

MEMBERS INTERESTS 2012

A Member with a disclosable pecuniary interest in any matter considered at a meeting must disclose the interest to the meeting at which they are present, except where it has been entered on the Register.

A Member with a non pecuniary or pecuniary interest in any business of the Council must disclose the existence and nature of that interest at commencement of consideration or when the interest becomes apparent.

Where sensitive information relating to an interest is not registered in the register, you must indicate that you have an interest, but need not disclose the sensitive information.

Please tick relevant boxes

Notes

	General		
1.	I have a disclosable pecuniary interest.	<input type="checkbox"/>	<i>You cannot speak or vote and must withdraw unless you have also ticked 5 below</i>
2.	I have a non-pecuniary interest.	<input type="checkbox"/>	<i>You may speak and vote</i>
3.	I have a pecuniary interest because it affects my financial position or the financial position of a connected person or, a body described in 10.1(1)(i) and (ii) and the interest is one which a member of the public with knowledge of the relevant facts, would reasonably regard as so significant that it is likely to prejudice my judgement of the public interest or it relates to the determining of any approval consent, licence, permission or registration in relation to me or a connected person or, a body described in 10.1(1)(i) and (ii) and the interest is one which a member of the public with knowledge of the relevant facts, would reasonably regard as so significant that it is likely to prejudice my judgement of the public interest	<input type="checkbox"/> <input type="checkbox"/>	<i>You cannot speak or vote and must withdraw unless you have also ticked 5 or 6 below</i> <i>You cannot speak or vote and must withdraw unless you have also ticked 5 or 6 below</i>
4.	I have a disclosable pecuniary interest (Dispensation 16/7/12) or a pecuniary interest but it relates to the functions of my Council in respect of: (i) Housing where I am a tenant of the Council, and those functions do not relate particularly to my tenancy or lease. (ii) school meals, or school transport and travelling expenses where I am a parent or guardian of a child in full time education, or are a parent governor of a school, and it does not relate particularly to the school which the child attends. (iii) Statutory sick pay where I am in receipt or entitled to receipt of such pay. (iv) An allowance, payment or indemnity given to Members (v) Any ceremonial honour given to Members (vi) Setting Council tax or a precept under the LGFA 1992	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<i>You may speak and vote</i> <i>You may speak and vote</i> <i>You may speak and vote</i> <i>You may speak and vote</i> <i>You may speak and vote</i> <i>You may speak and vote</i>
5.	A Standards Committee dispensation applies (relevant lines in the budget – Dispensation 20/2/13 – 19/2/17)	<input type="checkbox"/>	<i>See the terms of the dispensation</i>
6.	I have a pecuniary interest in the business but I can attend to make representations, answer questions or give evidence as the public are also allowed to attend the meeting for the same purpose	<input type="checkbox"/>	<i>You may speak but must leave the room once you have finished and cannot vote</i>

'disclosable pecuniary interest' (DPI) means an interest of a description specified below which is your interest, your spouse's or civil partner's or the interest of somebody who you are living with as a husband or wife, or as if you were civil partners and you are aware that that other person has the interest.

Interest

Prescribed description

Employment, office, trade, profession or vocation

Any employment, office, trade, profession or vocation carried on for profit or gain.

Sponsorship

Any payment or provision of any other financial benefit (other than from the relevant authority) made or provided within the relevant period in respect of any expenses incurred by M in carrying out duties as a member, or towards the election expenses of M.

	This includes any payment or financial benefit from a trade union within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992.
Contracts	Any contract which is made between the relevant person (or a body in which the relevant person has a beneficial interest) and the relevant authority— (a) under which goods or services are to be provided or works are to be executed; and (b) which has not been fully discharged.
Land	Any beneficial interest in land which is within the area of the relevant authority.
Licences	Any licence (alone or jointly with others) to occupy land in the area of the relevant authority for a month or longer.
Corporate tenancies	Any tenancy where (to M's knowledge)— (a) the landlord is the relevant authority; and (b) the tenant is a body in which the relevant person has a beneficial interest.
Securities	Any beneficial interest in securities of a body where— (a) that body (to M's knowledge) has a place of business or land in the area of the relevant authority; and (b) either— (i) the total nominal value of the securities exceeds £25,000 or one hundredth of the total issued share capital of that body; or (ii) if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which the relevant person has a beneficial interest exceeds one hundredth of the total issued share capital of that class.

"body in which the relevant person has a beneficial interest" means a firm in which the relevant person is a partner or a body corporate of which the relevant person is a director, or in the securities of which the relevant person has a beneficial interest; "director" includes a member of the committee of management of an industrial and provident society;

"land" excludes an easement, servitude, interest or right in or over land which does not carry with it a right for the relevant person (alone or jointly with another) to occupy the land or to receive income; "M" means a member of a relevant authority;

"member" includes a co-opted member; "relevant authority" means the authority of which M is a member;

"relevant period" means the period of 12 months ending with the day on which M gives notice to the Monitoring Officer of a DPI;

"relevant person" means M or M's spouse or civil partner, a person with whom M is living as husband or wife or a person with whom M is living as if they were civil partners;

"securities" means shares, debentures, debenture stock, loan stock, bonds, units of a collective investment scheme within the meaning of the Financial Services and Markets Act 2000 and other securities of any description, other than money deposited with a building society.

'non pecuniary interest' means interests falling within the following descriptions:

- 10.1(1)(i) Any body of which you are a member or in a position of general control or management and to which you are appointed or nominated by your authority;
- (ii) Any body (a) exercising functions of a public nature; (b) directed to charitable purposes; or (c) one of whose principal purposes includes the influence of public opinion or policy (including any political party or trade union), of which you are a member or in a position of general control or management;
- (iii) Any easement, servitude, interest or right in or over land which does not carry with it a right for you (alone or jointly with another) to occupy the land or to receive income.
- 10.2(2) A decision in relation to that business might reasonably be regarded as affecting your well-being or financial position or the well-being or financial position of a connected person to a greater extent than the majority of other council tax payers, ratepayers or inhabitants of the ward, as the case may be, affected by the decision.

'a connected person' means

- (a) a member of your family or any person with whom you have a close association, or
- (b) any person or body who employs or has appointed such persons, any firm in which they are a partner, or any company of which they are directors;
- (c) any person or body in whom such persons have a beneficial interest in a class of securities exceeding the nominal value of £25,000; or
- (d) any body of a type described in sub-paragraph 10.1(1)(i) or (ii).

'body exercising functions of a public nature' means

Regional and local development agencies, other government agencies, other Councils, public health bodies, council-owned companies exercising public functions, arms length management organisations carrying out housing functions on behalf of your authority, school governing bodies.

A Member with a personal interest who has made an executive decision in relation to that matter must ensure any written statement of that decision records the existence and nature of that interest.

NB Section 21(13) of the LGA 2000 overrides any Code provisions to oblige an executive member to attend an overview and scrutiny meeting to answer questions.

CABINET**HELD: 14 JANUARY 2014**

Start: 7.30pm

Finish: 8.25pm

PRESENT:

Councillor I Grant (Leader of the Council, in the Chair)

Councillors		<u>Portfolio</u>
Mrs V Hopley		Landlord Services and Human Resources
M Forshaw		Planning and Development
A Owens		Deputy Leader & Housing (Finance), Regeneration and Estates
D Sudworth		Health, Leisure and Community Safety
D Westley		Resources and Transformation

In attendance Councillors: Cropper, Dereli, Oliver,
PendletonOfficers
Managing Director (People and Places) (Mrs G Rowe)
Managing Director (Transformation) (Ms K Webber)
Assistant Director Housing and Regeneration (Mr B Livermore)
Assistant Director Planning (Mr J Harrison)
Borough Treasurer (Mr M Taylor)
Transformation Manager (Mr S Walsh)
Planning Policy & Implementation Team Leader (Mr P Richards)
Principal Member Services Officer (Mrs S Griffiths)**65. APOLOGIES**

There were no apologies for absence.

66. SPECIAL URGENCY (RULE 16 ACCESS TO INFORMATION PROCEDURE RULES)/URGENT BUSINESS

There were no items of special urgency.

67. DECLARATIONS OF INTEREST

1. Councillor Westley declared a non-pecuniary interest in agenda items 5(a) (Funding of Voluntary & Other Organisations), 5(i) (Provision of a new cycle and pedestrian link footway through the Tawd Valley in Skelmersdale linking to West Lancashire College) and 5(j) Draft West Lancashire Highways and Transport Masterplan) as a Member of Lancashire County Council.
2. Councillors Grant and Forshaw declared non-pecuniary interests in agenda item 5(e) (Medium Term Capital Programme) in relation to relevant lines in the budgets referring to Parish Council Capital Schemes, in view of their membership of Parish Councils.

68. MINUTES

RESOLVED That the minutes of the meeting of Cabinet held on 12 November 2013 be approved as a correct record and signed by the Leader.

69. MATTERS REQUIRING DECISIONS

Consideration was given to the reports relating to the following matters requiring decisions as contained on pages 1111 – 1395 of the Book of Reports.

70. FUNDING OF VOLUNTARY & OTHER ORGANISATIONS

Councillor Sudworth introduced the report of the Transformation Manager which advised on recommendations of the Funding of Voluntary and Other Organisations Working Group in relation to the monitoring/evaluation of submissions received from the voluntary organisations in receipt of revenue funding and an application for further funding received from the West Lancashire Dial A Ride Association.

In reaching the decision below, Cabinet considered the details set out in the report before it and accepted the reasons contained in it.

- RESOLVED
- A. That the recommendations arising from the monitoring and evaluation of the three year Service Level Agreements by the Funding of Voluntary and Other Organisations Working Group at its meetings of 9 September and 16 December 2013 be endorsed as detailed in the minutes of the meetings attached at Appendices 2 and 3 to the report.
 - B. That funding be made available to the West Lancashire Dial A Ride Association of £28,575 per annum from April 2014 in principle, and determined when the budget is set on 26 February 2014. This funding be by way of a two year Service Level Agreement and be subject to:
 - i) a review of the Service Level Agreement following the outcome of the Lancashire County Council review on Community Transport provision, and
 - ii) receipt of satisfactory financial statement from the organisation.

71. QUARTERLY PERFORMANCE INDICATORS Q2 2013-2014

Councillor Westley introduced the report of the Transformation Manager which presented performance monitoring data for the quarter ended 30 September 2013.

In reaching the decision below, Cabinet considered the details set out in the report before it and accepted the reasons contained in it.

- RESOLVED
- A. That the Council's performance against the indicator set for the quarter ended 30 September 2013 be noted.
 - B. That the call-in procedure is not appropriate for this item as the report is being submitted to the next meeting of the Corporate and Environmental Overview and Scrutiny Committee on 20 February 2014.

72. BUSINESS PLAN 2014-2015 REFRESH

Councillor Westley introduced the joint report of the Managing Director (People and Places) and the Managing Director (Transformation) which sought approval for the "Business Plan 2014/15 Refresh".

In reaching the decision below, Cabinet considered the details set out in the report before it and accepted the reasons contained in it.

- RESOLVED:
- A. That the "Business Plan 2014/15 Refresh" attached as Appendix A to the report be approved and referred to Council for adoption.
 - B. That authority be given to the Managing Directors to make any final amendments to the document, prior to publication.
 - C. That call-in is not appropriate for this item, as the report is being submitted to the next meeting of the Executive Overview and Scrutiny Committee on 30 January 2014.

73. DRAFT REVENUE BUDGET 2014 - 2015

Councillor Westley introduced the report of the Borough Treasurer which provided a summary of the current General Revenue Account budget position.

In reaching the decision below, Cabinet considered the details set out in the report before it, and accepted the reasons contained in it.

- RESOLVED
- A. That the financial position for 2014-15 and later years be noted.
 - B. That the Portfolio Holder for Resources and Transformation be given delegated authority to submit firm proposals to Council on 26th February 2014 to enable the budget to be set.
 - C. That call-in is not appropriate for this item as it is to be submitted to the next meeting of the Executive Overview and Scrutiny Committee on 30 January 2014.

74. MEDIUM TERM CAPITAL PROGRAMME

Councillor Westley introduced the report of the Borough Treasurer which outlined a number of options for the determination of the medium term capital programme.

In reaching the decision below, Cabinet considered the details set out in the report before it and accepted the reasons contained in it.

- RESOLVED
- A. That the medium term financial position be noted.
 - B. That the Portfolio Holder for Resources and Transformation be given delegated authority to submit firm proposals to Council on 26 February 2014 to enable the capital programme to be set.
 - C. That call-in is not appropriate for this item as it is to be submitted to the Executive Overview and Scrutiny Committee on 30 January 2014.

75. HOUSING ACCOUNT - REVENUE AND CAPITAL PROGRAMME

Councillor Owens introduced the report of the Assistant Director Housing and Regeneration which provided a summary of the budget position for the Housing Account for the next financial year.

Minute no. 30 of the Landlord Services Committee (Cabinet Working Group) held on 9 January 2014 was circulated at the meeting.

In reaching the decision below, Cabinet considered the minute of Landlord Services Committee (Cabinet Working Group) and details set out in the report before it and accepted the reasons contained therein.

- RESOLVED
- A. That the financial position for 2014-15 be noted.
 - B. That the Assistant Director Housing and Regeneration be given delegated Authority to set garage rents at a level to maximise income for the HRA.

- C. That the Assistant Director Housing and Regeneration be given delegated Authority to set service charges at levels that recover the costs of service provision.
- D. That this report be used for consultation purposes prior to the Council considering this matter in February 2014.
- E. That the Housing Finance Portfolio Holder be given delegated authority to submit firm proposals to Council on 26 February 2014 to enable the budget to be set.
- F. That call-in is not appropriate for this item as it is to be submitted to the next meeting of the Executive Overview and Scrutiny Committee on 30 January 2014.

76. YEW TREE FARM MASTERPLAN SUPPLEMENTARY PLANNING DOCUMENT OPTIONS PAPER

Councillor Forshaw introduced the report of the Assistant Director Planning which provided an update on the progress of the Yew Tree Farm Masterplan Supplementary Planning Document (SPD) and recommended that the "Options" version of the document be approved for public consultation.

In reaching the decision below, Cabinet considered the details set out in the report before it and accepted the reasons contained in it.

- RESOLVED
- A. That the Yew Tree Farm Masterplan Options document (Appendix A to this report) be approved for public consultation from 6 February to 21 March 2014, subject to any minor amendments made by the Assistant Director Planning in consultation with the Portfolio Holder, following consideration of the Options Document by Planning Committee and Executive Overview and Scrutiny Committee, as per recommendation B below.
 - B. That the Assistant Director Planning, be authorised, in consultation with the Portfolio Holder, to make any necessary minor amendments to the Yew Tree Farm Masterplan Options document, in the light of agreed comments from Planning Committee and Executive Overview and Scrutiny Committee, before the document is published for consultation.

- C. That Cabinet have regard to the Sustainability Appraisal provided in Appendix B in their decision on recommendation B above, which will also be publicly available for comment as part of the consultation on the Yew Tree Farm Masterplan Options document
- D. That call-in is not appropriate for this item as this report is being submitted to Executive Overview and Scrutiny Committee on 30 January 2014.

77. DEVELOPMENT BRIEFS FOR HOUSING SITES AT GROVE FARM, ORMSKIRK AND FIRSWOOD ROAD, LATHOM/SKELMERSDALE

Councillor Forshaw introduced the report of the Assistant Director Planning which recommended the draft development briefs for the allocated housing sites at Grove Farm, Ormskirk and Firswood Road, Lathom/Skelmersdale for public consultation.

A copy of revised recommendations were circulated at the meeting.

Councillor Owens expressed concern over reference to the number of vehicular access points onto Firswood Road contained within the Draft Development Brief.

In reaching the decision below, Cabinet considered the revised recommendations, the comments of Councillor Owens, the details set out in the report before it and accepted the reasons contained therein.

- RESOLVED
- A. That Cabinet approve the draft Grove Farm and Firswood Road Development Briefs (Appendices A and B to this report) for six weeks of public consultation from 6 February to 21 March 2014, subject to any minor amendments made by the Assistant Director Planning in consultation with the Portfolio Holder, following consideration of the draft Briefs by Planning Committee and Executive Overview and Scrutiny Committee, as per recommendation B. below.
 - B. That the Assistant Director Planning, be authorised, in consultation with the Portfolio Holder, to make any necessary minor amendments to the draft Grove Farm and Firswood Road Development Briefs, in the light of agreed comments from Planning Committee and Executive Overview and Scrutiny Committee, before the document is published for consultation.
 - C. That call-in is not appropriate for this item as this report is being submitted to Executive Overview and Scrutiny Committee on 30 January 2014.

78. PROVISION OF A NEW CYCLE AND PEDESTRIAN LINK FOOTWAY THROUGH THE TAWD VALLEY IN SKELMERSDALE LINKING TO WEST LANCASHIRE COLLEGE

Councillor Forshaw introduced the report of the Assistant Director Planning which advised on the proposal to create a new cycle/pedestrian link way through Tawd Valley linking to the West Lancashire College campus and sought approval to release Section 106 funding to finance the scheme.

In reaching the decision below, Cabinet considered the details set out in the report before it and accepted the reasons contained in it.

- RESOLVED
- A. That authority be delegated to the Assistant Director Planning, in consultation with the Portfolio Holder for Planning, to:
 - i) negotiate and enter into agreement with Lancashire County Council to provide a grant using S106 funding to assist them with the construction of the proposed cycle and pedestrian link through the Tawd Valley and to also to give Lancashire County Council access to land owned by West Lancashire Borough Council to conduct work to construct the proposed route.
 - ii) release section 106 funds of up to £200,000 secured through planning permissions related to West Lancashire College, to contribute towards the implementation of a new cycle and pedestrian path through the Tawd Valley linking the college campus with surrounding residential areas.
 - B. That subject to an acceptable scheme being designed, the Council arrange to dedicate the route to Lancashire County Council so that the County Council adopt the route, taking over future maintenance liabilities.
 - C. That the Assistant Director Planning be authorised to enter into all necessary agreements and licences and to obtain necessary consents, approvals and permissions to facilitate the scheme.

79. DRAFT WEST LANCASHIRE HIGHWAYS AND TRANSPORT MASTERPLAN

Councillor Forshaw introduced the report of the Assistant Director Planning which presented the draft West Lancashire Highways and Transport Masterplan document and sought authorisation for the submission of the Council's formal response to Lancashire County Council.

A copy of a revised Appendix A was circulated at the meeting.

In reaching the decision below, Cabinet considered the details set out in the report before it and the revised Appendix A and accepted the reasons contained therein.

- RESOLVED
- A. That the attached comments at revised Appendix A be approved as the Council's formal response to the consultation on the Draft West Lancashire Highways and Transport Masterplan.
 - B. That call-in is not appropriate for this item as the consultation closes on the 24 January 2014.

.....
LEADER



AGENDA ITEM: 5(a)

CABINET: 18th March 2014

Report of: Assistant Director Housing and Regeneration

Relevant Managing Director: Managing Director (Transformation)

Relevant Portfolio Holder: Councillor A. Owens

**Contact for further information: Mrs R Kneale (Extn. 2611)
(E-mail: rachel.kneale@westlancs.gov.uk)**

SUBJECT: WEST LANCASHIRE INVESTMENT CENTRE – UPDATE

Wards affected: Borough Wide

1.0 PURPOSE OF THE REPORT

1.1 To advise Members of the current position of the Investment Centre at Whitemoss as requested at the Cabinet meeting on the 18th June 2013.

2.0 RECOMMENDATION

2.1 That the improved financial position of the Investment Centre be noted.

3.0 BACKGROUND

3.1 In order to encourage the take up of space at the Investment Centre by embryonic businesses, elected members indicated that they wished the relocation of the staff members of Regeneration and Estates, who are not directly involved in the management of the Investment Centre, to 52 Derby Street, Ormskirk.

3.2 The relocation was completed by the end of September 2013.

3.3 The Investment Centre was commissioned in 2004 at a cost of £5.6m. The funding for this scheme came from WLBC (£300,000) with the remainder from ERDF and NWDA funds. The funding was predicated on the fact that the

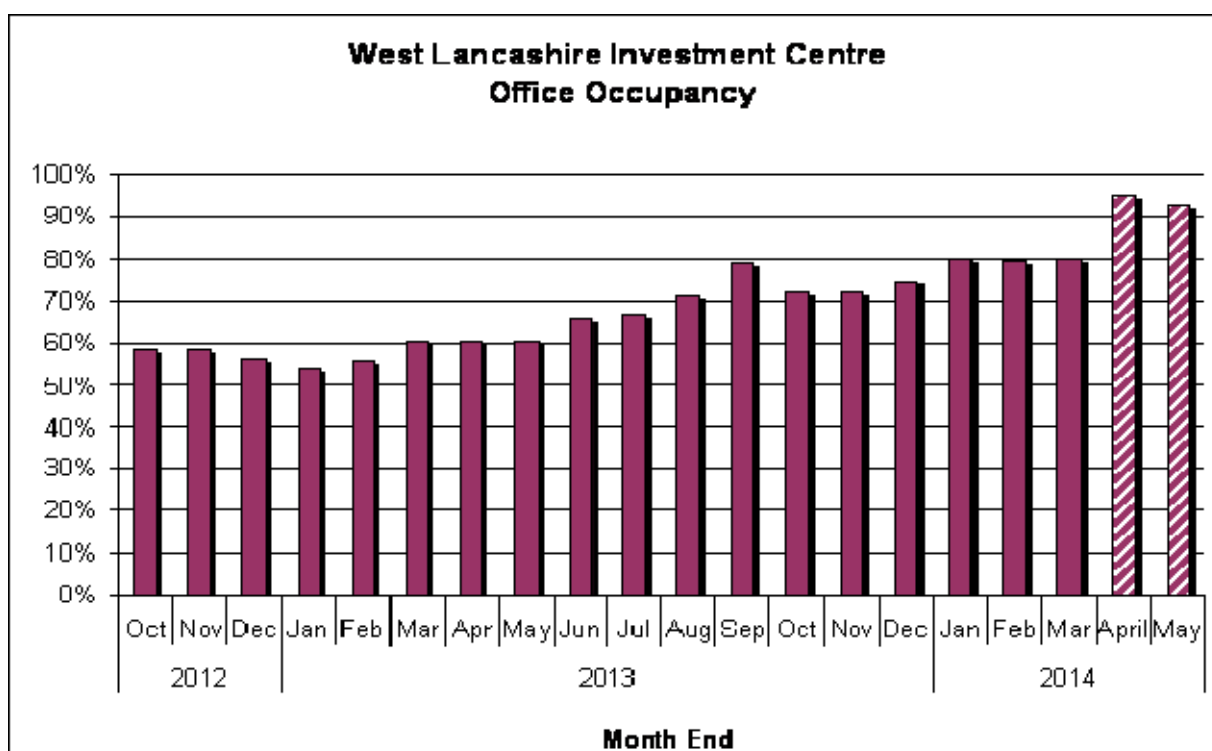
tenants would be, in large part, incubator businesses that would grow and develop within the Investment Centre confines.

- 3.4 The Investment Centre accumulated surpluses over the first several years of operation which were accounted for within a ring fenced reserve account. Under the terms of the funding, any surpluses made by the centre were to be used within the centre or for wider community and social economic development activity. The surplus generated over that time was £335,000. Over the last few years the Centre has traded at a loss, due to the downturn in the economy, which has meant utilisation of this reserve to support the financial position.
- 3.5 More recently, there has been an upturn in both office rental interest and conference bookings, and there are reasons to be positive about the financial position of the centre from 2014/15 onwards.
- 3.6 The Investment Centre made an operating loss of approximately £75,000 in 2012/13. In 2013/14 the budget was set in anticipation of a £110,000 deficit, of which, £10,000 was a contribution from GRA resources as the Investment Centre reserve would be fully utilised.

4.0 CURRENT POSITION

- 4.1 The financial position of the Investment Centre is now much improved. A number of existing tenants have expanded their office accommodation and a new tenant has taken a significant area. Agreement has been reached with a large national company who will take up occupation of the suite which the Council vacated together with Suite C1 in late April.

The graph below indicates the trend.



- 4.2 The graph has been extended to show the occupancy level of the centre once the new tenant has been installed. The uptake of offices has been spectacular over the past 15 months and has bucked the national trend which flat lined at best.
- 4.3 The Centre staff have worked hard to attract conference business and to ensure that repeat custom is achieved. They have exceeded the already challenging budgeted figure by more than £25,000 to date.

5.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

- 5.1 The prime reason for the construction of the Investment Centre more than 10 years ago was to meet the need for white collar jobs and to provide a supportive environment to fledgling businesses. The Investment Centre has exceeded this brief spectacularly and whilst there has been a number of privately developed prime office space, there is still nothing which provides the wrap around environment of the Investment Centre.

6.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 6.1 The income levels achieved from the Investment Centre have improved significantly over the last financial year and subsequently the financial position has significantly improved over the last 3 years, moving from a loss of £176K to an estimated small budget loss of £20K in 2014/15, which is to be funded from the remainder of the Investment Centre reserve. Costs have been scrutinised fully with many contracts being reconfigured in order to achieve savings. Rental and conferencing income levels have improved however some of the square foot rental charges achieved have not been as high as when market conditions were more buoyant.
- 6.2 A sinking fund has been established commencing from financial year 2012/13 whereby tenants get charged an amount, via their service charge to cover repairs and maintenance of the Investment Centre. This is to enable a planned approach to the maintenance of the Centre and ensures that tenants are contributing equitably towards this goal.
- 6.3 Looking forward it is hoped that 2014/15 could achieve an actual surplus outturn position and this will be closely monitored throughout the year. Market conditions, whilst still developing, appear to be more positive and the challenge is now to improve the rental charges levied per square foot in order to achieve an enhanced surplus and to fill the remaining vacant units.
- 6.3 A new full time Investment Centre Manager has been engaged and will provide stability going forward.

7.0 RISK ASSESSMENT

- 7.1 Any property ownership comes with risks of economic downturn and consequent rental depressions. The Investment Centre has shown that, with careful management and financial prudence the Centre has weathered the longest recession that the UK has ever known.
- 7.2 Nevertheless the building is now 10 years old and will require programmed maintenance to continue to function and attract tenants. A sinking fund has been created so that funds may be accrued to meet future repairing/refurbishment liabilities.

8.0 CONCLUSIONS

- 8.1 Members note the improving financial state of the Investment Centre and a further report is brought to cabinet in 12 months.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

The decision does not have any direct impact on members of the public, employees, elected members and / or stakeholders. Therefore no Equality Impact Assessment is required.

Exempt Information

In all the circumstances of the case the public interest in maintaining the exemption under Schedule 12A outweighs the public interest in disclosing the information.

Appendices

None



AGENDA ITEM: 5(b)

**PLANNING COMMITTEE:
13 March 2014**

**CABINET:
18 March 2014**

Report of: Assistant Director Planning

Relevant Managing Director: Managing Director (Transformation)

Relevant Portfolio Holder: Councillor M Forshaw

Contact for further information: Mr S Benge (Extn. 5274)
(Email: stephen.benge@westlancs.gov.uk)

SUBJECT: OPEN SPACE AND RECREATION PROVISION IN NEW RESIDENTIAL DEVELOPMENTS SUPPLEMENTARY PLANNING DOCUMENT

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To recommend the draft Open Space and Recreation Provision in New Residential Developments Supplementary Planning Document ('the Open Space SPD') for public consultation in April / May 2014.

2.0 RECOMMENDATION TO CABINET

2.1 That the draft Open Space SPD (Appendix A to this report) be approved for public consultation from Thursday 3 April to Friday 16 May 2014, having regard to the agreed comments of Planning Committee (provided at Appendix C to this report).

3.0 RECOMMENDATION TO PLANNING COMMITTEE

3.1 That the content of this report be considered and that agreed comments be referred to Cabinet for consideration.

4.0 BACKGROUND

- 4.1 In April 2009, the Council adopted a Supplementary Planning Document (SPD) on open space and recreation provision in new residential developments. This SPD covered both on-site open space, and wider, 'strategic' open space, both of which required financial contributions from developers of residential schemes above a certain number of dwellings. The size of the financial contributions depended on the size, location and nature of the residential development in question.
- 4.2 Subject to the introduction of the Community Infrastructure Levy (CIL), it is intended to change from the current system whereby developer contributions towards public open space are all secured through Planning Obligations (Section 106 Agreements). Instead, following the adoption of the CIL Charging Schedule in the Borough, housing developers will simply pay a levy per square metre of floorspace developed to contribute towards necessary infrastructure improvements (including "strategic" public open space) across the Borough, and so the use and the scope of Section 106 Agreements will be significantly curtailed.
- 4.3 Specifically, in terms of public open space, the implementation of CIL will mean that more strategic, off-site public open space will be funded through CIL contributions. However, there would still be a need to have "local" public open space on-site within developments of a certain size. This would be secured either through a planning condition or through a Section 106 Agreement.
- 4.4 As a result, a new Open Space SPD is required to deal solely with the provision of on-site public open space within new residential developments. This SPD needs to address:
- When on-site provision would be required;
 - The amount of public open space that would be required;
 - What type of public open space should be provided; and
 - How the public open space should be maintained.
- 4.5 Policy EN3: Provision of Green Infrastructure and Open Recreation Space of the West Lancashire Local Plan 2012-2027 sets the framework for open space provision in the Borough. As such, Policy EN3 is the 'parent' policy for the Open Space SPD. Part (d) of Policy EN3 states that:

Where deficiencies in existing open space provision exist, as demonstrated in the Council's Open Space, Sports and Recreation Study, new residential development will either be expected to provide public open space on site (where appropriate) or a financial contribution towards the provision of off-site public open space to meet the demand created by the new development or enhancement to existing areas of public open space which could be upgraded to meet the demand created by the new development

5.0 CURRENT POSITION

- 5.1 A draft Open Space SPD has been prepared, addressing the above questions. The document has been drawn up in consultation with officers in Leisure, Grounds Maintenance and in the Development Management team of Planning, and has drawn upon the 2009 Open Space Study and other relevant more up-to-date information. This draft SPD is appended to this report (Appendix A).
- 5.2 The SPD proposes the following with regard to on-site open space:
- No specific area of on-site public open space will be required by the Open Space SPD for residential developments of 1-39 dwellings (although a small amount may be required in order to ensure good design and adequate residential amenity under WLLP Policy GN3 (Criteria for Sustainable Development) or under the Design Guide SPD) – this is consistent with the existing 2009 Open Space SPD.
 - For developments of 40-289 dwellings, 13.5 square metres of open space will be required per bedroom developed. The public open space will take the form of “informal amenity green space”, i.e. undeveloped publicly accessible areas providing an informal recreation function.
 - For developments of 290 dwellings and above, 15 square metres of open space will be required per bedroom developed. This public open space will comprise informal amenity green space (approximately 13.5 square metres) and formal public open space including play equipment for children and young people (approximately 1.5 square metres).
- 5.3 While the threshold of 40 dwellings remains the same as the existing SPD, the introduction of a second, higher threshold where the level of on-site provision increases slightly is a measure to ensure that on the larger sites (accommodating approximately 1000 new residents) formal public open space with play facilities is included on-site. In terms of the quantity of public open space required per bedroom, this is now a flat rate requirement across the Borough (the existing SPD provides variable rates in different parts of the Borough) and requires a significantly larger amount of open space on-site than previously, to reflect the up-to-date open space standards in the 2009 Open Space Study.
- 5.4 The SPD will not allow for financial contributions to be made in lieu of on-site public open space provision, as this would not be permissible with the reduced ability to pool planning obligations under the CIL Regulations. A reduction in the amount of on-site public open space, compared with the above requirements, would only be allowed where the developer provides a clear and robust justification as to why it would be appropriate to reduce the amount of on-site public open space for their specific development.

- 5.5 In terms of maintenance, the SPD outlines how the preference of the Council will be that a developer retains the ownership of the on-site public open space and manages and maintains it themselves (or via a maintenance company or land trust). However, it is acknowledged that this will not always be appropriate and that in some instances ownership of the on-site public open space will need to transfer to the Council.
- 5.6 Where the public open space is to transfer to the ownership of the Council, the SPD requires a financial contribution from the developer to pay for the maintenance of the public open space provided for a period of at least ten years, after which the burden of maintenance would pass to the Council. A standard cost per hectare of open space would apply Borough-wide, rather than attempting to agree discrete costs for each development. The cost per hectare would be higher for sites above the 290 dwelling threshold, as there would be more types of open space to maintain.

6.0 NEXT STEPS

- 6.1 Assuming that Cabinet endorse the SPD for consultation, the consultation will take place for six weeks, from Thursday 3 April – Friday 16 May 2014.
- 6.2 Following the consultation period, all comments submitted to the Council will be processed and considered and any necessary amendments to the SPD will be made. It is anticipated that the final SPD will be brought to Council in July 2014, alongside the proposed CIL Charging Schedule, in order that CIL and the Open Space SPD can be implemented in tandem, once adopted by the Council.

7.0 SUSTAINABILITY IMPLICATIONS / COMMUNITY STRATEGY

- 7.1 The provision of adequate public open space for residents and visitors to West Lancashire is a key sustainability requirement and a significant factor in an individual's quality of life. This SPD will provide the Borough Council with greater control in ensuring that new development provides an acceptable level of on-site public open space.
- 7.2 As part of the preparatory work on the SPD, a screening exercise was carried out on the Council's behalf by consultants, to test whether the SPD needed a Sustainability Appraisal (SA). The consultants concluded that no SA of the SPD is required. This screening report is included as an appendix to the SPD.
- 7.3 Providing suitable public open space will, directly or indirectly, help to meet three of the key objectives of the Sustainable Community Strategy, namely "Improved health for all" (to improve health outcomes, promote social wellbeing for communities and improve health for everyone), "Young and older people" (to provide opportunities for young and older people to thrive), and "Better environment" (to protect and improve West Lancashire's environment including safeguarding our biodiversity).

8.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 8.1 The preparation of the Open Space SPD (and consultation on it) can be resourced through the Strategic Planning and Implementation Team's revenue budgets.
- 8.2 The adoption and implementation of the proposed policy set out in the SPD should result in the provision of additional public open space in the Borough. In time, depending on whether the new public open space passes into the Council's ownership or not, this may result in an ongoing financial cost to the Council for maintenance.

9.0 RISK ASSESSMENT

- 9.1 Not having an up-to-date, CIL-compliant SPD could lead to developers challenging any requirements from the Council for open space in new residential developments, possibly leading to inadequate standards of amenity for the occupiers of new developments and a greater strain on existing public open spaces in the Borough because of the additional demand on them created by the increased residential population. The speedy preparation and adoption of this SPD should ensure that the above scenario is avoided.

Background Documents

West Lancashire Borough Council Open Space, Sport and Recreation Study 2009
(http://www.westlancs.gov.uk/planning/planning_policy/the_local_plan/the_local_plan_2012-2027/evidence_and_research/open_space_study.aspx)

Equality Impact Assessment

There is a direct impact on members of the public, employees, elected Members and / or stakeholders. Therefore an Equality Impact Assessment is required. A formal Equality Impact Assessment is attached as Appendix B to this report, the results of which have been taken into account in the recommendations contained within this report.

Appendices

- A. Draft Open Space and Recreation Provision in New Residential Developments SPD
- B. Equality Impact Assessment
- C. Minute of Planning Committee held on 13 March 2014 (Cabinet only) (to follow)

Provision of Public Open Space in New Residential Developments

Supplementary Planning Document

Draft

February 2014

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Provision of Public Open Space in New Residential Developments

Supplementary Planning Document

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Preface

West Lancashire Borough Council believes that all residents within the Borough should have access to a range of high quality open space facilities. Open spaces are essential for sport, recreation, health, wellbeing and relaxation and, through appropriate design, can also act as important habitats for an array of wildlife and can improve biodiversity.

The Council understands that residents of West Lancashire value high quality open space and so therefore seeks to encourage, where appropriate, the provision of new public open space to a high standard and in such a way that maximises its use and provides multi-purpose benefits, helping to create healthier, safer and more attractive neighbourhoods throughout the Borough.

New residential development can place a strain on existing open spaces, the new housing usually resulting in an increase in the population of an area, and a corresponding increase in the number of open space users. If open space is not provided to meet this increased demand, this can result in the under-provision of open space.

Therefore, the Council seeks to ensure that new and enhanced open space facilities are made available to accompany new residential development. This Supplementary Planning Document (SPD) sets out how developers of new housing will be required to provide open space on-site, within their development proposals. It operates in conjunction with Policy EN3 of the West Lancashire Local Plan 2012-2027, and within the financial framework to be introduced as a result of the anticipated implementation of the Community Infrastructure Levy Charging Schedule in West Lancashire in summer 2014.

Comments are invited on this draft SPD from Thursday 10 April – Friday 23 May 2014. Details on how to comment are provided in Chapter 6.

1. Introduction

This Supplementary Planning Document (SPD) is designed to provide guidance on West Lancashire Borough Council's approach to, and expectations concerning, the provision of public open space and associated facilities within new residential developments. It supersedes and replaces the *Open Space and Recreation Provision in New Residential Developments SPD*, adopted by the Council on 7 May 2009, and updated in 2011¹ (hereafter referred to as the 2009 Open Space SPD).

The need to replace the 2009 Open Space SPD has arisen as a result of two factors. Firstly, it is anticipated that the Council will adopt a Community Infrastructure Levy (CIL) Charging Schedule in 2014, which will alter the types of infrastructure that are secured through planning obligations (Section 106 agreements). Secondly, an Open Space Study and Playing Pitch Assessment was prepared on behalf of the Council by the consultants PMP in 2009, subsequent to the adoption of the 2009 Open Space SPD. The findings of this study supersede the material underpinning the 2009 Open Space SPD.

Two policies of the West Lancashire Local Plan 2012-2027 deal, directly or indirectly, with public open space provision within the Borough. These are Policy EN3: Provision of Green Infrastructure and Open Recreation Space, and Policy IF4: Developer Contributions. The two policies are outlined in Chapter 2 of this SPD, and are set out in full in Appendices 1 and 2. The purpose of this document is to provide more detailed and specific advice to applicants as to how Local Plan policies EN3 and IF4 should be applied in relation to the provision of on-site public open space in new residential developments.

This SPD addresses:

- When on-site provision of public open space will be required;
- The amount of on-site public open space provision that will be required;
- What type of public open space will be required;
- What will be required with regard to the maintenance of the on-site public open space; and
- The location and design of public open space.

The contents of this SPD will be a material consideration when determining applications for residential development and will be used by the Council's Development Management team as a basis for negotiations with applicants prior to the determination of applications for residential development. Applicants are therefore strongly advised to have regard to this SPD when preparing applications for residential development within the Borough. They are also encouraged, prior to the submission of applications, to discuss the proposals with an officer in the Council's Development Management team via the pre-application advice process.

Queries regarding the pre-application and planning application process should be directed to the Planning Service on (01695) 585116, or electronically to plan.apps@westlancs.gov.uk.

Queries regarding this SPD in general, as a policy document, should be directed to the Strategic Planning & Implementation Team on (01695) 585274, or electronically to localplan@westlancs.gov.uk.

¹ In November 2011, the Council reduced the requirements for Open Space contributions. The new (lower) figures are listed in the Addendum to the SPD, and replace those in table 8.1 in the 2009 SPD.

2. Policy Context

This chapter sets out the policy framework within which the 2014 Open Space SPD operates, both at national and local level.

National Planning Policy Framework

The National Planning Policy Framework (NPPF) came into force in March 2012. Paragraph 73 of the NPPF deals with open space, sports and recreation facilities, and states:

Planning policies should be based on robust and up-to-date assessments of the need for new open space, sports and recreation facilities and opportunities for new provision. The assessments should identify specific needs and quantitative or qualitative deficits or surpluses of open space, sports and recreational facilities in the local area. Information gained from the assessments should be used to determine what open space, sports and recreational provision is required.

The information from the Council's most recent Open Space, Sport and Recreation Study has formed the basis of the open space standards set out in this SPD.

West Lancashire Local Plan 2012-2027

The West Lancashire Local Plan 2012-2027 ('WLLP') was adopted in October 2013. The two policies of greatest relevance to the provision of open space are policies EN3 and IF4.

Policy EN3: Provision of Green Infrastructure and Open Recreation Space, states:

2(d) *Where deficiencies in existing open recreation space provision exist, as demonstrated in the Council's Open Space, Sport and Recreation Study and any subsequent equivalent document, new residential development will either be expected to provide public open space on site (where appropriate) or a financial contribution towards the provision of off-site public open space to meet the demand created by the new development or enhancement of existing areas of public open space which could be upgraded to meet the demand created by the new development.*

WLLP Policy EN3 functions as the 'parent' policy for this SPD.

Policy IF4: Developer Contributions sets out the types of infrastructure towards which new developments will be required to contribute. Policy IF4 refers both to planning obligations (or 'Section 106 Agreements') and to the Community Infrastructure Levy.

Community Infrastructure Levy

It is anticipated that West Lancashire Borough Council will adopt a Community Infrastructure Levy (CIL) Charging Schedule in summer 2014.

The CIL Regulations 2010 set out limitations for the use of planning obligations once CIL is implemented. Under the CIL Regulations, planning obligations must be:

- Necessary to make the development acceptable in planning terms;
- Directly related to the development;
- Fairly and reasonably related in scale and kind to the proposed development.

Thus the effect of the implementation of CIL will be that planning obligations (or 'Section 106 agreements') will be much more limited in their scope. In terms of public open space provision, funding for the more strategic types of public open space off-site will come from CIL receipts², but residential developments of a certain size will be required to provide public open space on-site through a planning obligation or planning condition. The latter on-site provision is the subject matter of this SPD.

Open Space and Recreation Study 2009

The Open Space and Recreation Study was undertaken on behalf of the Council by the consultants PMP, and was finalised in October 2009, five months after the adoption of the 2009 Open Space SPD. In line with guidance set out within Planning Policy Guidance Note 17 (PPG17), which was in force at the time, the Study includes an assessment of need and an audit of existing open space in the Borough, and identifies local standards for open space provision. The study also assisted in establishing future planning policies and site allocations through the West Lancashire Local Plan 2012-2027.

This 2014 SPD is largely based upon the findings of the 2009 Open Space Study (it has also had input from WLBC Leisure officers). Whilst the Open Space Study was published five years before this SPD, it is considered that this evidence remains sufficiently up-to-date, given that the population and the amount and quality of open space in the Borough have not changed markedly since 2009.

Sustainability Appraisal

Consultants URS were engaged to determine whether there is a need to undertake a Strategic Environmental Assessment as part of a Sustainability Appraisal on this SPD in accordance with the *Environmental Assessment of Plans and Programmes Regulations 2004* and the *European Directive 2001/42/EC*. A Supplementary Planning Document does not require a Sustainability Appraisal to be completed if it relates to a parent document that has already been subject to Sustainability Appraisal. URS have concluded that such is the case for this SPD, given Sustainability Appraisal work carried out throughout the preparation of the West Lancashire Local Plan 2012-2027.

The Sustainability Appraisal Determination Report is included in Appendix 4 for further information.

² The use of CIL money is to be agreed annually with the local community, to reflect local priorities. Where local priorities include the provision of play equipment or other forms of open space, CIL funding may be used for the provision and ongoing maintenance of play equipment, in addition to the provision of strategic open space.

3. Local Assessment of Open Space

The former Planning Policy Guidance Note 17 and its Companion Guide called for local planning authorities to undertake local assessments of open space, sports and recreation. This demand has been reiterated in paragraph 73 of the NPPF. In response to this requirement, the Borough Council appointed consultants PMP in 2008 to undertake an Open Space Study and Playing Pitch Assessment for West Lancashire. The key aims of the study were to:

- Update the existing audit of open space provision to reflect recent changes;
- Update the assessment of local open space needs to ensure that the needs and aspirations of local communities are appropriately understood;
- Develop clear and robust standards; and
- Inform the future management of open space and facilitate decision-making on the current and future needs for open space, sport and recreational facilities.

The Playing Pitch Assessment was prepared in line with guidance set out within PPG17 and its Companion Guide. The study indicated that there are shortfalls of pitch provision across the Borough. In particular there are pressures on junior football pitches as well as pressures on cricket and rugby pitches. In most areas of the Borough, there was a significant issue in relation to the quality of the pitches, in terms of facilities (i.e. changing rooms) and drainage.

The Open Space Study and Playing Pitch Assessment can be found on the Council's website at:

http://www.westlancs.gov.uk/planning/planning_policy/the_local_plan/the_local_plan_2012-2027/evidence_and_research/open_space_study.aspx.

Types of Open Space

Open space exists in various forms, including:

- Formal parks and gardens
- Accessible natural green space
- Equipped / natural play areas
- Informal and amenity green space
- Outdoor sports spaces, for example football, rugby and cricket pitches, multi-use games areas
- Allotments

Table 14.4 of the 2009 Open Space Study recommends local standards for different types of open space in terms of quantity and accessibility. These standards form the basis of the open space requirements set out in this SPD, and are copied below:

Table 14. 4 – Recommended Local Standards

Typology	Quantity Standard	Accessibility Standard
Formal Parks	0.10 ha per 1000 population – equivalent to current level of provision Borough wide although set with locational deficiencies in mind	10 minute walk time (urban areas) 20 minute drive time (rural)
Country Parks	No standard set	20 minute drive time
Natural and Semi Natural Open Space	1.84 ha per 1000 population – equivalent to the existing provision	15 minute walk time
Amenity Green Space	1.35 ha per 1000 population – equivalent to existing provision	5 minute walk time
Provision for Children	0.038 ha per 1000 population – this represents a significant increase on existing provision. As a minimum this standard will require one facility in settlements exceeding 1500 residents.	10 minute walk time
Provision for young people	0.024ha per 1000 population Provision of a facility in settlements with a population of greater than 3000	10 minute walk time
Outdoor Sports Facilities	2.16 ha per 1000 population – above the existing level of provision	20 minute drive time to each facility type
Allotments	0.08 ha per 1000 population Above existing level of provision	20 minute drive time
Cemeteries and Churchyards	N/A. Indicative standard of 0.06 ha per annum required for burials.	No standard set

4. Policy OS1: Provision of On-Site Open Space

With the anticipated introduction of the CIL charge, the majority of the strategic public open space required as a result of new development will be funded using accumulated CIL contributions. Such schemes will be outlined in the West Lancashire CIL Infrastructure List (the 'Regulation 123 list') and projects will be delivered in line with programmes put forward by service providers on an annual basis.

Policy OS1 below deals specifically with on-site public open space, which must be provided as an integral part of new residential developments.

Policy OS1 Provision of On-Site Public Open Space

Developers of new residential developments will be required to provide public open space on-site as follows:

(a) Developments of 1-39 dwellings

For residential developments of 1-39 units, on-site public open space provision will not be required.

(b) Developments of 40-289 dwellings

For residential developments of 40-289 dwellings, developers will be required to provide 13.5 square metres of public open space per bedroom developed. This public open space should typically take the form of informal amenity green space in order to provide the local function necessary of this public open space.

(c) Developments of 290 dwellings and over

For residential developments of 290 dwellings and over, developers will be required to provide 15 square metres of open space per bedroom developed. The expected breakdown of this 15 square metres is approximately 13.5 square metres of informal amenity green space and 1.5 square metres of provision for formal public open space including play equipment for children and young people. In terms of the provision for formal public open space including play equipment for children and young people, the developer should liaise with the Council's Community Services (Leisure) officers to ascertain the exact nature and amount of play equipment that should be provided on that particular development.

If the developer proposes not to meet the above public open space requirements on-site, they must provide clear and robust justification as to why the requirements should not be met in that particular development proposal.

Maintenance of Open Space

The preference of the Council would be that the developer retains the ownership of the public open space within their development site, in which case they will be solely responsible for ongoing management and maintenance of the public open space (and ensuring that it remains accessible to the general public). Alternatively, with the agreement of the Council, developers may appoint a maintenance company or land trust to manage and maintain the public open space on their behalf.

