roads and countryside off of West Manley Lane. The plan shows that housing would be two storey and the integrity of the hedgerows on the lane would be maintained.	Illustrative Plan and Section The illustrative plan and section for the West Manley Lane area indicates a very limited number of low-density dwellings in two small groups on the northern side of the lane with large gardens. These are to be accessed from within the main development to the north and not off West Manley Lane. The plan shows that housing would be two storey and the integrity of the hedgerows along the lane would be maintained.
95	Thumbnail extract of Illustrative Framework Plan showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
95	Column 1, Para 1 The character of the southern extremity of the site around West Manley Lane is different from that of the wider area. It is defined by a more rural landscape dominated appearance made up from mature hedge banks, tree groups and fields enclosed by hedge boundaries. It is also one of the lowest areas of the site and therefore needs to incorporate appropriate	The character at the southern extremity of the site around West Manley Lane is different from that of the wider area. It is defined by a more rural landscape dominated appearance made up from mature hedge banks, tree groups and fields enclosed by hedge boundaries. It is also one of the lowest areas of the site and may need to incorporate appropriate measures for water attenuation.

	measures for water attenuation.	
95	Column 1, Para 2	A very limited number of low density houses are proposed in the vicinity of West Manley Lane (north side only) in order to safeguard its rural character and function as a natural southern boundary to development. This would comprise a small number of relatively large homes in small groups set within generous gardens and around courtyards. New housing should be designed so that it evokes the rural character of exiting development in and around the lane and to reduce its impact upon the character and appearance of the lane itself.
95	Column 1, Para 3 By introducing small housing clusters, it will be possible to ensure that landscape and ecological mitigation and SUDs measures can be properly incorporated.	Remove para 3.
95	Streets, public opens space and landscape Small private drive accessing courtyards for up to five houses off of West Manley Lane. The existing character of the lane to be retained. The existing character and function of the lane for local access to be retained together with opportunities along it for walking and cycling.	Streets, public opens space and landscape The existing character of the lane is to be retained. The existing character and function of the lane for local access is to be retained together with opportunities along it for walking and cycling.
97	Thumbnail extract of Illustrative Framework Plan showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
107	Area A Phase 1c showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
107	Area B Phase 2a showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
110	Area A Phase 1c showing the 3 housing clusters south of West Manley Lane	

110	Bullet Point 4: Public open space and green infrastructure (26.12ha)	Amend: Public open space and green infrastructure (27.11ha)
111	Area B Phase 2a showing the 3 housing clusters south of West Manley Lane	Amend to remove the 3 housing clusters south of West Manley Lane.
Sleeve	Illustrative Framework Plan	Amend to remove the 3 housing clusters south of West Manley Lane.
Adopted Masterplan SPD, Section 3 Appendix		No changes required

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CABINET
14 JUNE 2018

DATA PROTECTION POLICY

Cabinet Member: Cllr Clive Eginton
Responsible Officer: Catherine Yandle, Group Manager for Performance, Governance and Data Security

Reason for Report: To update the existing policy to incorporate the requirements of the Data Protection Act (DPA) 2018 and GDPR.

RECOMMENDATION(S): That Cabinet approves the revised Data Protection Policy.

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

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

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

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

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

1.0 Introduction

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

2.0 The Policy

2.1 The existing policy was already based on best practice which has meant the revised policy is not a complete re-write but recognition of the fact that additional requirements are now reflected in legislation.

2.2 The main changes were to the Principles in section 5, Special Category Data in section 6 and the Rights of Data Subjects in section 8.

2.3 There were minor changes to staff job titles and responsibilities, throughout.

3.0 **Conclusion**

3.1 That Cabinet approves the revised Data Protection Policy.

Contact for more Information: Catherine Yandle, Group Manager for Performance, Governance and Data Security

Circulation of the Report: Cabinet Members, Cllr Eginton, Leadership Team

Mid Devon District Council

Data Protection Policy

Policy Number: IM 002

May 2018

Version Control Sheet

Title: Data Protection Policy and Guidance

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

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

Version Number: 4.0

Status: Draft

Review Frequency: Every three years

Next review date: April 2021

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

Document History

This document obtained the following approvals.

Title	Date	Version Approved
Data Protection Officer/Group Managers		
Leadership Team		
Cabinet		

Roles

Senior Information Reporting Officer: Jill May

Data Protection Officer: Catherine Yandle

Group Managers; includes Head of Planning and Leisure Managers

Data Protection Policy

1. Introduction

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

Our residents, partners and suppliers have an expectation that they can deal with us in the knowledge that the Council will process their data properly.

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

2. Related Documents

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

3. Scope

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

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

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

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

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

4. Policy Statement

The Council regards the lawful and correct treatment of personal information as very important to its successful operations and to maintaining confidence between the Council and those with whom it carries out business. The Council will ensure that it treats personal information lawfully and correctly.

To this end the Council fully endorses and adheres to the six Principles of Data Protection as set out in the Data Protection Act 2018.

5. The principles of data protection

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

The Principles require that personal information shall be:

1. processed lawfully, fairly and transparently in relation to the data subject;
2. collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes;
3. adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed;
4. accurate and, where necessary, kept up to date;
5. kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed;
6. processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage.

The controller shall be responsible for, and be able to demonstrate compliance with these principles

The Act provides conditions for the processing of any personal data. It also makes a distinction between **personal data** and **“special category” data**.

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

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

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

- Racial or ethnic origin;
- Political opinion;
- Religious or philosophical beliefs;
- Trade union membership;
- Physical or mental health or condition;
- Sex life;
- Sexual orientation.

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

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

6. Identification of roles and responsibilities

- The Senior Information Reporting Officer for MDDC is ultimately responsible for ensuring proper application of Data Protection within MDDC with the Data Protection Officer responsible for overseeing the day to day implementation of the Data Protection principles by Services in relation to personal data management as set out in this policy.
- The Data Protection Officer will provide the link between Leadership Team, Data Protection, Freedom of Information and Records Management practices. Where appropriate, this post will co-ordinate activities, such as maintaining the Publication Scheme.
- Group Managers are responsible for the management of personal data processed by their services, in accordance with this policy, and ensuring that all staff are aware of Data Protection requirements.
- All Councillors and Employees of MDDC will be responsible for ensuring that the personal data they control in relation to their work is maintained in accordance with the data protection principles.
- All Staff have the responsibility of ensuring compliance with the requirements of Data Protection legislation and this is included in their job descriptions

7. Training and Awareness

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

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

8. Handling of personal/special category information

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

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

These include:

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

In addition, the Council will ensure that:

- Everyone managing and handling personal information understands that they are contractually responsible for following good data protection practice;
- Everyone managing and handling personal information is appropriately trained to do so;
- Everyone managing and handling personal information is appropriately supervised;
- Anyone wanting to make enquiries about handling personal information, whether a member of staff or a member of the public, knows what to do;
- Queries about handling personal information are promptly and courteously dealt with;
- Methods of handling personal information are regularly assessed and evaluated;

- Data sharing is carried out under a written agreement, setting out the scope and limits of the sharing. Any disclosure of personal data will be in compliance with approved procedures.

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

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

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

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

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

All contractors who are users of personal information supplied by the council will be required to confirm that they will abide by the requirements of the Act with regard to information supplied by the Council.

9. Disclosure of Personal Data

Personal Data will only be disclosed in accordance with the provisions of the DPA

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

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

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

10. Violations of Rules and Procedures

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

11. Implementation

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

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

12. Notification to the Information Commissioner

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

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

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

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

CABINET
14 JUNE 2018

RECORDS MANAGEMENT POLICY

Cabinet Member: Cllr Clive Eginton
Responsible Officer: Catherine Yandle, Group Manager for Performance, Governance and Data Security

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

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

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

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

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

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

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

1.0 Introduction

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

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

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

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

- (a) collection;*
- (b) alteration;*
- (c) consultation;*
- (d) disclosure (including transfers);*
- (e) combination;*
- (f) erasure.*

- (2) *The logs of consultation must make it possible to establish—*
- (a) *the justification for, and date and time of, the consultation, and*
 - (b) *so far as possible, the identity of the person who consulted the data.*
- (3) *The logs of disclosure must make it possible to establish—*
- (a) *the justification for, and date and time of, the disclosure, and*
 - (b) *so far as possible—*
 - (i) *the identity of the person who disclosed the data, and*
 - (ii) *the identity of the recipients of the data.*
- (4) *The logs kept under subsection (1) may be used only for one or more of the following purposes—*
- (a) *to verify the lawfulness of processing;*
 - (b) *to assist with self-monitoring by the controller or (as the case may be) the processor, including the conduct of internal disciplinary proceedings;*
 - (c) *to ensure the integrity and security of personal data;*
 - (d) *the purposes of criminal proceedings.*
- (5) *The controller or (as the case may be) the processor must make the logs available to the Commissioner on request.*

2.0 **The Policy**

- 2.1 In accordance with current Data Protection legislation it is vital that records handling happens as part of a managed process and is logged. This is a new and significant requirement.
- 2.2 The existing policy was already based on best practice which has meant the revised policy is not a complete re-write but recognition of the fact that additional requirements are now reflected in legislation.

3.0 **Conclusion**

- 3.1 That Cabinet approves the revised Records Management Policy.