However, where it is not appropriate for a developer to retain ownership of the public open space and, as a result, ownership is passed to the Council, the developer will be required to provide a financial contribution for the maintenance of the on-site public open space they provide for a minimum of 10 years. The size of the contribution will be calculated using current contract prices and maintenance costs of open space, and also taking into account inflation over the 10 year period. The rates are as follows:

(A) Sites of 40-289 dwellings

The Council will charge:

£0.47 per square metre per annum for maintenance of grassed areas, plus

£1.81 per square metre per annum for maintenance of shrub beds

In addition, further charges may be levied for tree pruning, litter picking, and the provision and routine emptying of litter bins and dog waste bins. These charges will be calculated on a site-by-site basis.

(B) Sites of 290 dwellings and above

The Council will charge:

£0.47 per square metre per annum for maintenance of grassed areas, plus

£1.81 per square metre per annum for maintenance of shrub beds, plus

£9,870 per annum for the maintenance of children's and young people's play equipment.

In addition, further charges may be levied for tree pruning, litter picking, the provision and routine emptying of litter bins and dog waste bins, and maintenance of footpaths and any other hard surface provided as part of the open space element of the development. Charges will be calculated on a site-by-site basis

Charges for soft landscaping will be subject to annual increases in line with the soft landscape indices.

Charges for maintenance of play equipment will be linked to the Consumer Price Indices.

Delivery of on-site public open space as part of new residential developments will be secured through conditions on any planning permission or, if necessary, a legal agreement.

Contributions towards the maintenance of public open space provided on-site will be secured through legal agreements.

Justification

Definition of open space

For the purposes of this SPD, informal amenity green space is defined as undeveloped, publicly accessible areas, providing an informal recreational function. This may include grassed areas, landscaped areas, and, in certain cases, buffer planting (where this is accessible to the public and has a clear amenity function, e.g. if a footpath is provided through the area of buffer planting). However, lines of trees, narrow grass strips, or 'left over spaces' are unlikely to count as informal amenity green space.

In terms of sustainable drainage systems, water features such as attenuation ponds will not count as public open space, unless, for example, they are designed with a specific amenity function in mind, for example a boating lake or strategically designed pond with amenity value. However, areas of informal amenity green space around such drainage features will count as public open space.

Thresholds

The Borough Council has used a threshold of 40 dwellings for on-site public open space contributions for a number of years, including under the 2009 Open Space SPD. This has worked well in practice, and there is no more recent evidence indicating that the threshold should be changed.

The higher threshold of 290 dwellings has been derived using a nominal average figure of 3.5 persons per new dwelling. At this rate of occupancy, 1,000 extra persons would be generated by 286 new dwellings. Rounded to the nearest 10 dwellings, this becomes 290 dwellings³.

The requirement to provide on-site public open space will apply to incremental developments on sites which would result in a development of 40 units or more on a larger site. An example would be where a large site was divided up into smaller parcels and proposals were submitted for 39 dwellings or fewer on each parcel on a piecemeal basis. Similarly, the requirement to provide the higher rate of on-site open space would apply to incremental developments on sites which would result in a development of 290 units or more on a larger site.

Types of open space

For residential developments expected to generate fewer than 1,000 additional persons in a locality, Policy OS1 only requires provision of informal amenity green space. For single residential developments expected to attract 1,000 or more residents, it is considered appropriate to increase the requirements on developers in terms of the types of open space to be provided on-site, such that residents can access formal parks, and children's or young people's play areas without needing to leave the site in question. This approach strikes what is considered an appropriate balance between ensuring ready access to formal parks and play areas for as great a proportion as possible of the Borough's

³ The calculation of the threshold of 290 dwellings has used an assumption of each dwelling accommodating on average 3.5 people. This is a different calculation from those used in Policy OS1, working out the area of open space to be provided in relation to individual developments (a calculation which uses numbers of bedrooms). In practice, 1,000 people may not necessarily require 1,000 bedrooms, as some bedrooms are occupied by more than one person. Conversely, some bedrooms are not occupied. For simplicity, the "average occupation per dwelling" approach is used to determine thresholds, and the "one person per bedroom" approach is used to determine levels of open space provision.

residents, and the Council's financial burden of maintaining a large number of small, scattered play areas.

The majority of new residential development sites are small. Informal amenity green space is preferred to formal open space and children's and young people's play areas in these situations; it is also preferred to semi-natural open space. The 2009 Open Space Study highlights that the public expectation of levels of maintenance of semi-natural open space is higher than that of amenity open space, which has lower maintenance issues.

The above requirements were finalised following discussions with the Borough Council Leisure officers and are considered the most appropriate means of ensuring that both the quality of existing open space areas are improved / enhanced and the quantity of open space is increased within areas of deficiency.

If a developer proposes not to meet the public open space requirements set out in Policy OS1 (either in full or in part), they must provide clear and robust justification as to why the requirements should not be met. This may relate to the provision of public open space in general in the locality (with reference to the accessibility standards in Table 14.4 above).

Maintenance of Open Space

It is the preference of the Council that a developer would retain the ownership of an on-site public open space created as part of their development proposals, in which case they will be solely responsible for ongoing management and maintenance of the open space. Developers may appoint a maintenance company or land trust to maintain the open space on their behalf, subject to approval of the specific company by the Council. In either instance, the developer / maintenance company would be expected to maintain the public open space to the standard expected by the Council.

However, it is acknowledged that it will not always be appropriate for an on-site public open space to remain in the ownership of the developer and instead should pass into the Council's ownership. In such situations, developers will be required to pay for the maintenance of any on-site public open space they provide for a minimum of 10 years. The value of the financial contribution will be calculated using current contract prices and maintenance costs of open space, and will also take into account inflation over the 10 year period in question.

For simplicity, just two rates per hectare will be charged Borough-wide for maintenance of new, on-site public open space, one rate for developments of 40-289 dwellings, and a higher rate for developments of 290 dwellings and above to reflect the increased maintenance costs of formal public open space. Under the current contract prices and maintenance costs these would be as follows:

(A) Sites of 40-289 dwellings

The Council will charge:

- £0.47⁴ per square metre per annum for maintenance of grassed areas. This cost usually represents twelve cuts of grass per year.

⁴ The figure of £0.47 (rounded from £0.4651) is calculated using a 2007 baseline figure of £0.4044 and applying a 15.02% increase to give a 2014 price, based on the soft landscaping indices between 2007 and 2014. Future prices will rise in line with the soft landscaping indices and in line with current contract prices.

- £1.81⁵ per square metre per annum for maintenance of shrub beds. This cost includes removal of shrub pruning, weeds and any detritus in the shrub beds once per year, and treating the shrub bed with herbicide for weed control as needed.

There is significant scope for variation in maintenance costs, depending on the location of the open space (urban / rural), the type of shrub planting, types of trees (if any), numbers of bins, etc. In addition, further charges may be levied for tree pruning, litter picking, the provision and routine emptying of litter bins and dog waste bins, and for maintenance of footpaths or any other hard surfaces provided as part of the open space contribution. Therefore charges will usually be determined on a site-by-site basis, and would be calculated once a specific open space and landscaping scheme has been agreed between the developer and the Council.

(B) Sites of 290 dwellings and above

The Council will charge £0.47 per square metre per annum for maintenance of grassed areas, plus £1.81 per square meter per annum for maintenance of shrub beds, plus possible further charges linked to tree pruning, etc, as for schemes of 40-289 dwellings.

In addition, a charge of £9,870 per annum will be applied for the maintenance of children's and young people's play areas. The breakdown of this charge is provided in Appendix 5 of this document. There is scope for variation of this charge, dependent upon the size of play areas involved, and the number of items of equipment.

The maintenance of any public open space provided on-site should be discussed with the Borough Council's Grounds Maintenance Team prior to permission being granted. If developers express an interest for the Council to maintain the public open space they are advised to contact West Lancashire's Head of Leisure, Culture and Arts Services to discuss the adoption agreement, including suitable payment for future management and maintenance by the adopting body.

Contact details are as follows:

Tel: 01695 585157

Email: john.nelson@westlancs.gov.uk

Legal Agreements

Developers will be required to enter into legal agreements to cover the arrangements for the maintenance of on-site public open space. Planning permission will not be granted until both the developer and the Council have signed this agreement. The delivery of the public open space itself will generally be required through a condition on any planning permission, but on occasion the delivery may also need to form part of the legal agreement if particular circumstances of the development require it.

WLLP Policy IF4 provides further guidance on legal agreements (please see Appendix 2).

⁵ The figure of £1.81 (rounded from £1.8086) is calculated using a 2007 baseline figure of £1.5724 and applying a 15.02% increase to give a 2014 price, based on the soft landscaping indices between 2007 and 2014. Future prices will rise in line with the soft landscaping indices and in line with current contract prices.

Examples of open space contributions under Policy OS1

1. Residential development of 62 dwellings

Local standard: 13.5 sqm per bedroom	
Dwelling size	Open space required per dwelling
1 bed	13.5 sqm
2 bed	27 sqm
3 bed	40.5 sqm
4 bed	54 sqm

If the proposal was for the development of 18 x 2 bed dwellings, 22 x 3 bed dwellings and 22 x 4 bed dwellings, the total amount of open space provision required would be calculated as follows:

Number of dwellings	Open space required
2 bed (13.5sqm per bedroom) x 18	486 sqm
3 bed (13.5sqm per bedroom) x 22	891 sqm
4 bed (13.5sqm per bedroom) x 22	1,188 sqm
TOTAL	2,565 sqm

2. Residential development of 338 dwellings

Local standard 15 sqm per bedroom	
Dwelling size	Open space required per dwelling
1 bed	15 sqm
2 bed	30 sqm
3 bed	45 sqm
4 bed	60 sqm

If the proposal was for the development of a total of 338 dwellings broken down into: 118 no. 2 bed dwellings, 100 no. 3 bed dwellings and 120 no. 4 bed dwellings, the total amount of open space provision required would be calculated as follows:

Number of dwellings	Open space required
2 bed (15sqm per bedroom) x 118	3,540 sqm
3 bed (15sqm per bedroom) x 100	4,500 sqm
4 bed (15sqm per bedroom) x 120	7,200 sqm
TOTAL	15,240 sqm

5. Location & Design of Public Open Space

The Borough Council will use a combination of resources to determine whether the proposed public open space meets the requirements of WLLP Policy EN3. Other documents (and any subsequent updates to these documents) should also be taken into consideration alongside Policy EN3, namely:

- The 2009 WLBC Open Space, Sport and Recreation Study;
- The 2008 Design Guide SPD;
- Site Planning – Layout and Design SPG.

Informal amenity open space is an integral part of design in any new development. Public open spaces should be open in nature and, where possible, be overlooked by residential development, in order to provide a degree of natural surveillance. However, care must be taken to ensure that the siting of the space minimises the likelihood of general disturbance to the nearby residents caused by noise and loss of privacy.

Public open space should meet the detailed design criteria listed under the West Lancashire Local Plan Policy GN3, and the 2008 West Lancashire Design Guide SPD.

Landscape design submissions should demonstrate that community safety and crime prevention measures have been considered, in addition to ensuring that spaces are designed to ensure ease of access for emergency vehicles.

In some instances, a formal risk assessment may be required to take into account issues such as proximity to highways, etc. The Borough Council will consider each case individually to ascertain whether such an assessment is deemed necessary.

Existing features such as trees, hedgerows, changes in ground levels, and water features should be incorporated into the public open space wherever possible to add to the nature conservation and biodiversity value of the site, and to help create more individual, dynamic spaces. Where water features are proposed as part of the development, it may be appropriate for these features to be used as part of a sustainable drainage system avoiding underground utility apparatus.

Careful consideration should be given to the role that public open space can play in improving and enhancing the wildlife and biodiversity value, and how such features can assist the Lancashire Biodiversity Action Plan (BAP). The Borough Council would particularly encourage this approach in the case of larger developments where public open space features and the natural environment should be integrated.

Developers are encouraged to make reference to Natural England's Accessible Natural Green Space Standards (ANGST) model regarding the protection and enhancement of natural features. The Standard can be viewed or downloaded from the Natural England website at <http://www.natural-england.org.uk>

Sites should, where possible, form part of a series of linked open spaces to assist in the creation of environmental corridors that can be used for recreation. Where development is adjacent to the canal network, consideration should be given to what role such a feature can play in providing for open space.

6. How to comment

Comments are invited on this document. The consultation period runs from Thursday 3 April – Friday 16 May 2014. Comments must be received by the Council by 5pm on Friday 16 May.

Comments may be made in the following ways:

Online: Please visit the Council's website at: www.westlancs.gov.uk/planningpolicy and fill in the online form.

Email: Comments forms can be downloaded from the Council's website (as above) and emailed to Localplan@westlancs.gov.uk

By post: Please post comments forms to:

Strategic Planning and Implementation
West Lancashire Borough Council
52 Derby Street
Ormskirk
Lancashire
L39 2DF

Any queries on the consultation process should be made to the above email or postal addresses, or can be made by telephone to 01695 585171.

Appendix 1

Policy EN3

Provision of Green Infrastructure and Open Recreation Space

1. Green Infrastructure

The Council will provide a green infrastructure strategy which supports the provision of a network of multi-functional green space including open space, sports facilities, recreational and play opportunities, allotments, flood storage, habitat creation, footpaths, bridleways and cycleways, food growing and climate change mitigation. The network will facilitate active lifestyles by providing leisure spaces within walking distance of people's homes, schools and work.

In order to support this green infrastructure strategy, all development, where appropriate, should:

- i. Contribute to the green infrastructure strategy by enhancing and safeguarding the existing network of green links, open spaces and sports facilities, and securing additional areas where deficiencies are identified - this will be achieved through contributions to open space as outlined within Policy IF4;
- ii. Provide open space and sports facilities in line with an appraisal of local context and community need, with particular regard to the impact of site development on biodiversity;
- iii. Seek to deliver new recreational opportunities, including the proposed linear parks between Ormskirk and Skelmersdale, between Ormskirk and Burscough, along the River Douglas at Tarleton and Hesketh Bank and along the former railway line in Banks;
- iv. Support the development of new allotments and protect existing allotments from development; and
- v. Support the Ribble Coast and Wetlands Regional Park and associated infrastructure.

2. Open Space and Recreation Facilities

a) Development that results in the loss of existing open space or sports and recreation facilities (including school playing fields) will only be permitted if one of the following conditions are met:

- i. The open space has been agreed by the Council as being unsuitable for retention because it is under-used, poor quality or poorly located;
- ii. The proposed development would be ancillary to the use of the site as open space and the benefits to recreation would outweigh any loss of the open area; or
- iii. Successful mitigation takes place and alternative, improved provision is provided in the same locality.

b) Development on open space and sports and recreation facilities will not be permitted where:

- i. Development would affect the open character of the area
- ii. Development would restrict access to publicly accessible Green Space
- iii. Development would adversely affect biodiversity in the locality
- iv. Development would result in the loss of Green Spaces, Green Corridors and the Countryside
- v. The open space contributes to the distinctive form, character and setting of a settlement
- vi. The open space is a focal point within the built up area
- vii. The open space provides a setting for important buildings (being listed or of local historic importance) or scheduled ancient monuments

c) Development for outdoor sports and recreational facilities will be permitted within settlement boundaries providing it does not conflict with other policies contained within the Local Plan. Appropriate development for outdoor sports and recreation facilities may be permitted in the Green Belt in accordance with national policy.

d) Where deficiencies in existing open recreation space provision exist, as demonstrated in the Council's Open Space, Sports and Recreation Study and any subsequent equivalent document, new residential development will either be expected to provide public open space on-site (where appropriate) or a financial contribution towards the provision of off-site public open space to meet the demand created by the new development or enhancement of existing areas of public open space which could be upgraded to meet the demand created by the new development.

e) Development which would prejudice the delivery of the informal countryside recreational activities proposed at the following sites will not be permitted:

- i. Hunters Hill, Wrightington
- ii. Parbold Hill, Parbold
- iii. Platts Lane and Mill Dam Lane, Burscough

f) Development which would prejudice the protection and improvement of facilities at the following existing countryside recreation sites will not be permitted:

- i. Beacon Country Park, Skelmersdale
- ii. Tawd Valley Park, Skelmersdale
- iii. Fairy Glen, Appley Bridge
- iv. Dean Wood, Up Holland
- v. Abbey Lakes, Up Holland
- vi. Ruff Wood, Ormskirk
- vii. Platts Lane Lake, Burscough
- viii. Chequer Lane, Up Holland

Appendix 2

Policy IF4

Developer Contributions

New development will be expected to contribute to mitigating its impact on infrastructure, services and the environment and to contribute to the requirements of the community.

Contributions may be secured through a planning obligation (subject to an obligation meeting the requirements of the relevant legislation and national policy) and through the Community Infrastructure Levy (CIL), at such a time when the Council has prepared a Charging Schedule.

The types of infrastructure that developments may be required to provide such contributions for include, but are not limited to:

- i. Utilities and Waste (where the provision does not fall within the utility providers legislative obligations);
- ii. Flood prevention and sustainable drainage measures;
- iii. Transport (highway, rail, bus and cycle / footpath network, canal and any associated facilities);
- iv. Community Infrastructure (such as health, education, libraries, public realm);
- v. Green Infrastructure (such as outdoor sports facilities, open space, parks, allotments, play areas, enhancing and conserving biodiversity and management of environmentally sensitive areas including Natura 2000 and Ramsar Sites);
- vi. Climate change and energy initiatives through allowable solutions;
- vii. Affordable housing; and
- viii. Skelmersdale Town Centre Regeneration.

Where appropriate, the Council will permit developers to provide the necessary infrastructure themselves as part of their development proposals, rather than making financial contributions.

Where a development is made unviable by the requirements of a planning obligation, the Council will have regard to appropriate evidence submitted by an applicant and consider whether any flexibility in the planning obligation is justified.

Appendix 3

Open Space Standard provision – Extract from the 2009 Open Space Study

A. Provision of amenity green space across West Lancashire

Analysis areas	Current provision	Number of sites	Smallest site (hectares)	Largest site (hectares)	LDF population (2026)	Provision per 1000 population (2026)
Burscough and Rufford	4.79	18	0.04	1.32	11,546	0.41
East	26.42	13	0.04	17.98	12,914	2.05
North	21.03	27	0.04	10.44	13,982	1.50
Ormskirk	19.45	37	0.02	2.07	26,542	0.73
West	2.13	8	0.08	0.93	8,078	0.26
Skelmersdale and Up Holland	102.44	102	0.02	7.74	43,538	2.35
Overall	176.26	205	0.02	17.98	116,600	1.51

B. Quantity Standard

Existing level of provision	Recommended standard
1.35 hectares per 1000	1.35 hectares per 1000
Justification	
<p>Findings from the household survey indicate that there is a difference in opinion regarding the quantity of amenity green space, with 46% of residents indicating that provision is sufficient and 40% suggesting that additional provision is required. This split in opinion is present in all areas. Analysis of the existing distribution of amenity spaces indicates that they are well distributed and that there are relatively few deficiencies.</p> <p>Consultations reinforced the role of amenity space, particularly in terms of providing localised facilities for children and young people. A need for a balance between quantity and quality is highlighted by residents. Indeed, many of the reasons provided for feeling that provision of amenity space was insufficient related to qualitative issues, supporting the emphasis on maintaining and improving the quality of amenity spaces.</p> <p>Setting the standard at the existing level of provision will promote qualitative improvements to amenity green space and in conjunction with the challenging accessibility standard will enable the identification of localised deficiencies.</p>	



**SEA Screening Determination for the West
Lancashire Open Space Supplementary Planning
Document**

February 2014

REVISION SCHEDULE

Rev	Date	Details	Prepared by	Reviewed by	Approved by
1	December 2013	SEA Screening Determination for West Lancashire Borough Council Open Space SPD	Ian McCluskey Senior Consultant	Mark Fessey Senior Consultant	Steve Smith Technical Director <i>Policy & Appraisal</i>

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1 BACKGROUND

1.1 Overview

West Lancashire Borough Council is in the process of preparing a Supplementary Planning Document (SPD) that sets-out guidance on the provision of Open Space in new residential developments.

This report sets out a determination as to whether there is a need to undertake a Strategic Environmental Assessment on this Open Space SPD in accordance with the *Environmental Assessment of Plans and Programmes Regulations 2004* and the *European Directive 2001/42/EC*.

1.2 Introduction to SEA / Sustainability Appraisal

The SEA Directive (2001/42/EC) identifies the purpose of SEA as “*to provide for a high level of protection of the environment and to contribute to the integration of environmental considerations into the preparation and adoption of plans and programmes with a view to promoting sustainable development*”.

The SEA Directive was transposed into the UK through the implementation of the Environmental Assessment of Plans and Programmes Regulations (2004).

For Local Development Documents, the requirement to undertake an environmental assessment must be carried out as part of a Sustainability Appraisal, which widens the scope of the assessment to include economic and social implications.

The requirement for SA applies to all Local Development Plan Documents. However amendments to the Town and Country Planning Regulations in 2009 removed the automatic need to undertake SA/SEA for SPDs

However, the Council must still determine if an SPD requires SASEA, i.e. there is a need to ‘screen’. The screening process in this instance essentially involves asking the question ‘are there likely to be significant effects as a result of the SPD, recognising that the role of the SPD is only to amplify adopted policy?’

1.3 West Lancashire Borough Council Open Space SPD

‘Parent’ plans and policies

The Council adopted the West Lancashire Local Plan 2012-2027 on 16 October 2013. It is now the development plan, and sets out the scale, distribution and development principles for the Borough up to 2027.

Policy EN3: ‘Provision of Green Infrastructure and Open Recreation Space’ sets the framework for open space provision. Of particular relevance to the Open Space SPD are the following policy clauses:

- *EN3 (1i) Contribute to the Green Infrastructure Strategy by enhancing and safeguarding the existing network of green links, open spaces and sports facilities, and securing additional areas where deficiencies are identified – this will be achieved through contributions to open space as outlined within Policy IF4.*
- *EN3: (2d) Where deficiencies in existing open space provision exist, as demonstrated in the Council’s Open Space, Sports and Recreation Study, new residential development will either be expected to provide public open space on site (where appropriate) or a financial contribution towards the provision of off-site public open space to meet the demand created by the new development or*

enhancement to existing areas of public open space which could be upgraded to meet the demand created by the new development.

Policy IF4: 'Developer Contributions' will be used to secure the necessary contributions to support a range of Local Plan policies, including EN3.

Prior to the Adoption of the Local Plan, the Borough adopted an SPD for 'Open Space and Recreation Provision in New Residential Developments' on the 7th May 2009.

In November 2011, the requirements for open space contributions were reduced in line with the updated evidence and the new (lower) figures were listed in an Addendum to the SPD.

The Adopted Local Plan sets out the intention to replace this SPD with a new one that reflects an updated evidence base and a move towards the implementation of the Community Infrastructure Levy (CIL).

The new Open Space SPD

The Council is currently preparing a new SPD to support policy EN3. In summary, the SPD will provide guidance on the following:

- What form of contribution is most appropriate for certain developments?
- What form of open space is most appropriate for certain developments, given the local context?
- What level of contribution is most appropriate for certain developments?

The SPD will seek to:

- Use CIL receipts to deliver strategic off-site open space across the Borough.
- Use CIL requirements to deliver on site provisions in open space where the proposal is of a significant enough size to meet this provision.
- Update the evidence to ensure that local standards are appropriate.

2 SCREENING DETERMINATION

2.1 Methodology

A central facet of the screening process is to determine whether the SPD is likely to have significant environmental effects. Criteria for determining the significance of effects are set out in Schedule 1 of the *Environmental Assessment of Plans and Programmes Regulations 2004*, which, in turn, are based on Article 3(5) and Annex II of the SEA Directive. The criteria relate to: (i) the scope and influence of the document; and (ii) the type of impact and area likely to be affected.

2.2 Impacts at Parent Plan level

The impacts of policy EN3 were set out in the SA Report for the Publication Version of the Core Strategy in June 2012. In summary, policy EN3 was determined to have the following impacts:

- Enhancement of green infrastructure would have **significant positive impacts** in terms of protecting landscape character, biodiversity habitats and species, and water quality.
- Secondary impacts were also predicted as likely to occur on health and wellbeing and the local economy through the delivery of high quality housing developments and the provision of community facilities (i.e. open space)

The Core Strategy Sustainability Appraisal did not identify any significant negative impacts associated with policy EN3.

Screening criteria	Screening determination	
	Answer to the criteria	Discussion
Characteristics of the SPD		
1(a) the degree to which the plan or programme sets a framework for projects and other activities, either with regard to the location, nature, size and operating conditions or by allocating resources.	Partly sets framework but significant impacts unlikely	The SPD will set a framework for how open space provision should be secured across the borough for particular developments. This could influence the nature of open space and where it is delivered. However, the SPD does not set out standards for open space provision, and the Local Plan already commits to the provision of open space where there is an identified need in-line with the Council's evidence base. Therefore, impacts are not anticipated to be <i>significantly different</i> to those identified in the SA for the Local Plan.
1(b) the degree to which the plan or programme influences other plans and programmes including those in a hierarchy.	Little influence / significant impacts unlikely	The SPD will provide guidance to help support the delivery of policy EN3 in the Adopted Core Strategy, which has already been subjected to Sustainability Appraisal. Although the SPD will help to guide development proposals, it is not expected to influence other plans or programmes.
1(c) the relevance of the plan or programme for the integration of environmental considerations, in particular with a view to promoting sustainable development.	Fairly relevant / positive impacts likely	The SPD will help to secure appropriate contributions towards open space provision and will also provide guidance on the types of open space that would be expected in certain situations. This will help to ensure that an appropriate mix of green infrastructure and open space is provided as needed across the Borough. Whilst this would have positive implications, the policy driver for this is contained within the Local Plan and the standards are driven by the local evidence.
1(d) environmental problems relevant to the plan or programme and;	Potential significant impacts	West Lancashire has a significant amount of high quality agricultural land, Green Belt and areas of important landscape character and biodiversity value. The Open Space SPD therefore has the potential to have a positive impact in protecting and enhancing these assets. Although the SPD does not set out the policy direction, the mechanisms for securing

Screening criteria	Screening determination	
	Answer to the criteria	Discussion
		open space could influence the appropriateness of open space.
1(e) the relevance of the plan or programme for the implementation of community legislation on the environment (for example, plans and programmes linked to waste management or water protection)	Little relevance / significant impacts unlikely	The SPD is unlikely to affect the delivery of other plans and programmes related to community legislation on the environment.
Characteristics of the likely impacts and plan area		
2(a) the probability, duration, frequency and reversibility of effects	Potential for positive impacts, but not considered significant	The SPD will help to set out a clear framework for securing contributions towards open space provision. It is therefore likely to have a positive effect on environmental quality.
2(b) the cumulative nature of the effects	Potential for positive impacts, but not considered significant	The SPD could have positive cumulative impacts by helping to secure appropriate open space across the borough over the plan period. However, the SPD is unlikely to have additional significant impacts than those identified in the appraisal of policy EN3 in the Core Strategy,
2(c) the transboundary nature of the effects	Significant impacts unlikely	It is not considered that any transboundary effects would arise.
2(d) the risks to human health or the environment (for example, due to accidents)	Significant impacts unlikely	It is not considered that the delivery of the SPD would lead to any risks to human health.
2(e) the magnitude and spatial extent of the effects (geographical area and size of the population likely to be affected)	Significant impacts unlikely	The SPD will cover the entire Borough of West Lancashire. The provision of onsite open space would have positive effects on communities in specific parts of the Borough. Other communities could also benefit from off-site contributions. However, the SPD does not set out the requirement to provide open space in new developments; rather it provides guidance on the most appropriate type of open space and delivery mechanism in support of Adopted Local Plan policies EN3 and IF4.
2(f) the value and vulnerability of the area likely to be affected due to; i. special natural characteristics or cultural heritage ii. exceeded environmental quality standards or limit values or iii. intensive land use	significant impacts unlikely	The SPD will seek contributions towards open space provision that reflect the characteristics of the local areas proposed for development. This will be positive in ensuring that where standards in open space provision are low, the baseline position can be improved. Seeking contributions for open space could perhaps have a knock-on impact on the ability to protect or enhance other environmental assets; however, these issues would not be addressed or influenced by the

Screening criteria	Screening determination	
	Answer to the criteria	Discussion
		open space SPD.
2(g) the effects on areas or landscapes which have a recognised national, community or international protection status.	significant impacts unlikely	<p>Policies EN2 and EN4 in the Adopted Local Plan seek to protect areas and landscapes with recognised protection status (<i>For example heritage assets</i>). These policies will have a greater influence than the Open Space SPD in protecting and enhancing landscapes and areas of importance.</p> <p>The SPD could help to guide and secure enhancements to open space/green infrastructure that take account of local context. In some instances, this could have a positive impact on protected areas. However, the SPD does not set out the policy framework for requiring open space provision and enhancements; it only provides the delivery mechanism.</p>

Summary / Screening Determination

The proposed Open Space and Recreation SPD does not set a framework for development. Although it will set out the use of small areas (*i.e. it will provide guidance on what type and amount of open space could be secured at different developments*) it is not the driving policy document.

The principles of open space delivery and enhancement are set out in the Adopted Local Plan in policy EN3. The SPD only adds clarity to the *delivery mechanism* and the types of open space that could be provided. As stated in policy EN3, this would be in-line with the local context and supported by evidence as outlined in the supporting text to policy EN3.

An SA was undertaken for the Local Plan, which considered the impacts of policy EN3. The findings suggested that the policy would have mainly positive impacts in terms of environmental enhancement and knock-on benefits for health and wellbeing. It is considered that the SPD would not have additional significant impacts compared to those already identified in the appraisal of the Parent Policy EN3. Therefore, SEA is not considered to be necessary for the Open Space SPD.

3 CONSULTATION

Based on the findings of the screening exercise, the Council does not consider that an SEA is required for the Open Space and Recreation SPD. However, before a final determination can be made, the three statutory bodies must be consulted on this screening report for a period of 5 weeks.

The three statutory bodies for the purposes of SEA Screening are:

- English Heritage;
- the Environment Agency; and
- Natural England.

A final determination will be made when the statutory bodies have commented on this Screening Report. The Council will then publish a statement outlining whether an SEA is required or not, with reasons provided. Comments received from the statutory bodies will also be included in this Screening Determination.

Appendix 5 Maintenance Costs for Play Equipment

With regard to children's play areas and young people's play areas the standard provision the Council currently offers is the following:

1. Multi Use Games Area
2. Skate Park
3. Teenage Shelter
4. Children's Play Area

The following figures represent the annual cost of inspection, routine repairs and maintenance as specified in the schedule of rates within the "Contract for the Inspection and maintenance of Children's Play Areas April 2013 to March 2016."

These rates would be used in respect of either the addition or removal of components or full play areas during the term of the contract.

These figures are linked to the Consumer Price Indices and are due for re-assessment in for the financial year 2015/16.

1. Multi Use Games Area

<i>Item</i>	<i>No.</i>	<i>Unit Price £</i>	<i>Cost £</i>	<i>Total Cost £</i>
Fence 20mx15m playing area @3m height	70 lnr m	50	3,500	
Basketball Facility	2	100	200	
Sign	1	20	20	
Bench	2	65	130	
Bin (inc emptying)	1	50	50	
				3,900

2. Skate Park

<i>Item</i>	<i>No.</i>	<i>Unit Price £</i>	<i>Cost £</i>	<i>Total Cost £</i>
¼ pipe	2	100	200	
½ pipe	1	150	150	
Grind rail	2	100	200	
Box	1	100	100	
Spine	1	100	100	
				750

3. Teenage Shelter

<i>Item</i>	<i>No.</i>	<i>Unit Price £</i>	<i>Cost £</i>	<i>Total Cost £</i>
Shelter	1	200	200	
				200

4. Children's Play Area

<i>Item</i>	<i>No.</i>	<i>Unit Price £</i>	<i>Cost £</i>	<i>Total Cost £</i>
Double Swing (flat seat)	1	200	200	
Double swing (cradle seat)	1	200	200	
Roundabout (standard)	1	210	210	
See Saw (standard)	1	190	190	
Multi Structure (standard)	1	260	260	
Slide (attached to above)	1	100	100	
Multi Structure (small)	1	180	180	
Slide (attached to above)	1	100	100	
Spring Mobile	2	100	200	
Fencing (bow top 1.2 m height)	70 lnr m	40	2,800	
Gate (self closing)	1	60	60	
Gate (manual closing)	1	50	50	
Sign	1	20	20	
Seat	2	75	150	
Bin (inc emptying)	2	50	100	
Safety Surfacing (spot repairs)	1	200	200	
				5,020

Summary

Multi Use Games Area	£3,900
Skate Park	£750
Teenage Shelter	£200
Children's Play Area	£5,020
Total	£9,870

The above figures include all inspection, and routine repair and maintenance, including play area visits, inspection recording, routine maintenance, dealing with potential hazards and hazardous debris, dealing with obscene or abusive graffiti, and re-painting or re-treating equipment.

<p>1. Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service / policy / strategy / decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people: <i>People of different ages – including young and older people</i> <i>People with a disability;</i> <i>People of different races / ethnicities / nationalities;</i> <i>Men; Women;</i> <i>People of different religions/beliefs;</i> <i>People of different sexual orientations;</i> <i>People who are or have identified as transgender;</i> <i>People who are married or in a civil partnership;</i> <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave;</i> <i>People living in areas of deprivation or who are financially disadvantaged.</i></p>	<p>No.</p>
<p>2. What sources of information have you used to come to this decision?</p>	<p>West Lancashire Borough Council Open Space, Sport and Recreation Study 2009</p>
<p>3. How have you tried to involve people / groups in developing your service / policy / strategy or in making your decision (including decisions to cut or change a service or policy)?</p>	<p>The document being reported on (Draft Open Space SPD) will, if approved by Cabinet, be subject to public consultation for six weeks. A wide range of different individuals and bodies will be contacted directly to advise about the consultation. In addition, the document will be publicised in the press and on the Council's website. People will be invited to submit their views on the content of, and proposals contained within, the document. These views will be taken into account in preparing the subsequent version of the document.</p>
<p>4. Could your service / policy / strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:- <i>Eliminate discrimination, harassment and victimisation;</i> <i>Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people);</i> <i>Foster good relations between people who share a protected characteristic and those who do not share it.</i></p>	<p>The purpose of the Open Space SPD is to ensure the provision of good quality open space amongst new residential developments. One consequence of this should be to improve equality of opportunity for, for example, disabled people, to access open space. Thus this decision should, indirectly, help the Council's ability to meet its duties under the Equality Act 2010.</p>
<p>5. What actions will you take to address any issues raised in your answers above</p>	<p>(The relevant actions are referred to above.)</p>



AGENDA ITEM: 5(c)

CABINET: 18th March 2014

Report of: Assistant Director Housing and Regeneration

Relevant Managing Director: Managing Director (Transformation)

Relevant Portfolio Holders: Councillor Mrs V. Hopley & Councillor A. Owens

**Contact for further information: Mr W. Berkley (Extn. 5259)
(E-mail: william.berkley@westlancs.gov.uk)**

SUBJECT: HOUSING ASSET MANAGEMENT – SECOND REVIVAL

Wards affected: Digmaor Ward

1.0 PURPOSE OF THE REPORT

1.1 To inform Cabinet of the option appraisal work that has been carried out in relation to Beechtrees flats and to establish a preferred revival option for consultation purposes.

2.0 RECOMMENDATIONS

2.1 That option 3 be adopted as the preferred option as set out in paragraph 6

2.2 That the Assistant Director Housing and Regeneration be authorised to undertake public consultation on the preferred option and present a further report to Cabinet in due course.

3.0 Background

3.1 Savills were commissioned in 2011 to carry out a 25% stock condition survey of the council retained housing Stock. This was following closure of the consultancy that previously carried out this work and introduction of self- financing.

3.2 To ensure a robust business plan and long term sustainability, Savills were further commissioned to carry out a sustainability analysis of our housing stock

and calculated its Net Present Value (NPV), This involved looking at future investment requirements, historic maintenance spend, void levels and management costs.

- 3.3 This analysis identified a number of areas that were potentially a drain on the business plan (had a negative NPV) and needed review prior to any major investment decisions being made. (A presentation of this analysis and how I intended to move forward was made to Landlord Services Committee and separate meetings for Council members tenants and staff).
- 3.4 In order to carry out this review an Option Appraisal Team was formed drawing from the various sections of the housing and regeneration service.
- 3.5 An up to date NPV analysis is included in Appendix A.

4.0 Option Appraisal Process

- 4.1 Beechtrees flats were identified as an area for review as they had a negative NPV and officers recognised the area was in need of revival. This decision was also endorsed by the sustainability study carried out by the Chartered Institute of Public Finance and Accountancy (CIPFA) which identified Beechtrees as one of the lowest scoring areas in terms of long term sustainability.
- 4.2 A review of data was undertaken to identify the reasons why the area was showing a negative value. The main reasons identified were, capital investment requirements, void income loss, void property turnaround costs and response maintenance costs.
- 4.3 Supply and demand was then reviewed; there are currently 54 lettable flats on Beechtrees and 25 useable garages. There has been a recent development in the local area, Miller Close comprising of 17 houses and Potter Way comprising of 12 Flats 17 houses. However, there does not appear to be an oversupply of smaller properties in the area as demand is still strong, with 309 people on the waiting list for smaller 1 and 2 bedroom properties that have included this area for consideration.
- 4.4 Whilst the demand appears to be present it was found that the turnaround for these properties is high, and this is illustrated in Appendix A of this report which shows the average void instances to be 0.43 times per property per annum resulting in an average 9.7 void days per property per annum this compares with 0.13 void instances for the remainder of the housing stock with the average void days of 6.36. The average repair cost for a void property is in the region of £1,600.
- 4.5 Whilst demand for smaller properties is expected to continue due to the impact of welfare reforms, whether this will address the property turnover frequency is unclear. However, it appears the client base for these properties has a tendency to leave properties on a more frequent basis incurring costs to the Council.

4.6 Following the analysis of the limited data we have available regarding the reason for people vacate the area I found that the main three reasons were as follows:

Reason	Percentage
Rent Too High	29%
Dislike Location	14%
Poor Condition of Property	14%

4.7 Our current customer demographic was then analysed and is shown in detail in Appendix H.

The main findings were that the largest group of tenants we have in Beechtrees flats are Males between 20-29.

4.8 The wider area was then considered by the option appraisal team and the potential for wider redevelopment. Unfortunately, the main area of adjoining land was the school playing field which had no plans for disposal. Some smaller pieces of land have been considered with the appropriate options.

4.9 In order to gain a more detailed understanding of how tenants felt about the flats and surrounding area a comprehensive consultation exercise was carried out with residents a comprehensive report of which is detailed in Appendix H. Although the response to the consultation was disappointing, those tenants that did respond were generally satisfied but wanted improvements to the properties and the appearance of the area. It is clear from the results that the ability to effectively heat and make comfortable the flats is of the highest importance to the tenants.

4.10 More efficient and effective heating systems combined with improved thermal performance of building elements such as windows and insulation would equate to substantial improvements in tenant satisfaction with their homes.

4.11 Security was also an issue for tenants; communal doors were reported to be frequently under attack from vandals affecting both their appearance and the security performance.

4.12 These benefits could lead to further improvements to the area in the form of increased desirability of the accommodation and less churn of tenancies.

4.13 Based on the above research it was felt that the main areas for concern were the void frequencies and days lost. It was also felt the demographic of typical customers for this stock were more likely to be transient which resulted in frequent void rates despite reasonable levels of demand. It was therefore felt essential to address the demographic issues to make the stock more sustainable. Making the properties more desirable was considered key in addressing the demographic issues, in particular the appearance of the blocks, lighting within communal areas and improving the heating systems and thermal performance of the properties.

5.0 Options

5.1 Based on the findings in 4.13 a series of options have been considered and costed.

- Option 1 Full Refurbishment of all flats on Beechtrees.
- Option 2 Full refurbishment of detached blocks, partial refurbishment of 2 attached blocks and the demolition of 3 attached blocks
- Option 3 Full refurbishment of detached blocks, partial refurbishment of 2 attached blocks and the demolition of 3 attached blocks. Demolition of 4 houses and construction of 14 new build houses.
- Option 4 Demolition of 48 flats plus 5 houses and the minor refurb of 7 flats, to enable the redevelopment and new build of approx. 44 dwellings. (e.g. 20 Houses and 24 flats).
- Option 5 Demolition of all 48 flats plus 9 houses and the minor refurb of 7 flats, to enable the redevelopment and new build of approx. 58 dwellings. (e.g. 34 Houses and 24 flats).
- Option 6 Demolition of 48 flats plus 9 houses to enable the disposal of land with outline planning permission for approx. 45 dwellings.

5.2 Formal planning permission will need to be sought following the agreement of a preferred option for consultation. Formal pre-application advice is currently being sought.

5.3 Option 1 is based on retaining all of the existing blocks of flats and refurbishing the exterior envelope. The internal communal areas would be refurbished and refreshed with the external areas adjacent to the flats landscaped to improve the appearance of the area. The communal doors and door entry systems would be replaced using the specification as used in other council schemes. The individual flats would be improved by inclusion in the on-going replacement schemes for Kitchens, Bathrooms and installation of wet gas central heating systems. In addition, the bedsits included in the detached blocks would be converted into 2 bedroom flats using the garages located at the front of the blocks which are little used. This has already been done in some cases both on Beechtrees and elsewhere on Digmaor. The aim of this option would be to improve the quality and desirability of the flats on Beechtrees in order to reverse the trend of transient tenancies and high void levels that have been seen in the past.

This option is discussed at length in Appendix B.

5.4 Option 2 is based on retaining the 6 detached blocks and refurbishing them as described in option 1, demolishing 3 of the attached blocks and bringing the other two blocks up to standard by inclusion in ongoing maintenance programmes.

The blocks that would be demolished under this option are among the most dilapidated in appearance and have suffered vandalism and damage partially due to their location directly along the footpath leading through the estate. These blocks are in an area of very high density of housing. All but 2 of the garages incorporated into the ground floors of these blocks are disused and blocked up. There are no alternative uses for the garages as they form the whole ground floor of the blocks apart from the stairwell. Design and specification for the refurbishment scheme for the detached blocks would be as detailed in option 1. Again the aim of this option would be to improve the quality and desirability of the flats on Beechtrees, removing the flats with the least potential and focusing investment on the detached blocks.

This option is discussed at length in Appendix C.

- 5.5 Option 3 is based on carrying out all of the work identified in option 2 and using the land cleared by the demolition of the 3 attached blocks to build 14no new dwellings. In order to provide enough space to have the option to build houses with driveways and gardens, 4no adjoining houses would also need to be demolished. The two houses adjoining the northernmost two blocks could be demolished independently. The house adjoining the southernmost block shares a rear outrigger with the next house in the terrace, so demolition of a single house would be very difficult. For this reason, the two houses adjoining the southernmost block would be demolished. This would also provide additional space for the new buildings. This, in turn gives more freedom over the types of accommodation to be built. Adoption of this scheme would mean that a corridor was created through the top of the estate that was brand new in appearance and surrounded by neatly landscaped areas. The development could be tailored to meet the specific housing need of the area and allow a selective lettings policy to help address some of the identified social problems of the area. Although demand is currently highest for one and two bedroom properties, the addition of houses with gardens or mews style low rise flats may help to encourage small families to the area rather than single tenants and couples. This in turn may encourage longer term tenancies and reduce the high levels of tenancy 'churn' experienced in the past. All of the 4 houses which would need to be demolished are council owned although the residents may be entitled to home loss payments.

This option is discussed at length in Appendix D

- 5.6 Option 4 consists of the demolition of nine blocks containing 48 flats and a short terrace of five houses, the subsequent cleared site could be followed by a potential redevelopment of the land, comprising approximately 44 new dwellings with a mix of houses and flats. In addition, the remaining 8 flats (including one leaseholder) would be partially refurbished to bring them up to the standard of other council properties in the area. This option would transform the appearance of the area and make the area much more desirable and provide a lower density of housing.

This option is discussed at length in Appendix E

5.7 Option 5 consists of the demolition of all nine blocks containing 48 flats and a short terrace of five houses and 4 end of terrace houses, the subsequent cleared site could be followed by a potential redevelopment of the land, comprising approximately 58 new dwellings with a mix of houses and flats. This option would transform the appearance the appearance of the area and make the area much more desirable and provide a full new build solution and reduced future maintenance costs and provide a modern level of comfort.

This option is discussed at length in Appendix F

5.8 Option 6 consists of the demolition of nine blocks containing 48 flats and a short terrace of five houses, the subsequently cleared site could be offered for sale and including with it outline planning permission for residential redevelopment of approximately 45 dwellings. Dependant on the sale value this option could provide a receipt to the Council and remove the negative NPV causing a drain on the business plan and result in new build properties with a percentage of affordable homes.

This option is discussed at length in Appendix G

5.9 A summary analysis of the outcomes for each of the options including costs is detailed in the table below, the appendices show, in detail the short terms costs and the long term financial projection of the payback period.

These options are summarized below:

Description	Option 1	Option 2	Option 3	Option 4	Option 5	Option 6
Demolished House	0	0	4	5	9	9
Demolished Flat	0	12	12	48	48	48
Minor Refurb Flat	0	7	7	7	7	0
Fully Refurb Flat	56	36	36	0	0	0
New Build House	0	0	14	20	34	0
New Build Flat	0	0	0	24	24	0
Unoccupied Garages Lost	8	12	12	12	12	12
Occupied Garages Lost	4	4	4	13	13	13
Net Change in Lettable Units	+2 (including buyback leaseholders)	-11 (including buyback leaseholder)	-1 (Including buyback leaseholder)	-8 (including buyback leaseholder)	+2 (including buyback leaseholders)	-57

Overall Estimated Cost	£2,511,952.84	£1,759,847.17	£2,995,450.09	£4,271,361.00	£5,355,889.00	£3,423,495
Estimated Payback Period#	15-16 Years	14-15 Years	16-17 Years	27-28 Years	25-26 Years	N/A

#This is the estimated simple payback period, funding will be considered as part of the HRA business plan.

6.0 Recommended Option

6.1 Considering the advantages and disadvantages of the various options and the costs involved it was considered on balance that option 3 provided the best overall outcome. It will provide a corridor of new-build and refurbished properties towards the top of the estate whilst removing the most problematic blocks and provide a template for possible regeneration of similar blocks.

6.2 The report recommends option 3 to be consulted upon due to the following reasons:

- It will provide good visual impact removing unsightly end terrace flat blocks with new build houses and increasing the desirability of the remaining detached flats.
- Provides a cost effective solution in comparison with the other options
- Will help meet demand for smaller accommodation whilst removing some of the most problematic smaller properties
- It would remove surplus garages
- It would provide the benefits of a newbuild scheme at a reduced cost
- Provides payback between 16-17 years
- Results in a net loss of only 2 properties (1 counting the bought back leasehold)
- Landscaping works would be designed to reduce anti-social behaviour and increase perceived security
- It could provide a template to address similar blocks of flats on Digmaor and potentially leave financial headroom to start to address these towards the end of our 5 year plan.

6.2 As part of this option it is recommended that following the revival a local lettings policy is developed and implemented in the area with a view to minimising vacation rates of the refurbished and new build properties and rebalancing the demographic.

7.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

7.1 The objective of this report is to ensure the long term sustainability of the flats on Beechtrees, to ensure they form a positive contribution to the business plan along with providing good quality homes for our tenants. Payback of the various schemes is detailed in section 5.9 and in the appropriate appendices.

8.0 FINANCIAL AND RESOURCE IMPLICATIONS

8.1 Estimates of the financial implications and potential cost profiling of the options on the business plan are detailed below. Funding options will be incorporated into the HRA business plan.

8.2 The table below shows the proposed profile of Spend under each option and excludes inflation.

Description	2014.15	2015.16	2016.17	2017.18	2018.19	Total
	£'000	£'000	£'000	£'000	£'000	£'000
Option 1			482	807	1,223	2,512
Option 2			521	986	252	1,759
Option 3			568	850	1,578	2,996
Option 4			504	751	3,017	4,272
Option 5			405	930	4,021	5,356

8.3 Based on the current business plan the table below shows resources available for reinvestment.

Description	2014.15	2015.16	2016.17	2017.18	2018.19
	£'000	£'000	£'000	£'000	£'000
Currently Available for reinvestment	6,282	3,570	1,765	2,854	7,382

8.4 The table below shows the reduction on the available resources in the current HRA Business Plan from 2014-15 to 2018-19 after adjusting profiled expenditure for inflation and adjusting for stock changes.

	2014.15	2015.16	2016.17	2017.18	2018.19
	£'000	£'000	£'000	£'000	£'000
Option 1	-	-	554	1,471	2,906
Option 2	-	-	624	1,795	2,147
Option 3	-	-	686	1,719	3,640
Option 4	-	-	680	1,740	5,487
Option 5	-	-	583	1,879	6,837

8.5 The resulting remaining balance of available resources for each of the options is illustrated below.

	2014.15	2015.16	2016.17	2017.18	2018.19
	£'000	£'000	£'000	£'000	£'000
Option 1	6,282	3,570	1,211	1,383	4,476
Option 2	6,282	3,570	1,141	1,059	5,235
Option 3	6,282	3,570	1,079	1,135	3,742
Option 4	6,282	3,570	1,085	1,114	1,895
Option 5	6,282	3,570	1,182	975	545

- 8.6 The figures do not allow for possible ECO funding, One for One Replacement or HCA funding towards New build. The assumption applied to new build is that income would begin to be earned in the year following completion of the development. Based on this spend profile all the options are affordable with the lowest remaining balance being £545k in year 2018/19 for option 5.
- 8.7 Should a right to buy be made following completion of the project, the current legal opinion is that our investment in the stock will be protected (i.e. limiting the discount in connection with a Right to Buy, an amount that has been spent on the property) for 10 years for our older stock and 15 years for newbuild stock. Right to buy sale proceeds are also subject to a pooled sharing agreement with the Council and the Treasury and proceeds may not flow to the HRA.
- 8.8 The demolition of properties will reduce the value of New Homes Bonus grant that will be received in future years, but this financial loss must be offset against the overall benefits of the scheme including the plans for new housing that should deliver additional New Homes Bonus in future years.

9.0 RISK ASSESSMENT

- 9.1 The actions referred to in this report are covered by the scheme of delegation to officers and any necessary changes have been made in the relevant operational risk registers.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

There is a direct impact on members of the public, employees, elected members and / or stakeholders. Therefore an Equality Impact Assessment is required. A formal equality impact assessment is attached as an Appendix to this report, the results of which have been taken into account in the Recommendations contained within this report

Appendices

- Appendix A – Current NPV Analysis / Void Histories
- Appendix B – Option 1
- Appendix C – Option 2
- Appendix D – Option 3
- Appendix E – Option 4
- Appendix F – Option 5
- Appendix G – Option 6
- Appendix H – Tenant Consultation
- Appendix I – Equality Impact Assessment
- Appendix J– Minute of Landlord Services Committee (Cabinet Working Group) 12 March 2014 (to follow)

Appendix A - Net Present Value (NPV) Analysis 2013-14

Using the data in Savills stock condition survey and whole stock NPV analysis carried out in 2012/13, a further analysis was carried out specifically for the Beechtrees flats. To evidence the void levels, data was extracted from the QL housing Management system, for a period of 6 years from 2008 to 2013. The results in the table below shows a comparison of the number of days void and the number of changes in tenancy a property has had in the 6 year period from 2008 to 2013. The figures for 2013-14 have been extrapolated from a half years data to a full year.

add_1	Property Type	2008-9 days void	2008-9 Void Instances	2009-10 days void	2009-10 Void Instances	2010-11 days void	2010-11 Void Instances	2011-12 days void	2011-12 Void Instances	2012-13 days void	2012-13 Void Instances	2013-14 days void extrapolated	2013-14 Void Instances
124 Beechtrees	FLAT	0		0		0		0		0		0	
126 Beechtrees	FLAT	14	1	0	1	0		0		15	1	0	
128 Beechtrees	FLAT	21	1	0		0		0		36	1	0	
130 Beechtrees	FLAT	0		0		0		0		0		0	
132 Beechtrees	FLAT	0		21	1	14	1	0		0		0	
134 Beechtrees	FLAT	0		0		0		0		0		0	
136 Beechtrees	BSIT	14	1	42	1	0		0		0		0	
138 Beechtrees	BSIT	7	1	0		21	1	0		35	1	14	2
140 Beechtrees	FLAT	0		21	1	0		0		0		0	
142 Beechtrees	FLAT	14	1	70	1	14	1	0		0		0	
144 Beechtrees	FLAT	0		0		14	1	0		0		0	
146 Beechtrees	FLAT	0		0		0		0		0		0	
148 Beechtrees	FLAT	0		0		0		0		0		0	
150 Beechtrees	FLAT	0		0		0		0		0		0	
152 Beechtrees	FLAT	0		0		7	1	0		43	1	0	
154 Beechtrees	FLAT	21	1	0		0		0		0		42	2
156 Beechtrees	FLAT	0		0		0		0		0		0	
158 Beechtrees	FLAT	0		0		0		0		0		184	2
160 Beechtrees	BSIT	0		0		0		0		0		0	
162 Beechtrees	BSIT	0		0		0		0		0		0	
164 Beechtrees	FLAT	0		0		0		0		0		0	
166 Beechtrees	FLAT	0		0		0		0		43	1	72	2
168 Beechtrees	FLAT	0		42	1	0		37	2	22	1	0	
170 Beechtrees	FLAT	0		0		14	2	0		0		0	
172 Beechtrees	BSIT	0		28	1	35	2	0		44	2	36	6
174 Beechtrees	BSIT	6	1	21	2	28	1	31	3	5	5	2	2
176 Beechtrees	FLAT	0		0		14	1	0		22	1	0	
180 Beechtrees	FLAT	28	1	0		0		0		0		0	
182 Beechtrees	FLAT	14	1	0		0		27	1	1	1	72	2
184 Beechtrees	BSIT	28	1	14	1	28	2	0		1	1	58	2
186 Beechtrees	BSIT	28	2	0		0		0		120	1	2	2
188 Beechtrees	FLAT	0		0		0		0		0		0	
190 Beechtrees	FLAT	7	1	0		0		0		44	2	0	
192 Beechtrees	FLAT	0		14	1	0		0		0		0	
193 Beechtrees	FLAT	0		0		0		0		0		0	
194 Beechtrees	FLAT	34	2	0		0		0		0		72	2
195 Beechtrees	FLAT	0		21	1	0		0		0		0	
197 Beechtrees	FLAT	0		65	1	11	1	0		0		0	
199 Beechtrees	FLAT	21	1	0		35	1	0		85	1	0	
211 Beechtrees	FLAT	49	1	0		0		0		0		0	
213 Beechtrees	FLAT	0		0		35	1	0		22	1	30	2
215 Beechtrees	FLAT	13	1	42	1	0		0		37	2	0	
217 Beechtrees	FLAT	34	2	21	1	21	1	0		1	1	0	
229 Beechtrees	FLAT	21	1	14	1	14	1	51	2	0		0	
231 Beechtrees	FLAT	49	1	0		14	1	29	1	0		0	
233 Beechtrees	FLAT	49	1	0		7	1	0		29	1	86	2
235 Beechtrees	FLAT	0		0		14	1	15	1	29	1	0	
42 Beechtrees	FLAT	0		0		0		15	1	0		0	
44 Beechtrees	FLAT	14	1	21	2	0		36	1	1	1	0	
46 Beechtrees	FLAT	0		0		7	1	0		64	1	0	
48 Beechtrees	FLAT	0		0		0		0		0		0	
60 Beechtrees	FLAT	0	2	91	2	0		0		0		100	2
62 Beechtrees	FLAT	0		0		0		0		51	1	0	
66 Beechtrees	FLAT	0		0		0		0		0		0	
		486		548		347		241		750		770	
			26		20		22		12		29		30

Average Days Void	523.67
Average Void Instances	23.17
Days Void per Dwelling	9.70
Void Instances per Dwelling	0.43

In the financial year 2013/14, it can be seen that 770 days rent are projected to be lost due to being void over 30 instances or changes in tenancy to 13 dwellings which equates to 24% of the dwellings having a change of tenancy in that year. 100% of the void properties, or 13 dwellings had 2 or more tenancy changes in that year. This is considerably greater than in most of the previous 5 years. This has an effect on rental income and the level of annual repairs needed for the blocks.

From the bottom of the table above it can be seen that the average days void per year for the period is 523.67 days, with the average instances per year being 23.17. This equates to 9.7 days void per property and 0.43 instances per property per year.

As a comparison the figures for the same period for all of the housing stock can be seen below.

2008-9 days void	2008-9 Void Instances	2009-10 days void	2009-10 Void Instances	2010-11 days void	2010-11 Void Instances	2011-12 days void	2011-12 Void Instances	2012-13 days void	2012-13 Void Instances	2013-14 days void Extrapolated	2013-14 Void Instances
31,165		36,897		29,682		27,792		37,016		73,974	
	709		725		800		748		846		1,146

Average Days Void	39,421.00
Average Void Instances	829.00
Days Void per Dwelling	6.36
Void Instances per Dwelling	0.13

As can be seen there are on average 39,421 days lost as void across 829 changes of tenancy. Which gives an overall average for all stock of 6.36 days void per property, and 0.13 instances per property.

This is considerably better than the average for the Beechtrees flats on there own.

A discounted cash flow analysis has been carried out for this possible option based upon the following assumptions;

There is no Initial cost as such, as this option spreads the investment over the 30 years based upon the requirements specified in the stock condition survey.

The inflated cost for this is £3,008,911 or £55,721 per dwelling.

Rate of inflation 3.2%

Discounted cash flow rate 6%

Annual management and Repair cost per dwelling £2,356

Starting rent for 2 bedroom flat from £70.96

Starting rent for 1 bedroom flat from £62.66

The second and third cycle renewals have been accounted for over the 30 years for Kitchens, Boilers, Heating distribution, Communal doors and Communal Decoration.

The Void days were assumed to be those in the 2013-14 column in the void days table above.

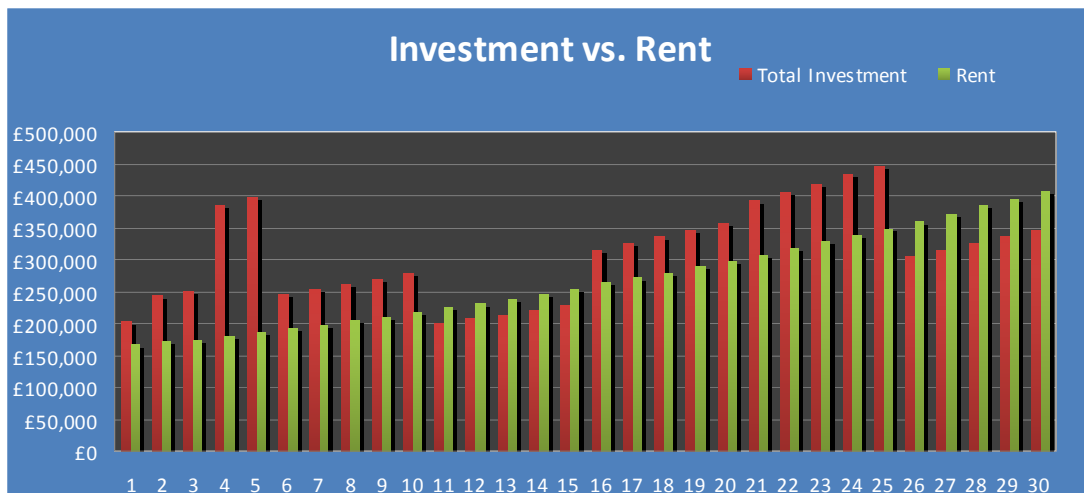
The results of the NPV analysis can be seen in the summary below.

	Total	Per Unit
NPV	-£763,711	-£14,143
STOCK CONDITION INFLATED	£3,008,911	£55,721
MANAGEMENT & REPAIRS INFLATED	£6,253,658	£115,808
RENT INFLATED	£8,060,592	£149,270

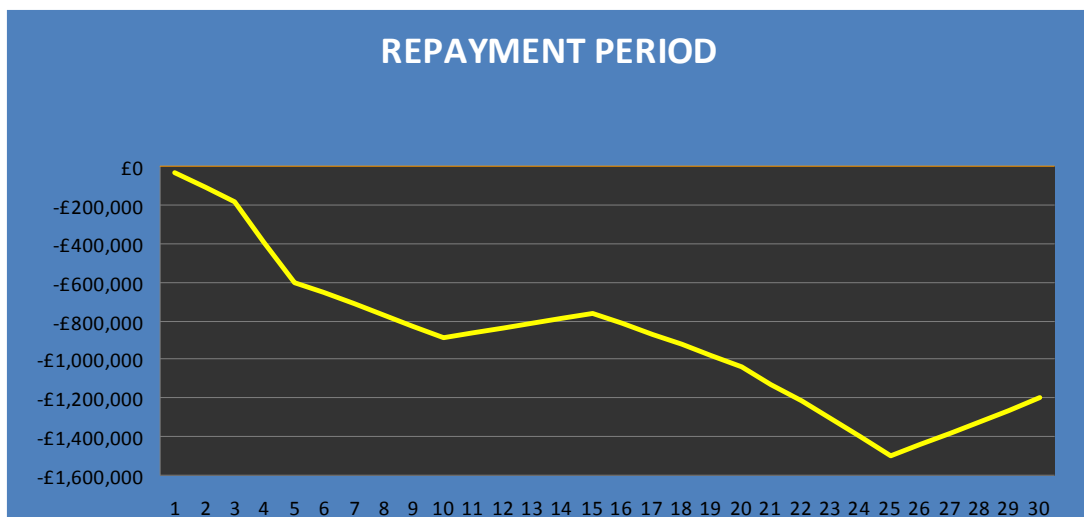
The total inflated expenditure over the 30 years including repairs and management costs taken from the NPV analysis spreadsheet is £9,262,569 or £171,529 per dwelling. As can be seen from the table above the expenditure exceeds the income of £8,060,592 by £1,201,977 or £22,259 per property.

The NPV value in the table above shows that in today's money each flat has a negative worth of -£14,143. This is based on the total expenditure on repairs, programmed works (stock Condition Survey) and management fees and the total income from the rent, all of this is inflated and then discounted down for the 30 year period.

The investment against rent graph below, includes all income and expenditure elements mentioned in the paragraph above, and displays them in a bar graph for each of the 30 years. As can be seen, the expenditure in red is generally greater than the income in green. It also clearly demonstrates that the costs have been inflated, as the rental income in green, rises with a steady gradient.



Using the data from the above graph to populate the Repayment Period graph below, it can be seen that if investment and income were to continue as predicted, the flats would become cost neutral in approximately year 49 to 50.



It has to be remembered that this would only be an elemental replacement when predicted failure has occurred, and would not be improving the amenity of the properties or the surrounding area, as could happen with other options. For instance it would not include for thermal upgrades like insulated render, or for the installation of gas mains to allow for the

changing of the inefficient electric storage heaters to a much more efficient traditional wet gas central heating system.

Due to this more random form of investment, it would be assumed that the level of repairs would continue at the present level, in part due to the assumed void levels which would be expected to continue at these high levels. Anecdotal evidence for this, from 'Voids and Allocations' is that they have had 7 void properties in the flats on Beechtrees during November 2013 alone.

This method of investment is not looking at enhancing the amenity of the properties, or rejuvenating the area, or targeting specific reasons for vacancy levels, it is purely designed to maintain the properties at their current existing condition and standard.

Although potentially a viable option for maintaining the stock at their existing levels, it does nothing for correcting the underlying problems within the area, or improving them to raise the standard of Amenity, Fitness or Quality expected by our residents.



Beechtrees Flats Option Appraisal

2013/14

Appendix B
Option 1

Analysis and
costings

“To be a top performing
landlord within an
economically vibrant
West Lancs”

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1 Introduction.

The purpose of this appendix is to examine the possibility of carrying out a full refurbishment of the flats on Beechtrees. It will include indications of the type of work which could be carried out and estimated cost projections for this type of scheme.

There are 2 types of block to consider; attached blocks which are located at the end of a terrace of houses, of which there are 5, and detached blocks, of which there are 6. The map below shows the locations of the flats.



Option 1 is based on retaining all of the existing blocks of flats and refurbishing the exterior envelope. The internal communal areas would be refurbished and refreshed with the external areas adjacent to the flats landscaped to improve the appearance of the area. The communal doors and door entry systems would be replaced using the specification as used in other council schemes.

The individual flats would be improved by inclusion in the ongoing replacement schemes for Kitchens, Bathrooms and installation of wet gas central heating systems.

In addition, the bedsits included in the detached blocks would be converted into 2 bedroom flats using the garages located at the front of the blocks which are little used. This has already been done in some cases both on Beechtrees and elsewhere on Digmoor.

The aim of this option would be to improve the quality and desirability of the flats on Beechtrees in order to reverse the trend of transient tenancies and high void levels that have been seen in the past.

2 Architectural brief.

In order to obtain ideas for the type of refurbishment and indicative prices, an Architectural practice was commissioned to produce a feasibility study and cost plan to show how the flats may look after refurbishment. Their brief included designs for the external envelope, internal communal areas and external landscaping.

The specifications and cost projections for the elements of the work covered by ongoing and past programmed works activities have been derived from the pre-existing data and produced in-house.

The Architects were appointed following a quotation exercise. The quote request is included below in Chapter 8 and was sent to 3 Architectural practices after an initial email to confirm interest and suitability.

The architects were asked to provide examples of relevant works carried out in the past as part of the quotation process. The successful Architect, Gornall Cross, provided details of a refurbishment project using a through coloured, insulated render system which would form a significant part of the works to the external envelope.

The following designs and cost projections are intended as an indication of the type of refurbishment scheme that could be carried out if any of the proposed options were to be adopted and the possible costs involved. They are not intended to be exhaustive or exclusive.

A second stage was added to the brief to cover the new build element of options 3, 4 and 5. The brief was to produce designs for the new build properties which would complement the designs already produced for the refurbishment of the flats. This would mean that elements of different options to be adopted and integrated if desired.

3 Decanting of residents

The tenants (and leaseholders) would need to be moved from the flats prior to commencement of the major refurbishment and a one off home loss payment would need to be made to every qualifying occupant. In order to qualify for the payment, an occupant has to have been in residence of the flat for a minimum of 1 year.

The statutory minimum amount of this payment is currently £4,700 under the land compensation act 1973.

The internal work including kitchen, bathroom and heating replacement could be carried out at the same time which would further reduce overall time on site and costs. This would greatly increase the desirability of the flats when they are re-let. There would be an option to refresh the flats internally with replacement of internal finishes which would mean that the flats would appear brand new upon re-let. The cost of this element of the work, based on WLBC's schedule of rates would be £3,673 for a 1 bed flat and £5,690 for a 2 bed flat.

This includes:

- Replacement of internal joinery such as doors, skirtings and window boards.
- Replacement of floor coverings including disposal of possible asbestos containing materials.
- Replacement of plastered ceilings including disposal of possible asbestos containing coatings.
- Redecoration of walls, ceiling and joinery including preparation and making good prior to commencement.
- Testing and any necessary upgrades to the electrics and consumer unit.

In addition, it is recommended a local lettings policy be applied for the refurbished properties which would allow more control by the lettings and allocations team over the demographic of the new occupants. This could have a positive impact on the area at large and help to combat some of the social problems that are currently present.

If new tenancies were created for all of the refurbished flats then the target rents could be applied immediately which would boost the income over all subsequent years. This may offset the income lost while the flats were empty.

4 Summary and scope of works.

The designs proposed by the architect consist briefly of:

- Removing and replacing the external render finish of the flats and upgrading the insulation to meet current building regulations. This will also necessitate replacement of the rainwater goods and fascias.
- Replacement of the existing single glazed windows with new double glazed windows to current regulations.
- Refurbishment of all communal internal areas and replacement of finishes with minor layout alterations.
- Full external landscaping to the areas immediately adjacent to the flats including installation of new facilities and boundary treatments.

In addition the flats themselves will be upgraded in line with current replacement programmes across the borough including:

- Installation of gas mains and replacement of existing electric heating and hot water systems with full gas central heating.
- Replacement of kitchens and Bathrooms.
- Replacement of existing, non compliant flat entrance doors with fully compliant fire rated doors.
- Replacement of communal doors and entry systems.
- Conversion of remaining bedsits to flats using integral garages.
- Internal refurbishment of finishes as described in chapter 3.
- Removal of all asbestos containing elements

Below is a table summarising the available lettable units and associated costs for the 3 options. The costs are detailed and broken down later in this report.

Description	Existing	Option 1
Total number of lettable units	54	56
1 Bedroom Dwellings	19	20
2 Bedroom Dwellings	27	36
Bedsits	8	0
Useable garages integrated in flats	25	11
Occupied garages at time of report	13	9
Overall scheme cost	N/A	£2,511,952.84
Cost per remaining unit	N/A	£44,856.30

5 Proposed designs

External envelope treatments

The refurbishment of the external envelope proposed by the architect includes a through coloured, insulated render system in a series of colours and profiles to accentuate parts of the buildings. The new windows would be high quality powder coated thermally broken aluminium finished in architectural grey.

Below is an artist's impression of how the area may look if the proposed scheme is adopted.

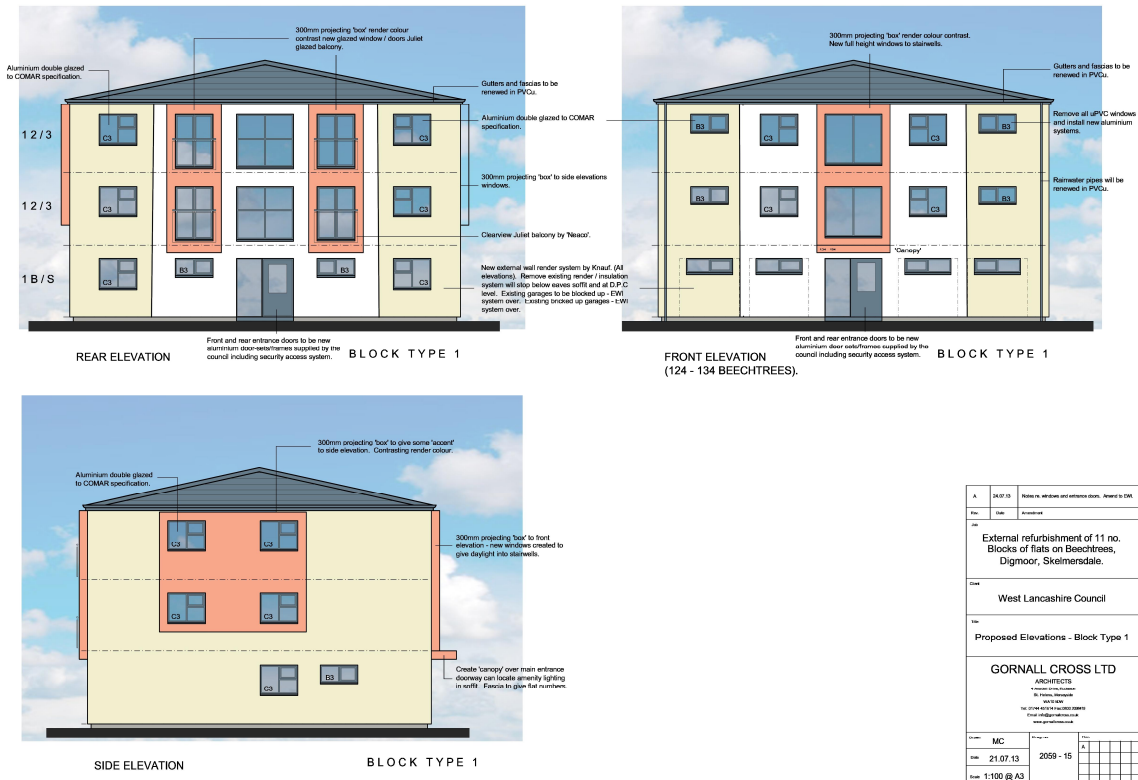


Overleaf are the proposed elevations of the detached blocks. Large windows have been added to the communal areas above the front doors with a raised rendered panel and canopy projecting out from the front elevation and forming a canopy over the main door. This would require removal of the internal storage space adjacent to the flat entrance doors.

To the rear, the existing windows on the enclosed balcony areas above the rear entrance doors have been enlarged. These areas located in front of the kitchen were previously open to the elements but were enclosed with a window and panel beneath. They are generally cold and unheated and prone to damp and leaks. The proposed treatment should combat this as well as allowing more light into the kitchens which are currently very dark. The division between the two flats occurs in the centre of this window so a small amount of internal work would be required.

The living room windows immediately adjacent to the enclosed balconies have been replaced with doors and Juliet balconies. This will allow more light into the living rooms of the flats and require little structural work as there is currently an infill panel beneath the window. These areas have also been accentuated from the adjacent walls by colour and plane. Further accentuated panels have been added to the side elevations around the bedroom windows

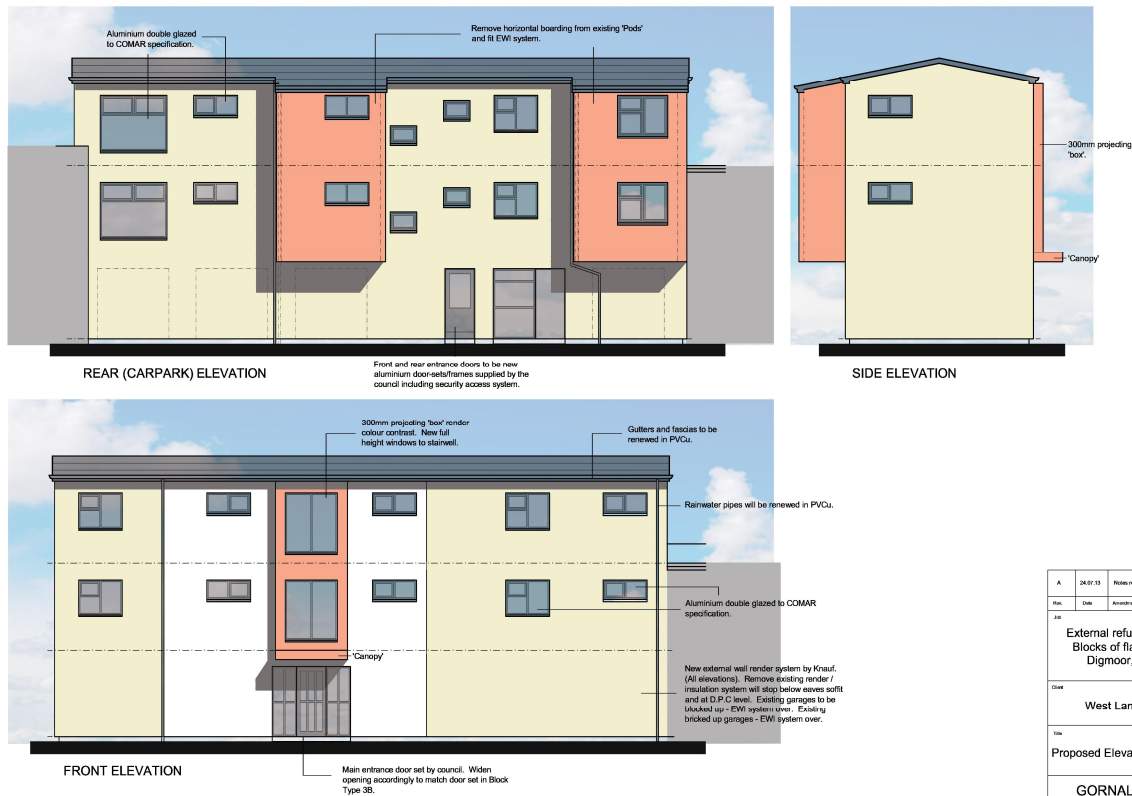
These elevations show the garages which currently exist in most blocks as having been converted to bedrooms to turn the existing bedsits into flats.



A	24.07.13	Notes re windows and entrance doors. Amend to DM.
Rev	1	Approved
<p>External refurbishment of 11 no. Blocks of flats on Beechtrees, Dignoor, Skelmersdale.</p>		
Client	West Lancashire Council	
Drawn	Proposed Elevations - Block Type 1	
<p>GORNALL CROSS LTD Architects Ltd 100-102, The Quadrant 1st Floor, 100-102, The Quadrant 100-102, The Quadrant 100-102, The Quadrant</p>		
Scale	MC	
Date	21.07.13	2059 - 15
Sheet	1:100 @ A3	

Below are the suggested elevations of the attached type blocks. Large additional windows to the stairwells above the communal door have again been added and the render built out from the adjacent walls. Also, a canopy has been added above the main door. This would require the removal of the cupboards adjacent to the individual flat entrance doors internally but would provide much more space and light to the stairwells.

The protruding bays to the rear elevation are an existing feature which are now clad in UPVC shiplap boarding. They have sustained a large amount of damage in the past through vandalism and are generally in poor condition. This solution proposes replacing the cladding with the render system in a contrasting colour. The insulation would also substantially improve the thermal efficiency and levels of comfort in the bedrooms and living rooms of the flats.



A	24.07.13	Notes re. windows and entrance doors. Amend to EIR.
Rev.	006	Amendments
<p>External refurbishment of 11 no. Blocks of flats on Beechtrees, Digmoor, Skelmersdale.</p>		
Client	West Lancashire Council	
Site	Proposed Elevations - Block Type 2A	
<p>GORNALL CROSS LTD ARCHITECTS Alicia Cross, Rossini 10, Victoria Road M612 2JW Tel: 01754 821144 Fax: 01754 821188 E: a.c@gornallcross.co.uk www.gornallcross.co.uk</p>		
Drawn	MC	Proj. no.
Date	21.07.13	2059 - 17B
Scale	1:100 @ A3	(colour)
		Sheet
		A

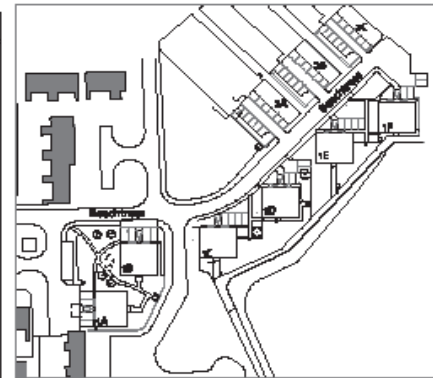
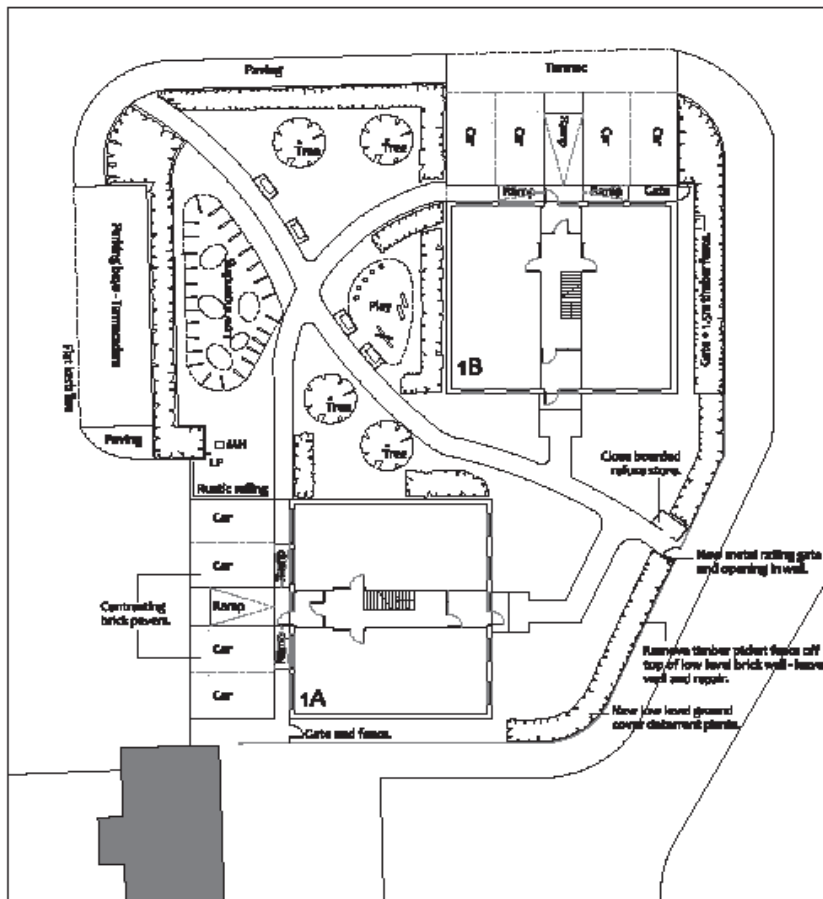
External landscaping and planting.

The proposal for the first area of landscaping incorporates the adjacent open grassed area. Enclosing the area within a boundary hedge as well as soft landscaping and benches are included. The access to both blocks is ramped and all existing car parking areas are retained but refurbished with block paving in contrasting colours.

Access to the area is controlled by steel gates and clear paths run between the blocks and all of the points of access. The conversion of the existing bedsits to 2 bedroom flats may make this area more suitable for families.

This proposal would have the effect of providing a fairly enclosed space for use by the residents and facilities which were not previously available. The enclosing boundary treatments and areas of raised ground will serve to separate the area from the estate and may have a positive impact on instances of antisocial behaviour.

The blocks in this section are nos 124-134 and 136-146.



Rev	Date	Author
01		
External refurbishment of 11 no. Blocks of flats on Bowdoin, Digmoor, Skirwastle.		
West Lancashire Council		
Proposed Site Layout Blocks 1A and 1B		
GORNALL CROSS LTD		
ARCHITECTS Landscape Architects Planning Consultants Interior Designers Construction Management		
Scale	1:500	Project
Date	21.08.18	2000 - 00
0120300000000000		

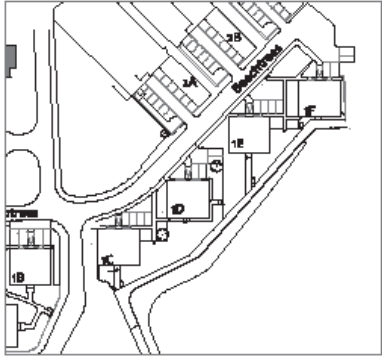
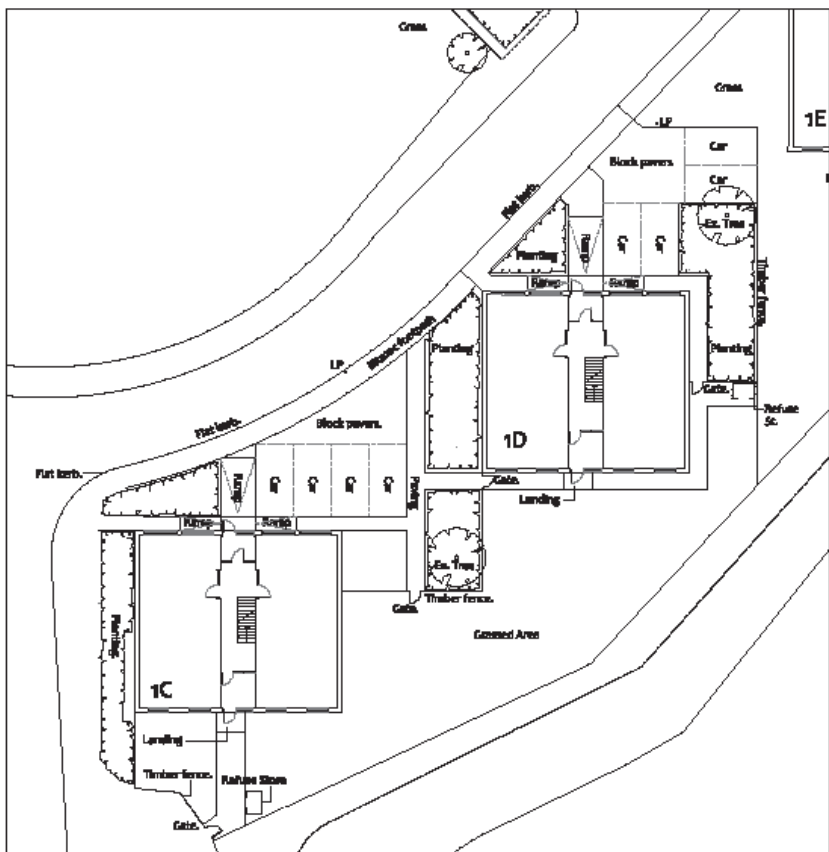
The proposal for the second area of landscaping uses strategic areas of raised planting beds to direct pedestrian traffic away from the direct vicinity of the blocks. Currently the area is entirely open with no physical barriers between the road and the flats. This plan should increase the privacy for the ground floor flats which will be converted from the bedsits as well as improving the appearance of the area as a whole.

The car parking areas currently situated directly in front of the flats have been partially offset to increase the privacy of the flats.

The rear of the area would be laid to grass with a closed pale timber fence enclosing it rather than the chaotic arrangement of fencing and dilapidated paving currently in place.

Clearly defined pedestrian paths with gates at all points of access should restrict access to the rear of the properties for non residents.

The blocks in this section are nos 148-158 and 160-170

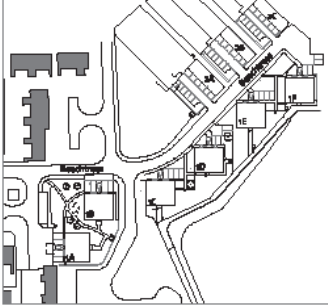
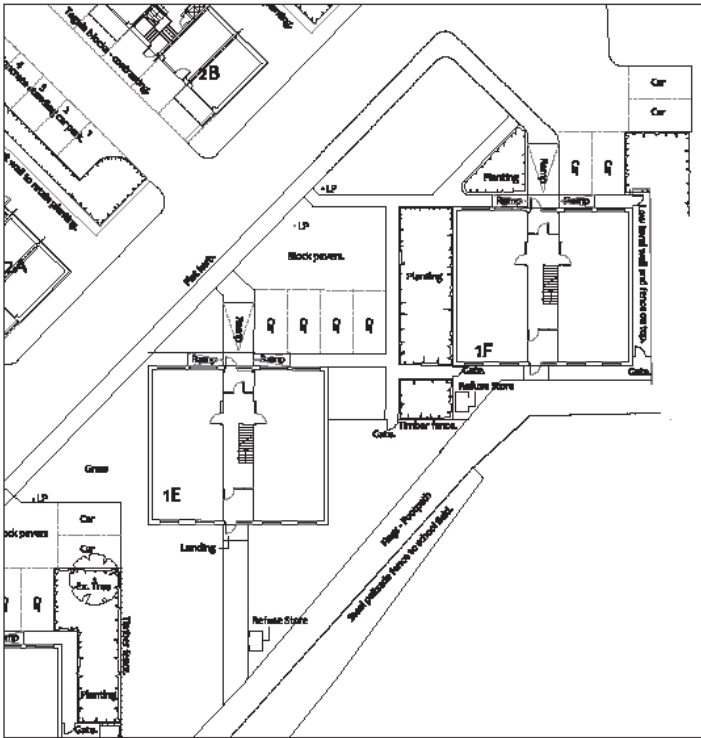


No.	Rev.	Author
External refurbishment of 11 no. Blocks of flats on Dovesdown, Dignoor, Bealmeadale.		
West Lanesville Church		
Proposed Site Layout Units 1C and 1D		
GORNALL CROSS LTD		
<small> 2008 0000 2008 0000 2008 0000 2008 0000 2008 0000 2008 0000 </small>		
No.	Rev.	Author
001	01	2009-21
© GORNALL CROSS LTD		

The proposal for the third area of landscaping employs the same techniques of creating a physical barrier around the blocks themselves using raised planting beds and offsetting the parking bays to increase privacy.

The rear of the area would continue on from the adjacent grassed area enclosed with a timber fence. The front entrances to all blocks are ramped.

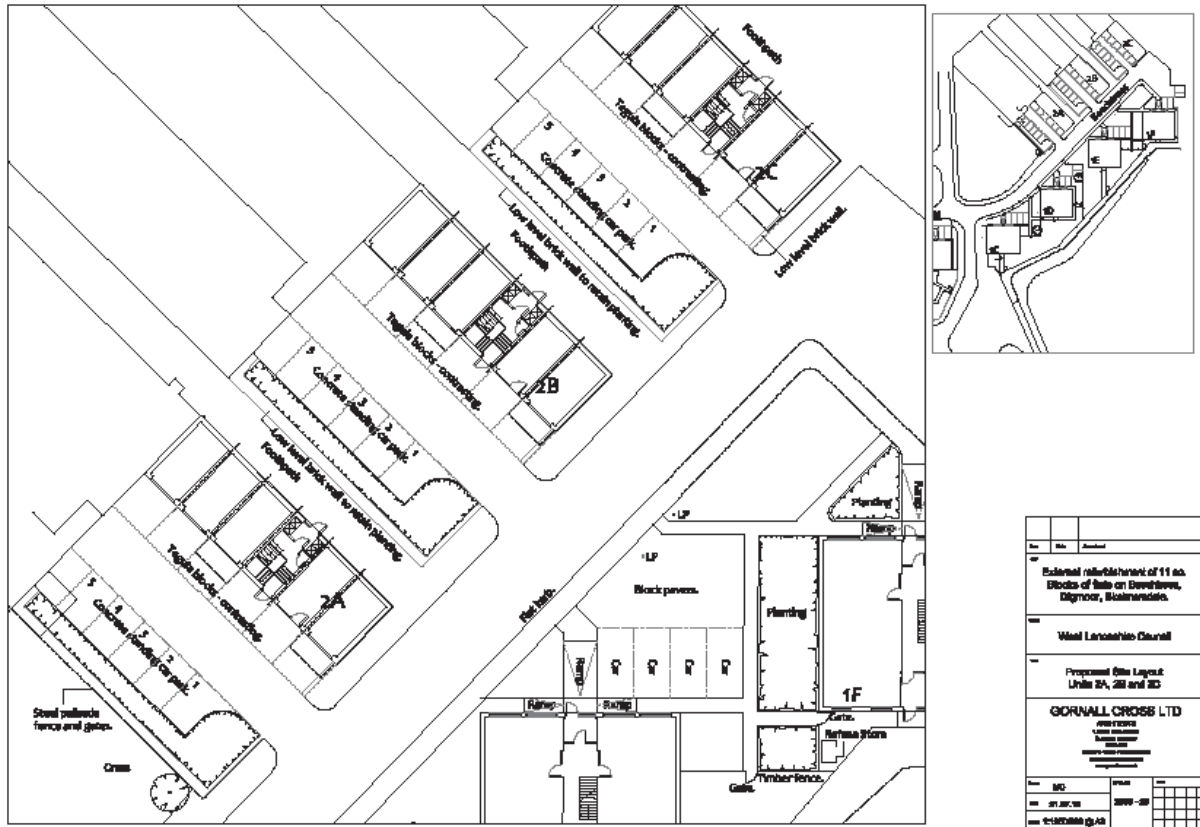
The blocks in this section are nos 172-182 and 184-194



No.	Rev.	Author
External refurbishment of 11 no. Blocks of flats on Dovesdown, Dignoor, Bealmeadale.		
West Lanesville Church		
Proposed Site Layout Units 1E and 1F		
GORNALL CROSS LTD		
<small> 2008 0000 2008 0000 2008 0000 2008 0000 2008 0000 2008 0000 </small>		
No.	Rev.	Author
001	01	2009-21
© GORNALL CROSS LTD		

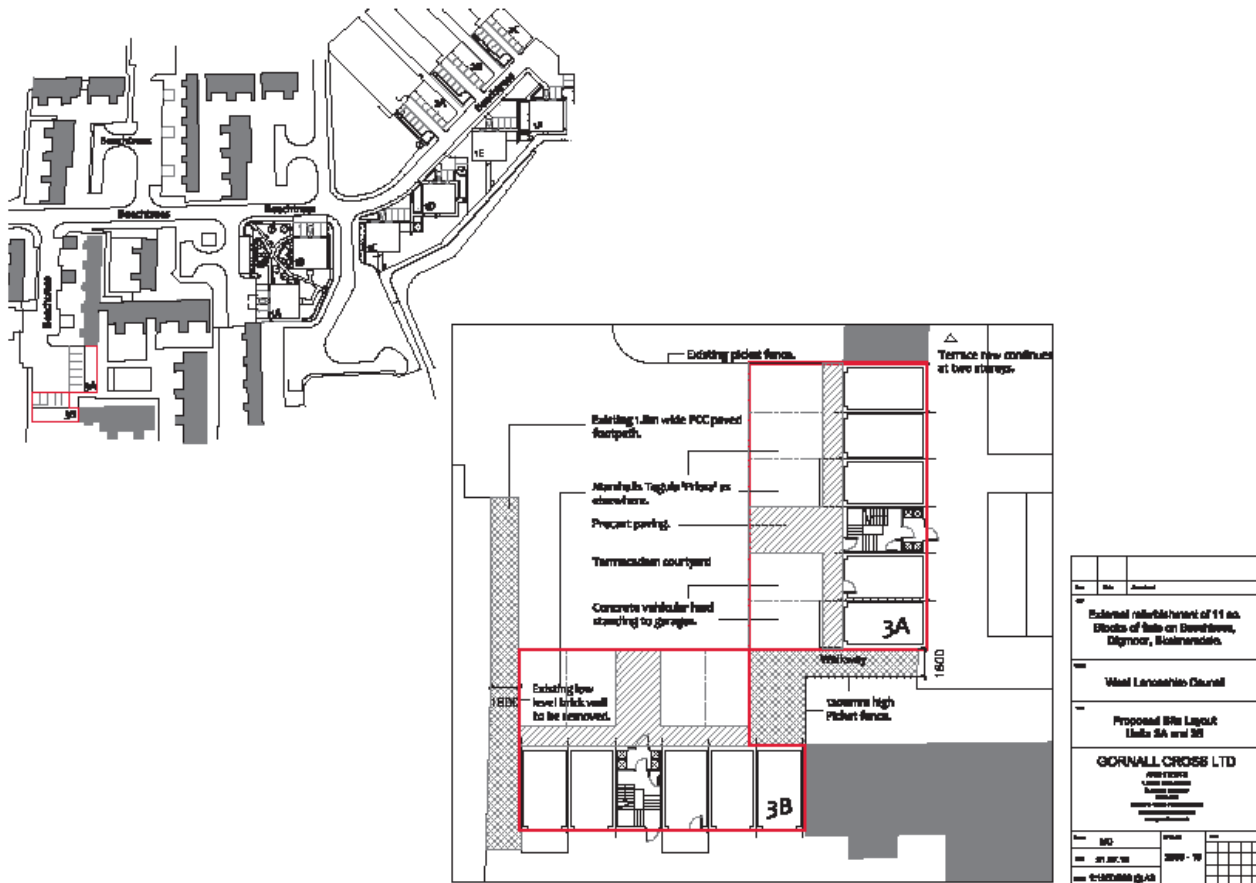
The options for landscaping the area immediately adjacent to the attached blocks are limited as access is required across the front elevation for the adjoined houses and vehicle access is necessary to the rear for the garages that form most of the ground floor of the blocks. This proposal adds some planting and clearer defining of the parking spaces to improve the appearance of the area.