Contact for more Information: Catherine Yandle, Group Manager for Performance, Governance and Data Security

Circulation of the Report: Cabinet Members, Cllr Eginton, Leadership Team

Mid Devon District Council

Records Management Policy

Policy Number: IM 001

May 2018

Version Control Sheet

Title: **Records Management Policy**

Purpose: **To detail the commitment of Mid Devon District Council to records management, and to advise officers on the standards to be implemented regarding record creation and record keeping.**

Owner: **Group Manager for Performance, Governance and Data Security**
cyandle@middevon.gov.uk
Telephone number 01884 234975

Date: **31 May 2018**

Version Number: **1.0**

Status: **Draft**

Review Frequency: **Every 4 years**

Next review date: **May 2022**

Consultation **This document was sent out for consultation to the following:**

Group Managers
Leadership Team
Cabinet Member

Document History

This document obtained the following approvals.

Title	Date	Version Approved
Group Managers Team		
Leadership Team	5 June 2018	
Cabinet*		
Council*		

*- Delete if not applicable

1.0 Introduction

1.1 Mid Devon District Council (MDDC) recognises that its records are an important public asset and are a key resource to effective operation and to accountability. Like any asset, they require careful management and this policy sets out the Council's responsibilities and activities in regard to the management of its records. It provides the framework for specific departmental and service guidance rather than detailed operating procedures, which must be developed within services taking account of this policy and the document retention requirements of any legislation they are subject to.

2.0 Scope

2.1 This policy aims to ensure that records are managed effectively throughout the organisation in accordance with professional principles and specified legislation and guidelines (see appendix 1). It applies to all the records of MDDC.

2.2 A record is any recorded information regardless of medium (including paper, electronic, audio and audio-visual), which is created, collected, processed, used, stored and/or disposed of by MDDC Councillors and employees, as well as those acting as its agents in the course of a Council activity. It applies to all Councillors and employees of MDDC.

3.0 Related Documents

- Data Protection Policy
- Information Security Policy
- Information Security Incident Policy
- Freedom of Information Policy

4.0 Policy Statement

4.1 The aim of this policy is to define a framework for managing the Council's records to ensure that the Council:

4.1.1 creates and captures accurate and reliable records to demonstrate evidence, accountability and information about its decisions and activities

4.1.2 facilitates auditing and protects its legal and other rights by:

- maintaining records securely and preserving access to them
- disposing appropriately of records that are no longer required in accordance with retention requirements and in such a manner that the disposal is logged
- protecting vital records, which it needs to order to function effectively
- maintaining records to meet the authority's business needs
- addressing the needs of the authority's stakeholders, including the public, employees and Councillors

- conforming to any legal and statutory requirements relating to record-keeping
- complying with Data Protection Legislation.

5.0 Identification of roles and responsibilities

- 5.1 The Chief Executive is responsible for approving this framework for records management as set out in this policy.
- 5.2 The Data Protection Officer will provide a link between Data Protection, Freedom of Information and Records Management practices. Where appropriate, this post will co-ordinate activities, such as maintaining the Corporate Document Retention Schedule and Publication Scheme.
- 5.3 Group Managers are responsible for the management of records associated with their service area(s), in accordance with this policy, and ensuring that all staff are aware of record keeping issues.
- 5.4 Devon County Record Office will, where appropriate, take custody of those records deemed worthy of permanent preservation.
- 5.5 All Councillors and employees of MDDC who create and maintain records in relation to their work are to ensure they are accurate and reliable.
- 5.6 Staff with specific responsibilities for record management will have these clearly defined in their job descriptions.

6.0 Training and Awareness

- 6.1 Since many MDDC employees are involved in creating, maintaining and using information/records, it is vital that everyone understands their information and record management responsibilities as set out in this policy. Group Managers will ensure that staff responsible for managing records are appropriately trained or experienced and that all staff understand the need for records management.
- 6.2 Annual training is mandatory to ensure that all staff are aware of their obligations concerning Data Protection, Freedom of Information and Information Security.

7.0 Records Creation and Record Keeping

- 7.1 Each service must have in place a record keeping system that documents its activities and provides for quick and easy retrieval of information. It must also take into account the legal and regulatory environment specific to their area of work. This system will include:
- Records arranged and indexed in such a way that they can be retrieved quickly and efficiently.
 - Records are linked with the Freedom of Information Publication Scheme.

- Procedures and guidelines for referencing, titling, indexing, version control and security marking.
- Procedures for keeping the system updated.
- The ability to cross reference electronic and paper records.
- Procedures to reduce record duplication and minimise paper records
- Documentation of this system

8. Record Maintenance

8.1 The record keeping system must be maintained so that the records are properly stored and protected, and can easily be located and retrieved. This will include:

- Ensuring that adequate storage/accommodation is provided for the records.
- Monitoring the movement and location of records so that they can be easily retrieved and provide an audit trail.
- Controlling access to the information.
- Identifying business critical records and applying the appropriate protection, including a business continuity plan.

9. Record Retention and Disposal

9.1 In accordance with Data Protection legislation it is vital that disposal of records happens as part of a managed process and is logged. Therefore, services must have in place clearly defined rules for the selection of records for disposal and for documenting this work. The system should ensure that:

- The appropriate records are reviewed and disposed of each year in accordance with the service retention policy.
- MDDC procedures for destroying confidential material and magnetic media are complied with.
- Documentation of the disposal of records is completed and retained.
- Records selected for permanent preservation are transferred to Devon County Record Office, the Place of Deposit for Public Records in Devon.
- An intended disposal/review date must be captured when creating electronic records.
- Records subject to a Subject Access Request (SAR) are not destroyed which is a criminal offence under DPA 2018.
- Initial guidance will be from LG Inform Plus but services will need to confirm this.

10. Performance Measurement

10.1 The Data Protection Officer will report annually to the Leadership Team.

10.2 Performance indicators will include:

- A summary of response times in providing information from the records or retrieving the records themselves with regard to SARs.
- Information audits of departmental records and follow up action plans.
- Stats from the Learning Management System regarding mandatory training undertaken.

Appendix 1: Standards and Legislation

Archive and Record-Keeping Legislation

- Public Records Act 1958 and 1967
- Local Government (Records) Act 1962
- Local Government Act 1972
- Local Government (Access to Information) Act 1985
- Freedom of Information Act 2000
- Data Protection Act 2018

Records Management Standards and Guidelines

- British Standards (BSI)
- Public Record Office standards for the management of public records
- Retention Guidelines for Local Authorities - produced by the Local Government Group of the Records Management Society Great Britain (currently 2003)
- LG Inform Plus Retention Guidelines

CABINET

AGENDA ITEM:

14 JUNE 2018:

PERFORMANCE AND RISK FOR 2017-18

Cabinet Member Cllr Clive Eginton
Responsible Officer Director of Corporate Affairs & Business Transformation,
Jill May

Reason for Report: To provide Members with an update on performance against the corporate plan and local service targets for 2017-18 as well as providing an update on the key business risks.

RECOMMENDATION: That the Committee reviews the Performance Indicators and Risks that are outlined in this report and feeds back any areas of concern.

Relationship to Corporate Plan: Corporate Plan priorities and targets are effectively maintained through the use of appropriate performance indicators and regular monitoring.

Financial Implications: None identified

Legal Implications: None

Risk Assessment: If performance is not monitored we may fail to meet our corporate and local service plan targets or to take appropriate corrective action where necessary. If key business risks are not identified and monitored they cannot be mitigated effectively.

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

1.0 Introduction

- 1.1 Appendices 1-5 provide Members with details of performance against the Corporate Plan and local service targets for the 2017-18 financial year.
- 1.2 When benchmarking information is available it is included.
- 1.3 Appendix 6 shows the higher impact risks from the Corporate Risk Register. This includes Operational and Health & Safety risks where the score meets the criteria for inclusion. See 3.0 below.
- 1.4 Appendix 7 shows the risk matrix for the Council.
- 1.5 All appendices are produced from the Corporate Service Performance And Risk Management system (SPAR).

2.0 Performance

Environment Portfolio - Appendix 1

- 2.1 Regarding the Corporate Plan Aim: **Increase recycling and reduce the amount of waste**: The Council has reached the end of the municipal with **Residual household waste per household (measured in Kilograms)** over achieved against the target of no more than 420kg at only 381.4kg. This is a good result although a little higher than last year's 374.2kg.
- 2.2 We are still a little below target for **% of household waste reused, recycled and composted** at 51.9% against the target of 53%. However due to the closure of the composting facility and stockpile facilities at Carlu Close being unavailable due to building works associated with the Waste Transfer Station it was not possible to compost all street sweeping residue in Q1 & Q2 2018, if this material had been composted the recycling rate for the year would be 53.0% i.e. on target.
- 2.3 Regarding the Corporate Plan Aim: **Reduce our carbon footprint**: The energy switching scheme went live on MDDC's website on 1 December 2017 and referrals are now also being made through the LEAP scheme. The first full quarter numbers for Q4 2017/18 were 22.
- 2.4 Regarding the Corporate Plan Aim: **Protect the natural environment**: 18 of the 27 recommendations from the Street Cleansing review have now been implemented. All the priority activities for Street Scene for 2017/18 in the Corporate Plan have now been completed except this one.