The blocks in this section are nos 193-199, 211-217 and 229-235



As with the previous area, the landscaping options to the final area are extremely limited as access is required to all sides of the blocks to get to other areas of the estate. A general refurbishment of the adjacent parking areas using Tegular block paving is again proposed to improve the appearance.

The blocks in this section are nos 42-48 and 60-66



Internal Communal areas.

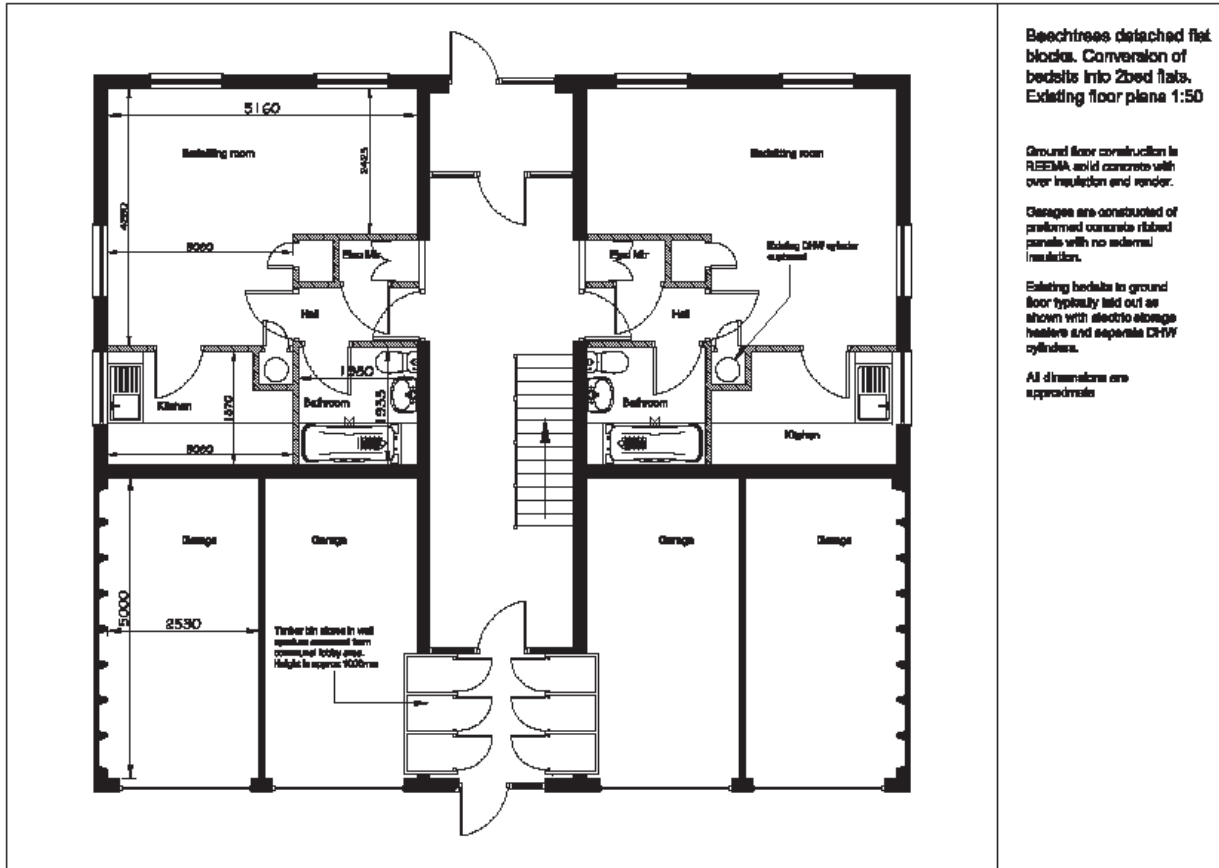
The internal communal areas of the blocks will be repainted with all floor, wall and ceiling finishes replaced. New communal lighting and new, more modern, handrails and balustrading to the stairwells.

6 Conversion of bedsits and garages to form flats.

The layout for the conversion of the garages and bedsits in the detached blocks is closely based on the conversions that have previously been carried out in the area. The changes to construction would bring the design up to current building regulations and allowance is made for the new boiler which will be fitted under the central heating programme. Overleaf are the existing and proposed plans.

Conversion of the bedsits to single bedroom flats was considered but due to the structure and layout, this was not considered economically viable.

Existing



Beechtree detached flat blocks. Conversion of bedsets into 2bed flats. Existing floor plans 1:50

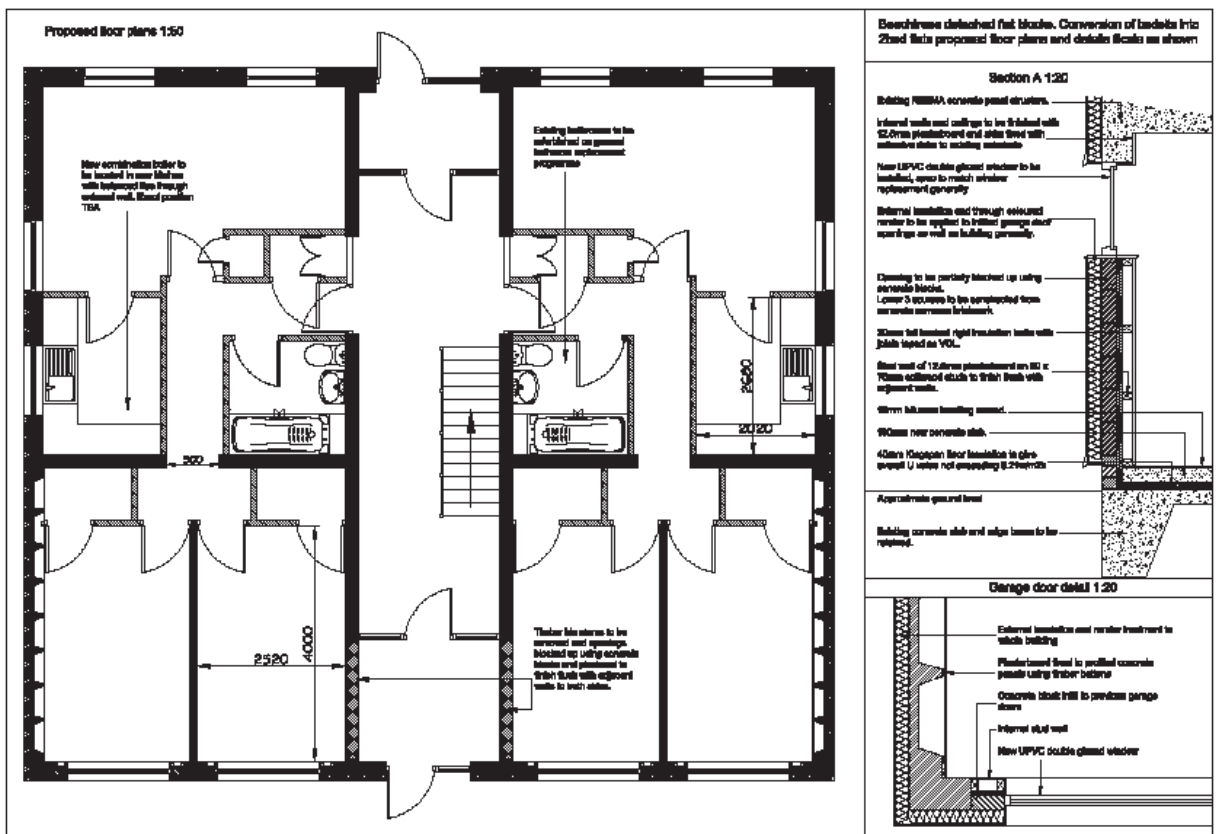
Ground floor construction in REEMA and concrete with over insulation and render.

Garages are constructed of preformed concrete ribbed panels with no external insulation.

Existing bedsets in ground floor typically laid out as shown with electric storage heaters and separate CHFF cylinders.

All dimensions are approximate

Proposed



7 Projected costs.

A fully itemised document detailing all of the projected costs relating to the works designed and specified by the Architect is included in Chapter 9

The costs for the conversion of bedsits into flats have been based on WLBC schedules of rates and ongoing maintenance programmes. A full breakdown of the projected costs per unit is included in chapter 10.

The projected costs for works to the individual flats and communal entrance doors are based on the standard costs used in the ongoing replacement programmes with the exception of the central heating installation. This element requires the installation of a new gas main to cover the parts of the estate not already on mains gas. A previously sought quote from Murphy, the designated gas main installer for the area has been used to calculate the installation costs. This has been divided between all of the properties on the estate including the flats, which require mains gas, and combined with the WLBC rate for installation of a full central heating system to provide the per unit cost which is included in the following tables.

Carbon reduction funding.

Many of the measures proposed as part of these options will improve the energy efficiency of the homes. As well as making them more comfortable and cheaper to heat, these measures would have the effect of reducing carbon emissions in line with the government's obligations.

In order to assist initiatives such as this, the government introduced the Energy company obligation (ECO). This is a subsidy from energy suppliers to provide energy-saving home improvements for those most in need and for properties that are harder to treat.

Due to the nature of the proposed works, and the solid walled construction of the flats this project may be eligible for partial funding as part of the ECO. The level of this funding has been assessed by 'Sustain' which is an impartial company set up to assist the implementation of schemes such as this.

The level of applicable funding, covering installation of external wall insulation, efficient heating systems and double glazed windows, has been estimated as up to **£5,388.49** per property. This figure would be subject to adjustment when a final scheme is proposed. This figure applies to refurbishment properties only. This funding has not been relied upon in the budget estimates.

Option 1 costs.

Assumptions:

The costs for the home loss payments have been based on 48 tenants being eligible for the payment. This is based on 54 tenants in total, 3 voids at any given time and 3 tenants who had been in residence for less than 12 months. An assumed 10% legal and admin fee has been added to the projected costs.

In addition to the home loss payments, there are 2 leaseholders in the flats. In order to clear the flats, the leases would need to be bought back. The costs for this have been calculated as £42,500 per property including legal fees and home loss payment.

Using these assumptions, the cost for clearing all of the tenants and leaseholders would be **£333,160.00**

DESCRIPTION	UNIT COST	NO OF UNITS	TOTAL
Refurbishment costs covered by Architect's work. Detailed in chapter 9	£1,131,765	1	£1,131,765
Professional fees associated with above work (set at 8% of construction costs)	£90,541.20	1	£90,541.20
Conversion of bedsits and garages into flats. Detailed in chapter 10	£12,571.35	8	£100,570.80
Kitchen replacement cost based on medium kitchen in current replacement programme	£3,100	56	£173,600.00
Bathroom replacement cost based on current replacement scheme budget cost.	£1,875.00	56	£105,000.00
Central heating installation including new gas main.	£4,068.14	56	£227,815.84
Replacement of communal entrance doors, front and back including new door entry systems to detached blocks	£3,600.00	6	£21,600.00
As above to attached blocks	£3,200.00	5	£16,000.00
Replacement of internal flat entrance doors complete to current fire regulations	£600.00	56	£33,600.00
Costs for decanting of tenants and leaseholders as detailed above	£333,160.00	1	£333,160.00
Cost for internal decoration and repairs to 1 bed flat as per chapter 3	£3,673.00	20	£73,460.00
As above for 2 bed flat	£5,690.00	36	£204,840.00
GRAND TOTAL			£2,511,952.84
Average cost per lettable unit			£44,856.30

Repayment period

A cash flow analysis has been carried out on the project based on the following assumptions:

The cost of the initial investment £2,511,952.84

Rate of inflation 3.2%

Annual management and Repair Cost per property £1,536

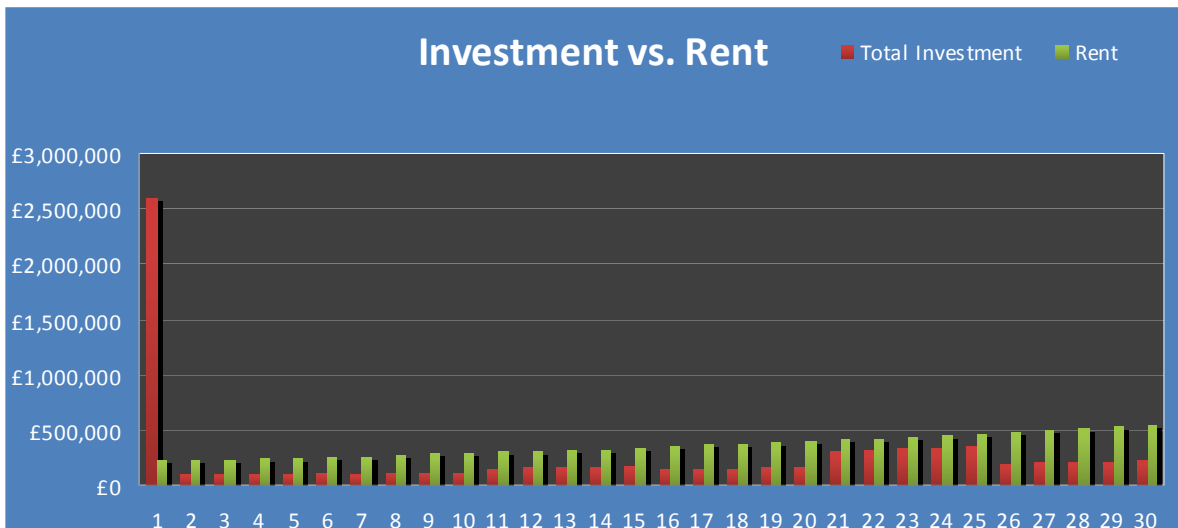
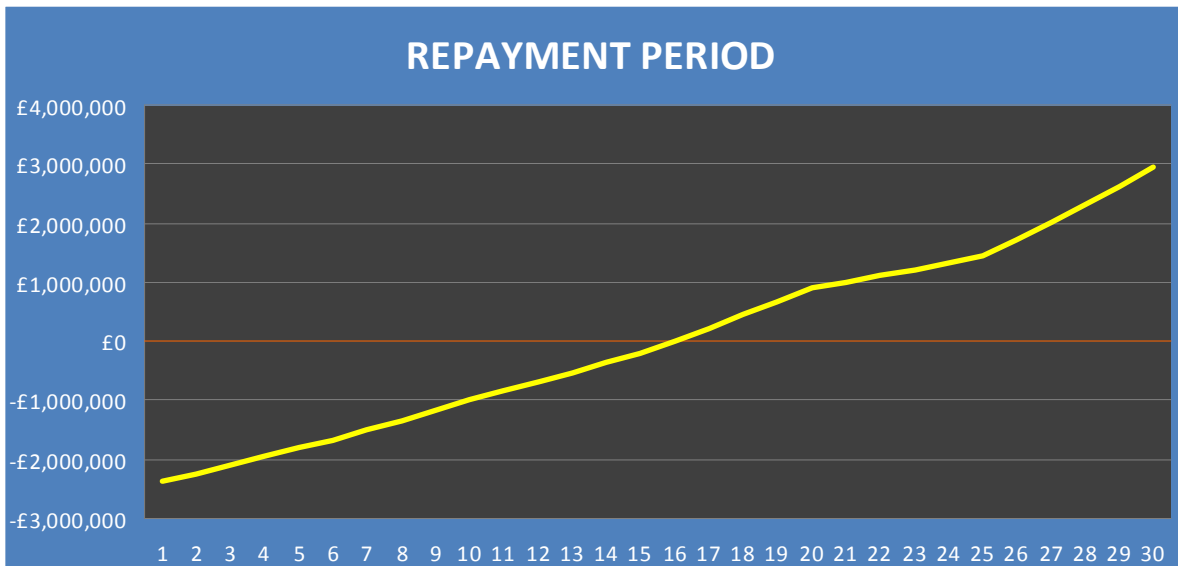
Starting rent for 2 bedroom flat £80.00

Starting rent for 1 bedroom flat £71.77

The second and third cycle renewals have been accounted for over the 30 years for Kitchens, Bathrooms, Boilers, Heating distribution, Communal doors and Communal Decoration.

Assumed void periods per year of 3 properties at 2 weeks each.

This produces the following graph which displays a cost neutral point of between years 15 and 16.



8 Outcome

- The cost of this possible proposal could be £2.51m
- This potential option could payback, that is become cost neutral, in between 15 and 16 years
- This will result in 56 full refurbished flats
- There should be a reduction in the maintenance cost as most elements of the dwellings will be new.
- The total rentable stock would increase by 2 dwellings.
- Two leaseholders would require buying back.
- 5 Newly refurbished blocks of flats would be adjoining houses detracting for the overall effect of the refurbishment.

9 Architects quote request.

Quote for:

Sketch Design, specification and cost analysis for the renovation of 11no blocks of flats on Beechtrees, Digmaor, Skelmersdale.

Dear Sir/Madam,

Please provide a quote for the above work. We require innovative and practical solutions to improve the quality and appearance of the flats on Beechtrees. This will include improvements to the external envelope such as replacement of windows and external doors, replacement of the existing render to improve the appearance and desirability of the flats. Also, rejuvenation and repair of the internal communal areas and external areas such as boundary treatments will be required.

This quote is for the design work including sketch designs, basic specification and cost projections, as accurate as possible, in order to allow the council to finalise the scheme and set a budget for the work.

The objective for this work is not only to improve the quality of the flats but also to make them more desirable to existing and prospective new tenants.

Attached are photos of the flats themselves and also of similar renovations that have been carried out by the council. The construction is REEMA solid concrete with external insulation and render.

Please return quotes by email to stuart.gibson@westlancs.gov.uk by 12 Noon on Monday 10th June 2013. If you need to visit the site, or have any queries please contact Stuart Gibson on 01695 585291. Please include any examples you may have of similar work you have carried out in the past.









Previously refurbished flats





Site plan showing positions of blocks and boundaries.



10 Architect's cost plan

External Refurbishment to 11 no. Blocks of

Flats Beechtrees,

Digmoor

Skelmersdale

Feasibility Cost Plan No 1

July 2013

The Windermere Suite • Paragon House • Paragon Business Park • Chorley New Road • Bolton • BL6 6HG
T: 01204 668392 • W: henryriley.co.uk

Project Information

Client: West Lancashire Council

Project: Beechtrees, Digmaor, Skelmersdale.

HR Project Reference: P158

Document: Feasibility Cost Plan

Project Description: External refurbishment of 11 no blocks of flats.

Building Use Class: Residential

Information Used

<u>Drawings</u>	<u>Drawing Number</u>
Site Layout Units 1A & 1B	2059-07
Site Layout Units 1C & 1D	2059-08
Site Layout Units 1E & 1F	2059-09
Site Layout Units 2A, 2B and 2C	2059-10
Existing Site Layout Units 3A and 3B	2059-06
Proposed Site Layout Units 1A & 1B	2059-20
Proposed Site Layout Units 1C & 1D	2059-21
Proposed Site Layout Units 1E & 1F	2059-22
Proposed Site Layout Units 2A, 2B AND 2C	2059-23
Proposed Site Layout Units 3A AND 3B	2059-19
Existing Plans (Block Type 1)	_02
Existing Plans (Type 2A)	_04
Existing Plans - Block Type 3B	2059-13
Existing Plans - Block Type 3A	2059-12
Existing Elevations (Block Type 1)	_01
Existing Elevations (Block Type 2A)	_3
Existing Elevations (Block Type 3A)	2059-11
Existing Elevations (Block Type 3B)	2059-14
Proposed Elevations - Block Type 1	2059-15
Proposed Elevations - Block Type 2A	2059-17
Proposed Elevations - Block Type 3A	2059-24
Proposed Elevations - Block Type 3B	2059-27

Documents

Gornell Cross Scop of Works Document

Exclusions

- 1 VAT
- 2 Professional Fees
- 3 Planning & Building Regulation Fees
- 4 Survey fees
- 5 Client construction contingency
- 6 Assessment of costs beyond current rates
- 7 Finance charges, insurance, taxation
- 8 Removal and disposal of asbestos
- 9 Contaminated land remediation or disposal off site including lighting, signage etc.
- 10 Diversion of existing services or drainage
- 11 Works within existing flats
- 12 Works to existing front doors of each flat
- 13 Works to store units in block type 2 & 3
- 14 Works to existing roofs
- 15 Rewiring
- 16 Structural Repairs

Assumptions

- 1 Assumed council are to provide all rear/entrance doors
- 2 Assumed make up of existing footpath is 150mm thick
- 3 Assumed existing concrete hard-standings is 150mm thick
- 4 Assumed low level brick walls that are to be removed are no greater than 1.5m high
- 5 External work is as per proposed site layout drawing numbers - 2059-21, 2059-22, 2059-23, 2059-19, 2059-20
- 6 Assumed that when the existing windows are removed that there is only nominal making good required
- 7 New internal, glazed aluminium screens and doors to the lobbies only in block type 1
- 8 Assumed canopies are not glazed. We have included a PC sum of £450/m for canopies (precise specification TBC)

<u>Group Elemental Breakdown</u>	<u>TOTALS</u>
0 External Facades	746,305
1 Internal Finishes	102,038
2 External Works	72,914
Subtotal: Building Works	921,257
9 Main Contractor's Preliminaries	110,551
Subtotals (including main contractor preliminaries)	1,031,808
10 Main Contractor's Overheads and Profit	46,063
Total Building Works Estimate	1,077,871
11 Project Design Team Fees	Excluded
12 Other Development / Project Costs	Excluded
Base Cost Estimate	1,077,871
13 Risks/Contingencies	53,894
Cost Limit (excluding inflations)	1,131,765
14 Inflation	Excluded
TOTAL COST LIMIT	1,131,765

Lvl 2	Lvl 3	Lvl 4	Item	Q	U	R	Total
			External Render Works to Block Types 1, 2 & 3				
			<u>Removal of Existing Render and Preparation to Receive New</u>				
			Remove and reinstate all fences and shrubs to allow removal of render	1	item	500.00	500.00
			Removal and re-fix all wall mounted items (satellite dishes, lights)	1	item	2,000.00	2,000.00
			Remove fascias, gutters & airvents	506	m	11.50	5,819.00
			Remove horizontal boarding from existing 'pods' on rear elevation to blocks 2 & 3 and prepare to receive new EWI system	273	m2	15.00	4,095.00
			Existing rainwater goods to be removed and replaced following the completion of works, ensuring that no run off water can affect the surface of the External Wall Insulation System during installation	173	m	4.50	778.50
			Remove existing render/insulation (50mm thick)	3,430	m2	7.20	24,696.00
			Where required allow for temporary fixing and re-fixing where any movement or adaption of meters, main cables, gas pipes, telephone cables are required	1	item	1,000.00	1,000.00
			<u>Penetrations to Walls</u>				0.00
			All protrusions through the EWI system (flues, waste pipes, overflow, airbricks etc) should be extended accordingly. Allow for sleeves to flue extensions	1	item	500.00	500.00
			<u>External Wall Insulation System</u>				0.00
			ThermoShell Rock Slab; 110mm Rock Mineral Wool with glass fibre reinforcing mesh to all external walls	3,659	m2	70.00	256,130.00
			ThermoShell Bond 10mm bonding/6mm reinforcing render and primer to all external walls	3,659	m2	35.00	128,065.00
			Install timber plate/ThermoShell insulation fixing plates to the same depth of the insulation for reinstatement of items	1	item	750.00	750.00
			Allow for contrasting smooth render colours to various elevations		m2		INC
			<u>Windows and External Doors</u>				
			<u>External Windows</u>				
			Remove all PVCu window frames to flats and common areas	502	m2	28.50	14,307.00
			Provide new aluminium double glazing to existing openings- Comar 5Pi ECO Top Projecting, Fixed Lights	440	m2	300.00	132,000.00
			Form new openings in existing REEMA concrete wall to receive windows (allowed 225mm thick)	63	m2	135.47	8,534.61
			Make good finishes where disturbed	1	item	500.00	500.00
			New internal, glazed aluminium screens and doors to the lobbies. Glass to be toughened and full height with mid rail.	28	m	500.00	14,000.00
			New full height windows in stairwells	63	m2	300.00	18,900.00
			Allow for framing out in lightweight construction to window surrounds as indicated on elevations, to create projecting feature (300mm). EWI system to be applied.	437	m2	100.00	43,700.00
			<u>External Doors</u>				
			Remove all external door sets	25	nr	10.36	259.00
			Canopies above external doors (not glazed)	23	m	450.00	10,350.00
			Widen door openings by 1m (blocks 2A, 2B, 2C & 3A)	9	m2	98.38	885.42
			Aluminium doors to main/rear entrance, Comar 7Pi Security Commercial Door (Specified by Council)	22	nr	NA	NA
			Fitting Main Doors	22	nr	175.00	3,850.00
			Aluminium doors to juliet balconies, Comar 7Pi Rebated	24	nr	800.00	19,200.00
			Replacement of aluminium frame to blocks 2A 2B& 2C (2200 x 2200)	3	nr	150.00	450.00
			<u>Balconies</u>				

Feasibility Cost Plan

2 External Facades

Lvl 2	Lvl 3	Lvl 4	Item	Q	U	R	Total
			Juliet glazed balconies by 'neaco' to Block type 1	24	nr	550.00	13,200.00
			<u>Garages</u>				
			Garage doors to be removed (2100 x 2200)	30	nr	70.00	2,100.00
			Openings to be built up to receive new windows	139	m2	150.00	20,850.00
			<u>Roof Drainage</u>				
			Gutters to be renewed in PVCu.	506	m	12.18	6,163.08
			Fascias to be renewed in PVCu	506	m	15.00	7,590.00
			Allowance for a 'swan neck' outlet to kick out over the new EWI system	32	nr	9.00	288.00
			Rainwater pipes to be renewed in PVCu	173	m	28.00	4,844.00
TOTAL: 2 - Superstructure Carried to Final Summary							746,304.61

Feasibility Cost Plan

3 Internal Finishes

Lvl 2	Lvl 3	Lvl 4	Item	Q	U	R	Total
			<u>Internal Works to Block Types 1, 2 & 3</u>				
			<u>Strip Out</u>				
			Floor finishes to be removed	636	m2	15.00	9,540.00
			Any redundant fittings/service runs to be removed	282	m	7.50	2,115.00
			Remove upper floor storage cupboards from block type 1	24	nr	50.00	1,200.00
			Remove upper floor timber, glazed partitions to original balcony	12	nr	150.00	1,800.00
			Remove existing staircase balustrade system	66	m	20.00	1,320.00
			<u>Floor Finishes</u>				
			New vinyl floor finish throughout - ALTRO	636	m2	25.00	15,900.00
			<u>Wall Finishes</u>				
			Allow for preparing existing surfaces to receive paint decoration in common areas	1469	m2	7.00	10,283.00
			<u>Stairs</u>				
			Include for new vinyl treads, risers and nosings to staircase	540	m	15.00	8,100.00
			Provide new tubular steel post balustrade system with glazed infill panels (Singer & James) to all staircases	66	nr	490.00	32,340.00
			<u>Fittings</u>				
			Provide new lighting fittings throughout common areas - amenity and emergency	1	item	9,540.00	9,540.00
			<u>Security</u>				
			Provide new CCTV over external access doors	11	item	900.00	9,900.00
TOTAL: 3 - Internal Finishes Carried to Final Summary							102,038.00

Feasibility Cost Plan

8 External Works

Lvl 2	Lvl 3	Lvl 4	Item	Q	U	R	Total
			<u>Blocks 1A & 1B</u>				
			<u>Car Parking</u>				
			remove brick delination	38	m	2.00	76.00
			existing concrete hard-standings to be broken out (assumed 150mm deep)	22	m3	39.70	873.40
			new block pavers (Marshalls Tegular Priora) to be laid	127	m2	25.20	3,200.40
			rustic railing	10	m	25.00	250.00
			<u>General</u>				
			removal of handrail	5	m	10.00	50.00
			removal of existing block paving (assumed 200mm deep)	29	m3	41.50	1,203.50
			removal of low level brick wall (assumed 1.5m high)	23	m2	33.90	779.70
			footpath & ramps to be laid in concrete paving slabs	161	m2	30.10	4,846.10
			existing boundary wall gates to be removed and openings bricked up	2	nr	50.00	100.00
			new gate - metal railing type to be provided adjacent new bin store	2.5	m	100.00	250.00
			new refuse store for both flats - steel frame structure with horizontal plastic boarding, spaced. Mono-pitch canopy style roof	2	nr	500.00	1,000.00
			repair existing wall	41	m	15.00	615.00
			remove fence on top of existing wall	41	m	25.00	1,025.00
			fenced area to be new timber construction 1.5m high	16	m	50.00	800.00
			<u>Play Space</u>				
			Play space equipment	1	item	1,300.00	1,300.00
			grass matting to avoid grass erosion	20	m2	10.00	200.00
			low mounding	50	m2	10.00	500.00
			<u>Landscaping</u>				
			removal of existing grass	306	m2	4.00	1,224.00
			tree planting	4	nr	150	600.00
			edging stones to planting beds	248	m	7.00	1,736.00
			low level deterrent planting around perimeters	178	m2	15.00	2,670.00
			<u>Blocks 1C & 1D</u>				
			<u>Car Parking</u>				
			remove brick delination	18	m	2.00	36.00
			existing concrete hard-standings to be broken out (assumed 150mm deep)	34	m3	39.70	1,349.80
			new block pavers (Marshalls Tegular Priora) to be laid	150	m2	25.20	3,780.00
			<u>General</u>				
			removal of footpath	181	m2	5.00	905.00
			removal of low level brick wall (assumed 1.5m high)	50	m	33.90	1,695.00
			remove fence on top of low level brick wall	16	m	25.00	400.00
			footpath & ramps to be laid in concrete paving slabs	121	m2	30.10	3,642.10
			remove timber picket fence (1m high)	5	m	15.00	75.00
			remove timber fence and gate (2m high)	4	m	25.00	100.00

Feasibility Cost Plan

8 External Works

Lvl 2	Lvl 3	Lvl 4	Item	Q	U	R	Total
			Install new timber fence & gate	43	m	50.00	2,150.00
			new refuse store - steel frame structure with horizontal plastic boarding, spaced. Mono-pitch canopy style roof	2	nr	500.00	1,000.00
			<u>Landscaping</u>				
			removal of grass	52	m2	4.10	213.20
			new grass	322	m2	5.20	1,674.40
			low level deterrent planting around perimeters	166	m2	15.00	2,490.00
			edging stones to planting beds	157	m	7.00	1,099.00
			<u>Blocks 1E 1F</u>				
			<u>Car Parking</u>				
			remove brick delination	14	m	2.00	28.00
			existing concrete hard-standings to be broken out (assumed 150mm deep)	18	m3	39.70	714.60
			break out existing tarmac	87	m2	5.00	435.00
			new block pavers (Marshalls Tegular Priora) to be laid	184	m2	25.20	4,636.80
			<u>General</u>				
			removal of footpath (assumed 150mm thick)	60	m2	7.00	420.00
			removal of low level brick wall (assumed 1.5m high)	26	m	33.90	881.40
			remove fence on top of low level brick wall	17	m	25.00	425.00
			footpath & ramps to be laid in concrete paving slabs	152	m2	30.10	4,575.20
			remove timber fence	5	m	10.00	50.00
			Install new timber fence & gate	12	m	20.00	240.00
			new refuse store - steel frame structure with horizontal plastic boarding, spaced. Mono-pitch canopy style roof	2	item	350.00	700.00
			<u>Landscaping</u>				
			removal of grass	95	m2	4.10	389.50
			new grass	94	m2	5.20	488.80
			low level deterrent planting around perimeters	95	m2	15.00	1,425.00
			edging stones to planting beds	79	m	7.00	553.00
			<u>Blocks 2A 2B & 2C</u>				
			<u>Car Parking</u>				
			remove brick delination	54	m	2.00	108.00
			tegular blocks contrasting	171	m2	25.20	4,309.20
			<u>Landscaping</u>				
			low level deterrent planting around perimeters	114	m2	15.00	1,710.00
			edging stones to planting beds	134	m	7.00	938.00
			<u>Blocks 3A & 3B</u>				
			pre-cast paved walkways	35	m2	30.10	1,053.50
			1200mm high picket fence	12	m	20.00	240.00

Feasibility Cost Plan

8 External Works

Lvl 2	Lvl 3	Lvl 4	Item	Q	U	R	Total
			remove low level brick wall (assumed 1.5m high)	17	m	33.90	576.30
			new block pavers; marshalls tegula 'Priora'	163	m2	25.20	4,107.60
TOTAL: 8 - External Works Carried to Final Summary							72,913.50

11 Cost breakdown for conversion of bedsits to flats.

WEST LANCASHIRE BOROUGH COUNCIL

BEECHTREES CONVERSIONS OF BEDSITE TO FLATS COST PROJECTIONS

Description	Unit Code	Base Rate	Quantity	Total
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Internal stripping out and preparation works.

Strip out; Clear bedsit of all rubbish within the curtillage, carpets, carpet grips, stair grips, lamp shades, all rubbish and all other remaining items. Brush out premises on completion of works. Remove all surface mounted electrical wiring and fittings electrical switchgear and disconnect from mains. Remove all kitchen fittings, boilers, pipework and waste pipes and cap off ready for new fittings. Remove all stud wall partitions where indicated on drawings, internal doors and casings, strip wallpaper and remove all arisings from site.	SM	32.50	15	487.50
Strip out Asbestos; Take up thermoplastic floor tiles containing asbestos and remove all textured ceiling coatings containing asbestos, double bag and dispose of at an authorised waste disposal centre and wash down areas. Supply method statement and risk assessment to Contract Administrator for all aspects of the work.	SM	14.50	25	362.50
TOTAL FOR SECTION				850.00

Internal alteration works to existing bedsits.

Partition; Renew plasterboard faced stud type partition, including take down old and fix new comprising; n.e. 50 x 100mm pressure impregnated preservative treated softwood noggins and members at 600mm centres, fix 9mm plasterboard to both sides of partition, scrim and skim and fix skirting to both sides of partition.	SM	35.50	15	532.50
Rewire; Carry out full electrical wiring and fittings installation to 2 bed flat as per framework rate to include for provision of NICEIC certificate on completion completed and returned to the contract administrator at Sandy Lane office. Allow for new consumer unit, full wiring encased in white UPVC mini trunking to external walls and behind boarding to stud walls. Provision to include 3no double sockets to living and bed rooms, 2 to hall, aerial socket, light switches and pendant light fittings to all rooms.	IT	2,500.00	1	2500.00
***** Kitchen; Replace complete kitchen, as per contract specification to include decoration, all floor coverings and electrical works. Allow for 8no units, 7LM worktop and full tiling between wall and base units and extract fan in accordance with building regs *****	NO	2500.00	1	2500.00
***** Heating; Install full central heating system to flat or maisonette including 8no suitably sized radiators and combination boiler. Allow for all new pipework extending gas and water feeds into property from connumal area, rust inhibitor, power flush system, test and commission. Price based on area quote including installation of gas main into building. Proportional cost per property. *****	IT	4068.14	1	4068.14
Room; Apply 2 No coats of emulsion to wall or ceiling. Colour and type of emulsion as directed by Supervising Officer.	SM	3.50	134	469.00
Room; Apply undercoat and gloss to general timber surfaces up to 300mm girth including rub down area touch up primer apply 2 coats of undercoat and 1coat gloss	LM	2.00	67	134.00
Internal door; install complete to block or stud wall opening. Remove any type of boarding, applied finish. Fit new lining to suit opening complete with butt hinges and lever furniture, architraves to both wall faces and joint to existing skirtings. Apply gloss paint finish to all new woodwork. Bathroom doors to include indicator bolt.	IT	145.00	5	725.00
Floor; Lay latex self levelling floor screed only to floor not exceeding 5mm thickness.	SM	18.50	25	462.50
Floor; Lay flexible tiles on new concrete floor with trowelled finish. Lay 3mm thick vinyl or thermoplastic tiles on compatible adhesive. Including all cutting and cleaning off on completion. All as directed by the Contract Administrator.	SM	10.50	25	262.50
TOTAL FOR SECTION				11653.64

Work to garages per unit (2 garages)

Form new opening 900mm wide to ceiling height to structural concrete wall between bedsit and garages including insert concrete lintel over bearing on new concrete padstones as directed by structural consultant, make good to edges of opening and finish flush with existing to all sides. Allow for any temporary support and making good to floor and ceiling finishes	IT	800.00	1	800.00
- 1501 -				

Work to garages per unit (2 garages)

Form new opening 900mm wide to ceiling height to structural concrete wall between bedsit and garages including insert concrete lintel over bearing on new concrete padstones as directed by structural consultant, make good to edges of opening and finish flush with existing to all sides. Allow for any temporary support and making good to floor and ceiling finishes	IT	800.00	1	800.00
Form new opening 900mm wide to concrete block dividing wall between garages including make good edges of opening	IT	150.00	1	150.00
Remove timber built bin stores from entrance lobby into garage and block up opening using concrete blocks to finish flush with existing both sides	IT	200.00	1	200.00
Floor; Build up floor level in garages to finish flush with FFL in existing bedsit with 40mm Kingspan rigid floor insulation to give overall U value not exceeding 0.21W/m ² K, 100mm concrete slab finished with 10-20mm bitumen levelling screed.	SM	65.00	25	1625.00
Garage door; Remove existing garage door, frame and mechanism and dispose. Partially block up opening using concrete common brickwork to receive window approximately 600 x 1800mm. New wall to be tied to existing with proprietary stainless steel wall starter bar. 30mm rigid foil backed insulation batts with taped joints to form VCL to be laid against wall to existing garage floor level and new internal wall of 12.5mm plasterboard on 75 x 50mm softwood studs, taped and skim finished. Window to be included on main window replacement.	NO	250.00	2	500.00
Partition; Renew plasterboard faced stud type partition, including take down old and fix new comprising; n.e. 50 x 100mm pressure impregnated preservative treated softwood noggins and members at 600mm centres, fix 9mm plasterboard to both sides of partition, scrim and skim and fix skirting to both sides of partition.	SM	35.50	15	532.50
Replaster complete; Remove any loose or defective material, prepare, apply backing coats to wall where necessary and apply skim coat. Apply 2 No coats of emulsion to wall or ceiling. Colour and type of emulsion as directed by Supervising Officer. To all unplastered areas affected by works	SM	15.00	50	750.00
Dry lining; fix 25 x 50mm treated softwood battens to concrete ribbed walls and ceilings and attach foil backed 12.5mm plasterboard linings to finish approx 20mm above finished floor level. Tape joints and skim finish to match adjacent walls. Allow for fitting softwood skirting to base of walls	SM	19.00	27	513.00
Room; Apply 2 No coats of emulsion to wall or ceiling. Colour and type of emulsion as directed by Supervising Officer.	SM	3.50	100	350.00
Room: Apply undercoat and gloss to general timber surfaces up to 300mm girth including rub down area touch up primer apply 2 coats of undercoat and 1coat gloss	LM	2.00	40	80.00
Internal door; install complete to block or stud wall opening. Remove any type of boarding, applied finish. Fit new lining to suit opening complete with butt hinges and lever furniture, architraves to both wall faces and joint to existing skirtings. Apply gloss paint finish to all new woodwork. Bathroom doors to include indicator bolt.	IT	145.00	4	580.00
Floor; Lay flexible tiles on new concrete floor with trowelled finish. Lay 3mm thick vinyl or thermoplastic tiles on compatible adhesive. Including all cutting and cleaning off on completion. All as directed by the Contract Administrator.	SM	10.50	25	262.50
TOTAL FOR SECTION				6343.00

OVERALL TOTAL				17996.64
OMISSION FOR WORKS INCLUDED IN OTHER PROGRAMMES				6568.14
SUB TOTAL				11428.50
10% CONTINGENCY FOR UNFORSEEN WORKS				1142.85
GRAND TOTAL				12571.35



Beechtrees Flats Option Appraisal

2013/14

Appendix C
Option 2

Analysis and
costings

“To be a top performing
landlord within an
economically vibrant
West Lancs”

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1 Introduction.

The purpose of this option is to consider a refurbishment scheme which would present a cost saving over the full scheme and direct the investment to the most effective areas.

Option 2 is based on retaining the 6 detached blocks and refurbishing them as described in option 1, demolishing 3 of the attached blocks and bringing the other two blocks up to standard by inclusion in ongoing maintenance programmes. The map below shows the location of the blocks.



The blocks that would be demolished under this option are among the most dilapidated in appearance. They have suffered vandalism and damage partially due to their location directly along the footpath leading through the estate. They are in an area of very high density of housing. All but 2 of the garages incorporated into the ground floors of these blocks are disused and blocked up. There are no alternative uses for the garages as they form the whole ground floor of the blocks apart from the stairwell.

The outcome of refurbishing these flats would produce a far less attractive finished product than the detached blocks due to the lack of scope for landscaping around the external areas. The houses directly adjacent to these flats are council owned. The gables of these houses would need to be made good after demolition.

The remaining 2 attached blocks are away from the main body of the flats. They are of the same design as the other attached blocks but the garages on the ground floor are still usable and all but one are currently occupied. Due to their location, demolition and redevelopment of the site would not be possible without obstructing access in the area and the houses immediately adjoining the flats are owner occupied.

These 2 blocks could be upgraded in line with other council properties in the area by replacing the windows and UPVC cladding to match the surrounding properties and installing gas central heating. They could also be included in the ongoing kitchen and bathroom replacement plan but the external render and landscaping would be omitted. This would allow some cost savings on the overall project but also greatly improve the quality of the flats and retain the general appearance of the area as it is. There is a leaseholder in one of the blocks so demolition would require buying back the lease.

Design and specification for the refurbishment scheme for the detached blocks would be as detailed in option 1.

2 Summary and scope of works.

The work to be carried out to the 6no detached blocks would comprise briefly of:

- Removing and replacing the external render finish and upgrading the insulation to meet current building regulations. This will also necessitate replacement of the rainwater goods and fascias.
- Replacement of the existing single glazed windows with new double glazed windows to current regulations.
- Refurbishment of communal internal areas and replacement of finishes with minor layout alterations.
- Full external landscaping to the areas immediately adjacent to the flats including installation of new facilities and boundary treatments.
- Installation of gas mains and replacement of existing electric heating and hot water systems with full gas central heating.
- Replacement of kitchens and Bathrooms.
- Replacement of existing, non compliant flat entrance doors with fully compliant fire rated doors.
- Replacement of communal doors and entry systems.
- Conversion of remaining bedsits to flats using integral garages.
- Internal refurbishment of finishes including internal doors, woodwork, plasterwork and decoration.
- Removal of all asbestos containing elements

The work to the 2no attached blocks to be partially refurbished would comprise briefly of:

- Replacement of the existing single glazed windows with new double glazed windows to current regulations including replacement of UPVC cladding to protruding bays.
- Replacement of kitchens and Bathrooms.
- Replacement of existing, non compliant flat entrance doors with fully compliant fire rated doors.

The three remaining attached blocks would be demolished with the gable walls to the adjoined houses rebuilt in blockwork and render.

Below is a table summarising the available lettable units and associated costs for option 2. The costs are detailed and broken down in the following chapter.

Description	Existing	Option 2
Total number of lettable units	54	43
1 Bedroom Dwellings	19	7
2 Bedroom Dwellings	27	36
Bedsits	8	0
Useable garages integrated in flats	25	9
Occupied garages at time of report	13	9
Overall scheme cost	N/A	£1,759,847.17
Cost per remaining unit	N/A	£40,926.68

3 Projected costs.

The projected costs for option 2 have been calculated using the same assumptions and figures as used in option 1. The cost per block for the refurbishment specified by the Architect was calculated using the overall build costs included in appendix B chapter 9.

To determine the refurbishment costs per block, the overall figure including overheads and contingencies but with all landscaping costs removed was simply divided by the number of blocks.

The landscaping works are almost all concentrated around the detached blocks as there are few outside spaces around the detached blocks. For this reason an estimation of 88% of the total landscaping costs identified by the architect has been used.

The costs for the demolition of the three attached blocks was based on the Architects feasibility cost plan for the new build options, which is included in Appendix D. The figure includes disconnection and removal of mains services, making good to adjoining gables, demolition of the blocks and disposal of all materials. An allowance for removal and disposal of asbestos containing materials prior to demolition has also been included. The figure has been reduced from the one included in the cost plan as the area for demolition of the 3 attached blocks was overestimated and has been adjusted accordingly.

This option assumes that the tenants and leaseholder from the flats to be refurbished or demolished would be displaced while the tenants and leaseholder in the 2 blocks to be partially refurbished would remain.

The costs for this would involve decanting 47 tenants and one leaseholder. Using the same assumptions used in option 1, 42 of the tenants would be eligible for home loss payments. This assumes an average of 3 void properties at any given time and 2 tenants who would not be eligible for home loss payments.

The cost per property would be as described in option 1, £5,170 per property for home loss payments including legal and admin charges, and £42,500 for purchase of the lease and displacement of the leaseholder.

Therefore the costs would be:

£259,640.00

The table overleaf shows the breakdown of the costs associated for this option.

DESCRIPTION	UNIT COST	NO OF UNITS	TOTAL
Refurbishment costs covered by Architect's work. Detailed in option 1 per block	£91,359.73	6	£548,158.36
Professional fees associated with above work (set at 8% of construction costs)	£43,852.67	1	£43,852.67
Landscaping costs	£64,164.32	1	£64,164.32
Conversion of bedsits and garages into flats. Detailed in option 1	£12,571.35	8	£100,570.80
Kitchen replacement cost based on medium kitchen in current replacement programme	£3,100.00	43	£133,300.00
Bathroom replacement cost based on current replacement scheme budget cost.	£1,875.00	43	£80,625.00
Central heating installation including new gas main.	£4,068.14	43	£174,930.02
Replacement of communal entrance doors, front and back including new door entry systems to detached blocks	£3,600.00	6	£21,600.00
Replacement of internal flat entrance doors complete to current fire regulations	£600.00	44	£26,400.00
Replacement of windows to attached flat blocks including UPVC cladding	£7500.00	2	£15,000.00
Demolition costs complete including making good and disconnection of services.	£86,766.00	1	£86,766.00
Costs for decanting of tenants to blocks to be demolished or undergo major refurbishment	£259,640.00	1	£259,640.00
Cost for internal decoration and repairs to 2 bed flat as detailed in option 1	£5,690.00	36	£204,840.00
GRAND TOTAL			£1,759,847.17
Average cost per unit			£40,926.68

Repayment period

A cash flow analysis has been carried out on the project based on the following assumptions:

The cost of the initial investment £1,759,847.17

Rate of inflation 3.2%

Annual management and Repair Cost per property £1,536

Starting rent for 2 bedroom flat £80.00

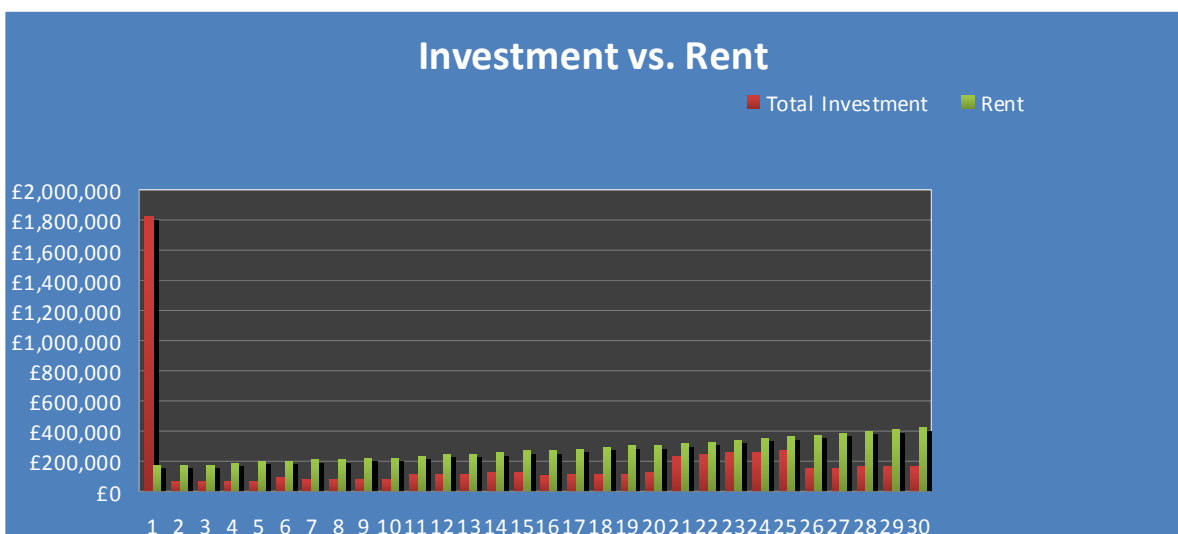
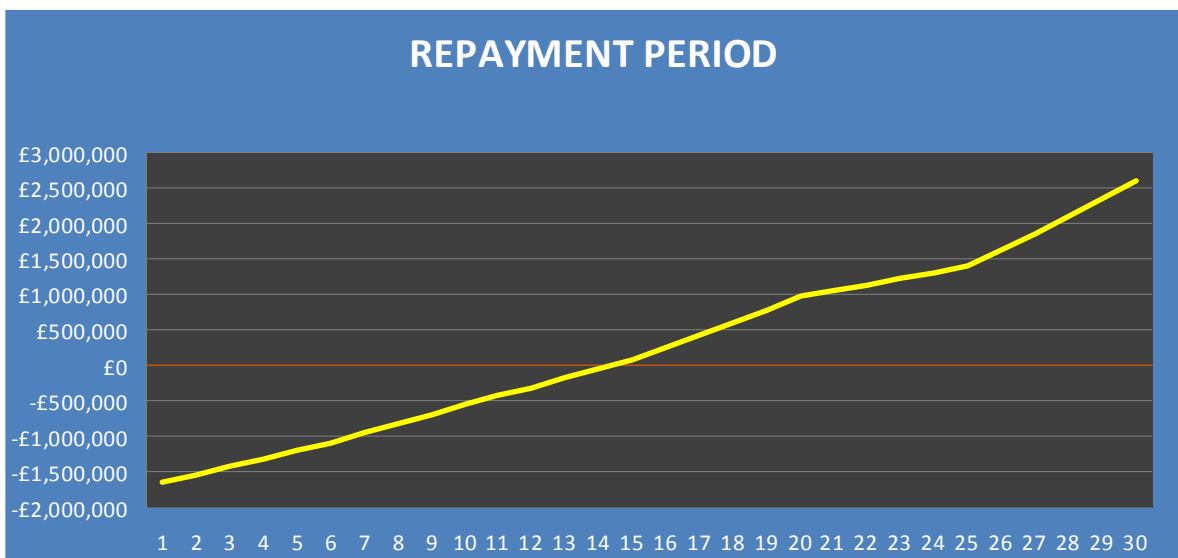
Starting rent for 1 bedroom flat £71.77

The second and third cycle renewals have been accounted for over the 30 years for Kitchens, Bathrooms, Boilers, Heating distribution, Communal doors and Communal Decoration.

Assumed void periods per year of 3 properties at 2 weeks each.

Costs are based on 43 remaining properties

This produces the following graph which displays a cost neutral point of between years 14 and 15.



4 Outcome

- The cost of this possible proposal could be £1.76m
- This potential option could payback, that is become cost neutral, in between 14 and 15 years
- This will result in 36 full refurbished flats and 7 partially refurbished flats.
- This option will dispose of 3 of the most unattractive blocks leaving un-utilised land.
- There should be a reduction in the maintenance cost as most elements of the dwellings will be new.
- The total rentable stock would decrease by 11 dwellings.
- One leaseholder would require buying back.
- 2 attached blocks of flats would remain with minor refurbishment.



Beechtrees Flats Option Appraisal

2013/14

Appendix D
Option 3

Analysis and
costings

“To be a top performing
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1 Introduction.

The purpose of this option is to consider a scheme which would revitalise the appearance of the area and improve the quality of the housing available without losing too many units overall. This will help meet the general demand for housing whilst increasing the desirability of Beechtrees itself and the area at large.

Option 3 is based on carrying out all of the work identified in option 2 and using the land cleared by the demolition of the 3 attached blocks to build 14no new dwellings.

In order to provide enough space to have the option to build houses with driveways and gardens, 4no adjoining houses would also need to be demolished. The two houses adjoining the northernmost two blocks could be demolished independently. The house adjoining the southernmost block shares a rear outrigger with the next house in the terrace, so demolition of a single house would be very difficult. For this reason, the two houses adjoining the southernmost block would be demolished. This would also provide additional space for the new buildings. This, in turn gives more freedom over the types of accommodation to be built. Below is a sketch showing a possible layout of accommodation on the site.



Adoption of this scheme would mean that a corridor was created through the centre of the estate that was brand new in appearance and surrounded by neatly landscaped areas. The development could be tailored to meet the specific housing

need of the area and allow a selective lettings policy to help address some of the identified social problems of the area.

Although demand is currently highest for one and two bedroom properties, the addition of houses with gardens or mews style low rise flats may help to encourage small families to the area rather than single tenants and couples. This in turn may encourage longer term tenancies and reduce the high levels of tenancy 'churn' experienced in the past.

All of the 4 houses which would need to be demolished are council owned although the residents may be entitled to home loss payments.

2 Summary and scope of works.

The refurbishment work to be carried out would comprise briefly of:

- Complete internal and external refurbishment of 6no attached blocks as described in option 1 including landscaping to surrounding areas.
- Partial refurbishment of 2no attached blocks in line with other council properties in the area
- Demolition of 3no blocks of 4 single bedroom flats each and 4no adjoined houses.

The newbuild element of the work would comprise briefly of:

- Construction of 14no new semi detached and terraced houses, nominally 2 bedroom, each with front and rear gardens and 2no off road parking spaces within the curtilage of the property

Below is a table summarising the available lettable units and associated costs for option 2. The costs are detailed and broken down in the following chapter.

Description	Existing	Option 3
Total number of lettable units	58	57
1 Bedroom Dwellings	19	7
2 Bedroom Dwellings	27	50
Existing houses	4	0
Bedsits	8	0
Useable garages integrated in flats	25	9
Occupied garages at time of report	13	9
Overall scheme cost	N/A	£2,995,450.09
Cost per remaining unit	N/A	£52,551.76

3 Proposed designs

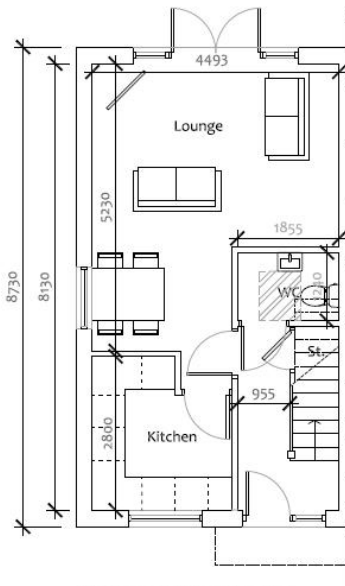
The design for the new build element of option 3 is to incorporate houses with gardens and off road parking. To conform to planning regulations, one parking space must be provided for every one bed property and two for every two or three bed property.

For the table in chapter 2, summary and scope of works, it is assumed that all 14 of the newly built properties would have 2 bedrooms this is for indicative purposes only and could be adjusted according to demand. Below is an artists impression of how the scheme may look if the proposed scheme is adopted

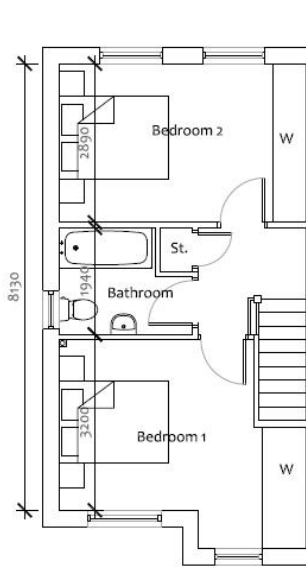


The Architect was briefed to produce designs for the new houses which would compliment and therefore could be used in conjunction with the designs for the refurbishment of the flats.

The layout consists of three house types in order to make best use of the space available. Below are the floor plans of house type A:



Proposed Ground Floor
(House Type A).

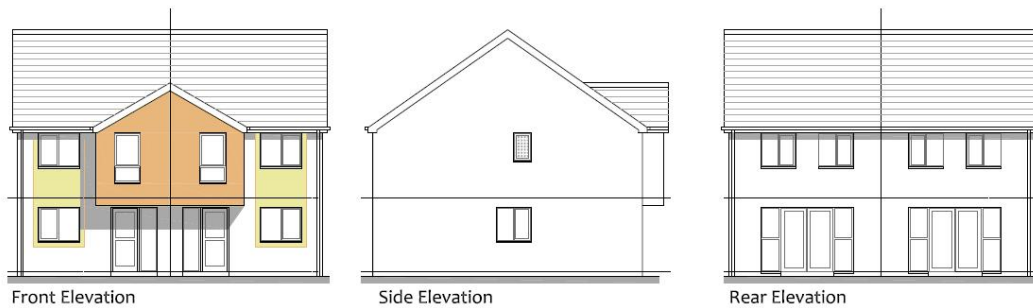


Proposed First Floor
(House Type A).

A	18.01.14	1st covering	
Rev	Date	Amendment	
Mr Beechtree, Skelmersdale Feasibility Scheme 2 (Proposed New Units)			
Client			
Title			
Plans - House type A			
GORNALL CROSS LTD ARCHITECTS 4 Ansdell Drive, Eccleston, St. Helens, Merseyside, WA5 3DV Tel: (01744) 451684 email: info@gornallcross.co.uk			
Drawn	MC	Drawn No.	Rev
Date	09.01.14	2059-SK 1	
Scale	1:500@A3		

The ground floor features a large living dining room and ground floor WC. The large French doors to the rear and the adjoining glazed panels would maximise the light available. The front kitchen is a good size for a small family and would look out over the front garden and parking area.

Both bedrooms are a generous double size which would make this house type suitable for some larger families. Each plot would have 2 off road parking spaces and a generous garden to the rear.



No.	Date	Amendment
100		Beechtrees, Skelmersdale Feasibility Scheme 2 (Proposed New Units)
Client		
100		House Type A Elevations
GORNALL CROSS LTD ARCHITECTS 4 Arnold Drive, Poulton, St. Helens, Merseyside WA9 5DW Tel: (01754) 49194 email: info@gornallcross.co.uk		
Drawn	MC	Drawn by
Date	13.01.14	2059 SK 5
Scale	1:100@A3	

The specification of the windows and external render would be the same as the refurbished flats with the colours chosen to compliment each other. The house designs feature extruded gables which form covered porches over the front door and colour accented panels in the through colour render.

The houses are handed to form the elevations shown above when paired as semi detached houses.

House type B shares the same floor plan as house type A but without the gable windows so it would be used to form the centre of terraces. All other features would be the same. In this way, the twinned, extruded gables could be used in terraces as long as necessary while maintaining the uniform appearance.



Front Elevation

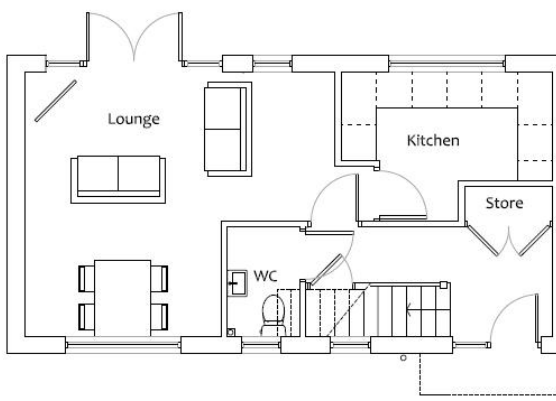


Rear Elevation

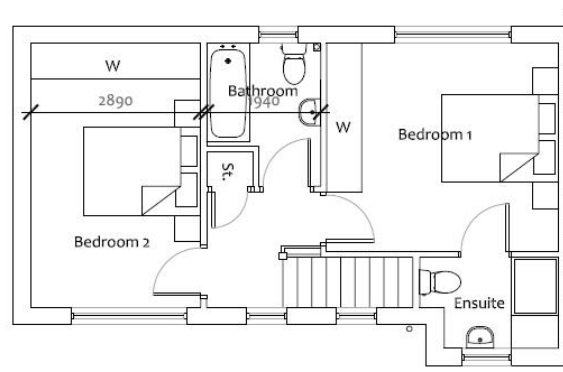
No.	Date	Amendment	
1		Beechtrees, Skelmersdale Feasibility Scheme 2 (Proposed New Units)	
Client:			
Title: House Type B Elevations			
GORNALL CROSS LTD ARCHITECTS 4 Ansdell Drive, Eccleston, St. Helens, Merseyside WA10 3DW Tel: 01524 491564 email: info@gornallcross.co.uk			
Drawn	MC	Drawn No.	2059 - SK 6
Date	13.01.14	Scale	1:100 @ A3

These house types are used for the majority of the site where the available plot depth allows. Towards the North end of the site, the available land would not allow this layout. In order to maintain the distances from houses to the rear required for planning permission, an alternative house layout has been proposed with a wider frontage and less depth. This would also vary the appearance of the street scene and the type of property available.

Below are the proposed plans for house type C.



Proposed Ground Floor
(House Type C)



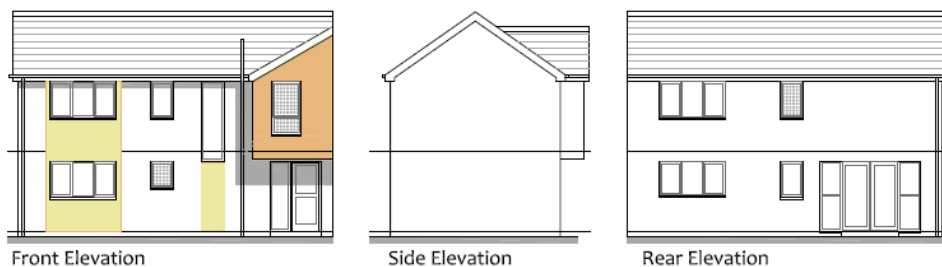
No.	Date	Amendment	
1		Beechtrees, Skelmersdale Feasibility Scheme 2 (Proposed New Units)	
Client:			
Title: Plans - House type C			
GORNALL CROSS LTD ARCHITECTS 4 Ansdell Drive, Eccleston, St. Helens, Merseyside WA10 3DW Tel: 01524 491564 email: info@gornallcross.co.uk			
Drawn	MC	Drawn No.	2059 - SK 3
Date	09.01.14	Scale	1:100 @ A3

This floor plan is essentially a rotated version of the plan for the other house types with the party wall forming the short side of the houses. This alters the character of the houses significantly and also means the garden space for each property would be larger than the other house types which may be more attractive to families with children and pets. At the same time, the build costs would be almost the same due to the very similar floor plans.

The extruded gable to the front elevation could provide additional storage space or even, as shown above, an ensuite.

The appearance of this house type is similar to that of the others but due to the increased external wall area, more windows are possible which would increase the amount of daylight admitted. This would include a long feature window on the stairwell which would create an attractive feature.

Overleaf are the proposed elevations for this house type.



Rev.	Date	Amended:
100		Beechtrees, Skelmersdale Feasibility Scheme 2 (Proposed New Units)
Client		
Title House Type C Elevations		
GORNALL CROSS LTD ARCHITECTS 4 Ansdell Drive, Eccleston, St. Helens, Merseyside WA10 3JW Tel: 01524 614114 email: info@gornallcross.co.uk		
Drawn:	MAC	Proj. No.
Date:	16.01.14	2059-SK 2
Scale:	1:1000(A3)	

4 Projected costs.

The cost for the refurbishment element of this option has been taken from option 2. To avoid duplication, the costs for the demolitions and home loss payments have been omitted and added back in at adjusted rates to take into account the additional 4 houses which will need to be demolished in order for the newbuild element of this option to take place. As with option 2, the demolition cost was adjusted due to an over-measure in the cost plan.

The 4 houses to be demolished are all assumed to be occupied and the tenants eligible for home loss payments.

Demolition and Newbuild costs

The costs for the demolition of the three attached blocks was calculated using the rates in the Architect's feasibility cost plan which is included as chapter 4 of this appendix.

The figures used are based on the section identified in the architects cost plan. The unit cost for the newbuild houses has been calculated to cover all of the associated costs including overheads and profit, and professional fees.

The external works and services costs were extrapolated from the cost plan by separating the elements attributable to the houses from those attributable to the flats. The table below shows the calculations used. The number of units included in this section of the cost plan was 12 so this is the figure used to calculate the unit cost although 14 units are included in this option.

Description	Quantity	Overall cost	Unit cost
New Housing Units; Substructure	12	137,484	11,457.00
New Housing Units; Superstructure	12	479,625	39,968.75
Housing external works	12	74,562	6,213.50
Housing Services connections	12	48,275	4,022.92
Prelims and OHP	12	126,016	10,501.29
Professional fees @8%	1		5,773.08
Total cost per unit			77,936.54

Option 3 costs

This option assumes that the tenants and leaseholder from the flats and houses to be refurbished or demolished would be displaced while the tenants and leaseholder in the 2 blocks to be partially refurbished would remain. All costs and calculations used are as previous options

DESCRIPTION	UNIT COST	NO OF UNITS	TOTAL
Complete works as identified in option 2	£1,759,847.17	1	£1,759,847.17
Omission from above figure for demolition of 3no attached blocks and disconnected services (amended figure included below).	£-86,766.00	1	£-86,766.00
Omission for home loss payments to 12no tenants included in option 2 (amended figure included below)	£-5,170.00	12	£-62,040.00
Demolitions and alterations	£99,589.56	1	£99,589.56
Home loss payment including admin fees	£5,170	16	£82,720
New semi detached mews house	£77,936.54	14	£1,091,111.56
Contingencies*	£110,987.80	1	£110,987.80
GRAND TOTAL			£2,995,450.09
Average cost per unit			£52,551.76

*Based on 10%of the demolition and new build costs excluding professional fees

Repayment period

A cash flow analysis has been carried out on the project based on the following assumptions:

The cost of the initial investment £2,995,450.09

Rate of inflation 3.2%

Annual management and Repair Cost per property £1,536

Starting rent for 2 bedroom houses is £84.16

Starting rent for 2 bedroom flat £80.00

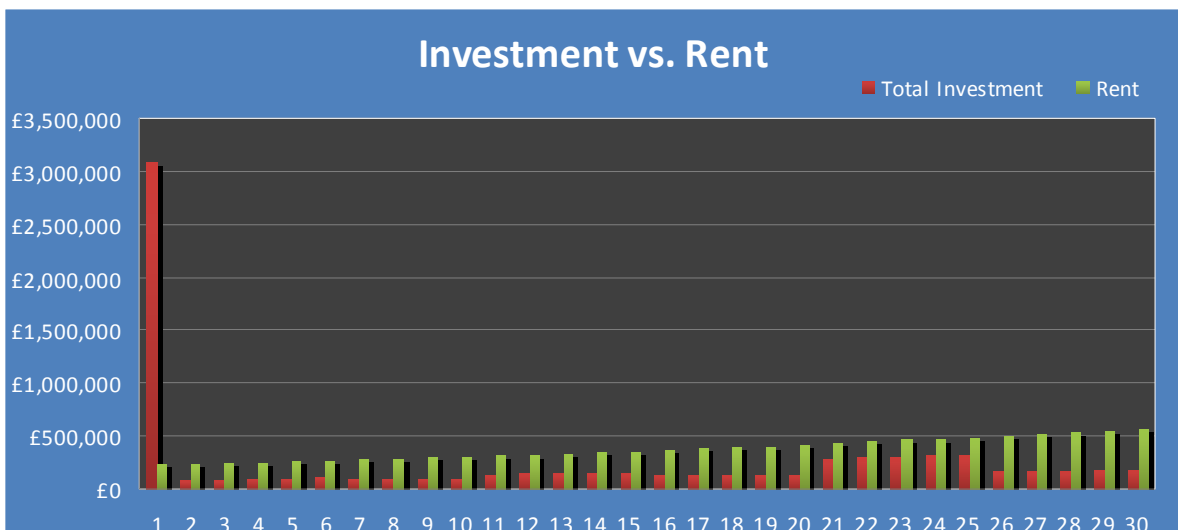
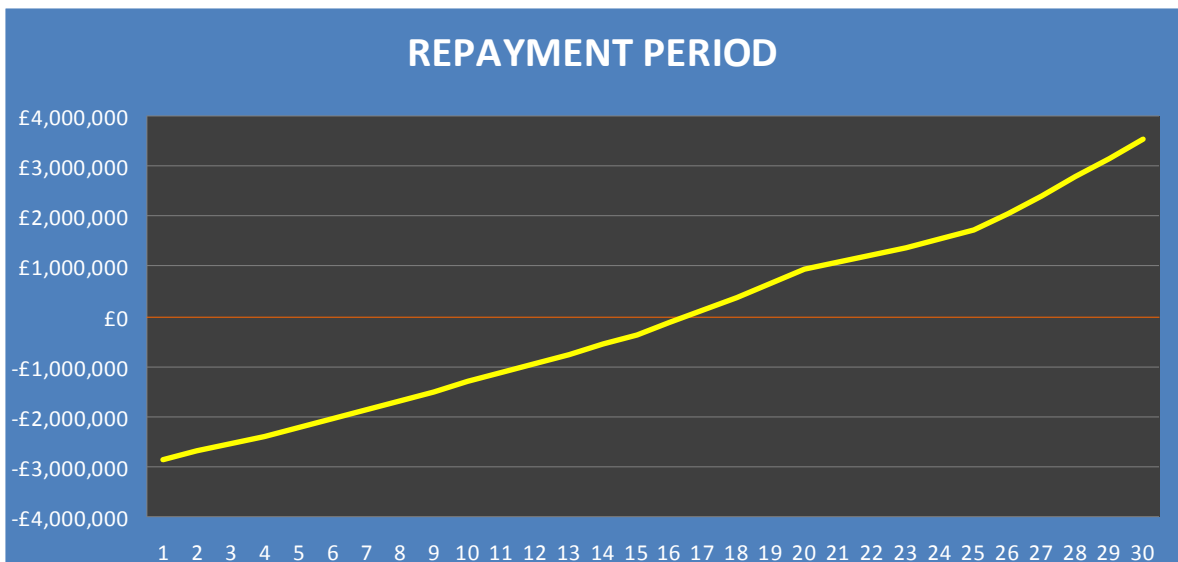
Starting rent for 1 bedroom flat £71.77

The second and third cycle renewals have been accounted for over the 30 years for Kitchens, Bathrooms, Boilers, Heating distribution, Communal doors and Communal Decoration.

Assumed void periods per year of 3 properties at 2 weeks each.

Costs are based on 57 remaining properties

This produces the following graph which displays a cost neutral point of between years 16 and 17.



5 Outcome

- The cost of this possible proposal could be £2.99m.
- This potential option could payback, that is become cost neutral, in between 16 and 17 years.
- This will result in 36 full refurbished flats and 14 Newbuild Houses and 7 partially refurbished flats.
- There should be a reduction in the maintenance cost as most elements of the dwellings will be new.
- The refurbishment of the detached blocks could be used as a template for the refurbishment of similar blocks in Digmaor.
- This option will create a corridor of new build /refurbished properties at the end of beechtrees which will create a cohesive visual appearance.
- The total rentable stock would decrease by 1 dwelling.
- One leaseholder would require buying back.
- 2 partially refurbished blocks of flats would remain.

6 Architect's Feasibility Cost Plan



-
- Option C (24 New Apartments & 34 New Housing Units)
 - Option E (Refurbish Existing Apartment Blocks 1A - 1E, 12 New Housing Units)

Beechtrees, Digmoor

Skelmersdale

Feasibility Cost Plan No 1

January 2014



The Windermere Suite • Paragon House • Paragon Business Park • Chorley New Road • Bolton • BL6 6HG
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Information Used (Option C - 24 Apartments & 34 New Housing Units)

Plans - House Type A 2059 SK01 Rev A, House Type B 2059 SK02 Rev A, House Type C 2059 SK03 Rev A
Proposed Site Plan C 2059-27 Rev B, Apartment Ground Floor and Upper Layouts 2059 SK10 Rev A
House Type A 2059 SK5 Rev -, House Type B 2059 SK6 Rev -, House Type C 2059 SK7 Rev -

Information Used (Option E - Refurbish Existing Apartment blocks 1A - 1E, 12 New Housing Units)

Proposed Elevations - Block Type 1 2059-40, Proposed Site Plan E 2059-31 (Option 2)

Assumed specification

External

- Strip foundation substructure, concrete slab construction
- External cavity brickwork with localised feature render
- Apartments to have metal balcony restraint (upper floors)
- Upper floors (timber joists in houses, metal deck in apartments)
- Concrete tiled roof (timber roof trusses) with GRP chimney if required
- UPVc external windows and door (front and rear doors to SBD)
- Front and rear light (houses)
- Bin store to apartments
- Minimal lighting to apartments externally (few lighting columns to car park and minimal building lighting for safety)

Internal

- Non-slip vinyl to kitchen, WC and bathroom areas
- Basic specification carpet to all other rooms
- Basic sanitary specification (e.g. Roca 'carla' for baths & Ideal standard 'Sandringham' range for WHB's WC's or similar)
- Basic taps specification (e.g. Vado matrix or similar)
- Basic electrical shower specification (e.g. Triton Eco or similar)
- Kitchen to be Moores Jazz or similar alternative
- Emulsion paint to walls, gloss timber skirting
- 1.8m high close boarded timber fencing to housing rear gardens
- low-level planting or fencing between front gardens / garden frontages
- Turfed front and rear gardens
- Basic intercom system to apartments
- Basic lighting, carpeting and painting to apartment communal areas

Generally

- Secured By Design
- Code for Sustainable Homes Level 3
- Lifetime homes required?
- Home office provision required?

Exclusions

- VAT
- Finance charges
- Any existing tenant re-housing costs
- Existing services infrastructure upgrade costs (e.g. new sub-station)
- Any additional surface water attenuation (assume existing infrastructure has adequate capacity)
- Extensive contamination treatment / removal
- Removal of soft spots and obstructions
- Highway re-surfacing works
- Highway pedestrian re-surfacing works
- Pedestrian lifts within apartment blocks
- Professional Fees and Legal Fees
- Local Authority Fees
- Design Fees
- Surveys / Survey Fees
- Any ecology works / requirements
- Rainwater Harvesting tanks / solar panel installations (or other re-newable installations)
- Client contingency
- Please see Estimate issued June 2013 for further assumptions / exclusions in connection with existing flat refurbishments
- Assessment of costs beyond estimate date

Assumptions / Notes

- Good ground conditions (with minimal contamination)
- No obstructions / soft spots encountered
- Un-restricted access to site
- All works undertaken consecutively
- All costs / quantities are notional and subject to change following receipt of further information
- Flat Refurbishment proposals are the same as June 2013

Beechtrees, Skelmersdale

Feasibility Estimate - Summary

Ref:	Item	£
1.0 <u>Option C (24 Apartments & 34 New Housing Units)</u>		
1.1	Demolitions and Alterations	327,244
1.2	New Housing Units; Substructure	382,905
1.3	New Housing Units; Superstructure	1,322,082
1.4	New Apartments; Substructure	214,500
1.5	New Apartments; Superstructure	1,059,956
1.6	External Works	508,205
1.7	Services	270,710
1.8	Principal Contractor Preliminaries / OH&P / Risk	569,024
	Grand Total:	4,654,626
2.0 <u>Option E (Refurbish Existing Apartment blocks 1A - 1E, 12 New Housing Units)</u>		
2.1	Demolitions and Alterations	120,966
2.2	New Housing Units; Substructure	137,484
2.3	New Housing Units; Superstructure	479,625
2.4	Existing Flats; Refurbishment	612,839
2.5	External Works	112,062
2.6	Services	116,050
2.7	Principal Contractor Preliminaries / OH&P / Risk	252,031
	Grand Total:	1,831,056

Beechtrees, SkelmersdaleFeasibility Estimate - Option C (24 Apartments & 34 New Housing Units)

Ref:	Item	Q	U	R	T	To Summary
1	<u>Demolitions and Alterations</u>					
1.1	Demolish existing flats (6 blocks)	2,970	m2	20	59,400	
1.2	Demolish existing flats (road opposite - 3 blocks)	2,610	m2	20	52,200	
1.3	Allowance to remove asbestos	1	Prov.	15%	16,740	
1.4	Break out existing hard standings (yellow)	3,032	m2	10	30,317	
1.5	Remove existing soft landscaping (pink)	4,292	m2	5	21,458	
1.7	Disposal of arisings off site	1,705	m3	20	34,097	
1.8	Allowance for contamination treatment	256	m3	75	19,179	
1.9	Demolish existing terrace houses	1,443	m2	20	28,853	
1.10	Amendments to existing retained dwellings	1	Prov.	10,000	10,000	
1.11	Rebuild gable ends (road opposite - 3 blocks)	1	Prov.	30,000	30,000	
1.12	Strip out / cap off existing redundant services	1	Prov.	25,000	25,000	327,244
2	<u>New Housing Units</u>					
2.1	<u>Substructure</u>					
2.1.1	Type A; Strip foundations; 150thk concrete slab	814	m2	230	187,220	
2.1.2	Type B; Strip foundations; 150thk concrete slab	296	m2	230	68,080	
2.1.3	Type C; Strip foundations; 150thk concrete slab	160	m2	230	36,800	
2.1.5	Provisional sum for abnormal foundations	1	Prov.	5%	14,605	306,705
2.2	<u>Substructure; Plot Drainage</u>					
2.2.1	Type A; Plot Drainage	814	m2	60	48,840	
2.2.2	Type B; Plot Drainage	296	m2	60	17,760	
2.2.3	Type C; Plot Drainage	160	m2	60	9,600	76,200
2.3	<u>Superstructure; Upper Floors</u>					
2.3.1	Type A; Upper Floors; timber joists	836	m2	38	31,768	
2.3.2	Type B; Upper Floors; timber joists	304	m2	38	11,552	
2.3.3	Type C; Upper Floors; timber joists	168	m2	38	6,384	49,704
2.4	<u>Superstructure; Roof</u>					
2.4.1	Type A; Roof; timber trusses. Conc. tiles	878	m2	80	70,224	
2.4.2	Type B; Roof; timber trusses. Conc. Tiles	319	m2	80	25,536	
2.4.3	Type C; Roof; timber trusses. Conc. Tiles	176	m2	80	14,112	109,872
2.5	<u>Superstructure; Stairs</u>					
2.5.1	Internal staircases; timber	34	nr	480	16,320	16,320
2.6	<u>Superstructure; External Walls</u>					
2.6.1	Type A; Cavity brickwork / internal blockwork	2,310	m2	120	277,200	

Beechtrees, Skelmersdale**Feasibility Estimate - Option C (24 Apartments & 34 New Housing Units)**

Ref:	Item	Q	U	R	T	To Summary
2.6.2	EO render / 1st floor feature	22	nr	750	16,500	
2.6.3	Type B; Cavity brickwork / internal blockwork	406	m2	120	48,768	
2.6.4	EO render / 1st floor feature	8	nr	750	6,000	
2.6.5	Type C; Cavity brickwork / internal blockwork	494	m2	120	59,280	
2.6.6	EO render / 1st floor feature	4	nr	750	3,000	410,748
2.7	Superstructure: Windows & External Doors					
2.7.1	Type A; Front Door; uPVC	22		750	16,500	
2.7.2	Type A; Rear Door; uPVC	22		450	9,900	
2.7.3	Type A; Windows; uPVC	286	m2	120	34,320	
2.7.4	Type B; Front Door; uPVC	8	nr	750	6,000	
2.7.5	Type B; Rear Door; uPVC	8	nr	450	3,600	
2.7.6	Type B; Windows; uPVC	104	m2	120	12,480	
2.7.7	Type C; Front Door; uPVC	4		750	3,000	
2.7.8	Type C; Rear Door; uPVC	4		500	2,000	
2.7.9	Type C; Windows	144	m2	120	17,280	105,080
2.8	Superstructure: Internal Walls					
2.8.1	Type A; Internal Walls	572	m	65	37,180	
2.8.2	Type B; Internal Walls	208	m	65	13,520	
2.8.3	Type C; Internal Walls	120	m	65	7,800	58,500
2.9	Superstructure: Internal Doors					
2.9.1	Type A; doors; timber incl. ironmongery	176	nr	60	10,560	
2.9.2	Type B; doors; timber incl. ironmongery	88	nr	60	5,280	
2.9.3	Type C; doors; timber incl. ironmongery	32	nr	60	1,920	17,760
2.10	Superstructure: Wall Finishes					
2.10.1	Type A; Plaster/ Emulsion paint / Gloss Paint	5,606	m2	12	67,274	
2.10.2	Type B; Plaster/ Emulsion paint / Gloss Paint	2,039	m2	12	24,463	
2.10.3	Type C; Plaster/ Emulsion paint / Gloss Paint	1,184	m2	12	14,206	
2.10.4	Type A; EO tiling	178	m2	30	5,330	
2.10.5	Type B; EO tiling	65	m2	30	1,938	
2.10.6	Type C; EO tiling	44	m2	30	1,324	
2.10.7	Type A; Gloss Paint; Skirting	2,242	m	3	6,727	
2.10.8	Type B; Gloss Paint; Skirting	815	m	3	2,446	
2.10.9	Type C; Gloss Paint; Skirting	474	m	3	1,421	
2.10.10	Gloss Paint staircase railing / newell posts	34	nr	65	2,210	127,338

Beechtrees, SkelmersdaleFeasibility Estimate - Option C (24 Apartments & 34 New Housing Units)

Ref:	Item	Q	U	R	T	To Summary
2.11	<u>Superstructure; Floor Finishes</u>					
2.11.1	Type A; non-slip vinyl	264	m2	35	9,240	
2.11.2	Type B; non-slip vinyl	96	m2	35	3,360	
2.11.3	Type C; non-slip vinyl	64	m2	35	2,240	14,840
2.12	<u>Superstructure; Ceiling Finishes</u>					
2.12.1	Type A; Insulation, Plaster & Emulsion	1,650	m2	20	33,000	
2.12.2	Type B; Insulation, Plaster & Emulsion	600	m2	20	12,000	
2.12.3	Type C; Insulation, Plaster & Emulsion	328	m2	20	6,560	51,560
2.13	<u>Superstructure; M&E Installations</u>					
2.13.1	Mechanical and Electrical Installations	2,578	m2	120	309,360	309,360
2.14	<u>Superstructure; Fixtures / Fittings & Equipment</u>					
2.14.1	Kitchen Installations	34	nr	1,500	51,000	51,000
3.0	<u>New Apartment Blocks</u>					
3.1	Substructure	780	m2	230	179,400	
3.2	Substructure; Apartment Drainage	2,340	m2	15	35,100	
3.3	Superstructure; Upper Floors; metal deck	1,560	m2	110	171,600	
3.4	Superstructure; Roof	835	m2	85	70,941	
3.5	Superstructure; External Walls	1,760	m2	120	211,200	
3.6	Superstructure; EO external walls for feature render	310	m2	15	4,650	
3.7	Superstructure; Windows; Apartments	152	m2	120	18,240	
3.8	Superstructure; Windows; Communal Areas	65	m2	120	7,800	
3.9	Superstructure; External Doors; Communal	8	nr	750	6,000	
3.10	Superstructure; Balcony Doors; Apartments	24	nr	450	10,800	
3.11	Superstructure; Balcony Rails; Apartments	16	nr	500	8,000	
3.12	Superstructure; Front Door; Communal Areas; glazed	8	nr	750	6,000	
3.13	Superstructure; Rear Door; Communal Areas; glazed	8	nr	750	6,000	
3.14	Superstructure; Internal Walls; Stud; Apartments	635	m	65	41,275	
3.15	Superstructure; Internal Walls; Block; Communal Areas; boarded one side	459	m2	90	41,310	
3.16	Superstructure; Internal Walls; Block; Apartment division wall; boarded both sides	141	m2	100	14,100	
3.17	Superstructure; Internal Doors; Apartments	144	nr	60	8,640	
3.18	Superstructure; Internal Doors; Communal Areas	24	nr	750	18,000	
3.19	Superstructure; Glazed screen; Communal Area	28	m2	300	8,400	
3.20	Superstructure; Glazed screen; Communal Area; upper floors	92	m2	300	27,600	

Beechtrees, Skelmersdale**Feasibility Estimate - Option C (24 Apartments & 34 New Housing Units)**

Ref:	Item	Q	U	R	T	To Summary
3.21	Superstructure; Wall Finishes; Apartments	4,104	m2	12	49,248	
3.22	Superstructure; Wall Finishes; Communal Areas	930	m2	12	11,160	
3.23	Superstructure; Floor Finishes; Apartments; vinyl	264	m2	35	9,240	
3.24	Superstructure; Floor Finishes; Apartments; carpet	1,104	m2	35	38,640	
3.25	Superstructure; Floor Finishes; Communal Areas; carpet	390	m2	35	13,650	
3.26	Superstructure; Ceiling Finishes; Apartments; Skim / Emulsion	1,488	m2	20	29,760	
3.27	Superstructure; Ceiling Finishes; Communal Areas / Skim / Emulsion	228	m2	20	4,560	
3.28	Superstructure; Communal Staircases	2	nr	4,500	9,000	
3.29	Superstructure; Communal Staircases; ballustrading; perforated metal	35	m	350	12,250	
3.30	Superstructure; Communal Staircases; handrails	75	m	100	7,500	
3.31	Superstructure; M&E Installations; Apartments	1,512	m2	66	99,792	
3.32	Superstructure; Electrical Installations; Communal	360	m2	35	12,600	
3.33	Superstructure; Apartment Phone Entry provisions	24	nr	750	18,000	
3.34	Superstructure; Fire Installations; Apartments; Communal	1	Prov.	20,000	20,000	
3.35	Superstructure; Fixtures / Fittings & Equipment; Apartments; Kitchens	24	nr	1,500	36,000	
3.36	Superstructure; Communal Areas; Entrance Canopies	1	Prov.	8,000	8,000	1,274,456
4.0	Site External Works					
4.1	Site Drainage	9,400	m2	20	188,000	
4.2	Turf (Apartments and Houses)	3,635	m2	6	21,810	
4.3	High Level Fencing; Houses; 1.8m timber close boarded	655	m	30	19,650	
4.4	High Level Fencing; Apartments; 1.8m timber close boarded	290	m	30	8,700	
4.5	Steel railing (1.8m high); bordering playing fields	175	m	120	21,000	
4.6	Low Level Fencing; Houses	250	m	20	5,000	
4.7	Garden Sheds; Houses	34	nr	250	8,500	
4.8	External Paving	1,400	m2	35	49,000	
4.9	Roadway / parking surfacing; Apartments	1,920	m2	45	86,400	
4.10	Roadway / parking surfacing; Houses	781	m2	45	35,145	
4.11	Planting (hedges, trees, shrubs)	1	Prov.	25,000	25,000	
4.12	External lighting to Apartment block areas	1	prov	15,000	15,000	
4.13	Entrance area ramping / railing to Apartment entrances	1	Prov.	15,000	15,000	
4.14	Allowance for Apartment block bin stores	1	Prov.	10,000	10,000	508,205
5.0	Services					

Ref:	Item	Q	U	R	T	To Summary
5.1	Incoming Electrical supplies	58	nr	1,350	78,300	
5.2	Incoming Gas supplies (houses only)	34	nr	350	11,900	
5.3	Water connections (Mains / Foul)	58	nr	850	49,300	
5.4	Incoming Telecoms (ducting only)	58	nr	200	11,600	
5.5	Allowance for Gas Governor	1	Prov	20,000	20,000	
5.6	New Electrical cabling (sub station to apartments)	500	m	150	75,000	
5.7	BWIC with new incoming services	10	%		24,610	270,710
6.0	Main Contractor Prelims					
6.1	Prelims	60	weeks	6,500	390,000	
6.2	OH&P / Design Development / Risk	4	%		179,024	569,024
					Grand Total:	4,654,626

Beechtrees, SkelmersdaleFeasibility Estimate - Option E - (Refurbish Existing Apartment blocks 1A - 1E, 12 New Housing Units)

Ref:	Item	Q	U	R	T	To Summary
1	<u>Demolitions and Alterations</u>					
1.2	Demolish existing flats (road opposite - 3 blocks)	2,610	m2	20	52,200	
1.3	Allowance to remove asbestos	1	Prov.	15%	7,830	
1.4	Break out existing hard standings (yellow)	760	m2	10	7,600	
1.5	Remove existing soft landscaping (pink)	725	m2	5	3,625	
1.7	Disposal of arisings off site	375	m3	20	7,495	
1.8	Allowance for contamination treatment	56	m3	75	4,216	
1.11	Rebuild gable ends (road opposite - 3 blocks)	1	Prov.	30,000	30,000	
1.12	Strip out / cap off existing redundant services	1	Prov.	8,000	8,000	120,966
2	<u>New Housing Units</u>					
2.1	<u>Substructure</u>					
2.1.1	Type A; Strip foundations; 150thk concrete slab	148	m2	230	34,040	
2.1.2	Type B; Strip foundations; 150thk concrete slab	148	m2	230	34,040	
2.1.3	Type C; Strip foundations; 150thk concrete slab	160	m2	230	36,800	
2.1.5	Provisional sum for abnormal foundations	1	Prov.	5%	5,244	110,124
2.2	<u>Plot Drainage</u>					
2.2.1	Type A; Plot Drainage	148	m2	60	8,880	
2.2.2	Type B; Plot Drainage	148	m2	60	8,880	
2.2.3	Type C; Plot Drainage	160	m2	60	9,600	27,360
2.3	<u>Superstructure: Upper Floors</u>					
2.3.1	Type A; Upper Floors; timber joists	152	m2	38	5,776	
2.3.2	Type B; Upper Floors; timber joists	152	m2	38	5,776	
2.3.3	Type C; Upper Floors; timber joists	168	m2	38	6,384	17,936
2.4	<u>Superstructure: Roof</u>					
2.4.1	Type A; Roof; timber trusses. Conc. tiles	160	m2	80	12,768	
2.4.2	Type B; Roof; timber trusses. Conc. Tiles	160	m2	80	12,768	
2.4.3	Type C; Roof; timber trusses. Conc. Tiles	176	m2	80	14,112	39,648
2.5	<u>Superstructure: Stairs</u>					
2.5.1	Internal staircases; timber	12	nr	480	5,760	5,760
2.6	<u>Superstructure: External Walls</u>					
2.6.1	Type A; Cavity brickwork / internal blockwork	420	m2	120	50,400	
2.6.2	EO render / 1st floor feature	4	nr	750	3,000	
2.6.3	Type B; Cavity brickwork / internal blockwork	203	m2	120	24,384	
2.6.4	EO render / 1st floor feature	4	nr	750	3,000	

Beechtrees, Skelmersdale

Feasibility Estimate - Option E - (Refurbish Existing Apartment blocks 1A - 1E, 12 New Housing Units)

Ref:	Item	Q	U	R	T	To Summary
2.6.5	Type C; Cavity brickwork / internal blockwork	494	m2	120	59,280	
2.6.6	EO render / 1st floor feature	4	nr	750	3,000	143,064
2.7 Superstructure: Windows & External Doors						
2.7.1	Type A; Front Door; uPVC	12		750	9,000	
2.7.2	Type A; Rear Door; uPVC	12		450	5,400	
2.7.3	Type A; Windows; uPVC	52	m2	120	6,240	
2.7.4	Type B; Front Door; uPVC	4	nr	750	3,000	
2.7.5	Type B; Rear Door; uPVC	4	nr	450	1,800	
2.7.6	Type B; Windows; uPVC	52	m2	120	6,240	
2.7.7	Type C; Front Door; uPVC	4		750	3,000	
2.7.8	Type C; Rear Door; uPVC	4		500	2,000	
2.7.9	Type C; Windows	72	m2	120	8,640	45,320
2.8 Superstructure: Internal Walls						
2.8.1	Type A; Internal Walls	104	m	65	6,760	
2.8.2	Type B; Internal Walls	104	m	65	6,760	
2.8.3	Type C; Internal Walls	120	m	65	7,800	21,320
2.9 Superstructure: Internal Doors						
2.9.1	Type A; doors; timber incl. ironmongery	32	nr	60	1,920	
2.9.2	Type B; doors; timber incl. ironmongery	44	nr	60	2,640	
2.9.3	Type C; doors; timber incl. ironmongery	32	nr	60	1,920	6,480
2.10 Superstructure: Wall Finishes						
2.10.1	Type A; Plaster/ Emulsion paint / Gloss Paint	1,019	m2	12	12,232	
2.10.2	Type B; Plaster/ Emulsion paint / Gloss Paint	1,019	m2	12	12,232	
2.10.3	Type C; Plaster/ Emulsion paint / Gloss Paint	1,184	m2	12	14,206	
2.10.4	Type A; EO tiling	32	m2	30	969	
2.10.5	Type B; EO tiling	32	m2	30	969	
2.10.6	Type C; EO tiling	44	m2	30	1,324	
2.10.7	Type A; Gloss Paint; Skirting	408	m	3	1,223	
2.10.8	Type B; Gloss Paint; Skirting	408	m	3	1,223	
2.10.9	Type C; Gloss Paint; Skirting	474	m	3	1,421	
2.10.10	Gloss Paint staircase railing / newell posts	12	nr	65	780	46,577
2.11 Superstructure: Floor Finishes						
2.11.1	Type A; non-slip vinyl	48	m2	35	1,680	
2.11.2	Type B; non-slip vinyl	48	m2	35	1,680	

Beechtrees, SkelmersdaleFeasibility Estimate - Option E - (Refurbish Existing Apartment blocks 1A - 1E, 12 New Housing Units)

Ref:	Item	Q	U	R	T	To Summary
2.11.3	Type C; non-slip vinyl	64	m2	35	2,240	5,600
2.12	<u>Superstructure: Ceiling Finishes</u>					
2.12.1	Type A; Insulation, Plaster & Emulsion	300	m2	20	6,000	
2.12.2	Type B; Insulation, Plaster & Emulsion	300	m2	20	6,000	
2.12.3	Type C; Insulation, Plaster & Emulsion	328	m2	20	6,560	18,560
2.13	<u>M&E Installations</u>					
2.13.1	Mechanical and Electrical Installations	928	m2	120	111,360	111,360
2.14	<u>Fixtures / Fittings & Equipment</u>					
2.14.1	Kitchen Installations	12	nr	1,500	18,000	18,000
3.0	<u>Existing Apartment Blocks: Refurbishment</u>					
3.1	Please refer to Previous Estimate Issued June 13	1	item	101.70%	602,582	612,839
4.0	<u>Site External Works</u>					
4.1	Site Drainage	2,310	m2	20	46,200	
4.2	Turf (Houses)	1,054	m2	6	6,324	
4.3	High Level Fencing; Houses; 1.8m timber close boarded	95	m	30	2,850	
4.4	High Level Fencing; Apartments; 1.8m timber close boarded	280	m	30	8,400	
4.6	Low Level Fencing; Houses	250	m	20	5,000	
4.7	Garden Sheds; Houses	12	nr	250	3,000	
4.8	External Paving	423	m2	35	14,788	
4.10	Roadway / parking surfacing; Houses	300	m2	45	13,500	
4.11	Planting (hedges, trees, shrubs)	1	Prov.	12,000	12,000	112,062
5.0	<u>Services</u>					
5.1	Incoming Electrical supplies	12	nr	1,350	16,200	
5.2	Incoming Gas supplies (houses only)	12	nr	350	4,200	
5.3	Water connections (Mains / Foul)	12	nr	850	10,200	
5.4	Incoming Telecoms (ducting only)	12	nr	200	2,400	
5.5	Allowance for Gas Governor	1	Prov	20,000	20,000	
5.6	New Electrical cabling (sub station to apartments)	350	m	150	52,500	
5.7	BWIC with new incoming services	10	%		10,550	116,050
6.0	<u>Main Contractor Prelims</u>					
6.1	Prelims	28	weeks	6,500	182,000	
6.2	OH&P / Design Development / Risk	4	%		70,031	252,031
					Grand Total:	1,831,056



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Appendix E

Option 4

Analysis and
costings

"To be a top performing
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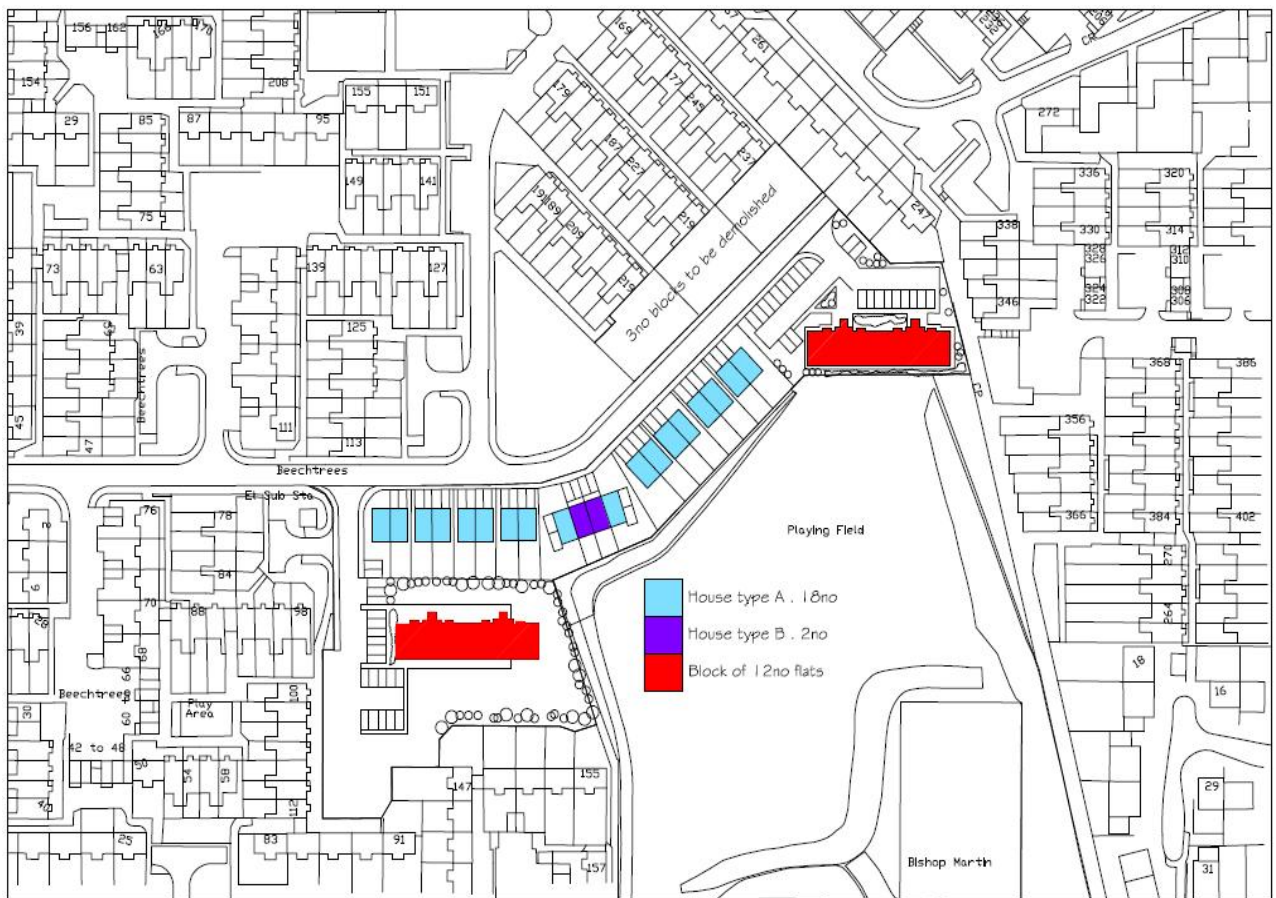
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1 Introduction

This report will deal with option 4 or the demolition and rebuild scenario.