Homes Portfolio - Appendix 2

- 2.5 Regarding the Corporate Plan Aim: **Build more council houses**: No new **Council Houses** were completed; however work is progressing on Birchen Lane (4), Palmerston Park (26) and Burlescombe (6). The poor weather has caused delays, but all are due for completion in 2018/19.
- 2.6 Regarding the Corporate Plan Aims: **Facilitate the housing growth that Mid Devon needs, including affordable housing; and Planning and enhancing the built environment**: 32 responses have been received following the latest consultation on the Local Plan (sustainability appraisal). These have been sent to the Planning Inspector so we now await a date for inspection of the Plan (expected to be in the autumn).
- 2.7 **Percentage of Properties with a Valid Gas Safety Certificate (LGSR)**: There were seven properties as at the end of March where MDDC has been unable to carry out the annual service and issue a Landlord Gas safety Record, 4 of these have since been serviced. Failure to renew the safety record is centred on tenant issues that have prevented the contractor from delivery of the necessary works. The remainder are all at the legal stage which means that either a letter before action (LBA) has been issued or we are in the process of seeking an injunction.

Economy Portfolio - Appendix 3

- 2.8 Regarding the Corporate Plan Aim: **Attract new businesses to the District:** A planning application from Lidl is expected shortly, a new industrial development is being started in Cullompton – Venn Place. Delivery of employment land allocations in the Local Plan is being actively pursued.
- 2.9 Regarding the Corporate Plan Aim: **Focus on business retention and growth of existing businesses:** we record **Businesses assisted** which is on target at 261 against an annual target of 250; they have to be assisted for a minimum of an hour to be included in this figure.
- 2.10 Regarding the Corporate Plan Aim: **Improve and regenerate our town centres with the aim of increasing footfall, dwell-time and spend in our town centres:** for **Empty Shops**, counting takes place at the start of the quarter so the final position for 2017/18 compared to 2016/17 is; 7 more empty shops for Tiverton, 1 more in Crediton and 1 more in Cullompton.
- 2.11 Regarding the Corporate Plan Aim: **Grow the tourism sector:** the Mid Devon Destination Management Plan for Tourism; this PDG recommended to Cabinet that the strategy be recommended to Council for approval. Subject to the inclusion of additional material with regard to country sports and mention of the shrine at the Roman Catholic Boniface Church the Destination Management Plan was duly approved by Full Council on 25 April.
- 2.12 Mid Devon had a slightly lower than average income deprivation indice in 2015 at 0.103 compared to the average of 0.109 (all comparisons are for England only); only Westex, Lowman and Cranmore are higher than average. The rate of unemployment for 2015/16 was low; 0.8% compared to an average of 1.8%.
- 2.13 Educationally we do well too, with a higher than average number of children attaining 5 or more A* to C grades at GCSE (including English and Maths), at 62.2% compared to an average of 56.6%. For housing, according to the 2011 census, Mid Devon has half the average number of overcrowded houses but over double the number without central heating.

Community Portfolio - Appendix 4

- 2.14 Food Hygiene data, scores on the doors, is included as Appendix 4a.

Corporate - Appendix 5

- 2.15 **Working days lost due to sickness** is well below target but not higher than the average for English authorities according to LGA.
- 2.16 The **Response to FOI requests** is still well below target. However 89% have been on time in the 3 months since the new Information Management Officer started. For April this figure was 97%.

- 2.17 GDPR (DPA) project; further updates have been given at team meetings, Leadership Team and a Members' briefing. The Privacy Notices for on-line forms and the website are in the progress of being published and a parishes' briefing has been arranged for 30 May.
- 2.18 The **Performance Planning Guarantee determined within 26 weeks** remains slightly below target but the 4 speed and quality measures are all well above the required target.

3.0 Risk

- 3.1 The Corporate risk register is reviewed by Group Managers (GMT) and updated; risk reports to committees include risks with a total score of 10 or more. (Appendix 6)
- 3.2 Appendix 7 shows the risk matrix for MDDC for this quarter. If risks are not scored they are included in the matrix at their inherent score which will be higher than their current score would be.

4.0 Conclusion and Recommendation

- 4.1 That the Committee reviews the performance indicators and any risks that are outlined in this report and feeds back any areas of concern.

Contact for more Information: Catherine Yandle Group Manager for Performance, Governance and Data Security ext 4975

Circulation of the Report: Management Team and Cabinet Member

Corporate Plan PI Report Environment

Monthly report for 2017-2018
 Arranged by Aims
 Filtered by Aim: Priorities Environment
 For MDDC - Services

Key to Performance Status:

Performance Indicators: No Data Well below target Below target On target Above target Well above target

* indicates that an entity is linked to the Aim by its parent Service

Corporate Plan PI Report Environment																		
Priorities: Environment																		
Aims: Increase recycling and reduce the amount of waste																		
Performance Indicators																		
Time	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
301	374.20	374.20	420.00	32.80	63.57	98.56	130.52	166.92	195.29	224.36	255.24	285.00	321.83	350.87	381.40	381.40	Stuart Noyce	(April - March) This is an estimated figure based on raw data which is yet to be verified by DCC (LD)
	53.3%	53.3%	53.0%	51.3%	52.6%	51.3%	51.8%	52.5%	52.5%	52.6%	52.7%	52.9%	52.6%	52.3%	51.9%	51.9%	Stuart Noyce	(March) Figures for March 2018 recycling rate supplied by DCC

Corporate Plan PI Report Environment

Priorities: Environment

Aims: Increase recycling and reduce the amount of waste

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes	
Page 302																		one month behind reporting cycle. March 2018 recycling rate is estimated based on the raw data available; not yet verified by DCC (LD)	
	Net annual cost of waste service per household	£54.39	£54.39	£50.35	n/a	£49.91	£49.91	Stuart Noyce											
	Number of Households on Chargeable Garden Waste	8,536	8,536	9,000	8,692	8,973	9,107	9,343	9,449	9,537	9,520	9,268	9,286	9,330	9,367	9,386	9,386	Stuart Noyce	(March) 386 customers over the 9,000 customer target for the year (LD)
	% of missed collections reported (refuse and	0.04%	0.04%	0.03%	0.04%	0.03%	0.03%	0.03%	0.03%	0.03%	0.04%	0.04%	0.04%	0.04%	0.04%	0.04%	0.04%	Stuart Noyce	(March) Actual March figure =

Corporate Plan PI Report Environment

Priorities: Environment

Aims: Increase recycling and reduce the amount of waste

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
<u>organic waste</u>																		0.02% (LD)
<u>% of Missed Collections logged (recycling)</u>	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	0.03%	Stuart Noyce	

Aims: Protect the natural environment

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
<u>Number of Fixed Penalty Notices (FPNs) Issued (Environment)</u>		10	10		5	9	10	13	16	21	24	31	36	41	42	49	Stuart Noyce	

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Corporate Plan PI Report Homes

Monthly report for 2017-2018
 Arranged by Aims
 Filtered by Aim: Priorities Homes
 For MDDC - Services

Key to Performance Status:

Performance Indicators: No Data Well below target Below target On target Above target Well above target

* indicates that an entity is linked to the Aim by its parent Service

Corporate Plan PI Report Homes

Priorities: Homes

Aims: Build more council houses

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Manager Date	Group Manager	Officer Notes
<u>Build Council Houses</u>	0	0	13	0	0	0	0	0	0	0	0	0	0	0	0	0	Angela Haigh	

Aims: Facilitate the housing growth that Mid devon needs, including affordable housing

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Manager Date	Group Manager	Officer Notes
<u>Number of affordable homes delivered (gross)</u>	31	31	80	n/a	n/a	26	n/a	n/a	59	n/a	n/a	72	n/a	n/a	92	92	Angela Haigh	
<u>Deliver 15 homes per year by bringing Empty Houses into use</u>	33	33	25	7	11	13	23	34	43	54	84	98	111	122	128	128	Simon Newcombe	

Aims: Other

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
<u>Number of Successful Homelessness Prevention Cases</u>	295	295	No Target - for information only	n/a	n/a	99	n/a	n/a	159	n/a	n/a	240	n/a	n/a	344	344	Angela Haigh	
	100.00%	100.00%	100.0%	99.9%	99.9%	100.0%	99.9%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		

Corporate Plan PI Report Homes																		
Priorities: Homes																		
Aims: Other																		
Performance Indicators																		
Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
<u>% Decent Council Homes</u>																	Angela Haigh	
<u>% Properties With a Valid Gas Safety Certificate</u>	99.86%	99.86%	100.00%	99.95%	99.64%	99.87%	99.82%	99.96%	99.91%	99.82%	99.87%	99.82%	99.64%	99.69%	99.69%	99.69%	Angela Haigh	
<u>Rent Collected as a Proportion of Rent Owed</u>	100.18%	100.18%	100.00%	93.76%	95.18%	96.25%	96.87%	99.14%	98.73%	99.08%	98.85%	99.73%	99.37%	99.34%	99.25%	99.25%	Angela Haigh	
<u>Current Tenant Arrears as a Proportion of Annual Rent Debt</u>	0.60%	0.60%	1.00%	0.93%	1.06%	1.16%	1.30%	1.26%	1.30%	1.17%	1.33%	1.05%	1.28%	1.32%	0.95%	0.95%	Angela Haigh	
<u>Dwelling rent lost due to voids</u>	0.5%	0.5%	no target - for information only	0.4%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	Angela Haigh	
<u>Average Days to Re-Let Local Authority Housing</u>	15.7days	15.7days	16.0days	14.0days	15.7days	16.4days	15.8days	16.1days	16.8days	17.1days	16.6days	16.3days	16.0days	15.0days	15.5days	15.5days	Angela Haigh	