This Option 4 consists of the demolition of nine blocks containing 48 flats and a short terrace of five houses, the subsequent cleared site would be followed by a potential redevelopment of the land, comprising approximately 44 new dwellings with a mix of houses and flats. In addition, the remaining 8 flats (including one leaseholder) would be partially refurbished to bring them up to the standard of other council properties in the area.

Below is a site plan showing a possible layout for this scheme.



2 Summary and scope of works.

The refurbishment work to be carried out would comprise briefly of:

- Partial refurbishment of 2no attached blocks in line with other council properties in the area
- Demolition of 3no blocks of 4 single bedroom flats each and clearing of site including making good to adjoining gables

The newbuild element of the work would comprise briefly of:

- Demolition of 6no blocks of flats and 5no houses and clearing of site.
- Construction of 20no new semi detached and terraced houses, nominally 2 bedroom, each with front and rear gardens and 2no off road parking spaces within the curtilage of the property
- Construction of 2no 3 storey blocks, each of 12 flats and landscaping to the surrounding areas

Description	Existing	Option 4
Total number of lettable units	59	51
1 Bedroom Dwellings	19	7
2 Bedroom Dwellings	27	44
Existing Houses	5	0
Bedsits	8	0
Useable garages integrated in flats	25	9
Occupied garages at time of report	13	9
Overall scheme cost	N/A	£4,271,361.00
Cost per remaining unit	N/A	£83,752.17

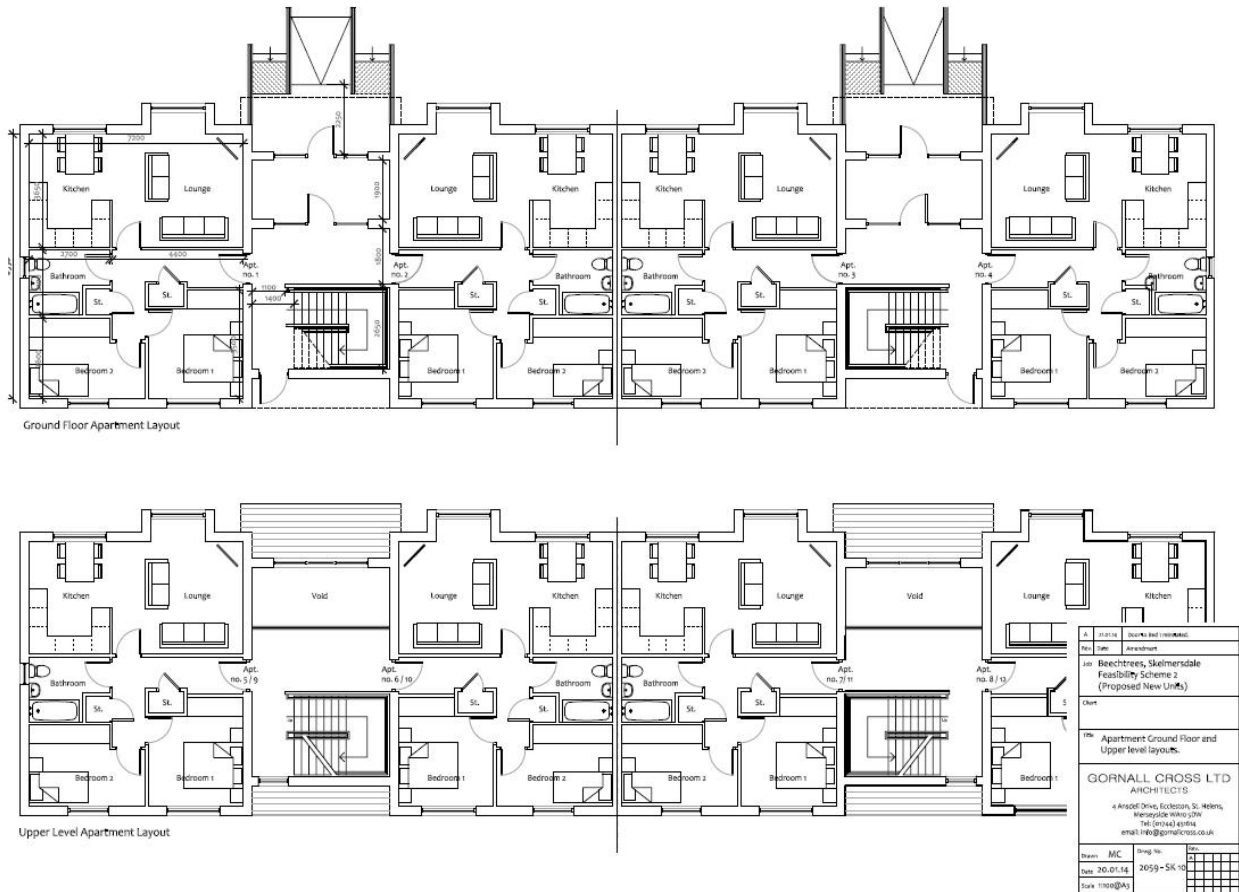
3 Proposed designs.

The proposed designs for option 4 utilise the same methodology and house design as used in option 3 with house types A and B. The layout as shown in chapter 1 consists of 8 pairs of semi detached houses and one row of 4 terraced houses. Below is an artists impression of how the scheme may look if this option is adopted



Each house has 2 off road parking spaces and a generous garden area.

The flats are designed as 3 storey blocks, each with 2 main entrances. Below are the proposed floor plans for the flats.



All flats have the same floor plan although the plan could easily be altered to form one bedroom flats where required.

Each flat incorporates a large open plan living room kitchen area with an attractive bay window area with a Juliet balcony to the upper floors. The bedrooms are of a generous size with good amounts of storage space.

The communal areas include an attractive triple height space immediately inside the main entrance doors which incorporates large windows to allow plenty of natural light into the communal areas. The approaches to the communal doors are ramped for access and have canopies over.

The external appearance of the flats is very different from the previous blocks but complements the style of other elements of the scheme. The protruding bays along with the accent colours and undulating roofline break up the front elevation and present a departure from the monolithic facades of the previous blocks.



Front Elevation



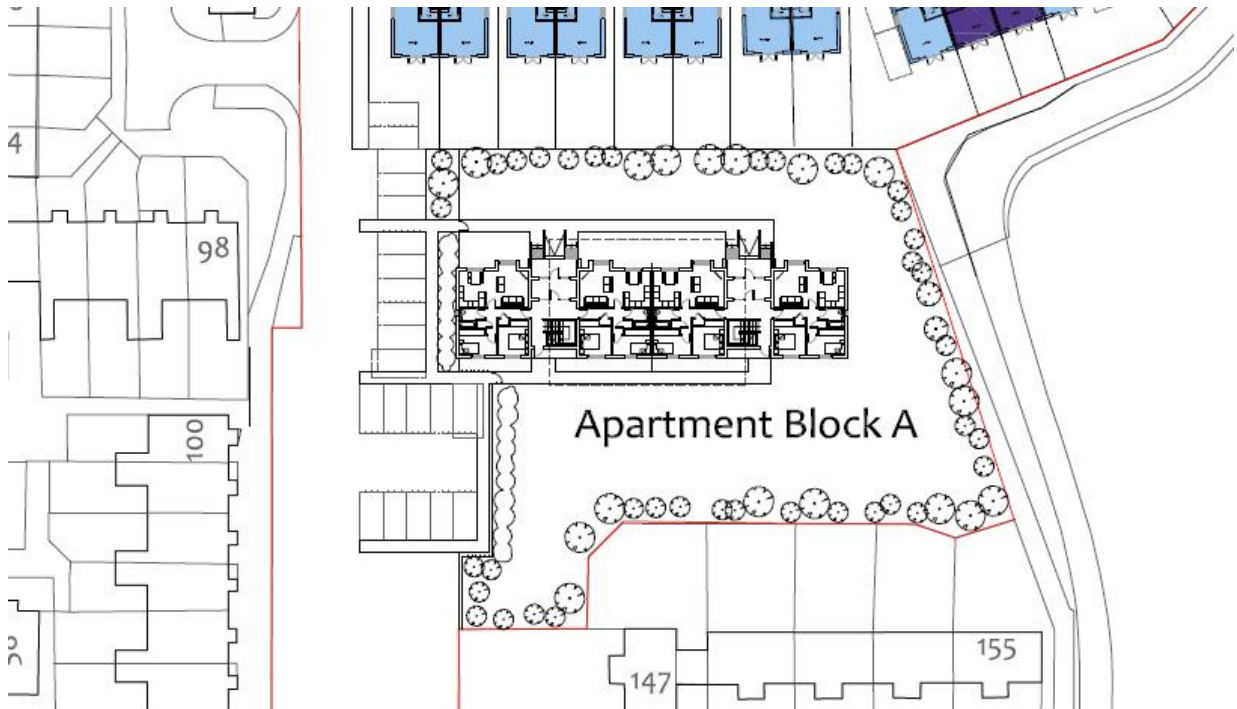
Rear Elevation

Side Elevation

Side Elevation

Rev	Date	Description
01		Bechtroes, Skelmersdale Feasibility Scheme 2 (Proposed New Units)
Client		
Apartment Ground Floor and Upper level layouts.		
GORNALL CROSS LTD ARCHITECTS 4 Ansdal Drive, Edenhall, St Helens, Merseyside WA22 2PW Tel: (01524) 45464 email: info@gornallcross.co.uk		
Drawn	MC	Proj No.
Date	20.01.14	2059 - SK 11
Scale	1:100	
Scale	(ft)	

The external areas around the apartments would be landscaped which would not only improve the appearance of the area but also create a partition between the flats and the new houses situated in front of them. Below is an example of a possible layout and parking arrangements of the block towards the south of the site



The exact layout and number of parking spaces needed would be finalised when the details of the scheme were confirmed. Raised planting beds at the edges of parking areas would provide a barrier between pedestrian and vehicle areas.

Below is an example of a possible layout and parking arrangements for the block towards the north of the site.



4 Projected costs

This section shows the breakdown of the costs for the demolition and rebuilding of a possible scheme of flats and houses.

In this Option it is proposed that all 48 flats in the 9 blocks and a single terrace of 5 houses be demolished, and rebuilt with a potential new development of around 44 dwellings on the cleared site. In addition, the two remaining blocks would be partially refurbished to bring them up to the standard of other council properties in the area as with options 2 and 3.

The possible new development may consist of 20 semi detached mews style houses and two detached purpose built blocks of flats containing a total of twelve flats each.

Fortunately for this possible scheme, there is only one lease holder property within the flats to be demolished. This property would require the lease buying back from the owner, and it would probably also incur costs for Home Loss, Disturbance and Legal Fees to allow the block to be demolished.

The costs for the demolition of the three attached blocks was based on the rates in the Architect's feasibility cost plan which is included as chapter 4 of appendix D.

The figures used are from the section identified in the cost plan. The unit cost for the newbuild houses has been calculated using the same assumptions as option 3. The number of units included in this section of the cost plan was 34 so this is the figures used to calculate the unit cost although 20 units are included in this option.

Description	Quantity	Overall cost	Unit cost
New Housing Units; Substructure	34	382,905	11,261.91
New Housing Units; Superstructure	34	1,322,082	38,884.76
Housing external works	34	258,105	7,591.32
Housing Services connections	34	115,810	3,406.18
Prelims and OHP	34	284,512	8,368.00
Professional fees @8%	1		5,560.98
Total cost per unit			75,073.15

The unit cost differs slightly from the one used in option 3 as the schemes were separated in the cost plan to allow them to be more site specific.

The following table shows the figures used to calculate the unit cost for the construction of the new apartment blocks.

Description	Quantity	Overall cost	Unit cost
Apartments: Substructure	24	214,500	8,937.50
Apartments: Superstructure	24	1,059,956	44,164.83
Apartments: external works	24	250,100	10,420.83
Apartments: Services connections	24	154,900	6,454.17
Prelims and OHP	24	284,512	11,854.67
Professional fees @8%	1		6,546.56
Total cost per unit			88,378.56

Cost breakdown for possible Demolition and NewBuild proposal.

Using the rates calculated above, the following estimation was produced for option 4

Property type	Quantity	Unit Cost	Total
Demolition costs	1	£280,220	£280,220
Semi detached mews house	20	£75,073	£1,501,463
2 bed flat	24	£88,379	£2,121,085
Buy back of leasehold property, including for disturbance home loss and legal fees	1	£42,500	£42,500
Home loss payment including admin fees	47	£5,170	£242,990
Partial Refurbishment of 2 attached Blocks	1	£83,102	£83,102
		Total Basic Cost	£4,271,361

The figure of £42,500 for the buying back of the lease from the leaseholder was provided by the Development section and is a predicted value only, which could go up or down from this level depending upon the market value at the time of sale. As demonstrated in Table 1 above, it can be seen that the potential demolition and rebuilding cost would be £4.27m, depending upon the level and quality of specified materials, fixtures and fitting within the potential properties.

The value of £5,170 for the home loss payment has had a 10% cost uplift to account for administration fees. This payment is only eligible to be paid to tenants that have been in residence in the property for a minimum of 12 months.

This equates to a refurbishment cost of £83,752.17 per dwelling dependent upon the quality of the fixtures and fittings.

A cash flow analysis has been carried out on the possible scheme based upon the following assumptions;

Initial cost of investment using the basic quality scheme cost of £4,271,361 or £83,752.17 per dwelling.

Rate of inflation 3.2%

Annual management and Repair cost per dwelling £1,436

Starting rent for 2 bedroom house £84.16

Starting rent for 2 bedroom flat £80.00

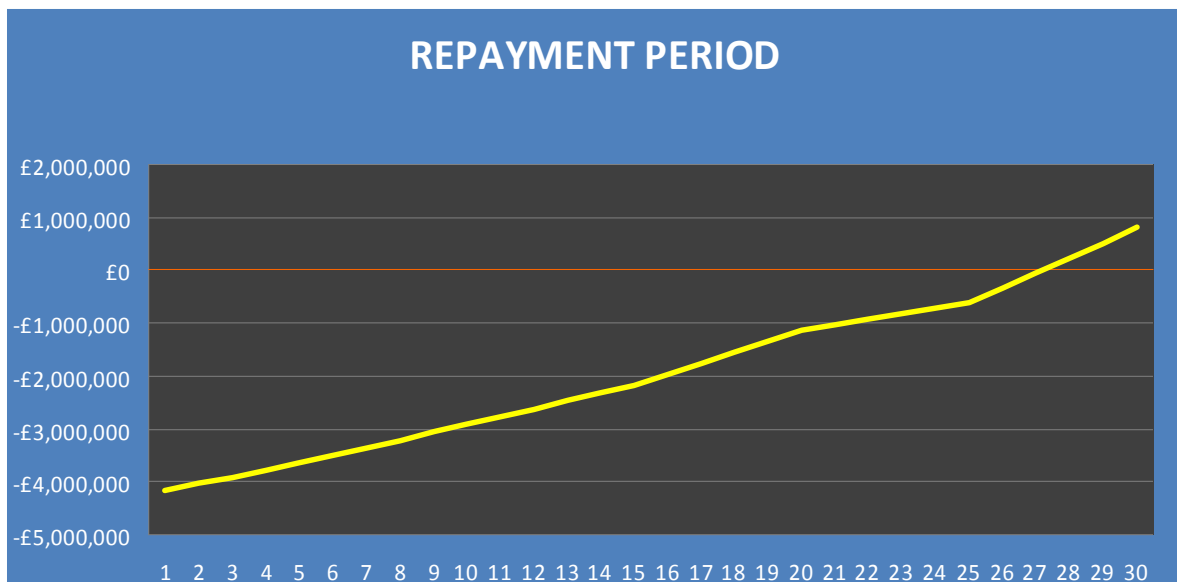
Starting rent for 1 bedroom flat £71.77

The second and third cycle renewals have been accounted for over the 30 years for Kitchens, Boilers, Heating distribution, Communal doors and Communal Decoration.

An assumed number of void periods per year of 3 properties at 2 weeks each.

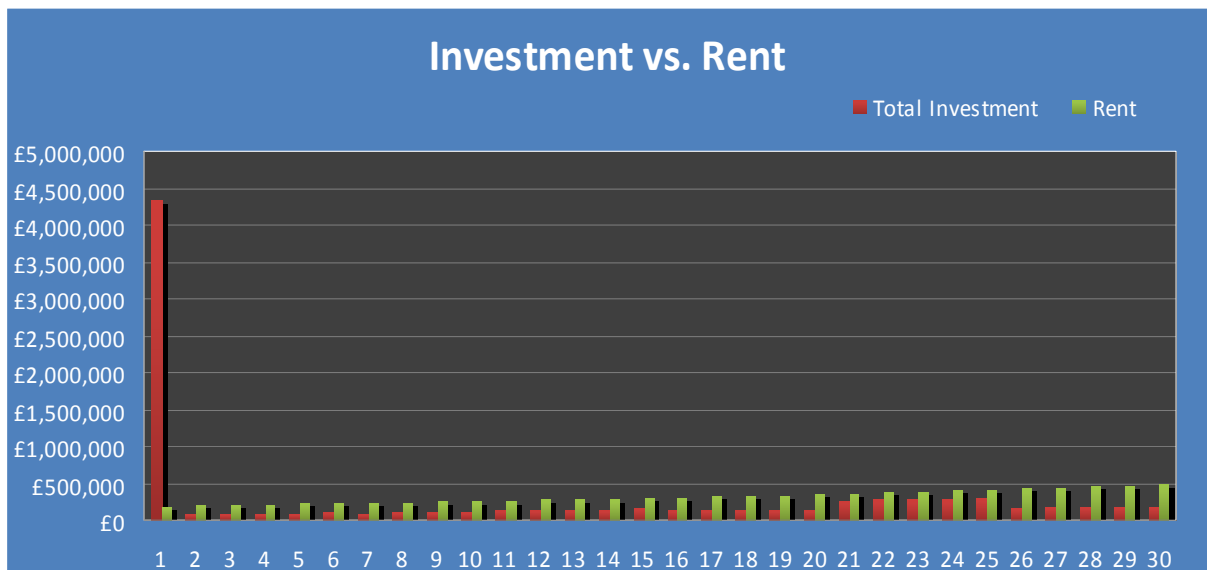
This could produce the following graph.

GRAPH 1 payback period for Option 4



As can be seen in the above graph 1 the displayed cost neutral point is between years 27 and 28.

GRAPH 2 Income against Expenditure for Option 4



As can be seen in Graph 2 the rental income exceeds the expenditure by a small amount in every year except the first, which contains the substantial primary capital investment.

Even though this option is losing 52 lettable dwellings, it would benefit from the New Homes Bonus on the 44 new build dwellings. This bonus is likely to be around £350 per dwelling per year, and is payable over a 6 year period.

5 Outcome

- The cost of this possible proposal could be £4.27m
- This potential option could payback, that is become cost neutral, in between 27 and 28 years
- We acquire 44 brand new thermally efficient dwellings.
- There should be a reduction in the maintenance cost as all elements of the dwelling are new.
- The total rentable stock would reduce by 8 dwellings.
- One lease would require buying back.
- Under-utilised land would remain where the attached blocks of flats were demolished.
- This option will leave little remaining capital to address problems with similar flats.



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Appendix F

Option 5

Analysis and
costings

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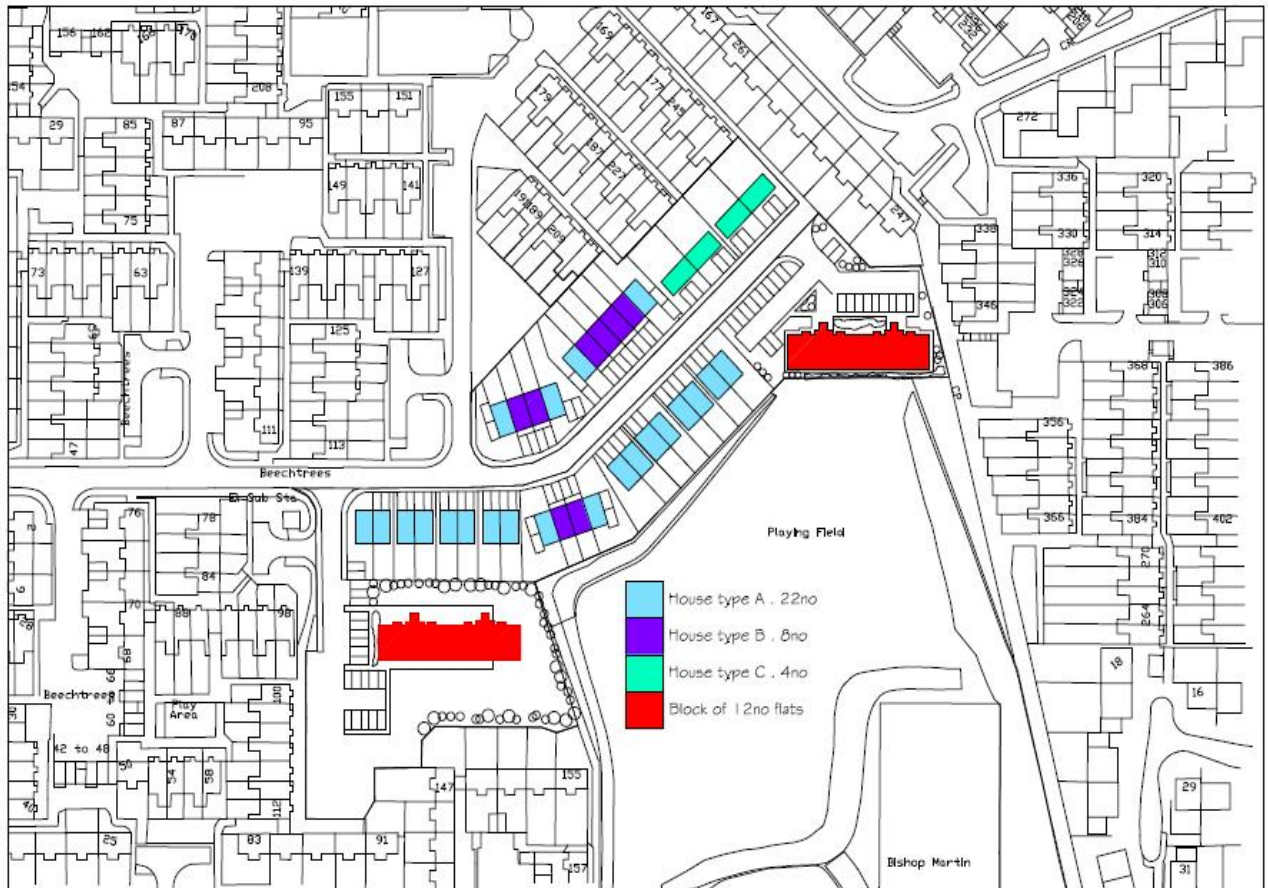
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1 Introduction

This report will deal with option 5 or the demolition and rebuild scenario.

This Option 5 consists of the demolition of all nine blocks containing 48 flats and a short terrace of five houses and 4 end of terrace houses, the subsequent cleared site would be followed by a potential redevelopment of the land, comprising approximately 58 new dwellings with a mix of houses and flats.

Below is a site plan showing the proposed layout for this scheme.



2 Summary and scope of works.

The refurbishment work to be carried out would comprise briefly of:

- Partial refurbishment of 2no attached blocks in line with other council properties in the area

The newbuild element of the work would comprise briefly of:

- Demolition of 9no blocks of flats and 9no houses and clearing of site.
- Construction of 34no new semi detached and terraced houses, nominally 2 bedroom, each with front and rear gardens and 2no off road parking spaces within the curtilage of the property
- Construction of 2no 3 storey blocks, each of 12 flats and landscaping to the surrounding areas

Description	Existing	Option 5
Total number of lettable units	63	65
1 Bedroom Dwellings	19	7
2 Bedroom Dwellings	27	58
Bedsits	8	0
Existing houses	9	0
Useable garages integrated in flats	25	9
Occupied garages at time of report	13	9
Overall scheme cost	N/A	£5,355,889.00
Cost per remaining unit	N/A	£82,398.28

3 Proposed designs

The component elements of option 5 are included within previous options nos 3 and 4. This option combines the newbuild elements of both of the previous option to create a full new development. Below is an artists impression of how the development may look if this scheme is adopted



Below is the proposed site plan prepared by the architect showing the house types and proposed landscaping for the full scheme.



4 Projected costs

This section shows the breakdown of the costs for the demolition and rebuilding of a possible scheme of flats and houses.

In this Option it is proposed that 48 flats in the 9 blocks a single terrace of 5 houses and 4 end of terrace houses be demolished. The resulting cleared site being redeveloped with a potential new development scheme of around 58 new dwellings.

The possible new development may consist of 34 semi detached and linked mews style houses and two detached purpose built blocks of flats containing a 12 flats each.

Fortunately for this possible scheme, there is only one lease holder property within one of the existing blocks of flats. This property would require the lease buying back from the owner, and it would probably also incur costs for Home Loss, Disturbance and Legal Fees to allow the block to be demolished.

The demolition costs were calculated using the same figures as the previous options, extrapolated from the feasibility cost plan included in Appendix D

The unit costs for newbuild flats and houses are the same as those used in option 4. Further details can be found in Appendix E.

TABLE 1 Cost breakdown for possible Demolition and NewBuild proposal.

Property type	Quantity	Unit Cost	Total
Demolition costs	1	£293,044	£293,044
Semi detached mews house	34	£75,073	£2,552,487
2 bed flat	24	£88,379	£2,121,085
Buy back of leasehold property, including for disturbance home loss and legal fees	1	£42,500	£42,500
Home loss payment including admin fees	51	£5,170	£263,670
Partial Refurbishment of 2 attached Blocks	1	£83,102	£83,102
		Total Basic Cost	£5,355,889

The figure of £42,500 for the buying back of the lease from the leaseholder was provided by the Development section and is a predicted value only, which could go up or down from this level depending upon the market value at the time of sale. As demonstrated in Table 1 above, it can be seen that the potential demolition and rebuilding cost could be £5.36M.

The value of £5,170 for the home loss payment has had a 10% cost uplift to account for administration fees. This payment is only eligible to be paid to tenants that have been in residence in the property for a minimum of 12 months.

This equates to a refurbishment cost of £82,398.28 per dwelling dependent upon the quality of the fixtures and fittings.

A cash flow analysis has been carried out on the possible scheme based upon the following assumptions;

Initial cost of investment using the basic quality scheme cost of £5,355,889 or £82,398.28 per dwelling.

Rate of inflation 3.2%

Annual management and Repair cost per dwelling £1,436

Starting rent for 2 bedroom house £84.16

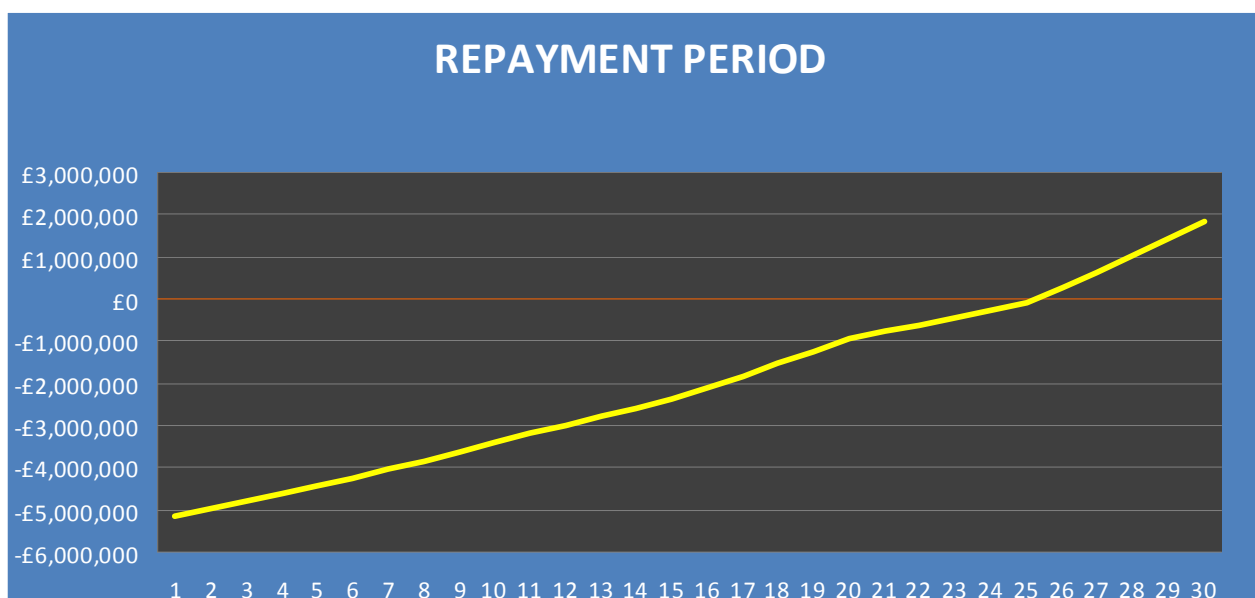
Starting rent for 2 bedroom flat £80.00

Starting rent for 1 bedroom flat £71.77

The second and third cycle renewals have been accounted for over the 30 years for Kitchens, Boilers, Heating distribution, Communal doors and Communal Decoration. An assumed number of void periods per year of 5 properties at 2 weeks each.

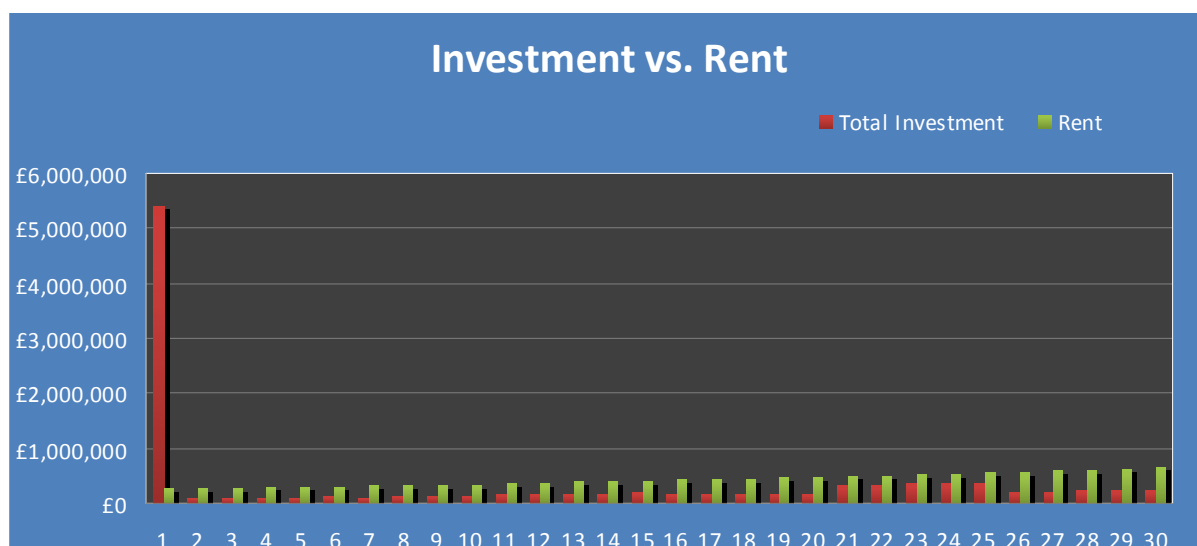
This could produce the following graph.

GRAPH 1 payback period for Option 5



As can be seen in the above graph 1 the displayed cost neutral point occurs between years 25 and 26

GRAPH 2 Income against Expenditure for Option 5



As can be seen in Graph 2 the rental income exceeds the expenditure by a small amount in every year except the first, which contains the substantial primary capital investment.

Even though this option is losing 57 dwellings, it would benefit from the New Homes Bonus on the 58 new build dwellings. This bonus is likely to be around £350 per dwelling per year, and is payable over a 6 year period.

3.1 Outcome

- The cost of this possible proposal could be £5.36M
- This potential option could payback, that is become cost neutral, in 25-26 years
- We acquire 58 brand new thermally efficient dwellings.
- There should be a reduction in the maintenance cost as all elements of the dwelling are new.
- This option would have the greatest visual impact of all the options
- The total rentable stock would increase by 2.
- One leaseholder would require their lease buying back.
- This option will leave little remaining capital to address problems with similar flats.



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Appendix G

Option 6

Analysis and
costings

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1 Introduction

This report will deal with option 6 or the demolition and sale of land scenario with outline planning permission.

This option 6 consists of the demolition of nine blocks containing 48 flats, a short terrace of five houses and 9no end terrace houses. The subsequently cleared site could be offered for sale with outline planning permission for residential redevelopment of approximately 58 dwellings.

The purpose of this appendix is to illustrate the relative merits this option.

2 Projected costs

This section covers the Clearance and subsequent Sale of the land with outline planning permission.

The costs for demolition of the flats and houses have been taken from the feasibility cost plan included in Appendix D. As with earlier options, the figure stated was adjusted due to the over-estimation in the Architect's document.

Again fortunately for this possible scheme, there is only one lease holder property within the existing blocks of flats to be demolished. This property would require the lease buying back from the owner, and it would probably also incur costs for Home Loss, Disturbance and Legal Fees to allow the blocks to be demolished.

TABLE 1 Cost breakdown for potential Sale of land

Property type	Quantity	Unit Cost	Total
Demolish costs complete including service disconnections and making good	1	-£264,191	-£264,191
Demolition of Houses to increase land area and value	9	-£3,206	-£28,853
Buy back of leasehold property, including for disturbance home loss and legal fees	1	-£42,500	-£42,500
Home loss payment including admin fees	56	-£5,170	-£289,520
Fees and Contingencies	1	-£62,500	-£62,500
Semi detached mews house	20	-£75,073	£1,501,460
2 bed flat	24	-£88,379	£2,121,096

The figure of £42,500 for the buying back of the lease from the leaseholder was provided by the Development section and is a predicted value only.

The value of £5,170 for the home loss payment has had a 10% cost uplift to account for administration fees. This payment is only eligible to be paid to tenants that have been in residence in the property for a minimum of 12 months. In this option, all residents to be displaced are assumed to be entitled to the home loss payment as a worst case scenario.

A figure of £62,500 has been assumed for consultants and specialists fees and also includes for a contingency sum, the total of which is approximately 10% of the estimated demolition and home loss costs. This of course should be increased if there is a substantial increase in any of the estimated costs.

The newbuild costs have been taken from option 5. It is assumed that any development of the site would be similar in nature and therefore cost to the scheme proposed by ourselves.

In order to obtain an accurate value for the land, an analysis has been produced by the estates department. The costs detailed above have been offset against the potential market value of the new houses in the scheme.

The scheme allows for 10% affordable housing which could only be sold at a discounted rate.

3 Estates Department Valuation of Site

	Note No.
GROSS VALUE OF COMPLETED SCHEME £3,290,000	
less allowance for 10% affordable housing £148,050	1
less costs of sale £31,420	4
NET CAPITAL VALUE £3,110,53	
DEMOLITION/SITE COSTS (<i>use fixed value</i>) £293,000	5
<i>Interest on demolition costs (whole building period)</i> £45,415	3
BUY BACK HOMELOSS LEGALS/DIST £332,020	5
<i>Interest on above costs (whole building period)</i> £51,463	3
BUILDING COSTS: £4,673,572	5
<i>Interest on building costs - finance (half the building period)</i> £362,202	3
FEES AND CONTINGENCIES £62,500	5
<i>Interest on fees (two thirds of building period)</i> £8,333	3
BUILDING COSTS AND INTEREST £5,445,021	
DEVELOPERS PROFIT £1,089,004	6
TOTAL COSTS: £6,534,026	
RESIDUAL LAND VALUE -£3,423,495	2

Notes to Valuation

1 Assumption: affordable element is valued at 55% MV. A change to this percentage will not have a significant effect on the valuation

2 This valuation includes all fees and a contingency sum

3 This valuation is carried out on a market value basis so interest is calculated on all costs due to the need for purchasers to obtain finance on the acquisition

Even if interest/finance was not applicable the valuation would not be effected enough to make the scheme commercially viable

4 Costs of selling finished properties - Agents' fees

5 Figures provided by customer

6 An open market sake would be to a developer who would require a profit on the scheme. This is estimated to be 20% of the build costs

A reduction in developers profit would still not make the scheme viable

4 Outcome

- Potentially 58 new build properties with minimum 10% affordable housing
- The residual value of the land is negative due to the low market value of the finished scheme. In order to allow a developer to make a profit, a substantial cash incentive would need to be offered essentially giving the land a net value of -£3,423,495
- This scheme would not be financially viable unless the market value of the new houses and flats were to double.
- Potential positive affect on business plan from reduction in maintenance, management and capital investment costs but this would be cancelled by the costs involved.
- Number of rentable units reduced by 56 dwellings and 16 garages.
- No further income from rent or development potential would be possible from this site if this option were adopted



Beechtrees Flats Option Appraisal

2013/14

Appendix H
Tenant
satisfaction
survey

Results and
analysis

"To be a top performing
landlord within an
economically vibrant
West Lancs"

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1 Introduction and Purpose of the Report

As part of the ongoing option appraisal of the flats on Beechtrees, Digmaor, a consultation exercise was carried out in August 2013

There are 56 flats on Beechtrees comprising of 8no Bedsits, 20no 1 bed flats and 28no 2 bed flats. 2 of the flats have been sold leasehold but they were included in the questionnaire.

They have suffered for many years with a high turnover of tenancies and high void levels. Combined with high repair costs, this has caused the flats to have a negative NPV (net present value).

The purpose of this report is to try to determine which issues are most important to the tenants in order to ascertain how any future investment may be most effectively used.

2 Methodology

The consultation took the form of a questionnaire. A copy of this questionnaire is shown in appendix 1.

The questionnaire was designed by the Option Appraisal team to examine the range of social problems and maintenance issues that are known to exist in the flats, and determine which are considered by the tenants to be the most serious. Additionally, general satisfaction with the properties and the area at large was included with a number of opportunities for the tenants to raise any further issues which may not have been specifically included.

To allow more effective analysis of the data, several questions regarding the circumstances of the tenants themselves were included. The survey itself was anonymous but includes identification of the block to allow any area specific data to be identified and analysed.

The questionnaire was printed using in-house printing facilities using mail merge data exported from our housing management system. This enabled the letters to be individually addressed.

The questionnaire pack included a return envelope which was pre-paid to encourage a good response.

The questionnaire was distributed using the standard Royal Mail second-class post.

After the initial responses over approximately 3 weeks this was followed up with a site visit to knock on doors and hand out questionnaires manually.

Finally, another letter and questionnaire was sent to all flats in blocks from which we had previously received no responses.

On its return the data was entered into a spreadsheet where it was analysed.

3 Response

This section shows the proportion of questionnaires returned.

Out of the 56 questionnaires distributed, 12 were returned – this equates to 21.4%.

With such a small survey it is important to obtain as many responses as possible. Using both postal distribution and door to door distribution is the best way to ensure this.

Table 2: Returns by Block

Block	Returned	Sent	Percentage Return
124-134	2	6	33.3%
136-146	1	6	16.7%
148-158	0	6	0%
160-170	1	6	16.7%
172-182	1	6	16.7%
184-194	0	6	0%
193-199	1	4	25%
211-217	0	4	0%
229-235	1	4	25%
42-48	1	4	25%
60-66	2	4	50%
Unspecified	2	-	

Outcomes

- Due to the size of the survey and the number of returns, the usual confidence level of 95% cannot be achieved within a reasonable confidence indicator. (Actual confidence indicator was calculated as 20.76%)
- With such a small number of actual returns, analysis of the spatial distribution of responses becomes difficult.
- Bearing these limitations in mind, the returns from the attached blocks constitute a far higher percentage of surveys sent out than in the detached blocks. This figure is 25% for the attached blocks compared to 14% for the detached blocks. In terms of actual surveys, however the numbers are the same
- Of the blocks where no returns were received at all, 2 were detached blocks compared to 1 attached block.

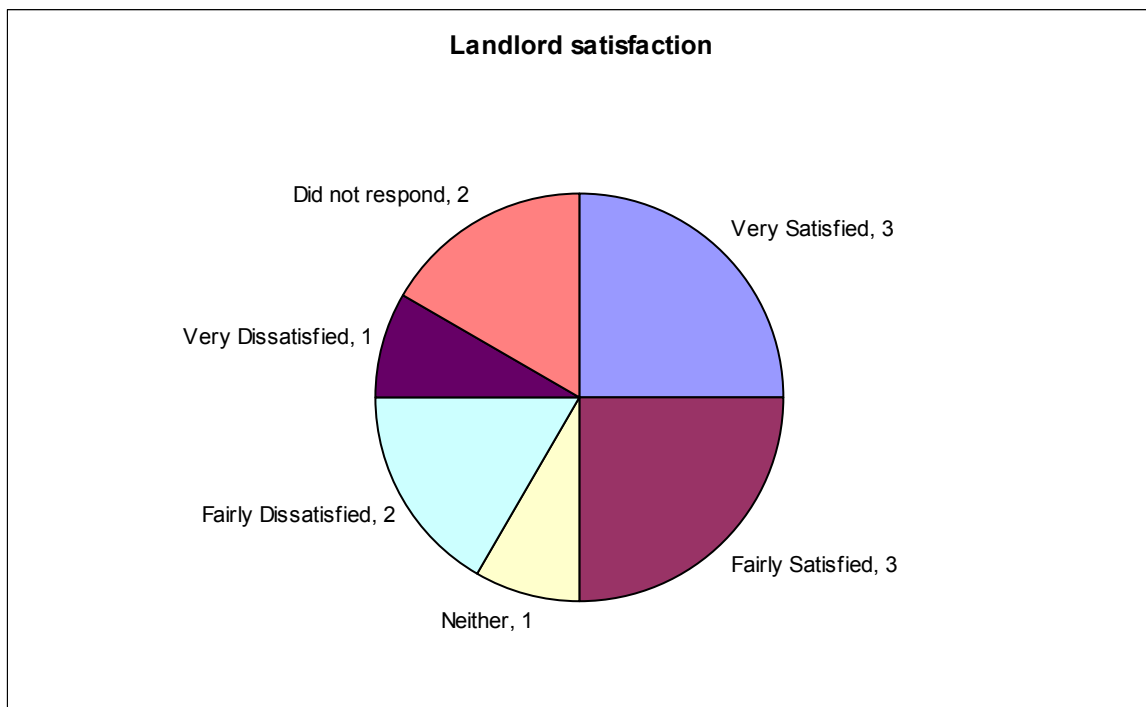
4 Results:

4.1 Section 1: About where you live

This section covers the first 4 questions asked on the survey, which relates to the area in general and what it is like to live there.

Question 1: Overall, How satisfied are you with WLBC as your landlord?

Of the 12 surveys received, there were 10 responses to this question. The chart below shows the results.