Corporate Plan PI Report Economy

Monthly report for 2017-2018
 Arranged by Aims
 Filtered by Aim: Priorities Economy
 For MDDC - Services

Key to Performance Status:

Performance Indicators:

No Data	Well below target	Below target	On target	Above target	Well above target
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* indicates that an entity is linked to the Aim by its parent Service

Corporate Plan PI Report Economy

Priorities: Economy

Aims: Attract new businesses to the District

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group to Manager	Officer Notes
<u>Number of business rate accounts</u>	2,930	2,930	3,000	2,933	2,936	2,942	2,951	2,951	2,963	2,963	2,987	3,004	3,004	3,021	3,028	3,028	John Chumbley, Andrew Jarrett	(March) Can only increase if there are actual new properties brought into the Valuation List as a result of a new business being built, converted from CTAX to NDR or another NDR property is split into several other properties. (CY)

Aims: Focus on business retention and growth of existing businesses

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group to Manager	Officer Notes
<u>Businesses assisted</u>	n/a	n/a	250	20	38	53	92	112	137	159	195	207	227	249	261	261	None	

Aims: Improve and regenerate our town centres

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group to Manager	Officer Notes
<u>Increase in Car Parking Vends</u>	55,241	55,241		48,051	53,937	54,086	54,730	54,417	54,734	53,420	51,810	51,051	48,993	45,345	47,790	47,790	Andrew Jarrett	
<u>The Number of Empty Shops (TIVERTON)</u>	16	16	18	n/a	n/a	19	n/a	n/a	25	n/a	n/a	23	n/a	n/a	21	21	Adrian Welsh	(Quarter 4) Vacancies as of 30th January 2018 = 21 representing 9.1% of total units (JB)
<u>The Number of Empty Shops (CREDITON)</u>	7	7	8	n/a	n/a	8	n/a	n/a	8	n/a	n/a	8	n/a	n/a	11	11	Adrian Welsh	(Quarter 4) Vacancy Rates as of 30th January 2018 is 11, representing 9.4% (JB)
<u>The Number of Empty Shops (CULLOMPTON)</u>	8	8	8	n/a	n/a	11	n/a	n/a	9	n/a	n/a	9	n/a	n/a	8	8	Adrian Welsh	(Quarter 4) Vacancy Rates as of 30th January 2018 is 8 vacant units representing 9.4% of retail units. (JB)

Corporate Plan PI Report Economy**Priorities: Economy****Aims: Other****Performance Indicators**

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
<u>Funding awarded to support economic projects</u>	£61,842	£61,842		n/a	n/a	£0	n/a	n/a	£25,459	n/a	n/a	£35,899	n/a	n/a	£35,899	£35,899	Adrian Welsh	(Quarter 4) NO further grants awarded in Q4 (JB)

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Corporate Plan PI Report Community

Monthly report for 2017-2018

Arranged by Aims

Filtered by Aim: Priorities Community

Filtered by Flag: Exclude: Corporate Plan Aims 2016 to 2020

For MDDC - Services

Key to Performance Status:

Performance Indicators:

No Data

Well below target

Below target

On target

Above target

Well above target

* indicates that an entity is linked to the Aim by its parent Service

Corporate Plan PI Report Community

Priorities: Community

Aims: Promote physical activity, health and wellbeing

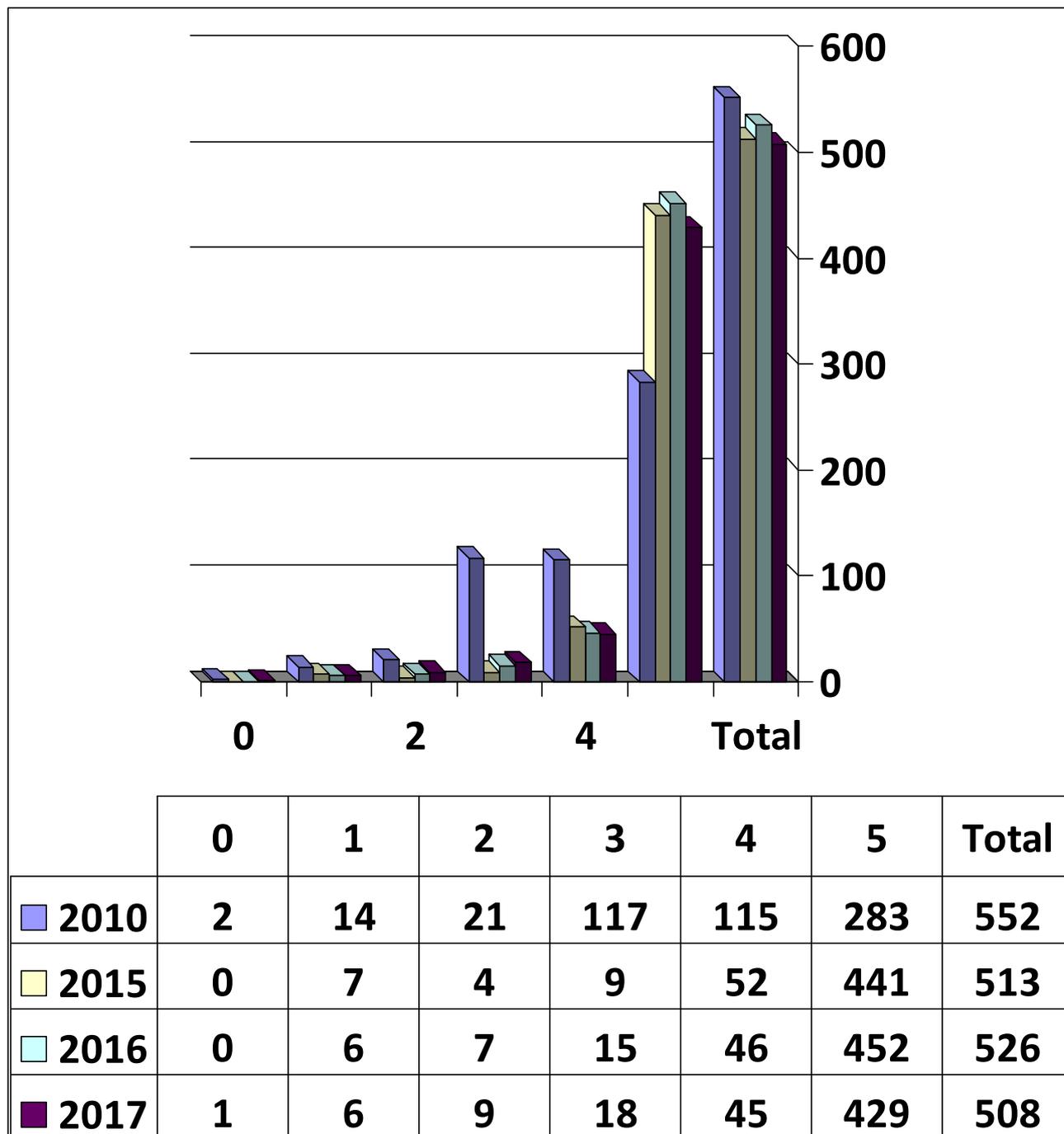
Performance Indicators																			
Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes	
<u>GP Referrals</u>	n/a	n/a		18	18	18	22	22	22	22	22	22	22	22	22	22	Corinne Parnall	(March) 22 (K)	

Aims: Other

Performance Indicators																			
Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes	
<u>Number of social media communications MDDC send out</u>	191	191	For information only	87	129	101	152	152	111	175	201	133	108	102	108	108	Jane Lewis	(March) No. of Facebook Posts Published = 50 No. of Tweets Tweeted	

Corporate Plan PI Report Community																		
Priorities: Community																		
Aims: Other																		
Performance Indicators																		
Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
																		= 58 (MA)
<u>Number of web hits per month</u>	28,543	28,543	***For information only***	30,041	32,545	28,620	28,208	27,028	26,949	27,804	26,099	24,152	36,837	28,794	45,006	45,006	Jane Lewis	(March) (MA)
<u>Compliance with food safety law</u>	89%	89%	90%	90%	90%	90%	89%	89%	89%	88%	87%	88%	87%	85%	85%	85%	Simon Newcombe	

Food Hygiene Rating Scheme 2010-17



FOOD HYGIENE RATING SCHEME BANDINGS

- 0 Urgent improvement necessary
- 1 Major improvement necessary
- 2 Improvement necessary
- 3 Generally satisfactory
- 4 Good
- 5 Very good

* The national food hygiene rating scheme was launched in 2010

Corporate Plan PI Report Corporate

Monthly report for 2017-2018

Arranged by Aims

Filtered by Aim: Priorities Delivering a Well-Managed Council
For MDDC - Services

Key to Performance Status:

Performance Indicators:

No Data	Well below target	Below target	On target	Above target	Well above target
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* indicates that an entity is linked to the Aim by its parent Service

Corporate Plan PI Report Corporate

Priorities: Delivering a Well-Managed Council

Aims: Put customers first

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
<u>% of complaints resolved w/in timescales (10 days - 12 weeks)</u>	92%	92%	90%	100%	96%	88%	91%	92%	93%	94%	95%	93%	92%	93%	91%	91%	Lisa Lewis	
<u>Number of Complaints</u>	21	21	For information only	13	13	23	15	27	38	19	30	15	19	15	31	31	Lisa Lewis	
<u>New Performance Planning Guarantee determine within 26 weeks</u>	98%	98%	100%	n/a	n/a	99%	99%	Jenny Clifford, Adrian Welsh										
<u>Major applications determined within 13 weeks (over last 2 years)</u>	74%	74%	60%	n/a	n/a	83%	83%	Jenny Clifford, Adrian Welsh										
<u>Minor applications determined within 8 weeks (over last 2 years)</u>	76%	76%	65%	n/a	n/a	79%	79%	Jenny Clifford, Adrian Welsh										
	9%	9%	10%	n/a	n/a	4%	4%											

Corporate Plan PI Report Corporate																		
Priorities: Delivering a Well-Managed Council																		
Aims: Put customers first																		
Performance Indicators																		
Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
<u>Major applications overturned at appeal (over last 2 years)</u>																	Jenny Clifford, Adrian Welsh	
<u>Minor applications overturned at appeal (over last 2 years)</u>	n/a	n/a	10%	n/a	n/a	0%	0%	Jenny Clifford, Adrian Welsh										
<u>Response to FOI Requests (within 20 working days)</u>	94%	94%	100%	79%	85%	82%	80%	78%	78%	74%	69%	67%	69%	70%	72%	72%	Catherine Yandle	(March) 64 replies 5 late (HF)
<u>Working Days Lost Due to Sickness Absence</u>	7.89days	7.89days	7.00days	0.61days	1.25days	1.88days	2.54days	3.12days	3.79days	4.66days	5.70days	6.55days	7.45days	8.14days	8.82days	8.82days	Jane Cottrell	
<u>Return on Commercial Portfolio</u>	8.6%	8.6%	7.5%	n/a	4.6%	4.6%	Andrew Busby	(2017 - 2018) The reasons for this reduction are Market Walk voids, rental arrears and the purchase of 4 new properties (Coggan's Well, 30,36 & 38 Fore Street) near the end of 2017-18 for which there is not yet any return. (CY)										
<u>% total Council tax collected - monthly</u>	98.10%	98.10%	98.50%	11.34%	20.61%	29.74%	38.73%	51.60%	56.69%	66.58%	75.68%	84.68%	93.72%	97.13%	98.00%	98.00%	John Chumbley, Andrew Jarrett	
	99.18%	99.18%	99.20%	12.20%	19.88%	33.72%	40.57%	50.41%	57.38%	65.32%	73.47%	81.02%	89.31%	97.02%	99.22%	99.22%		

Corporate Plan PI Report Corporate

Priorities: Delivering a Well-Managed Council

Aims: Put customers first

Performance Indicators

Title	Prev Year (Period)	Prev Year End	Annual Target	Apr Act	May Act	Jun Act	Jul Act	Aug Act	Sep Act	Oct Act	Nov Act	Dec Act	Jan Act	Feb Act	Mar Act	Actual to Date	Group Manager	Officer Notes
<u>% total NNDR collected - monthly</u>																	John Chumbley, Andrew Jarrett	(March) NNDR arrears still over 99% but because of 2017 Revaluation and the fact that many Ratepayers had late bills many Ratepayers received 12 instalments instead of 10 (JC)
<u>Number of visitors per month</u>	2,761	2,761	3,000	2,351	2,673	2,784	2,787	2,724	2,703	2,715	2,714	2,610	2,604	2,569	2,517	2,517	Lisa Lewis	
<u>Satisfaction with front-line services</u>	81.58%	81.58%	80.00%	0.00%	0.00%	97.59%	97.59%	97.59%	97.14%	97.14%	97.14%	97.14%	97.14%	97.14%	97.14%	97.14%	Lisa Lewis	
<u>Increase Number of Digital payments</u>	69,567	69,567	70,960	6,326	12,698	19,179	25,446	31,703	38,810	48,423	56,854	62,510	68,383	73,207	78,926	78,926	Lisa Lewis	

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Risk Report Appendix 6

Report for 2018-2019

Filtered by Flag: Include: * CRR 5+ / 15+

For MDDC - Services

Filtered by Performance Status: Exclude Risk Status: Low

Not Including Risk Child Projects records or Mitigating Action records

Key to Performance Status:

Risks: No Data (0+) High (15+) Medium (6+) Low (1+)

Risk Report Appendix 6

Risk: Affordable and Council Housing Demand Housing supply does not meet local demand or reflect demographic shifts like increased demand for single occupancy

Effects (Impact/Severity):

- Increased costs for paying for private accommodation to house homeless
- Increase in number of homeless people in Mid Devon

Causes (Likelihood):

- Impact of economic downturn and reduced funding has reduced number of affordable housing units being built
- Under-occupation in existing stock
- Reduction in number of Right to Buys results in less HRA funding available for new builds

Service: Housing Services

Current Status: Medium (12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Claire Fry

Review Note: There is still a significant deficit between permissions granted and build-out rates

Risk: Asset Management • The Council may not be optimising its portfolio of assets

- Assets purchased without prior approval may not be supported by Council policies and systems
- Misuse of assets could have a financial impact to the Council
- Inadequate inventory records could invalidate insurance claims, disrupt the business continuity process and hide instances of theft
- Failure to maintain the Asset Management Strategy could result in an inefficient use of resources

Not making a commercial ROI

Effects (Impact/Severity):

- Theft of stocks and stores

Causes (Likelihood):

- Mismanagement of stocks and stores

Service: Property Services

Current Status: Medium (12)

Current Risk Severity: 3 - Medium

Current Risk Likelihood: 4 - High

Service Manager: Andrew Busby

Review Note: Capital Asset Management Strategy 2016-2020 on the website

Risk Report Appendix 6

Risk: Car Parks Car Park Overcrowding

Effects (Impact/Severity):

Causes (Likelihood):

Service: Leisure Services

Current Status: Medium
(12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Darren Beer

Review Note:

Risk: Commercial Land supply Failure to identify commercial land supply will stunt economic growth

Effects (Impact/Severity):

Causes (Likelihood):

Service: Planning

Current Status: High
(15)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 3 - Medium

Service Manager: Jenny Clifford

Review Note:

Risk: Contingency - Business Continuity The Council fails to have an effective Business Continuity Plan in place that is up-to-date and complements the Emergency Plan, Disaster Recovery Plan and Risk Management Plan leading to service failure and loss in reputation.

Effects (Impact/Severity):

- Staff are not enabled or adequately prepared to deal with incidents in the event that senior managers are unavailable
- Poor management of a major incident will affect the Council's reputation
- There is a risk to decision-making processes and maintaining quorate committees in the event of loss of Members.
- Software Failure, leading to potential inability to pay staff, creditors, benefits etc and inability to access key data affecting service delivery and customer experience
- Increase in workforce homeworking

Causes (Likelihood):

- Severe weather including snow, flooding and heatwaves can cause disruption to normal service operation
- Severe space weather can cause disruption to a range of technologies and infrastructure, including communications systems, electronic circuits and power grids.
- Fuel strikes
- Industrial action

Failure to plan for this and implement contingency procedures will affect service delivery.

Service: Governance

Current Status: Medium
(12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Catherine Yandle

Risk Report Appendix 6

Review Note: Use of Business Continuity Template from DEPS launched in December and published on SharePoint for use

Risk: Corp RA - Recycling Income Reduction in material income levels due to market forces.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Street Scene Services

**Current Status: Medium
(12)**

**Current Risk Severity: 4 -
High**

**Current Risk Likelihood: 3 -
Medium**

Service Manager: Stuart Noyce

Review Note: With China banning imports of recycling materials in the New Year this risk is currently at a higher level

Risk: Council Finances - Banking Arrangements Problems with banks and online services may affect ability to access funds when we need to send or receive / process payments on a timely basis

Effects (Impact/Severity): Unable to promptly pay suppliers or treasury commitments

Causes (Likelihood): ICT systems down at Council or Bank so impossible to review cash position or make urgent payments

Service: Financial Services

**Current Status: No
Data**

**Current Risk Severity: 5 - Very
High**

**Current Risk Likelihood: 1 - Very
Low**

Service Manager: Andrew Jarrett

Review Note: We use a well established, mainstream bank headquartered in the UK and so it is very unlikely that our banking arrangements will fail for as much as a single day.