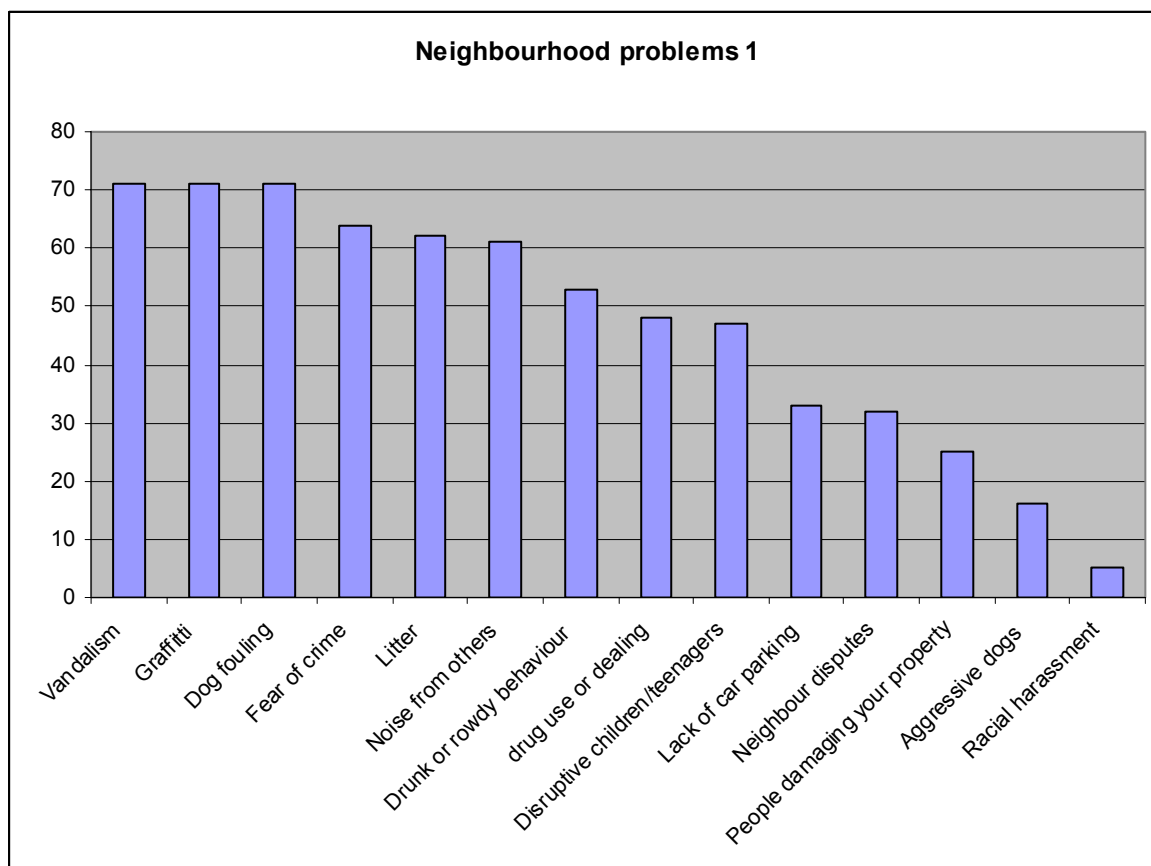


Outcomes

- As the chart shows, half of the responses fall into the positive category, being either very or fairly satisfied. This compares to one quarter negative responses. This demonstrates relative confidence, among the tenants on Beechtrees in the Council's ability to manage the problems in the area and perform the duties of landlord.

Question 2: Do you feel your neighbourhood suffers from any of the following problems?

In order to analyse the data from this question, the answers were given a numerical value. 10 for a major problem, 5 for a minor problem and 0 for not a problem. In addition, points were added for any items that were identified as one of the three biggest problem areas. The overall scores were then added together and the results are displayed below. The data has been sorted in order of score.

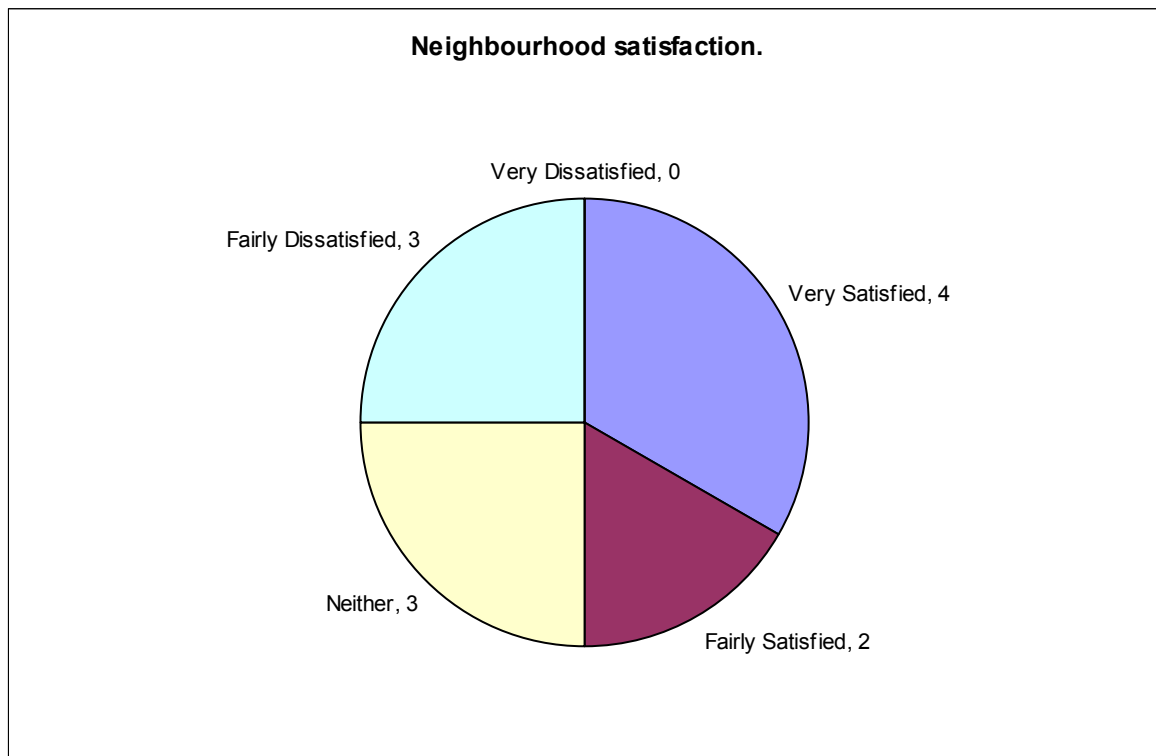


Outcomes

- All of the problems identified were considered to be present to some extent by at least one of the respondees.
- 4 of the top 5 scoring problems, Vandalism, Graffiti, Dog fouling, and litter concern the appearance and maintenance of the communal areas and the estate at large. This is reinforced by the fact that damage to individual property and disputes with neighbours score relatively low on the scale of priorities.

Question 3: How Satisfied/Dissatisfied are you with the neighbourhood as a place to live?

This question deals with the neighbourhood at large and follows on from the previous question. The results are shown in the chart below.



Outcomes

- As the chart shows, half of the responses fall into the positive category, being either very or fairly satisfied. This compares to one quarter (3) negative responses. This demonstrates relative confidence, among the tenants on Beechtrees in the Council’s ability to manage the problems in the area and perform the duties of landlord.

Question 4: What single thing would make your living environment better?

A variety of answers were understandably received for this question covering. To display the data the answers were grouped into 3 main categories.

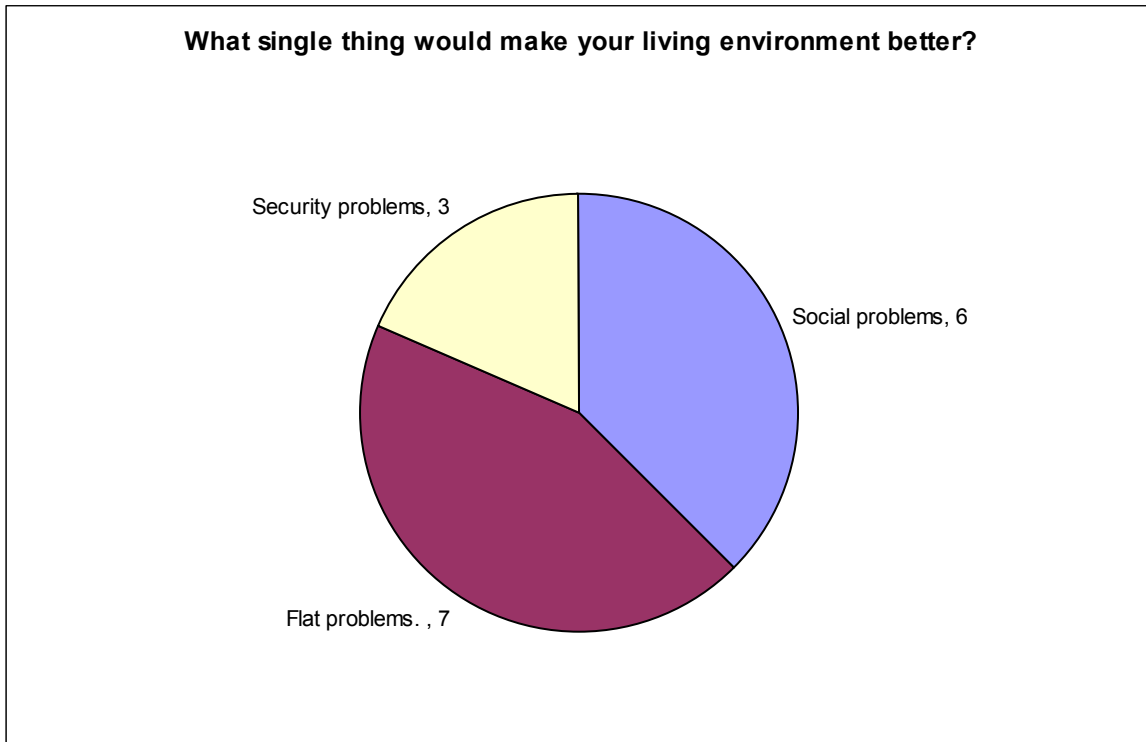
Social problems refers to removal of drug dealers, graffiti, vandalism and dog fouling. Also neighbour disputes and disruptive behaviour in the area.

Flat problems refers to repairs and upgrades perceived as being needed to the properties themselves. Replacement windows, communal doors and heating systems

were the most frequently mentioned but improved landscaping and general maintenance were also mentioned.

Security problems refers to indications of increased security needed such as more police and CCTV.

The number of responses exceeds the number of surveys received as, despite the wording of the question, the majority of the answers contained more than one point.



Outcomes

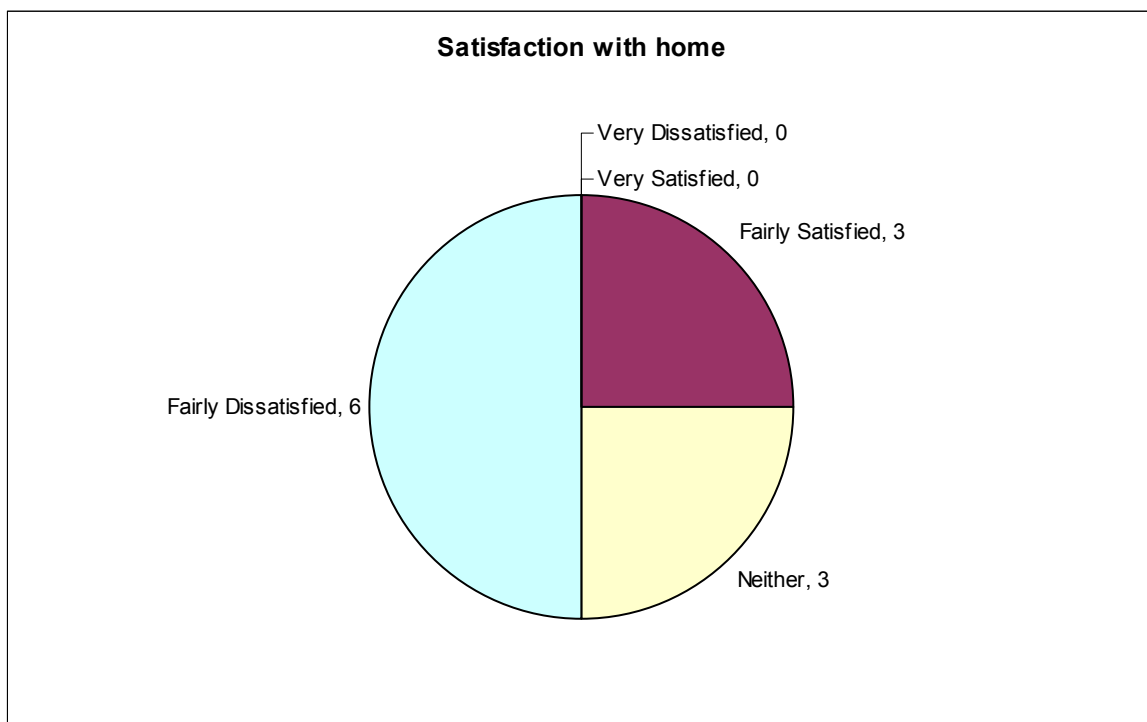
- As the chart shows, most of the responses fell into the category of either flat problems or social problems. It is difficult to draw conclusions from this due to the way in which most of the respondees chose to answer the question.

4.2 Section 2: About your home

This section covers the next 9 questions asked on the survey, which relate to the flats themselves and which are the most important issues to the tenants.

Question 5: Overall, how Satisfied/Dissatisfied are you with the quality and condition of your home.

This question deals specifically with the flats themselves such as disrepair and updating of major elements such as heating and windows.



- As the chart shows, half of the responses fall into the negative category, being fairly dissatisfied. This compares to one quarter positive responses. This clearly demonstrates a need to improve the quality of the accommodation.

Question 6: Is your home comfortable to live in? Please say why/why not.

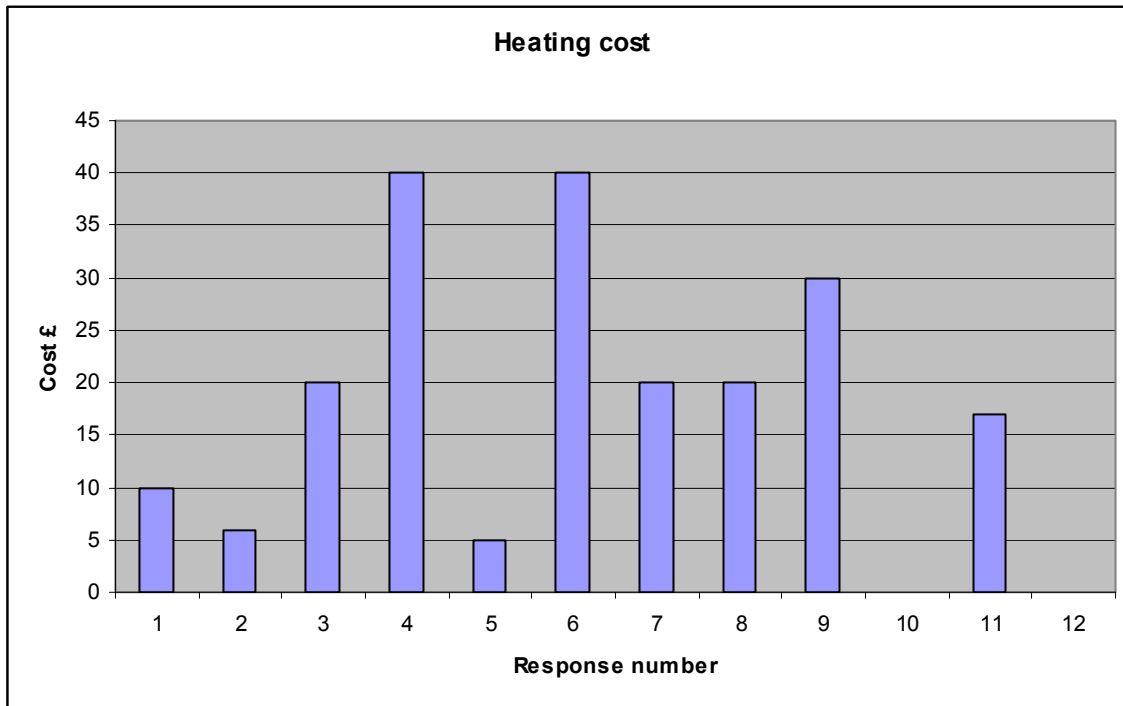
- Once again, a variety of answers were received to this question. Only 4 of the 12 responses were positive.
- Of the 6 respondees who answered 'fairly dissatisfied' to question 5, 5 indicated that difficulty to effectively heat the property was the reason it was not comfortable.
- Of the 6 other respondees, 2 indicated that difficulty to effectively heat the property was the reason it was not comfortable.
- One respondee declined to answer this question.

Question 7: Do you pay for your electricity with a Key/Card meter or a bill?

- Of the 12 responses received, only 1 indicated the electricity was paid by Bill. This could indicate that either the current or previous tenants have had credit problems in the past.

Question 8: Approximately how much do you spend on heating per week?

The heating systems in the flats on Beechtrees are economy 7 storage heaters and have not been replaced as a scheme throughout the estate for many years. Combined with the single glazed windows still present in the flats and the relatively low amount of wall insulation, the heating systems are far from optimal. The chart overleaf shows the answers received from the 12 respondees.

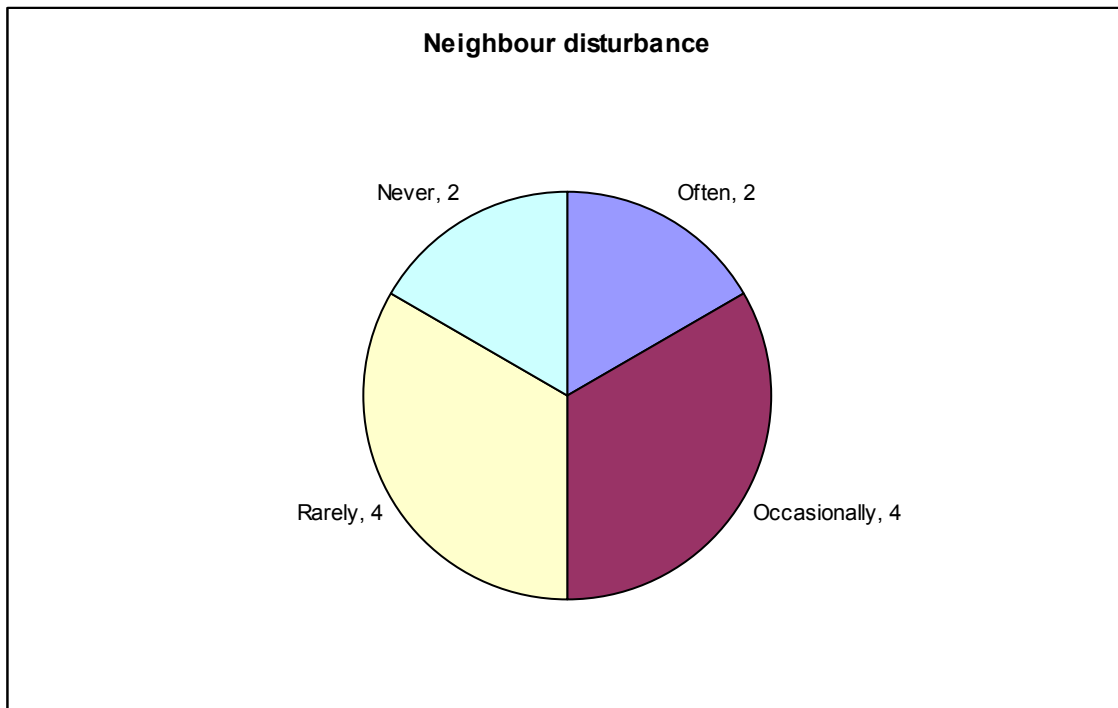


Outcomes

- There is a fairly large range of answers but the mean value is £20.80. The median and mode figures are both £20 so this provides reasonable confidence that the average weekly spend on heating for the Beechtrees flats would be around £18-£23.
- This survey includes bedsits, 1 and 2 bedroom flats. Taking the mean value, the yearly heating cost would average at £1,081.60 per year. This compares to an average throughout all homes in the UK of £587 (according to Uswitch.com)
- Despite the extremely high heating costs, many of the comments received in response to question 6 indicated that the flats were cold, damp or drafty.
- The survey was carried out in the middle of a very warm summer. This may have an effect on the responses of the tenants, especially if they had not been present through the last winter.
- The figures given are based on an estimate made by the tenants of what proportion of the overall electric cost would be attributed to heating. The accuracy of this estimate and therefore the assumed averages could vary greatly.

Question 9: Are you disturbed by noise from others living in the block?

This question follows on from question 2 which identified noise from others and neighbour disputes as potential problems in the area. The results are shown in the chart overleaf

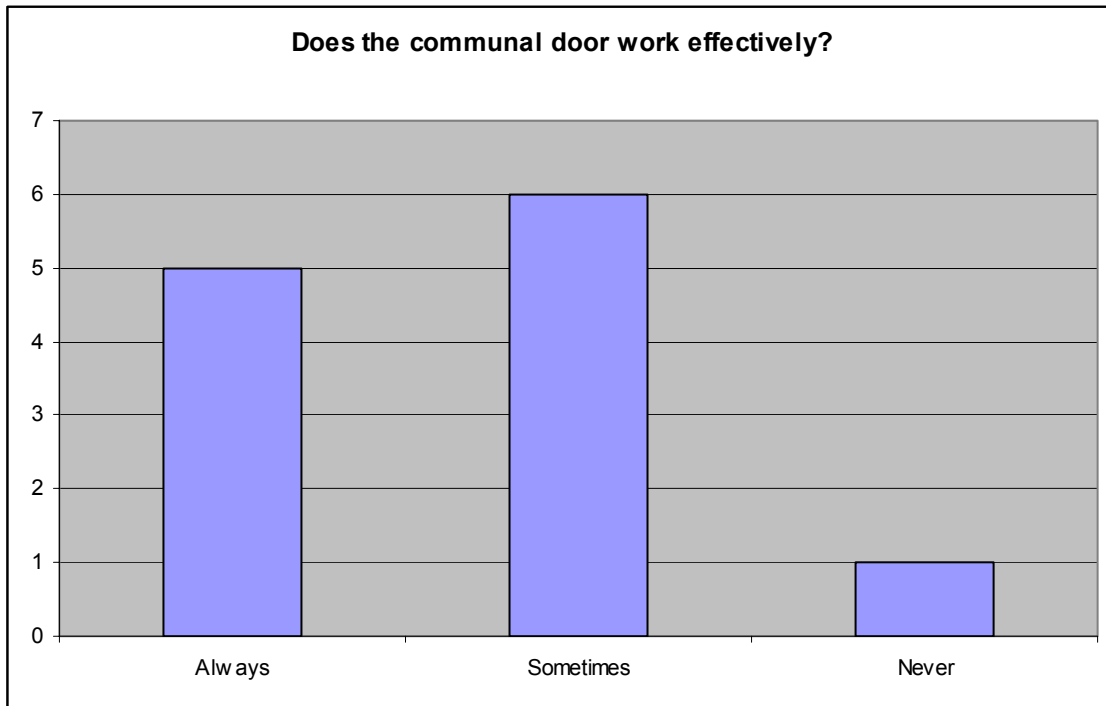


Outcomes

- Only 2 of the respondees answered 'often' to the above question. Both of these responses were received from people in block 124-134. This suggests a specific problem which may be addressed by housing management.
- Only 2 respondees answered 'never'. One of these did not specify which block they lived in so it is impossible to say whether there may a quieter area.

Question 10: Does the communal door work effectively?

There are 3 types of communal door on Beechtrees. The detached blocks have steel fob entry doors with magnetic locks fitted within the last 5 years. 3 of the attached blocks have key operated polycarbonate faced doors which are around 10 years old. The remaining 2 attached blocks have newer aluminium doors fitted within the last 3 years. Most have suffered at least some vandalism but the degree of damage varies greatly.

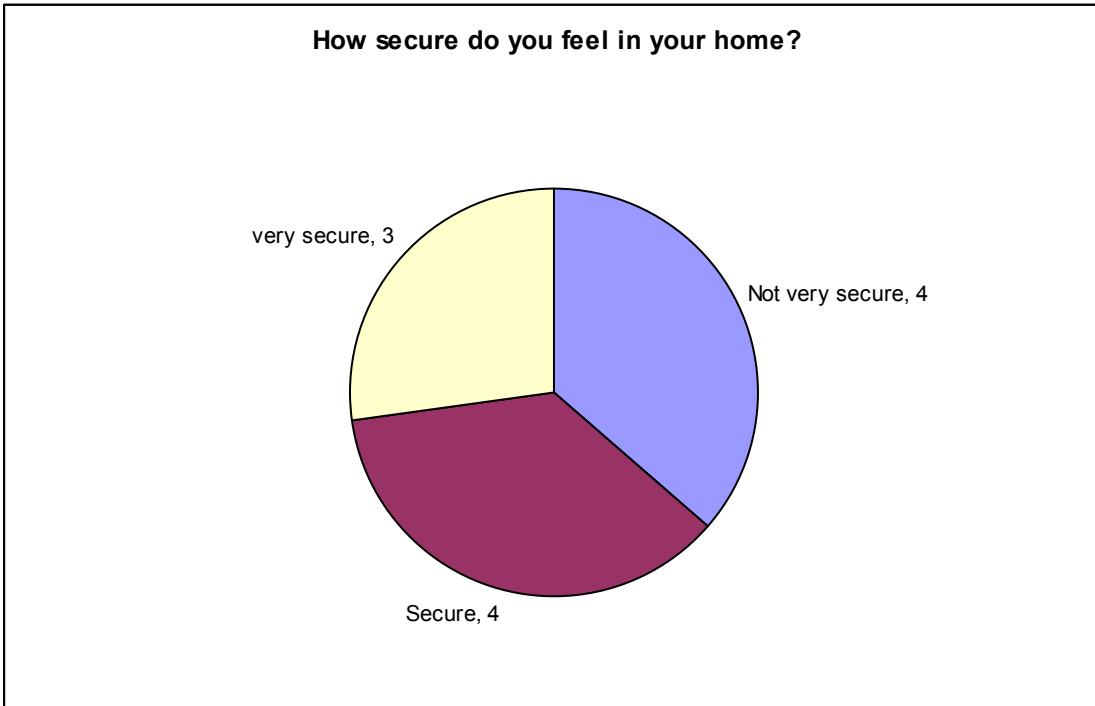


Outcomes

- The answers to this question are largely opinion based and therefore inherently unscientific. This is reinforced by the fact that the respondent that stated the door 'never' worked effectively lives in the same block as another respondent who chose 'sometimes' as the answer.
- It is discouraging that a relative minority of tenants perceive their communal door as always working effectively.

Question 11: How secure do you feel in your home?

This question follows on from the last as the effectiveness of the communal doors would have a direct effect on the perceived security of the tenants. In addition, the individual flat entrance doors and the social issues in the area will have a bearing on how secure the tenants feel.

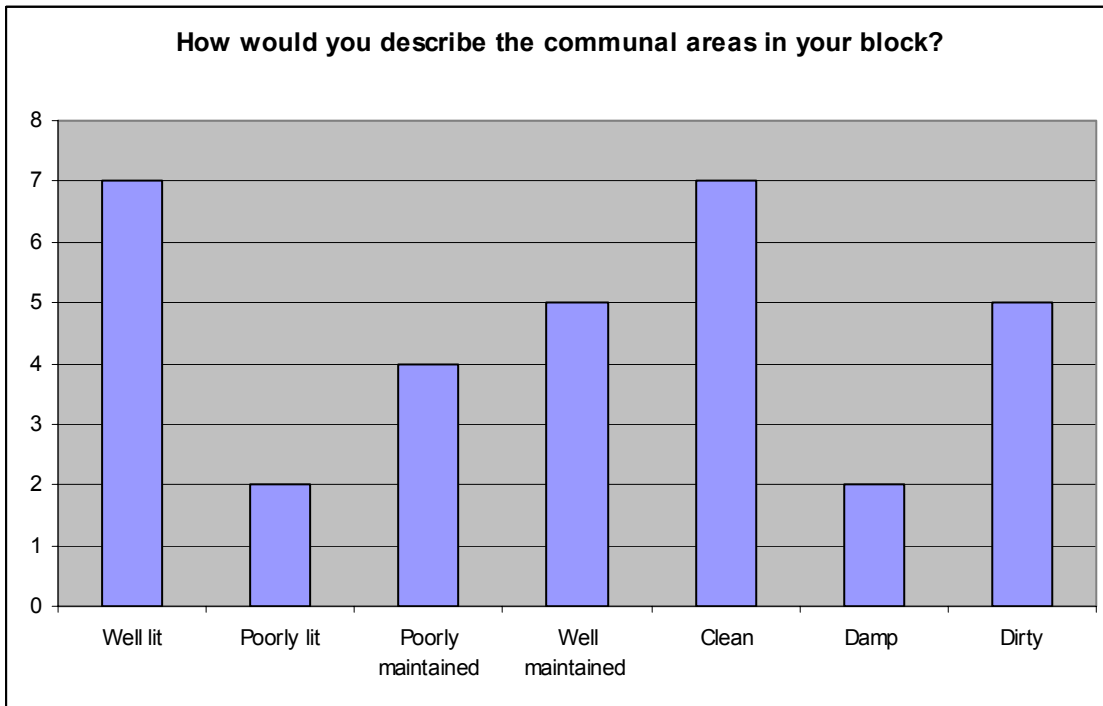


Outcomes

- The results displayed above could be viewed in 2 ways. If the answer 'secure' is viewed as a positive response, then the overall result is positive with 7 of the 12 respondees returning positive responses. If it is regarded as neutral, however, the opposite is true with more tenants feeling not very secure than very secure. Therefore, looked at in isolation, the results of this question overall are inconclusive.
- Looking at the results by block, 2 of the 3 respondees who felt 'very secure' in their homes were from the 5 attached blocks compared to 1 from the detached blocks. The results are reversed for the 'not very secure responses with 2 from the detached blocks, 1 from an attached block and 1 with no block reference.

Question 12: How would you describe the communal areas in your block?

This question was designed to assess the perception of the communal areas. Most of the blocks have not been fully refurbished for many years and there have been issues in the past with vandalism and cleanliness. There are no windows in the communal areas of the detached blocks so it was thought that poor lighting may be an issue. The results are shown overleaf.



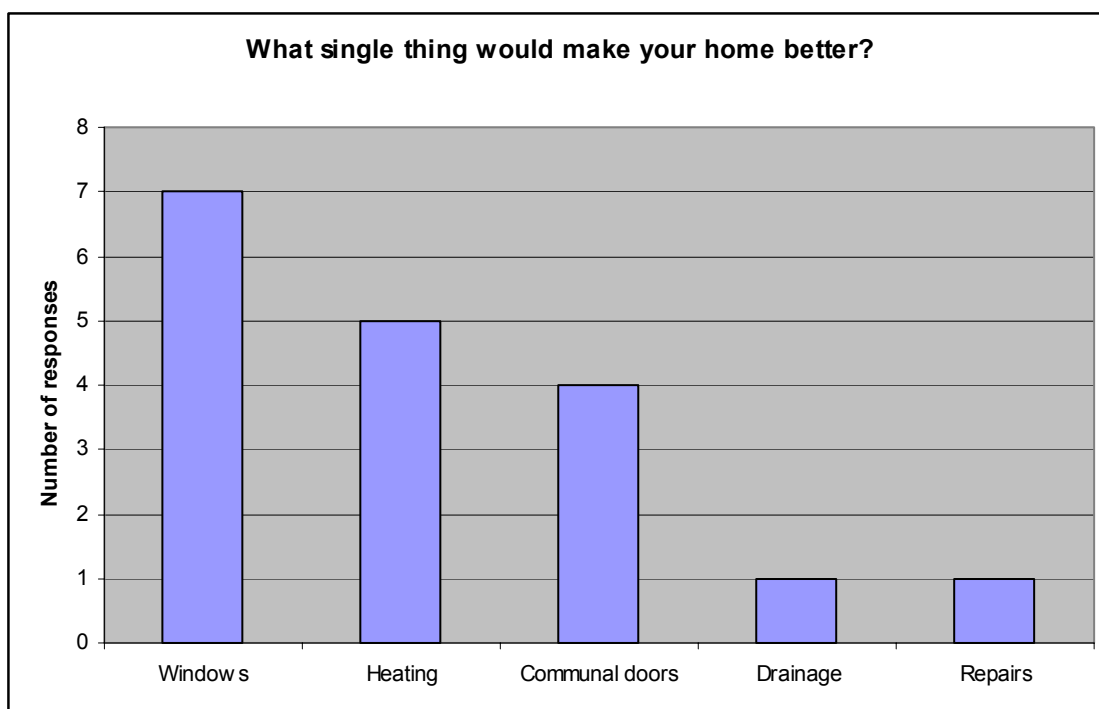
Outcomes

- The two most frequently recorded impressions of the communal areas are that they are clean and well lit.
- More respondents considered their communal areas to be well maintained than poorly maintained.
- The results are necessarily opinion based, as is demonstrated by the fact that of the 2 respondents from block 124-134, one considered the communal areas to be well maintained and clean, whereas the other considered them to be poorly maintained and dirty. Of the 2 respondents from block 42-48, one responded that the communal areas were clean while the other considered them dirty. These observable anomalies suggest that further detailed conclusions from specific results may not be reliable.
- Overall, the number of positive responses was 19 compared to 13 negative ones, suggesting the communal areas could be improved but generally seem to meet the expectations of the tenants.

Question 13: What single thing would make your home better?

As with question 4, a range of answers were received to this question. Due to the nature of the question, however, enough similar responses were received to allow the specific areas to be examined.

The results displayed below again show more responses than the number of questionnaires received because most responses contained more than one answer.



Outcomes

- The results show clearly that replacement windows are the highest priority to the tenants. The flats in Beechtrees have UPVC framed single glazed windows that were fitted approximately 25 years ago. They are among the last areas of single glazing in the WLBC housing stock. The houses on Beechtrees and other estates in the area have recently been included in the window replacement programme and many of the tenants of the flats were disappointed that they were not.
- Heating is also a very high priority due to the current system of storage heaters. As demonstrated in question 8, the heating costs for these flats appear to be very high and a more efficient heating system could greatly improve this.
- The inclusion of replacement communal doors in these results is in line with information from questions 4, 10 and 11 regarding the reliability of the communal doors and the relative sense of security they convey.

4.3 Section 3: About you.

This section deals with the respondees themselves to determine whether there is a link between the personal circumstances of the tenants and their experience of living in the flats

Do you have one or two bedrooms?

The attached blocks contain only 1 bedroom flats and the detached blocks are made up of 2 no bedsits and 2 no 2 bedroom flats. In the case of block 124-134 and 148-158, the bedsits have been converted into 2 bedroom flats. The responses were divided equally between 1 and 2 bedroom flats with 2 respondees giving no answer.

How long have you lived here?

One of the key aims of the estate management of the flats on Beechtrees is to combat the high turnover of tenancies so information regarding the current lengths of tenancy will help to understand the scope of the problem.

The range of answers received to this question was greatly varied and therefore fairly difficult to interpret but some of the main statistics are included in the table below. Of the 12 surveys received, 11 answered this question.

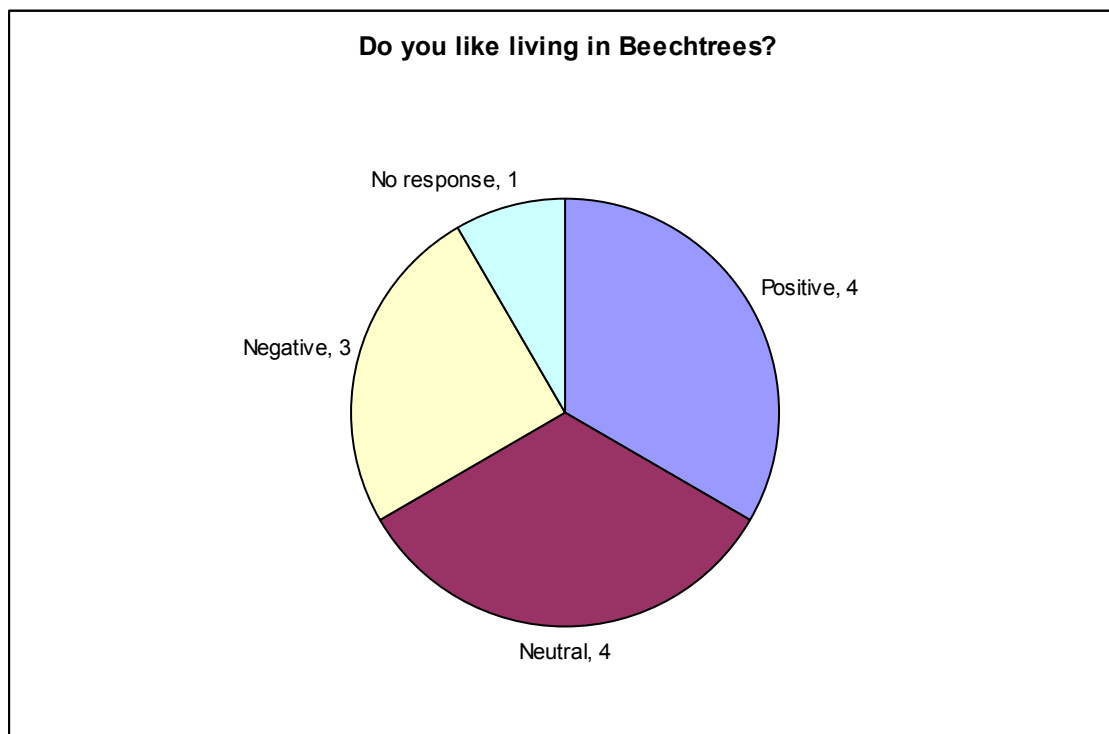
How long have you lived here?	
Lowest answer received	4 Months
Highest answer received	312 Months
Mean result	59 Months
Median result	30 Months
Modal result	12 Months
Mean result disregarding highest and lowest answers	43 Months
Percentage of answers 36 months or below	64%
Percentage of answers 72 months and below	82%

As the table shows, the average length of tenancy is very difficult to estimate and the results vary according to the method used.

It is clear that the majority of tenants have lived for less than 6 years in their current flat. A reasonable estimate of an average tenancy may be between 1 and 5 years. This reinforces the assumption that there is a high turnover of tenancies in this area.

Do you like living in Beechtrees?

A wide range of responses to this simple question were received ranging from fervent enthusiasm to complete indifference. To display the data the responses are categorised into positive, neutral and negative as shown below.



As the chart shows the answers were fairly evenly spread between the three categories. Given the relatively low confidence level in the answers due to the number of responses received it is essentially impossible to draw any meaningful conclusions.

Where did you live before here?

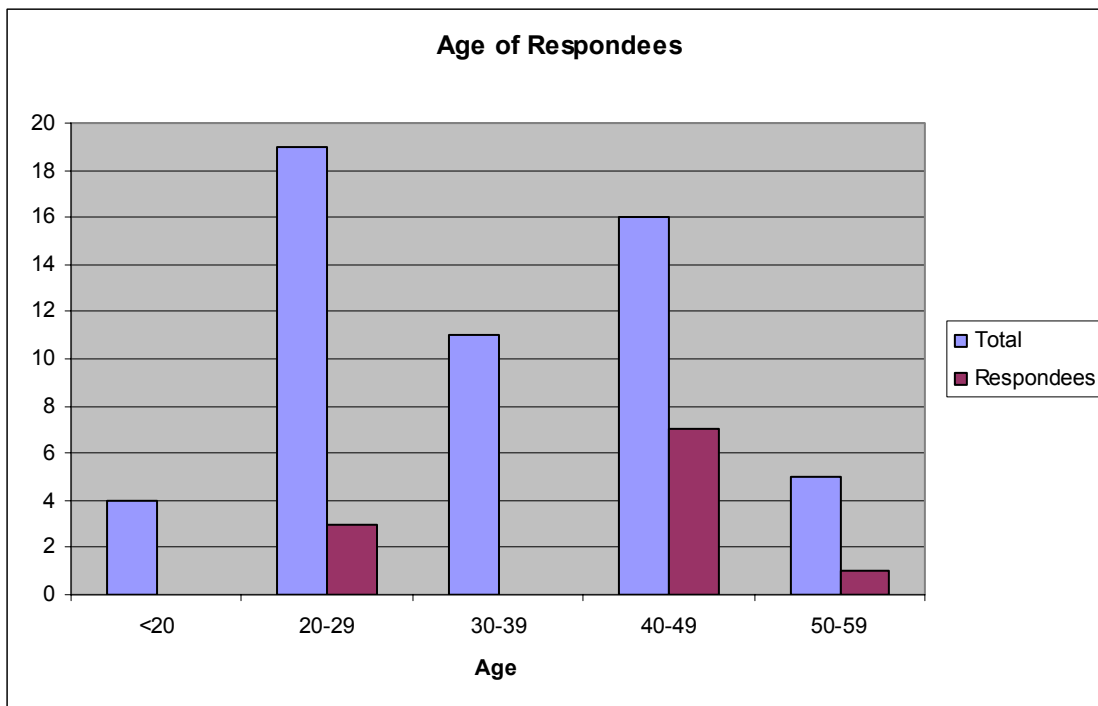
The table below shows a summary of the results received for this question. The answers are grouped to demonstrate geographical area.

Where did you live before here?	
Total answers received	9
Within Digmaor	2
Within Skelmersdale	6
Within West Lancs	7
Within the North West	8
Within the UK	9

- The majority of respondees have previously lived within a few miles of Beechtrees with two thirds from within Skelmersdale. This gives a fairly strong indication that relatively few tenants are moving in to Beechtrees from other areas.
- The survey was only sent in English so any tenants for whom English was not a first language may be less likely to respond.

What age are you?

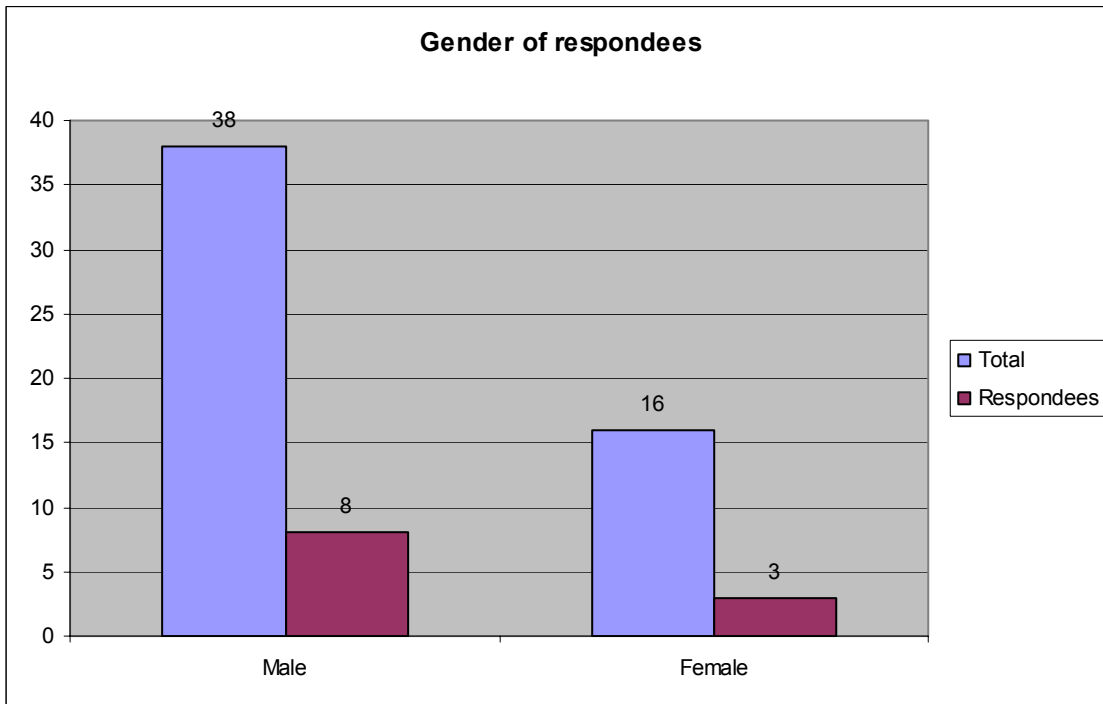
In order to assess how indicative the responses were of the Beechtrees flats at large, the results are shown in comparison to the ages of all of the tenants. The results are shown below



- As the chart shows, there was no response at all from tenants in the under 20 and 30-39 categories although these categories make up 27% of the tenants.
- 58% of the respondees were aged 40-49 whereas tenants in this category make up 29% of the total.
- 25% of the respondees were aged 20-29 whereas tenants in this category make up 34.5% of the total.
- 9% of the respondees were aged 50-59 whereas tenants in this category make up 8% of the total.
- One respondent did not answer which accounts for the last 8%
- The responses clearly did not represent an accurate cross section of the tenants in the Beechtrees flats. This could further reduce the reliability of the answers received although to what extent cannot be predicted.

Are you male or female?

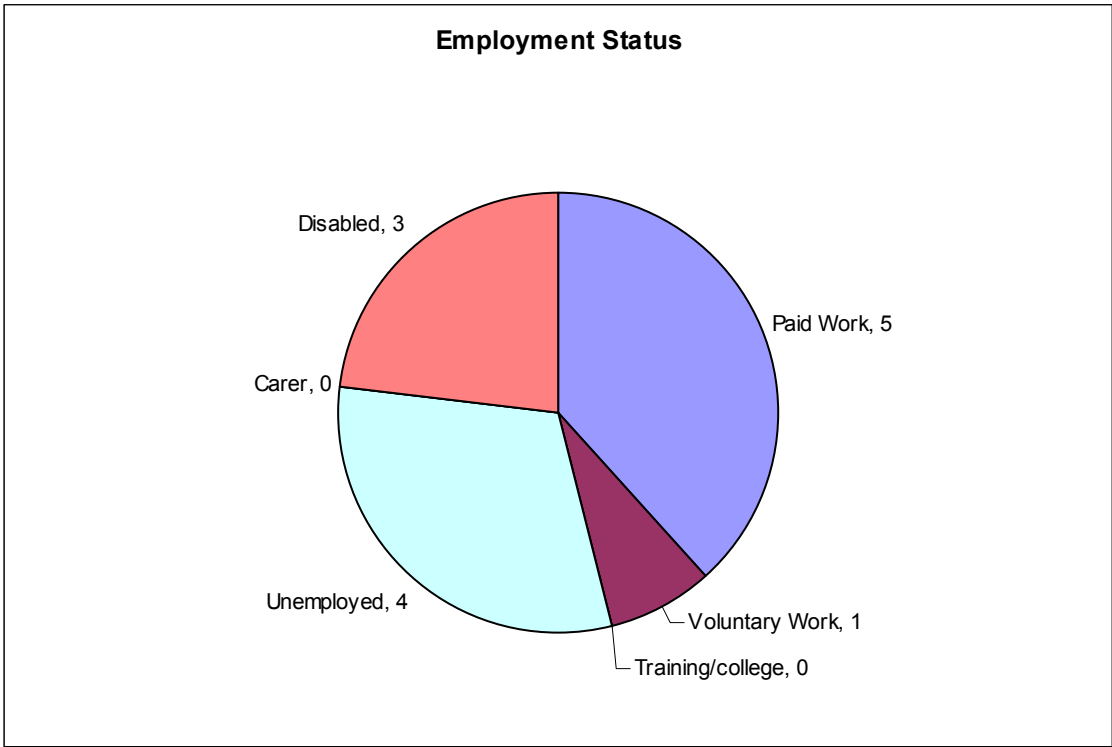
As with the previous question, the table below shows the results from the questionnaire responses compared to the overall figures for the Beechtrees flats.



- Male respondees make up 67% of the responses received while male tenants make up 70% of all of the tenants in the Beechtrees flats.
- Female respondees make up 25% of the responses received while female tenants make up 30% of all tenants in Beechtrees flats.
- One respondee did not answer this question which accounts for the last 8% of the responses. So the male and female populations on the flats in Beechtrees are proportionally represented by the responses received.
- The data used for this information comes from the rent account names and does not taken into account other members of a household who may be living there.

Employment status

This question examines the level of employment and training within the flats.