Risk: Council Finances - Investments Failure to invest in the Council's funds in an efficient and effective manner may cause potential of a loss of monies invested

Effects (Impact/Severity): • Could result in cash flow loss of up to £3M

Causes (Likelihood): • Future banking collapses

Service: Financial Services

**Current Status: No
Data**

**Current Risk Severity: 5 - Very
High**

**Current Risk Likelihood: 1 - Very
Low**

Service Manager: Andrew Jarrett

Review Note:

Risk Report Appendix 6

Risk: Council Finances - Treasury Management Failure to comply with the CIPFA Code of Practice on Treasury Management /local authority accounting would be a breach in statutory duty

Effects (Impact/Severity):

Causes (Likelihood):

Service: Financial Services

Current Status: No Data

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 1 - Very Low

Service Manager: Andrew Jarrett

Review Note:

Risk: Dangerous Equipment Risks associated with using powered equipment and machinery or that which has moving parts eg fans, woodworking machines, abrasive wheels. Also risks with using powered portable tools eg electric drill, off-hand grinders as well as manual tools eg knife, guillotine. There are risks that some equipment may produce electromagnetic interference with pace-makers.

Effects (Impact/Severity): High if no PPE worn or risk assessments not followed

Causes (Likelihood): medium if procedures followed.

Service: Property Services

Current Status: Medium (12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Andrew Busby

Review Note:

Risk: Decline in National economics A decline in national economics could result in level of influence by local government being limited and having little or no impact on local economic activity

Effects (Impact/Severity): High - Inability to meet Council objectives, customer requirements or financial commitments

Causes (Likelihood): High - no control over macro-economics but Council objectives and action plan currently in process to increase local economic activity

Service: Community Development

Current Status: Medium (12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: John Bodley-Scott

Review Note:

Risk: Economic Development Service Failure to promote economic activity within the District will suppress the potential for new jobs and increased prosperity for residents

A continuing economic recession could jeopardise our ability to achieve corporate objective of 'A Thriving Economy'

Risk Report Appendix 6

Effects (Impact/Severity): - Inability to meet Council objectives

- A lack of inward investment
- Uncertain economic recovery, impact on employment and infrastructure development

Causes (Likelihood): - Decline in national macro-economics

Service: Community Development

Current Status: Medium (12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Adrian Welsh

Review Note: Economic Strategy currently being prepared which will focus the District Council's intervention in a more focused way and will also enable improved monitoring for this risk.

Risk: Evictions Tenants being evicted could become violent.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Housing Services

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Claire Fry

Review Note: The pre-eviction risk assessment identifies household composition and layout, and any issues such as mental health and drug use relating to the tenant(s) and their families as well as whether or not there are any dogs present at the property.

Risk: Five year housing land Supply Risk: Housing land supply. Inability to demonstrate the required 5 year housing land supply (+20%) until Local Plan Review approved

Effects (Impact/Severity): Effects (Impact /severity):

- Receipt of speculative housing applications in unplanned locations with less community benefit and less infrastructure / coordination compared with allocated sites.
- Objections
- Pressure on major application appeal performance (Government indicator of quality of decision making). Risk of intervention: loss of fee and less local control over major application decision making.

Causes (Likelihood): - Lack of sufficient housing completions, housing market conditions.

Service: Planning

Current Status: No Data

Current Risk Severity: 3 - Medium

Current Risk Likelihood: 5 - Very High

Service Manager: Jenny Clifford

Review Note: Found to not have sufficient housing supply at appeal. Mitigation principally via new Local Plan once adopted. Close monitoring of applications, decisions and associated appeal performance.

Risk Report Appendix 6

Risk: GDPR compliance That the Council cannot demonstrate that we are prepared for GDPR

Effects (Impact/Severity):

Causes (Likelihood):

Service: Governance

**Current Status: High
(15)**

Current Risk Severity: 5 - Very
High

Current Risk Likelihood: 3 -
Medium

Service Manager: Catherine Yandle

Review Note: The project team meet weekly, progress is steady

Risk: H&S RA - Carlu Close Depot Inherent risk at Carlu Close site - highest scoring risk

Effects (Impact/Severity):

Causes (Likelihood):

Service: Street Scene Services

**Current Status: High
(15)**

Current Risk Severity: 5 - Very
High

Current Risk Likelihood: 3 -
Medium

Service Manager: Stuart Noyce

Review Note: The risk was reviewed as the result of carbon monoxide levels building up now transfer station work completed. Detailed trials and monitoring plan now in place.

Risk: H&S RA - Chainsaw Use Only staff who are NPTC qualified are permitted to use a chainsaw.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Grounds Maintenance

**Current Status: Medium
(12)**

Current Risk Severity: 4 -
High

Current Risk Likelihood: 3 -
Medium

Service Manager: Joe Scully

Review Note:

Risk Report Appendix 6

Risk: H&S RA - First Aid availability First Aid availability when maintaining green spaces etc. because of the nature of the work which can be in areas of limited access to emergency services and of a high risk all team members should be Emergency First Aid at Work (EFAW)

Effects (Impact/Severity):

Causes (Likelihood):

Service: Grounds Maintenance

Current Status: Medium (8) Current Risk Severity: 4 - High Current Risk Likelihood: 2 - Low

Service Manager: Joe Scully

Review Note:

Risk: H&S RA - Power Take Off (PTO) shaft That the PTO shaft is not correctly guarded

Effects (Impact/Severity):

Causes (Likelihood):

Service: Grounds Maintenance

Current Status: Medium (8) Current Risk Severity: 4 - High Current Risk Likelihood: 2 - Low

Service Manager: Joe Scully

Review Note:

Risk: H&S RA - Recycling Depot Operatives Risk assessment for role - Highest Risks scored - Vehicle Movements inside Depot/Risk of Fire

Effects (Impact/Severity):

Causes (Likelihood):

Service: Street Scene Services

Current Status: Medium (10) Current Risk Severity: 5 - Very High Current Risk Likelihood: 2 - Low

Service Manager: Stuart Noyce

Review Note: SSoW/designated walkways/PPE/Reversing Assistants/Equipment servicing. Regular alarm testing and equipment checks/flammable materials outside.

Risk Report Appendix 6

Risk: H&S RA - Refuse Driver/Loader Risk Assessment for Role - Highest risk from role RA. - Risk of RTA from severe weather conditions

Effects (Impact/Severity):

Causes (Likelihood):

Service: Street Scene Services

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Stuart Noyce

Review Note: SSoW/Training & Instruction/Mobile phones

Risk: H&S RA - Street Cleansing Operative Risk assessment for role - highest risk from role - Risk of accident/injury when working roadside

Effects (Impact/Severity):

Causes (Likelihood):

Service: Street Scene Services

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Stuart Noyce

Review Note: SSoW/Induction training /PPE - Hi viz conforming to Class 3 requirements/ No working in peak hours 7am -10am & 4pm - 7pm/Operatives to litter pick facing against traffic/Operatives to be certificated on Chapter 8/Operative to remain alert to traffic at all times/Warning beacons on vehicle/Warning signage must be used in correct locations

Risk: Hoarding Some tenants are known hoarders but we have policies in place and we do regular inspections.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Housing Services

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Claire Fry

Review Note: Staff are trained to respond to such issues and we have a policy setting out our approach to this type of management issue.

Risk: Homelessness Insufficient resources to support an increased homeless population could result in failure to meet statutory duty to provide advice and assistance to anyone who is homeless.

Risk Report Appendix 6

Effects (Impact/Severity): - Dissatisfied customers and increase in complaints.

- This will involve an increase in officer time in dealing with Homelessness prevention and early intervention.

- Possible increase in temporary accommodation usage.

Causes (Likelihood): - Social and economic factors like the recession and mortgage repossessions increase the number of homeless.

- Lack of private sector housing.

Service: Housing Services

Current Status: High (16) Current Risk Severity: 4 - High Current Risk Likelihood: 4 - High

Service Manager: Claire Fry

Review Note: Homelessness strategy to be reviewed early 2018.

Risk: Impact of Welfare Reform and other emerging National Housing Policy Changes to benefits available to tenants could impact upon their ability to pay.

Other initiatives could impact upon our ability to deliver our 30 year Business Plan.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Housing Services

Current Status: High (15) Current Risk Severity: 5 - Very High

Current Risk Likelihood: 3 - Medium

Service Manager: Claire Fry

Review Note:

Risk: Information Security Inadequate Information Security could lead to breaches of confidential information, damaged or corrupted data and ultimately Denial of Service. If the council fails to have an effective information strategy in place.

Risk of monetary penalties and fines, and legal action by affected parties

Effects (Impact/Severity):

Causes (Likelihood):

Service: I C T

Current Status: High (20) Current Risk Severity: 5 - Very High

Current Risk Likelihood: 4 - High

Service Manager: Alan Keates

Review Note:

Risk: Legionella Legionella

Effects (Impact/Severity):

Causes (Likelihood):

Risk Report Appendix 6

Service: Leisure Services

**Current Status: High
(15)**

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 3 - Medium

Service Manager: Darren Beer

Review Note: Following the adverse sampling for Legionella at LMLC and subsequent review of risk assessment the score has been increased due to a failure in the management processes. Corporate Property are responsible for carrying through the action points raised in the safety review carried out by the Health and Safety Officer

Risk: Leisure Income Generation Inability to compete with neighbouring leisure centres could result in reduced custom / use

Effects (Impact/Severity): • Reduced income levels

Causes (Likelihood): • Discretionary spend nature of leisure sector in economic recession
• The set-up of budget gyms in Mid Devon is unlikely but could impact on our income if they did
• Smaller leisure businesses are more likely to set up in Mid Devon and their impact on our service could be reduced if internal communication processes are improved so as to notify Leisure Managers of any potential competitors in the area

Service: Leisure Services

Current Status: No Data

Current Risk Severity: 3 - Medium

Current Risk Likelihood: 3 - Medium

Service Manager: Lee Chester

Review Note: The Leisure Service achieved above income target for 2012-13 and is expected to achieve above target for 2013-14. The improvements made to the three sites in the last 12 months has meant that we offer a good value for money service which is reflected in year on year improvements in membership figures.

Risk: Local Plan Whether the Inspector will find the Plan unsound

Effects (Impact/Severity):

Causes (Likelihood):

Service: Planning

**Current Status: Medium
(10)**

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Jenny Clifford

Review Note: Steps taken to mitigate risks by commissioning additional work to strengthen evidence base.

Risk Report Appendix 6

Risk: Lone Working Risks associated with working alone (eg on site visits, call-outs, evening, weekend and emergency work and working from home).

Effects (Impact/Severity):

Causes (Likelihood):

Service: Property Services

Current Status: Medium
(12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Andrew Busby

Review Note:

Risk: New Homes A low housing build rate would equal less affordable housing resulting in a reduction in potential New Homes Bonus

Effects (Impact/Severity): - Loss of Affordable Housing Income Section 106

- Failure to meet targets in Development Plan

- Potentially unallocated sites being developed as 5-year housing supply reduces

Causes (Likelihood):

Service: Planning

Current Status: Medium
(12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Jenny Clifford

Review Note:

Risk: Overall Funding Availability Changes to Revenue Support Grant, Business Rates, New Homes Bonus and other funding streams in order to finance ongoing expenditure needs.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Financial Services

Current Status: High
(15)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 3 - Medium

Service Manager: Andrew Jarrett

Review Note: Mitigation – Local and national working groups and advice from experts – liaise with DCLG and then attempt to model/plan.

Risk: Plant Room Plant Room

Effects (Impact/Severity):

Causes (Likelihood):

Service: Leisure Services

Current Status: Medium
(10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Risk Report Appendix 6

Service Manager: Darren Beer

Review Note: • Only authorized personnel to enter storage areas

- Pool plant operator certification required by operators
- Backwash only when pool not in use
- Planned storage of combustible materials
- Staff carry two way radios.

Risk: Pool Inflatable Pool Activities

Effects (Impact/Severity):

Causes (Likelihood):

Service: Leisure Services

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Darren Beer

Review Note:

Risk: Premier Inn Construction site Increased difficulty in management of the car parking facility while the Premier Inn is being built

Effects (Impact/Severity):

Causes (Likelihood):

Service: Property Services

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Andrew Busby

Review Note: Premier Inn are reviewing plans to secure VfM and will come back to MDDC with a start date asap.

MDDC will update the RA on receipt of the Construction Phase Schedule from Premier Inn.

Risk: Reputational damage - social media impact of reputational damage through social media is a significant risk that warrants inclusion on the Authority's risk register.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Communications

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Jane Lewis

Review Note:

Risk Report Appendix 6

Risk: Reputational re Council Housing Stock Handling a disaster/mistake properly would prevent any reputation damage.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Housing Services

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Claire Fry

Review Note:

Risk: Safeguarding Awareness Failure to ensure that awareness of safeguarding issues and what to do if one's suspicions are raised are not adequately dissipated throughout the council.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Safeguarding

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Nicola Cuskeran

Review Note: Compulsory training for all staff has been re-launched.
Policy reviewed and updated annually
Councillor briefing
Recent audit completed

Risk: School Swimming Sessions School Swimming Sessions

Effects (Impact/Severity):

Causes (Likelihood):

Service: Leisure Services

Current Status: Medium (10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Darren Beer

Review Note:

Risk: Stress The physical and mental well-being of Officers could be affected by work environment and pressures caused by work demands and work relationships.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Legal Services

Current Status: Medium (12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Risk Report Appendix 6

Service Manager: Kathryn Tebbey

Review Note: The risk is not well-related to Legal Services. The risk for Legal Services is from a constant high workload leading to burnout and stress. Some of this will be alleviated through improved systems, but this may prove insufficient mitigation.

Risk: Stress The physical and mental well-being of Officers could be affected by work environment and pressures caused by work demands and work relationships.

Effects (Impact/Severity):

Causes (Likelihood):

Service: Housing Services

Current Status: Medium
(12)

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Claire Fry

Review Note: In the case of potential stress and related conditions, Managers should undertake regular supervision meetings to monitor the situation and provide support.

Risk: Swimming Lessons Swimming Lessons

Effects (Impact/Severity):

Causes (Likelihood):

Service: Leisure Services

Current Status: Medium
(10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Darren Beer

Review Note:

Risk: Swimming Pool Swimming pool & spectator walkway

Effects (Impact/Severity):

Causes (Likelihood):

Service: Leisure Services

Current Status: Medium
(10)

Current Risk Severity: 5 - Very High

Current Risk Likelihood: 2 - Low

Service Manager: Darren Beer

Review Note:

Risk: Tenants with Complex Needs As our housing stock shrinks, the proportion of such tenants will increase.

Effects (Impact/Severity):

Causes (Likelihood):

Risk Report Appendix 6

Service: Housing Services

**Current Status: Medium
(12)**

**Current Risk Severity: 4 -
High**

**Current Risk Likelihood: 3 -
Medium**

Service Manager: Claire Fry

Review Note: Good links with other partners including the Police, Social Services, support agencies etc.

Risk: Welfare Reform Act - Benefits Failure to implement and communicate the new benefits framework effectively could result in applications not being completed in time

Effects (Impact/Severity): If the changes from current benefits system to Universal Credit go ahead, the system will require greater staff resource

Causes (Likelihood): Will now happen

Service: Revenues - Benefits

Current Status: No Data

Current Risk Severity: 4 - High

Current Risk Likelihood: 3 - Medium

Service Manager: Andrew Jarrett

Review Note:

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Print Date: 15 May 2018 17:12

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Risk Matrix

Report For MDDC - Services Current settings

Risk Likelihood	5 - Very High	No Risks	1 Risk	No Risks	No Risks	No Risks
	4 - High	No Risks	No Risks	1 Risk	3 Risks	2 Risks
	3 - Medium	No Risks	3 Risks	10 Risks	17 Risks	6 Risks
	2 - Low	1 Risk	15 Risks	38 Risks	36 Risks	29 Risks
	1 - Very Low	4 Risks	9 Risks	9 Risks	16 Risks	19 Risks
	1 - Very Low	2 - Low	3 - Medium	4 - High	5 - Very High	
	Risk Severity					

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MID DEVON DISTRICT COUNCIL – NOTIFICATION OF KEY DECISIONS

June 2018

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)
Revised Freedom of Information Policy To consider a revised policy	Cabinet	5 Jul 2018	Catherine Yandle, Group Manager for Performance, Governance and Data Security Tel: 01884 234975	Cabinet for the Working Environment and Support Services (Councillor Margaret Squires)	Open
Eastern Relief Road, Gullompton To consider material for public consultation	Cabinet	5 Jul 2018	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Custom and Self Build To consider a report discussing processes.	Cabinet	5 Jul 2018	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

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Agenda Item 17.

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)
Broadband Update To consider broadband issues	Cabinet	5 Jul 2018	Andrew Jarrett, Director of Finance, Assets and Resources Tel: 01884 234242	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Fully exempt
Blackdown Hills - Area of Outstanding Natural Beauty (AONB) Management Plan Review To consider a draft management plan for public consultation	Cabinet	5 Jul 2018	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Local Plan Examination Hearing To consider the role of officers in the examination and hearing process.	Cabinet Council	5 Jul 2018 29 Aug 2018	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
The Green, Public Convenience, Crediton To consider the asset disposal of "The Green",	Cabinet	5 Jul 2018	Andrew Jarrett, Director of Finance, Assets and Resources Tel:	Cabinet Member for Housing (Councillor Ray Stanley)	Fully 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)
Public Convenience, Crediton			01884 234242		
Repairing Footpaths and Roads Policy	Environment Policy Development Group Cabinet Council	10 Jul 2018 2 Aug 2018 29 Aug 2018	Steve Densham, Development Services Manager Tel: 01884 234921	Cabinet Member for Housing (Councillor Ray Stanley)	Open
Market Rights Policy report proposing the adoption of a new Market Policy.	Economy Policy Development Group Cabinet Council	12 Jul 2018 2 Aug 2018 29 Aug 2018	Adrian Welsh, Group Manager for Growth, Economy and Delivery Tel: 01884 234398	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Rechargeable Repairs To receive a report reviewing the Rechargeable Repairs policy.	Homes Policy Development Group Cabinet	17 Jul 2018 2 Aug 2018	Mark Baglow, Group Manager for Building Services Tel: 01884 233011	Cabinet Member for Housing (Councillor Ray Stanley)	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)
<p>Gas Safety Policy To consider a report regarding the revised Gas Safety Policy.</p>	<p>Homes Policy Development Group Cabinet</p>	<p>17 Jul 2018 2 Aug 2018</p>	<p>Mark Baglow, Group Manager for Building Services Tel: 01884 233011</p>	<p>Cabinet Member for Housing (Councillor Ray Stanley)</p>	<p>Open</p>
<p>Void Management Policy To receive a report from the Group Manager for Building Services presenting the revised Void Management Policy.</p>	<p>Homes Policy Development Group Cabinet</p>	<p>17 Jul 2018 2 Aug 2018</p>	<p>Mark Baglow, Group Manager for Building Services Tel: 01884 233011</p>	<p>Cabinet Member for Housing (Councillor Ray Stanley)</p>	<p>Open</p>
<p>Single Equalities Policy and Equality Objective Report outlining the Council's statutory duties under the Equality Act 2010, and to seek Members' approval for the revised Single Equality Scheme and Equality Objective.</p>	<p>Community Policy Development Group Cabinet</p>	<p>24 Jul 2018 2 Aug 2018</p>	<p>Jill May, Director of Corporate Affairs and Business Transformation Tel: 01884 234381</p>	<p>Cabinet for the Working Environment and Support Services (Councillor Margaret Squires)</p>	<p>Open</p>
<p>Illegal Encampment Policy To receive a report regarding a policy regarding to Illegal Encampment</p>	<p>Community Policy Development Group</p>	<p>24 Jul 2018</p>	<p>Andrew Busby, Group Manager for Corporate Property and Commercial Assets Tel: 01884</p>	<p>Cabinet Member for Community Well Being (Councillor Colin Slade)</p>	<p>Open</p>

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)
	Cabinet Council	2 Aug 2018 29 Aug 2018	234948		
Culm Garden Village - Cullompton (a) To consider constraints, opportunities and issues	Cabinet	2 Aug 2018	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Culm Garden Village - Cullompton (b) To consider arrangements in connection with governance, decisionmaking and procurement.	Cabinet	2 Aug 2018	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Cleaning Contractors To approve the outcome of the procurement exercise.	Cabinet	2 Aug 2018	Andrew Jarrett, Director of Finance, Assets and Resources Tel: 01884 234242	Cabinet for the Working Environment and Support Services (Councillor Margaret Squires)	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)
Tiverton Eastern Urban Extension Area B Masterplanning To consider the outcome of the tender process	Cabinet	30 Aug 2018	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Part exempt
Town Centre Masterplan following public consultation To consider that masterplan.	Cabinet	30 Aug 2018	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Human Resources Strategy To consider the revised strategy	Cabinet	30 Aug 2018	Jane Cottrell, Group Manager for Human Resources Tel: 01884 234919	Cabinet for the Working Environment and Support Services (Councillor Margaret Squires)	Open
Annual Report of Complaints, Comments and Compliments To consider this annual report	Cabinet	30 Aug 2018	Jill May, Director of Corporate Affairs and Business Transformation Tel: 01884 234381	Cabinet for the Working Environment and Support Services (Councillor Margaret	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)
				Squires)	
Exe Valley Area of Outstanding Natural Beauty To consider the setting up of a partnership to explore an AONB for the Exe Valley and other issues.	Environment Policy Development Group Cabinet Council	4 Sep 2018 27 Sep 2018 24 Oct 2018	Adrian Welsh, Group Manager for Growth, Economy and Delivery Tel: 01884 234398	Leader of the Council (Councillor Clive Eginton)	Open
Economic Strategy To consider a new policy.	Economy Policy Development Group Cabinet Council	6 Sep 2018 27 Sep 2018 24 Oct 2018	Adrian Welsh, Group Manager for Growth, Economy and Delivery Tel: 01884 234398	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Corporate Asbestos Policy To receive a report from the Group Manager for Building Services presenting the revised Corporate Asbestos Policy.	Homes Policy Development Group Cabinet	11 Sep 2018 27 Sep 2018	Mark Baglow, Group Manager for Building Services Tel: 01884 233011	Cabinet Member for Housing (Councillor Ray Stanley)	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)
Neighbourhood Management Policy To receive a report from the Group Manager for Housing presenting the revised Neighbourhood Management Policy.	Homes Policy Development Group Cabinet	11 Sep 2018 27 Sep 2018	Claire Fry, Group Manager for Housing Tel: 01884 234920	Cabinet Member for Housing (Councillor Ray Stanley)	Open
Customer Care Policy yearly review	Community Policy Development Group Cabinet	18 Sep 2018 27 Sep 2018	Jill May, Director of Corporate Affairs and Business Transformation Tel: 01884 234381	Cabinet for the Working Environment and Support Services (Councillor Margaret Squires)	Open
Community Engagement Strategy 2018 Report updating Members on progress made with the Community Engagement Action Plan and to review the strategy and focus for 2018	Community Policy Development Group Cabinet	18 Sep 2018 27 Sep 2018	Jill May, Director of Corporate Affairs and Business Transformation Tel: 01884 234381	Cabinet Member for Community Well Being (Councillor Colin Slade)	Open
Community Engagement Action Plan To consider a revised action plan	Community Policy Development Group Cabinet	18 Sep 2018 27 Sep 2018	Jill May, Director of Corporate Affairs and Business Transformation Tel: 01884 234381	Cabinet for the Working Environment and Support Services (Councillor Margaret	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)
				Squires)	
<p>Proposals for improvements to Tiverton Town Centre To receive a presentation on proposals for improvements to Tiverton Town Centre, seeking authority to go out to tender with a view to progress project work'.</p>	Cabinet	27 Sep 2018	Andrew Jarrett, Director of Finance, Assets and Resources Tel: 01884 234242	Cabinet Member for Housing (Councillor Ray Stanley)	Fully exempt
<p>Vehicle Maintenance Contract To consider the maintenance contract.</p>	Cabinet	27 Sep 2018	Stuart Noyce, Group Manager for Street Scene and Open Spaces	Leader of the Council (Councillor Clive Eginton)	Open
<p>ICT Strategy Report regarding a review of the ICT Strategy</p>	Cabinet	25 Oct 2018	Jill May, Director of Corporate Affairs and Business Transformation Tel: 01884 234381	Cabinet Member for Community Well Being (Councillor Colin Slade)	Open
<p>Medium Term Financial Plan To consider the MTFP.</p>	Cabinet	25 Oct 2018	Andrew Jarrett, Director of Finance, Assets and Resources Tel: 01884 234242	Cabinet Member for Finance (Councillor Peter Hare-Scott)	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)
Draft 19/20 General Fund and Capital Programme To consider options available in order for the Council to set a balanced budget for 2019/20.	Cabinet	25 Oct 2018	Andrew Jarrett, Director of Finance, Assets and Resources Tel: 01884 234242	Cabinet Member for Finance (Councillor Peter Hare-Scott)	Open
Treasury Management Strategy and Mid Year Review Report To consider a report of the Treasury performance during the first 6 months of the financial year.	Cabinet Council	25 Oct 2018 19 Dec 2018	Andrew Jarrett, Director of Finance, Assets and Resources Tel: 01884 234242	Cabinet Member for Finance (Councillor Peter Hare-Scott)	Open
Information Security To consider a revised policy	Cabinet	25 Oct 2018	Catherine Yandle, Group Manager for Performance, Governance and Data Security Tel: 01884 234975	Cabinet Member for Community Well Being (Councillor Colin Slade)	Open
Information Security Incident To consider a revised policy	Cabinet	25 Oct 2018	Catherine Yandle, Group Manager for Performance, Governance and Data Security Tel: 01884 234975	Cabinet Member for Community Well Being (Councillor Colin Slade)	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)
Supply and Demand Policy To receive a report from the Group Manager for Housing presenting the revised Supply and Demand Policy.	Homes Policy Development Group Cabinet	13 Nov 2018 22 Nov 2018	Claire Fry, Group Manager for Housing Tel: 01884 234920	Cabinet Member for Housing (Councillor Ray Stanley)	Open
Severe Weather Emergency Protocol and Extended Winter Provision Protocol To receive a report from the Group Manager for Housing presenting an updated Severe Weather Emergency Protocol and Extended Winter Provision Protocol.	Homes Policy Development Group Cabinet	13 Nov 2018 22 Nov 2018	Claire Fry, Group Manager for Housing Tel: 01884 234920	Cabinet Member for Housing (Councillor Ray Stanley)	Open
Public Health Enforcement Policy 2 yearly review	Community Policy Development Group Cabinet	20 Nov 2018 3 Jan 2019	Simon Newcombe, Group Manager for Public Health and Regulatory Services Tel: 01884 244615	Cabinet for the Working Environment and Support Services (Councillor Margaret Squires)	Open
ASB Policy and Procedures To receive a report from the Group Manager for Housing presenting the revised Anti-	Homes Policy Development Group Cabinet	12 Mar 2019 4 Apr 2019	Claire Fry, Group Manager for Housing Tel: 01884 234920	Cabinet Member for Housing (Councillor Ray Stanley)	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)
Social Behaviour Policy and Procedures.					
Tenancy Strategy To consider a report regarding the revised strategy.	Homes Policy Development Group Cabinet	12 Mar 2019 4 Apr 2019	Claire Fry, Group Manager for Housing Tel: 01884 234920	Cabinet Member for Housing (Councillor Ray Stanley)	Open
Greater Exeter Strategic Plan To consider a report of the Head of Planning, Economy and Regeneration regarding a draft strategic plan.	Cabinet Council	Not before 20th May 2019 Not before 31st May 2019	Jenny Clifford, Head of Planning, Economy and Regeneration Tel: 01884 234346	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

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