- A slight majority of respondees are in paid employment.
- No clear trends are presented in overall occupation type.

Do you own a car?

Only one of the 12 respondees was a car owner. Of the responses to question 2, 3 respondees considered lack of car parking to be a minor problem and one considered it to be a major problem and the rest did not consider it a problem. The car owner was one of the respondees who did not consider lack of parking to be a problem. It can only be assumed that the problems perceived by the other respondees relate to visitors to the flats having trouble parking.

It is difficult to draw any reliable conclusions from this seemingly anomalous information. Combined with the extremely high void rate of garages on the estate it may be reasonable to assume that car use on the estate is relatively low.

Do you have any health or disability issues?

This question was covered by a tick box in the employment status section and with a specific question. Of the 12 respondees, 3 (25%) considered themselves disabled as shown in the previous pie chart. 4 respondees (33%) considered themselves to have health or disability issues.

Of these responses, 2 were potentially serious mobility issues while 2 were more social and nervous problems.

5 Summary of outcomes.

5.1 Survey design (Response)

Whilst having a reasonable overall response the survey under represents customers in a number of age brackets. This needs to be considered when assessing the data, with consideration being given to more than one method of consultation to increase the reliability of the data. One possibility would be to carry out additional surveys over the telephone, focused on areas and groups with a low return of postal surveys.

5.2 Section 1: About where you live.

Overall reasonably high satisfaction levels with both WLBC as a landlord and Beechtrees as a neighbourhood seem to be tempered with an acknowledgement by the tenants that the area does suffer with a number of social problems.

Environmental problems appear to be of high importance to the tenants so measures to improve the general appearance of the area would be highly beneficial. These could include action to combat antisocial behaviour such as vandalism and graffiti as well as physical action to improve the area.

Almost half of the respondees identified the resolution of problems with their individual flats to be the single thing that would make their living environment better. This suggests greater satisfaction with the area than the accommodation itself.

5.3 Section 2: About your home

This section represents the area in which WLBC has the most chance to improve. It is clear from the results that the ability to effectively heat and make comfortable the flats is of the highest importance to the tenants. More efficient and effective heating systems combined with improved thermal performance of building elements such as windows and insulation would equate to substantial improvements in tenant satisfaction with their homes.

These benefits could lead to further improvements to the area in the form of increased desirability of the accommodation and less churn of tenancies.

The other main tenant concern is security. As previously mentioned the communal doors frequently come under attack from vandals and this affects both their appearance and the security performance. Any improvement in the security specification of the doors themselves would need to be combined with measures to combat antisocial behaviour in order to make the tenants feel more secure and avoid the situation from simply repeating itself.

5.4 Section 3: About you

The results of this section demonstrate the previously observed trends of relatively short term tenancies and high turnover.

The tenant population in the Beechtrees flats is largely young males although the representation by age of the respondees was not proportionate. This may demonstrate that some tenants do not see the flats as potential long term homes and so are less inclined to take part in surveys such as this.

Other than the comments above there was no clear trend to illustrate the types of tenant present in the flats on Beechtrees. In order to gain an accurate view of this, further separate, more in-depth research would be necessary.

Appendix 1: Survey Questionnaire

This is an anonymous survey aimed at helping us improve our services and identify areas of tenant concern.

ABOUT WHERE YOU LIVE

1. Overall, how satisfied or dissatisfied are you with W.L.B.C. as your landlord?
(please choose and tick boxes below)

Very satisfied	Fairly satisfied	Neither	Fairly dissatisfied	Very dissatisfied
----------------	------------------	---------	---------------------	-------------------

2. Do you feel your neighbourhood suffers from any of the following problems:

Major problem Minor problem Not a problem

	Major problem	Minor problem	Not a problem
Vandalism			
Graffiti			
Litter			
Neighbour disputes			
Fear of crime			
Noise from others			
Racial harassment			
Aggressive dogs			
Dog fouling			
People damaging your property			
Drunk or rowdy behaviour			
Disruptive children/teenagers			
Drug use or dealing			
Lack of Car parking			

From the list above, which would you consider to be the three biggest problem areas?

1.	2.	3.
----	----	----

3. How Satisfied/Dissatisfied are you with the neighbourhood as a place to live?

Very satisfied	Satisfied	Neither	Dissatisfied	Very dissatisfied
----------------	-----------	---------	--------------	-------------------

4. What single thing would make your living environment better?

ABOUT YOUR HOME

5. Overall, how satisfied or dissatisfied are you with the quality and condition of your home?
(please choose and tick boxes below)

Very satisfied	Satisfied	Neither	Dissatisfied	Very dissatisfied
----------------	-----------	---------	--------------	-------------------

6. Is your home comfortable to live in?

Please say why /why not

--

7. Do you pay for your electricity with a key/ card meter or a bill?

Key/Card	Bill
----------	------

8. Approximately how much do you spend on heating per week?

£	
---	--

9. Are you disturbed by noise from others living in the block?

Often (more than once a week)	Occasionally	Rarely	Never
-------------------------------	--------------	--------	-------

10. Does the communal door work effectively?

Always	Sometimes	Never
--------	-----------	-------

11. How secure do you feel in your home?

Very secure	Secure	Not very secure
-------------	--------	-----------------

12. How would you describe the communal areas in your block? (again, please tick)

Well lit?	Poorly lit?	Clean?	Dirty
Poorly maintained		Well maintained	Damp

13. What single thing would make your home better?

--

ABOUT YOU:

Please circle which block you live in:

42-48 60-66 124-134 136-146 148-158 160-170 172-182 184-194 193-199 211-217 229-235

Do you have one or two bedrooms?

How long have you lived here?

Do you like living in Beechtrees?

Where did you live before here?

What age are you?

Are you

or

Are you currently:

	YES	NO
Working earning		
Voluntary worker		
In training/college		
Unemployed		
Carer		
Disabled		

Do you own a car?

Do you have any health or disability issues?

If yes, what are they?

<p>1. Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service/policy/strategy/decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people: <i>People of different ages – including young and older people</i> <i>People with a disability;</i> <i>People of different races/ethnicities/ nationalities;</i> <i>Men; Women;</i> <i>People of different religions/beliefs;</i> <i>People of different sexual orientations;</i> <i>People who are or have identified as transgender;</i> <i>People who are married or in a civil partnership;</i> <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave;</i> <i>People living in areas of deprivation or who are financially disadvantaged.</i></p>	<p>The decision could have an effect on the occupants of Beechtrees flats and a limited number of houses, the largest demographic being males between 20-29</p> <p>Any resulting any new build properties will be up to modern standards and building regulations in terms of accessibility.</p> <p>The report will potentially address areas of deprivation and improve long term sustainability.</p> <p>Additional consultation will be carried out following the adoption of a preferred option.</p>
<p>2. What sources of information have you used to come to this decision?</p>	<p>The report aims to improve the housing provision in the area, these improvements will have a positive effect and improve housing standards.</p> <p>Sustainability analysis of the stock.</p>
<p>3. How have you tried to involve people/groups in developing your service/policy/strategy or in making your decision (including decisions to cut or change a service or policy)?</p>	<p>Consultation has been carried out with the residents of Beechtrees flats to identify issues with the area; further consultation will be carried out once a preferred option is adopted.</p>
<p>4. Could your service/policy/strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:- <i>Eliminate discrimination, harassment and victimisation;</i> <i>Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people);</i> <i>Foster good relations between people who share a protected characteristic and those who do not share it.</i></p>	<p>The decision will help meet the needs of our residents and aims to improve living conditions and the environment.</p>
<p>5. What actions will you take to address any issues raised in your answers above</p>	<p>Addition consultation will be carried out with residents following the adoption of a preferred option.</p>



AGENDA ITEM: 5(e)

CABINET: 18 MARCH 2014

Report of: Assistant Director Community Services

Relevant Managing Director: Managing Director (People and Places)

Relevant Portfolio Holder: Councillor D Sudworth

**Contact for further information: Mrs. P.F.Campbell (Ext.5144)
(E-mail:paula.campbell@westlancs.gov.uk)**

SUBJECT: INSKIP MEETING ROOM

Wards affected: Birch Green

1.0 PURPOSE OF THE REPORT

1.1 To consider the future arrangements regarding Inskip Meeting Room.

2.0 RECOMMENDATION

2.1 That Inskip meeting room be added to the portfolio of commercial premises and advertised for commercial or community use by the Assistant Director Housing and Regeneration.

3.0 BACKGROUND

3.1 Inskip along with the other meeting rooms were transferred to the Council by the former Commission for New Towns (now the Homes and Communities Agency) in 1989 as part of the Community Related Assets Transfer. The transfer had a restrictive user clause which allowed it to be used for 'community purposes only' and if let for such a use any lease over 5 years must be approved by the HCA.

3.2 There is also clawback provisions in favour of the HCA should the Council dispose of the property or the use of the premises changes from community use. The amount of clawback decreases by 2% p.a. and is currently 50%.

- 3.3 In 2001 Inskip Meeting Room was let to the Independent Community Enterprise group (I.C.E.) as part of the Council's service review of under-utilised meeting rooms in Skelmersdale.
- 3.4 Unfortunately the ICE group folded within the first year of occupation leaving the building vacant.
- 3.5 It was not possible to identify a sustainable local community group to take over the responsibility for the premises however; following discussions with LCC the Council secured a tenancy with Lancashire County Council who occupied the building by lease agreement for the purpose of providing a Resource Centre for adults with learning and physical disabilities.

4.0 CURRENT POSITION

- 4.1 The current lease is due to expire on 1st May 2014. Lancashire County Council has given notice that they will not be renewing their lease for Inskip Meeting Room. LCC have undertaken improvement work to the Whiteledge Centre in Skelmersdale and as part of their service rationalisation plans will no longer require the facilities at Inskip.
- 4.2 The building is in good condition, and has had some improvements to the internal layout and fixtures and benefited from routine maintenance whilst it was occupied by LCC.

5.0 ISSUES

- 5.1 Within the lease agreement with LCC a clause was inserted to allow the continued use of the Centre by the local Derby and Joan Club who had utilised the building on two afternoons each week by permission of the previous tenant. With the lease ending this arrangement will no longer exist and this group will no longer have the use of the building.
- 5.2 The group has been offered the use of Lambourne Residents Lounge by the Councils Housing and Regeneration Service Area, however several members have physical disabilities and have indicated that they would have difficulty relocating to Lambourne without the aid of transport.
- 5.3 The organisers of the Derby and Joan club have asked at the expiry of the LCC lease, if the Borough Council would manage the facility or find another community group to take over the operation of the building and allow them to continue to use the building.
- 5.4 The Council is in the process of transferring six community buildings to the community, five of which are located in Skelmersdale. Preferred partners have been identified for each of these buildings. The Council would not wish to take over the management of the Inskip Meeting Room.

- 5.5 I believe it is unlikely that a sustainable community organisation could, in any case, be found to take over the responsibility for this meeting room and also be able to accommodate the existing club on two afternoons each week.
- 5.6 However, the building is suitable for use as a commercial property providing accommodation space for closed and open plan offices with appropriate storage space.
- 5.7 Advertising the site as a commercial unit suitable for commercial or community use would not preclude community organisations registering an interest. Advertising the premises as a commercial property immediately rather than seeking only a community organisation would reduce the time when the property may be empty. Should a community organisation express an interest then an assessment would then be made on sustainability of the proposals and community gain.
- 5.8 The building has lease restrictions; Inskip transferred to the Council from the former Commission for New Towns (now the Homes and Communities Agency) in 1989 as part of the Community Related Assets Transfer. The transfer had a restrictive user clause which allowed it to be used for 'community purposes only' and if let for such a use any lease over 5 years must be approved by the HCA.

6.0 PROPOSALS

- 6.1 In order to progress matters and reduce the time when the premise may remain unoccupied, at a cost to the Borough Council, it is proposed Inskip Meeting Room be transferred to the Housing and Regeneration Services Area as a commercial property and advertised for commercial or community use.
- 6.2 The Estates and Valuation Manager believes that the site may attract a commercial tenant but would require a period of marketing to achieve this. If this was the chosen route there will need to be negotiations with the HCA about their share of any rental income.

7.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

- 7.1 Inskip meeting room has been providing support and a resource for adults with learning and physical disabilities. The responsibility for this services and the support has been provided by LCC. Following investment in Whiteledge Centre LCC have determined that a combined site for the services to meet the need of the principal users of the facility can now be accommodated at this newly refurbished site.
- 7.2 The proposals to seek a new occupier for the site, either commercial or community is in keeping with the current Council commitment and within the scope of the community strategy towards seeking sustainable partnerships for the operation of Council premises.

8.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 8.1 There are no resources identified or available for the Council to continue to hold the building beyond the expiry of the lease.
- 8.2 The Council will incur building maintenance, security, and payment of service charges and rates for the premises beyond 1st May 2014, while a new tenant is being found.
- 8.3 There are clawback provisions in favour of the HCA should the Council dispose of the property or the use of the premises changes from community use. The amount of clawback decreases by 2% p.a. and is currently 50%. If the building is not let to a community based organisation then there will need to be negotiations with the HCA about their share of any rental income.

9.0 RISK ASSESSMENT

- 9.1 There is a high risk of vandalism should the building remain vacant which would have financial implications to the Council. It is therefore in the interest of the Council to find a new occupier of the premises as soon as possible.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

There is a direct impact on members of the public, employees, elected members and / or stakeholders. Therefore an Equality Impact Assessment is required. A formal equality impact assessment is attached as an Appendix to this report, the results of which have been taken into account in the Recommendations contained within this report.

Appendices

1. Equality Impact Assessment

Date: 12/02/2014

Completed by : P.F.Campbell.

<p>1.</p>	<p>Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service/policy/strategy/decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people: <i>People of different ages – including young and older people</i> <i>People with a disability;</i> <i>People of different races/ethnicities/ nationalities;</i> <i>Men; Women; People of different religions/beliefs;</i> <i>People of different sexual orientations;</i> <i>People who are or have identified as transgender;</i> <i>People who are married or in a civil partnership;</i> <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave;</i> <i>People living in areas of deprivation or who are financially disadvantaged.</i></p>	<p>Inskip meeting room has been providing support and a resource for adults with learning and physical disabilities. The responsibility for this services and the support has been provided by LCC.</p> <p>Following investment in Whiteledge Centre LCC have determined that a combined site for the services to meet the need of the principal; users of the facility can now be accommodated at this newly refurbished site.</p>
<p>2.</p>	<p>What sources of information have you used to come to this decision?</p>	<p>Lease documents, information from LCC and meeting with a community group who use the facility. Discussion with Housing Officers</p>
<p>3.</p>	<p>How have you tried to involve people/groups in developing your service/policy/strategy or in making your decision (including decisions to cut or change a service or policy)?</p>	<p>Consultation with user group.</p>
<p>4.</p>	<p><i>Could your service/policy/strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:-</i> <i>Eliminate discrimination, harassment and victimisation;</i> <i>Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people);</i> <i>Foster good relations between people who share a protected characteristic and those who do not share it.</i></p>	<p>Consideration of the needs of all the community will be considered as part of the process of advertising the site for commercial or community use.</p>
<p>5.</p>	<p>What actions will you take to address any issues raised in your answers above</p>	<p>Consideration will be given towards sustainable community use</p>



AGENDA ITEM: 5(f)

CABINET: 18 March 2014

**EXECUTIVE OVERVIEW &
SCRUTINY COMMITTEE:
3 April 2014**

Report of: Transformation Manager

Relevant Head of Service: Managing Director (Transformation)

Relevant Portfolio Holder: Councillor D Westley

**Contact for further information: Ms A Grimes (Extn. 5409)
(E-mail: alison.grimes@westlancs.gov.uk)**

SUBJECT: CORPORATE PERFORMANCE MANAGEMENT 2014/15

Borough wide interest

1.0 PURPOSE OF THE REPORT

1.1 To seek approval for the Suite of Performance Indicators (Appendix A) to be adopted as the Council's Corporate PI Suite 2014/15.

2.0 RECOMMENDATIONS TO CABINET

2.1 That the Suite of Performance Indicators 2014/15 (Appendix A) and targets be approved as being the most important in terms of delivering the Council's Corporate Priorities and adopted as the Council's Corporate PI Suite 2014/15.

2.3 That the Transformation Manager, in consultation with the Portfolio Holder for Resources & Transformation, be authorised to finalise and amend the suite having regard to comments from Executive Overview and Scrutiny Committee made on 3 April 2014, and to make any amendments to the suite in year in response to any issues that may arise, for example government policy or collection mechanisms.

2.4 That call-in is not appropriate for this item as it is being considered at the next meeting of Executive Overview & Scrutiny Committee on 3 April 2014.

3.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW AND SCRUTINY COMMITTEE

3.1 That the Committee consider the Suite of Performance Indicators 2014/15 (Appendix A) and agree comments as appropriate.

4.0 BACKGROUND

- 4.1 The corporate suite of performance indicators is reported to demonstrate performance against the priorities agreed by Members through the Business Plan. The suite will help the authority understand how well it is performing and provide information as to whether the organisation is on track to achieve the priorities.
- 4.2 Following the *Business Plan 2014/15 Refresh*, a review of the 2013/14 suite of performance indicators was undertaken. The review resulted in:
- the addition of the remainder of the PIs that form part of the Revenues & Benefits and ICT Services contract.
 - the revision to the definitions of two existing PIs to reflect methods of calculation (*% Rent Collected* and *Working Days Lost to Sickness Absence*)
 - the addition of *Number of completed scheduled vehicle services*
 - the revision to some targets.

The proposed suite for 2014/15 is attached at Appendix A.

- 4.3 It is recommended that targets for performance in 2014-15 are set to be challenging but realistic. In most cases this means that targets are maintained as for 2013-14, but where circumstances suggest that PIs/targets need to vary from 2013/14 an explanation for the proposed change is provided in the table.
- 4.4 As in previous years, PI targets are reviewed and agreed with Heads of Service and Portfolio Holders prior to submission to committee.
- 4.5 There are 56 proposed performance indicators within the suite. 35 of these are the 'key performance indicators' which will be reported to Members on a quarterly basis as indicated in the Appendix. The remainder will be reported annually. The full suite outturn will be reported with the Annual Business Plan Report.

5.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

- 5.1 The information set out in this report aims to help the Council to improve service performance and is consistent with the Sustainable Community Strategy aim of providing good quality services that are easily accessible to all.

6.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 6.1 There are no significant financial or resource implications arising from the recommendations within this report.

7.0 RISK ASSESSMENT

- 7.1 Monitoring and managing performance information data together with the monitoring of progress against the Business Plan helps the authority to ensure it is achieving its priorities and reduces the risk of not doing so.

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

The decision does not have a direct impact on members of the public, employees, elected members and/or stakeholders. Therefore no equality impact assessment is required.

Appendices

Appendix A – 2014/15 Corporate Performance Indicator Suite

Appendix B – Proposed for replacement for 2014/15

Appendix C – Minute of Cabinet 18 March 2014 (Executive Overview and Scrutiny Committee only)

APPENDIX A: CORPORATE PERFORMANCE INDICATOR SUITE 2012-15

PI Code & Short Name	Reported	2012/13 Outturn	2012/13 Annual Target	2013/14 Annual Target	2014/15 Annual Target	Notes setting targets for 14/15	Change to 2013/14
Corporate Priorities							
Balancing the budget and providing the best possible services within the resources available							
WL117 Planned net spend per head	Annual	£129.92	Data only	Data only	Data only	Information based on Revenue Return Estimates	
WL118 Income from fees & charges	Annual	£7.48m	£7.057m	£7.069m	£6.967m	Information from Budget decision	Y - target
OCL-R1-BV9 % of Council Tax collected	QPI /Annual	96.40%	98.06%	96.11%	tbc	OCL contractual PI. Annual target set via contract process. Quarterly target reported in performance reports is not contractual.	tbc
OCL-R3-BV10 % of Non-domestic Rates Collected	QPI /Annual	95.40%	97.77%	96.57%	tbc	OCL contractual PI. Annual target set via contract process. Quarterly target reported in performance reports is not contractual.	tbc
CIT03 % satisfied with how WLBC runs things	Annual	67.00%	67.00%	67.00%	67%		
CIT08 % residents agreeing that WLBC provides value for money	Annual	42%	42%	42%	42%		
TS1 Rent collected as a % of rent owed (excluding arrears b/f)	QPI /Annual	N/A	N/A	N/A	99.83%	Replacing BV66a. The change in coding acknowledges that the calculation in use has never been fully reflective of the BV66a guidance, due to the way income is received. The replacement TS1 definition simplifies the calculation and uses the actual rent & charges collected year-to-date on current General Needs and Housing for Older People tenancies (excluding garages) as a percentage of the actual rent & charges due year-to-date for all tenanted GN and HfOP properties (excluding garages). The data for this can be taken directly from the balance summary. The PI is also used by Housemark and will present the opportunity to benchmark nationally. A realistic target has been set however the full impact of Welfare Reform is not yet known and may affect this indicator. Members will be advised accordingly.	Y - definition
Focussing upon sustainable regeneration and growth within the Borough							
NI 154 Net additional homes provided	Annual	139	80	260	310	Target taken from the Local Plan.	Y - target
NI 159 Supply of ready to develop housing sites	Annual	108.00%	80.00%	105%	105%	Target based on the Local Plan and a national policy requirement for a five-year-plus-5% supply of ready-to-develop housing sites.	
NI 155 Number of affordable homes delivered (gross)	Annual	168	60	30	60		Y - target
NI 152 Working age people on out of work benefits	Annual	14%	12.00%	Data only	Data only		
Caring for our Borough by delivering the small improvements that can make a big difference							
NI 195a Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Litter	QPI /Annual	~	1.61%	1.61%	1.61%	2012/13 Q4 survey data has not been analysed	
NI 195b Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Detritus	QPI /Annual	~	7.33%	7.33%	7.33%	2012/13 Q4 survey data has not been analysed	
NI 195c Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Graffiti	QPI /Annual	~	1.11%	1.11%	1.11%	2012/13 Q4 survey data has not been analysed	
NI 195d Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Fly-posting	QPI /Annual	~	0.00%	0.00%	0.00%	2012/13 Q4 survey data has not been analysed	

Caring for our Borough by delivering the small improvements that can make a big difference (continued)							
PI Code & Short Name	Reported	2012/13 Outturn	2012/13 Annual Target	2013/14 Annual Target	2014/15 Annual Target	Notes setting targets for 14/15	Change to 2013/14
WL01 No. bins missed per 100,000 collections	QPI /Annual	65.94	81.64	70	70		
WL06 Average time taken to remove fly tips (days)	QPI /Annual	1.11	1.09	1.09	1.09		
CIT01 % feel West Lancs is safe & secure to live	Annual	79%	76%	70%	70%		
CIT02 % satisfied with cleanliness of streets	Annual	63%	67%	67%	67%		
CIT05 % satisfied with local area as a place to live	Annual	83%	89%	89%	89%		
CIT04 Local authority tenants' satisfaction with landlord services	Annual (Bi-ennial survey)	87.00%	89.00%	not carried out	90%	Survey subject to growth bid. Useful benchmarking tool. Increase in target to reflect investment.	Y - target
HS14-NI158 % non-decent council homes	Annual	0.96%	1.00%	0.50%	0.40%	Improved target to further reduce numbers.	Y - target
Services							
Street Scene							
CIT12 % of people satisfied with household collections for domestic waste	Annual	81%	79%	79%	79%		
CIT13 % of people satisfied with household collections for recyclable materials	Annual	77%	77%	77%	77%		
WL122 No. completed scheduled vehicle services	QPI /Annual	N/A	N/A	N/A	tbc	Target set will reflect achieving 100% of scheduled services.	New
NI 191 Residual household waste per household (Kg)	QPI /Annual	490.26	493.91	493.91	493.91		
NI 192 Percentage of household waste sent for reuse, recycling and composting	QPI /Annual	47.75%	47.58%	47.58%	47.58%		
Community Services							
WL18 Use of leisure and cultural facilities (swims and visits)	QPI/Annual	1,140,027	1,182,039	1,095,000	1,120,000	Data for 2014-15 will no longer include data from Community Resource Centres following the community transfers. The quarter targets applied will reflect the seasonal variation.	Y - target
CIT06 % satisfied with sports/leisure facilities	Annual	39%	46%	46%	46%		
CIT07 % satisfied with parks and open spaces	Annual	58%	65%	65%	65%		
WL08a Number of Crime Incidents	QPI/Annual	5,440	6,076	6,076	6,076		
Planning							
NI 157a Processing of planning applications: Major applications	QPI/Annual	60.61%	65.00%	65.00%	65%		
NI 157b Processing of planning applications: Minor applications	QPI/Annual	78.28%	75.00%	75.00%	75.00%		
NI 157c Processing of planning applications: Other applications	QPI/Annual	91.10%	85.00%	85.00%	85.00%		
WL24 % Building regulations applications determined within 5 weeks	QPI/Annual	75.98%	70.00%	70.00%	70.00%		

PI Code & Short Name	Reported	2012/13 Outturn	2012/13 Annual Target	2013/14 Annual Target	2014/15 Annual Target	Latest Notes	Change to 2013/14
Housing							
HS1-WL111 % Housing repairs completed in timescale	QPI/Annual	97.34%	95.00%	95.50%	97%	Target approved by tenants.	Y - target
HS13-WL114 % LA properties with CP12 outstanding [Lower is Better]	QPI/Annual	0.11%	0%	0%	0%		
TS24b-BV212 SP Average time taken to re-let local authority housing (days) - SUPPORTED NEEDS	QPI/Annual	77.9	45	45	50	The marketing work we are undertaking to promote supported housing will result in some long term voids being tenanted which will have a negative impact on re-let performance. We have therefore reflected this negative impact in the 2014/15 target.	Y - target
TS24a-BV212 GN Average time taken to re-let local authority housing (days) - GENERAL NEEDS	QPI/Annual	23.36	17.5	22	35	To take account of current low demand.	Y - target
Shared Services - ICT and Revenues & Benefits ¹							
OCL-ICT1 Severe Business Disruption (Priority 1)	QPI/Annual	100%	99%	99%	99%	Contractual PI.	
OCL-ICT2 Minor Business Disruption (P3)	QPI/Annual	99%	95%	97%	97%	Contractual PI.	
OCL-ICT3 Major Business Disruption (P2)	QPI/Annual	100%	95%	97%	97%	Contractual PI.	New
OCL-ICT4 Minor Disruption (P4)	QPI/Annual	99%	95%	97%	97%	Contractual PI.	New
OCL-ICT5 Advice & Guidance (P5)	Annual	99%	95%	97%	97%	Contractual PI.	New
OCL-B1-NI181 Time taken to process benefits	QPI/Annual	11.27	12 days	12 days	tbc	Contractual PI. For 2014/15, the quarter outturn will be reported as a progressive 'year to date' position rather than the current 'within quarter' performance.	Y - outturn period
OCL-B2 Overpayment Recovery of Housing Benefit overpayments (payments received)	QPI/Annual	£170,882	£170,000	£170,000	tbc	Contractual PI.	tbc
OCL-B3 Benefit Fraud Sanctions & Prosecutions	Annual	47	Data only	Data only	Data only	Contractual PI.	New
OCL-B4 Benefits Local authority Error Overpayments	Annual	£166,979	Below £180,107	Below £145,308	tbc	Contractual PI. Assessment made on year end figure.	New
OCL-R1-BV9 % of Council Tax collected	see entry on p1					Contractual PI.	
OCL-R2 % council tax arrears collected	QPI/Annual	18.32%	24.46%	24.46%	tbc	Contractual PI.	New
OCL-R3-BV10 % of Non-domestic Rates Collected	see entry on p1					Contractual PI.	
OCL-R4 Sundry Debtors (cash collected and write offs)	QPI/Annual	5,675,860	5,768,616	*5,706,034 (5,768,616)	tbc	Contractual PI. During the year, the sundry debt collection function for Housing Chargeable Repairs was transferred from OCL to Housing. The target was therefore reduced* to reflect the change in definition / reduction in debt available for recovery by OCL. This definition is applied to 2014-15.	Y - definition and target
Transformation							
WL90 % of Contact Centre calls answered	QPI/Annual	87.20%	90.60%	90.60%	90.60%		
WL108 Average waiting time for callers to the contact centre (seconds)	QPI/Annual	36.5	26.25	26.25	26.25		
WL19b(ii) % Direct Dial calls answered within 10 seconds	QPI/Annual	78.91	82.21	82.21	82.21		

PI Code & Short Name	Reported	2012/13 Outturn	2012/13 Annual Target	2013/14 Annual Target	2014/15 Annual Target	Latest Notes	Change to 2013/14
CIT14 % of residents satisfied with how the council keeps them informed	Annual	58%	47%	47%	58%	Question first asked in 2012/13. 2012/13 outturn received after the 13/14 target was set. 14/15 target raised to reflect 12/13 baseline outturn. Many sections of the council communicate with stakeholders keeping them informed about services. This is in addition to the dedicated resource that covers media relations and website content.	Y- target
WL121 Working Days Lost Due to Sickness Absence	QPI/Annual	9.14	8.08	8.08	8.08	Formerly BV12. The change in coding reflects that the full BV12 guidance was not being applied to the calculation in relation to working out the average FTE. There will be no actual change to the method of calculation used for reporting sickness for 2014/15.	Y - code
BV8 % invoices paid on time	QPI/Annual	97.22%	98.24%	98.24%	98.24%		

Notes: ¹ Managed through One Connect Limited contract. Contractual targets are annual and set via SLA. Quarter targets reported in performance reports are provided as a gauge for performance but are not contractual. One Connect Ltd is a joint venture between BT and LCC. From 1 April, revised arrangements between BT and LCC will mean that for WLBC, ICT and Revenues & Benefits services will continue to be delivered through existing structures but via BT Lancashire Services Ltd, a wholly owned subsidiary of BT.

Reporting of PIs is dependent on collection mechanisms remaining in place.
Coding of PIs may be subject to change during the year.

APPENDIX B: PROPOSED FOR REPLACEMENT IN THE CORPORATE SUITE 2014/15

PI Code & Short Name	Reported	Note
BV66a % Rent collected (excluding arrears brought forward)	QPI/Annual	The definition has been replaced to reflect existing practices (see TS1)
BV12 Working Days Lost Due to Sickness Absence	QPI/Annual	The definition has been replaced to reflect existing practices (see WL121)



AGENDA ITEM: 5(g)

**CORPORATE & ENVIRONMENTAL OVERVIEW &
SCRUTINY COMMITTEE:
20 FEBRUARY 2014**

CABINET: 18 MARCH 2014

Report of: Transformation Manager

Relevant Head of Service: Managing Director (Transformation)

Relevant Portfolio Holder: Councillor D Westley

**Contact for further information: Ms A Grimes (Extn. 5409)
(E-mail: alison.grimes@westlancs.gov.uk)**

SUBJECT: QUARTERLY PERFORMANCE INDICATORS (Q3 2013/14)

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To present performance monitoring data for the quarter ended 31 December 2013.

2.0 RECOMMENDATIONS TO CORPORATE & ENVIRONMENTAL OVERVIEW & SCRUTINY COMMITTEE

2.1 That the Council's performance against the indicator set for the quarter ended 31 December 2013 be noted.

3.0 RECOMMENDATIONS TO CABINET

3.1 That the Council's performance against the indicator set for the quarter ended 31 December 2013 be noted.

3.2 That the call-in procedure is not appropriate for this item as the report was submitted to the meeting of the Corporate & Environmental Overview & Scrutiny Committee on 20 February 2014.

4.0 CURRENT POSITION

- 4.1 Members are referred to Appendix A of this report detailing the quarterly performance data.
- 4.2 Of the 31 indicators reported for Q3:
- 13 met or exceeded target
 - 4 indicators narrowly missed target; 7 were 5% or more off target
 - 1 is data only
 - 6 indicators have data unavailable at the time of the report (*NI191: Residual household waste per household; NI192: Percentage of household waste sent for reuse, recycling and composting; NI195a-d: Street and environmental cleanliness*).

As a general comparison, Q3 performance from the 2012/13 suite gave 14 (from 32) indicators on target.

- 4.3 Improvement plans are already in place for those indicators where performance falls short of the target by 5% or more for this quarter if such plans are able to influence outturn.
- 4.4 These plans provide the narrative behind the outturn and are provided in Appendices B1-B4. Where performance is below target for consecutive quarters, plans are revised only as required, as it is reasonable to assume that some remedial actions will take time to make an impact.
- 4.5 For those PIs that have flagged up as ‘amber’ (indicated as a triangle), an assessment has been made at head of service level based on the reasons for the underperformance and balancing the benefits of implementing an improvement plan versus resource implications. This is indicated in the table.

5.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

- 5.1 The information set out in this report aims to help the Council improve service performance and is consistent with the Sustainable Community Strategy aim of providing good quality services that are easily accessible to all.

6.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 6.1 There are no direct financial or resource implications arising from this report.

7.0 RISK ASSESSMENT

- 7.1 This item is for information only and makes no recommendations. It therefore does not require a formal risk assessment and no changes have been made to risk registers as a result of this report. Monitoring and managing performance information data helps the authority to ensure it is achieving its corporate priorities and key objectives and reduces the risk of not doing so.

8.0 CONCLUSIONS

- 8.1 The performance indicator data appended to this report details the council's current performance against the key performance indicators from the full suite of indicators for 2013/14 as agreed by Cabinet in March 2013. The full suite is reported annually.
-
-

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

The decision does not have any direct impact on members of the public, employees, elected members and / or stakeholders. Therefore no Equality Impact Assessment is required.

Appendices

Appendix A – Quarterly Performance Indicators for Q3 October-December 2013/14

Appendix B – Improvement Plans

- B1: HS13-WL114: % LA properties with CP12 outstanding
- B2: TS24a-BV212: Average time taken to re-let local authority housing GENERAL NEEDS
- B3: TS24b-BV212 SP Average time taken to re-let local authority housing (days) - SUPPORTED NEEDS
- B4: BV12: Working Days Lost Due to Sickness Absence

Appendix C – Minute of Corporate and Environmental Overview & Scrutiny Committee held on 20 February 2014 (Cabinet only)



APPENDIX A: QUARTERLY PERFORMANCE INDICATORS

Icon key		
PI Status		Performance against same quarter previous year
	OK (within 0.01%) or exceeded	13
	Warning (within 5%)	4
	Alert (by 5% or more)	7
	Data only	1
	Awaiting data	6
N/A	Data not collected for quarter	0
Total number of indicators		31











	Improved	13
	Worse	7
	No change	3
/	Comparison not available	2
	Awaiting data	6

Shared Services¹



PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
OCL-ICT1 Severe Business Disruption (Priority 1)	N/A	N/A	100%	100%	100%	100%	100%	100%	100%	99%			
OCL-ICT2 Minor Business Disruption (P3)	N/A	N/A	97%	98%	100%	100%	100%	100%	100%	97%			
OCL-B1-NI181 Time taken to process Housing Benefit/Council Tax Benefit new claims and change events	9.06	7.19	12.34	11.40	12.08	10.31	7.12	8.23	9.88	12.00			
OCL-B2 Overpayment Recovery of Housing Benefit overpayments (payments received)	£127,047	£186,926	£48,280	£90,397	£130,250	£170,882	£43,041	£84,613	£123,567		Quarter outturn reported as data only. Current performance suggests that the year-end target will be achieved.		
OCL-R1-BV9 % of Council Tax collected	86.96%	98.06%	30.59%	58.07%	86.77%	96.40%	28.33%	55.47%	82.85%	84.96%	Performance is impacted by migration to new technology resulting in reduced recovery activity. Additional recovery action scheduled for Q4.	/ ²	
OCL-R3-BV10 % of Non-domestic Rates Collected	87.87%	97.67%	32.31%	61.41%	88.04%	95.40%	27.89%	58.57%	84.58%	85.20%	Performance is impacted by migration to new technology resulting in reduced recovery activity. Additional recovery action scheduled for Q4.	/ ²	

PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
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OCL-R4 Sundry Debtors (cash collected and write offs)	3,817,022	5,814,105	1,134,242	2,718,863	4,031,803	5,675,860	1,217,643	2,462,608	3,773,629	4,210,505	Performance is impacted by a small number of cases. The impact of these on outturn is currently being addressed.		





Housing & Regeneration

PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
TS1-BV66a % Rent collected (Including arrears brought forward)	N/A	N/A	98.02%	98.15%	98.63%	98.41%	97.58%	97.58%	98.25%	97.00%			
HS1-WL111 % Housing repairs completed in timescale	95.79%	92.98%	94.62%	98.18%	98.66%	97.90%	97.20%	96.57%	96.46%	95.50%			
HS13-WL114 % LA properties with CP12 outstanding	0.19%	0.07%	0.01%	0.09%	0.08%	0.11%	0.07%	0.04%	0.01%	0%	Target based on legal requirement for all eligible properties to have certificate. Quarter performance is an average from months. There were 0 properties outstanding in December. Actions undertaken as outlined in the Improvement Plan at Appendix B1		
TS24a-BV212 GN Average time taken to re- let local authority housing (days) - GENERAL NEEDS	13.63	13.14	21.32	19.70	21.75	29.67	53.61	49.52	58.10	22.00	Improvement Plan at Appendix B2		
TS24b-BV212 SP Average time taken to re-let local authority housing (days) - SUPPORTED NEEDS	N/A	N/A	47.59	73.29	167.57	50.23	29.94	64.73	98.01	45.00	Improvement Plan at Appendix B3		











Community Services

PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
WL08a Number of Crime Incidents	1,488	1,395	1,444	1,392	1,351	1,253	1,281	1,403	1,449	1,488		↓	
WL18 Use of leisure and cultural facilities (swims and visits)	268,446	341,024	296,315	280,865	241,569	321,278	302,367	323,139	252,748	273,750	Seasonal variation means that Q3 is usually the lowest quarter. In addition, repair work during the period resulted in temporary closure of some facilities. No improvement plan beyond detail above.	↑	











Planning

PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
NI 157a Processing of planning applications: Major applications	61.54%	22.22%	55.56%	80.00%	33.33%	80.00%	30.00%	77.78%	54.55%	65.00%	Performance represents 6 out of 11 complex applications. Outturn largely beyond the control of officers. A small number of major applications are received, often very complex, involving decisions being delegated to committee or subject to S106 agreements. No improvement plan beyond detail above.	↑	
NI 157b Processing of planning applications: Minor applications	84.42%	85.46%	81.33%	82.09%	73.13%	75.86%	87.50%	84.62%	82.43%	75.00%		↑	
NI 157c Processing of planning applications: Other applications	93.13%	99.20%	92.53%	92.54%	91.78%	89.23%	91.61%	93.02%	92.99%	85.00%		↑	
WL24 % Building regulations applications determined within 5 weeks	80.60%	87.18%	79.29%	79.51%	66.20%	73.33%	80.00%	67.09%	75.61%	70.00%		↑	

Transformation

PI Code & Short Name	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	2011/12	2011/12	2012/13	2012/13	2012/13	2012/13	2013/14	2013/14	2013/14				
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
BV12 Working Days Lost Due to Sickness Absence ³	2.28	1.90	2.26	2.42	2.14	2.31	2.63	2.74	2.88	2.02	Improvement Plan at Appendix B4		
BV8 % invoices paid on time	98.20%	97.84%	97.46%	96.98%	96.71%	97.82%	97.21%	97.03%	97.75%	98.24%	Head of Service's amber assessment: improvement plan not required.		
WL19b(ii) % Direct Dial calls answered within 10 seconds ⁴	82.49	83.17	79.20	78.49	78.38	79.47	79.55	80.18	80.50	82.21	Head of Service's amber assessment: improvement plan not required.		
WL90 % of Contact Centre calls answered	90.9%	87.8%	84.7%	85.7%	88.8%	89.9%	87.3%	93.6%	92.6%	90.6%			
WL108 Average answered waiting time for callers to the contact centre (seconds)	19.00	46.00	38.00	46.00	26.00	36.00	47.00	17.00	25.00	26.25			

Street Scene

PI Code & Short Name	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	2011/12	2011/12	2012/13	2012/13	2012/13	2012/13	2013/14	2013/14	2013/14				
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
WL01 No. residual bins missed per 100,000 collections	68.38	44.94	49.96	63.36	65.40	87.09	64.78	63.54	65.40	70.00			
WL06 Average time taken to remove fly tips (days)	1.07	1.19	1.18	1.10	1.12	1.05	1.05	1.07	1.08	1.09			
NI 195a Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Litter	.83%	2.17%	N/A	.33%	1.00%	N/A ⁵	N/A	1.67%		1.61%	Survey carried out three times each year. No data for Q1.		
NI 195b Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Detritus	13.43%	4.15%	N/A	6.49%	3.10%	N/A ⁵	N/A	2.70%		7.33%	Survey carried out three times each year. No data for Q1.		

PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
NI 195c Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Graffiti	.67%	.33%	N/A	.67%	.00%	N/A ⁵	N/A	.00%	?	1.11%	Survey carried out three times each year. No data for Q1.	?	?
NI 195d Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Fly-posting	0.00%	0.00%	N/A	0.00%	0.00%	N/A ⁵	N/A	0.00%	?	0.00%	Survey carried out three times each year. No data for Q1.	?	?
NI 191 Residual household waste per household (Kg)	123.97	124.36	121.91	122.3	131.59	116.18	104.64	?	?	123.48	Awaiting external confirmation of data	?	?
NI 192 Percentage of household waste sent for reuse, recycling and composting	44.65%	42.52%	51.48%	52.74%	44.17%	40.73%	52.35%	?	?	47.58%	Awaiting external confirmation of data	?	?

Notes: ¹ Managed through One Connect Limited contract. Contractual targets are annual and set via SLA. Quarter targets are provided as a gauge for performance but are not contractual. One Connect Ltd is a joint venture between BT and LCC. From 1 April, revised arrangements between BT and LCC will mean that for WLBC, ICT and Revenues & Benefits services will continue to be delivered through existing structures but via BT Lancashire Services Ltd, a wholly owned subsidiary of BT.

² In line with current good practice, the 2013/14 outturns/targets do not include a value of 'credit on accounts' resulting in the outturn being lower than if credits were still included. Quarter outturns of previous years are therefore not directly comparable. Including credit on accounts may inflate collection rates as it is probable that these credits will need to be refunded to the tax payer. When targets were set, assumed values of 0.54% CTax and 1.2% NNDR were applied. Although the contractual targets / annual SLAs do not include credits on account, an annual figure including credit on accounts will be provided at year end to allow a direct year-on-year comparison. This is not done quarterly, as the new Northgate system does not automatically include the data.

³ From Q3 2012-13 data does not include OCL seconded staff. ⁴ From Q1 2012-13 data does not include OCL seconded staff. ⁵ Data for Q4 was collected but not analysed due to a staff vacancy, subsequently filled. However, due to competing priorities this work has not taken place.

'NI' and 'BV' coding retained for consistency/comparison although national reporting no longer applies.

PERFORMANCE IMPROVEMENT PLAN	
Indicator	TS24a Average time taken to re-let local authority housing (days) - GENERAL NEEDS
Reasons for not meeting target	
<p>Performance has been above target due to a number of issues. Firstly, there has been a backlog of maintenance work due to the increased number of empty homes as a result of placing high cost voids on hold to control spending in 2012/13. The Council's maintenance contractors have struggled with capacity to carry out the repairs to these voids in addition to normal voids and maintain performance on the turnover of empty homes.</p> <p>The Kitchen Refurbishment Programme has also resulted in inevitable delays in the re-letting of those empty properties requiring new kitchens. This is mainly due to the added process of ordering, preparing plans and awaiting delivery of kitchen units from the manufacturers as well as the additional time taken to fit a full kitchen.</p> <p>In addition a number of key staff in the Voids & Allocations Team has been on long term sickness absence which has reduced staffing resources.</p> <p>Over recent advertising cycles there has been a reduction in demand for some general needs properties, in particular houses across the new town estates. This has meant it is now taking longer to let these property types in these areas.</p>	
Brief Description of Proposed Remedial Action	
<p>Increased turnaround times have been an inevitable result of measures taken to reduce projected overspends in 2012/13.</p> <p>Void properties placed on hold over the latter part of 2012/13 due to budgetary pressures, have now started to be released for letting. This is being done on a phased basis in liaison with the Council's maintenance contractors. It is important to note however that the release of long term voids will result in an increase in void turnaround times when the properties are subsequently let and will impact on performance in 2013/14.</p> <p>To reduce delays caused by the Kitchen Refurbishment Programme, officers have arranged for a third party supplier to hold stock locally. There are still however issues with stock availability due to volumes required which we are working to address.</p> <p>Temporary arrangements have been put in place to second experienced surveyors into the Voids and Allocations Team to cover for sickness absence.</p> <p>Allocations staff are taking a more proactive approach to promoting and advertising empty homes, and options for offering more flexibility in allocations have been implemented.</p> <p>Finally, to avoid duplication, keep costs low and speed up the process, the Council's surveyors rather than the contractors are now pre inspecting empty properties to identify work required.</p>	
Resource Implications	
Loss of rental income	

Priority High	
Future Targets No change	
Action Plan	
Ensure that all new voids are relet within target.	Ongoing
Work with contractors to minimise delays with kitchen refurbishment works.	Ongoing
Look at new ways to advertise and promote low demand properties.	Completed
Consider more flexible allocations for lower demand homes	Completed
Release all voids on hold.	Completed

PERFORMANCE IMPROVEMENT PLAN	
Indicator	TS24b - Average time taken to re-let local authority housing (days) - SUPPORTED NEEDS
Reasons for not meeting target	
<p>Several long term voids have been relet during the quarter which adversely affects average number of days to relet.</p> <p>For a number of years the council has been experiencing low demand across many of its sheltered housing schemes.</p> <p>The Kitchen Refurbishment Programme has also resulted in inevitable delays in the reletting of those empty properties requiring new kitchens. This is mainly due to the added process of ordering and awaiting delivery of kitchen units from the manufacturers.</p> <p>A number of key staff in the Voids & Allocations Team have been on long term sickness absence.</p>	
Brief Description of Proposed Remedial Action	
<p>Options Appraisals of two sheltered schemes have now been commissioned.</p> <p>All investment in Category II sheltered schemes will be considered in light of the councils Asset Management Plan.</p> <p>Promotional exercises to stimulate demand are planned in January 2014</p> <p>Declassification of some additional sheltered schemes to be considered on a phased basis.</p>	
Resource Implications	
Loss of rental income	
Priority	
High	
Future Targets	
Action Plan	
Tasks to be undertaken	Task Completion Date
<ul style="list-style-type: none"> ▪ Options Appraisals ▪ Asset Management Planning ▪ Promotion of low demand schemes ▪ Declassification programme 	<p>Ongoing</p> <p>Ongoing</p> <p>January 2014</p> <p>December 2014</p>

PERFORMANCE IMPROVEMENT PLAN	
Indicator	WL114: % LA properties with CP12 outstanding
<p>Reasons for not meeting target Properties requiring a gas certificate alter on a daily basis and are monitored weekly at service management team level. A very small number of tenants still refuse to give access.</p>	
<p>Brief Description of Proposed Remedial Action We continually work to reduce the number of properties that do not have a current CP12, this is monitored weekly at the service management team.</p> <p>We will continue to work with our contractor to reduce the number of properties without a current CP12 and cater for individual tenant needs. In addition we continue to maximise publicity utilising our own newsletters / leaflets and the local media emphasising the importance of allowing access and publicising evictions.</p> <p>We will continue to fit gas restriction devices on properties with a history of repeat “no access”, this device restricts the delivery of gas to the boiler which will prompt the tenant to phone us for access.</p>	
<p>Resource Implications</p> <p>A small cost is associated with fitting gas restriction devices, which is met from existing budgets.</p>	
<p>Priority High</p>	
<p>Future Targets No change</p>	
Action Plan	
<p>Tasks to be undertaken As outlined above</p>	<p>Completion Date On-Going</p>

PERFORMANCE IMPROVEMENT PLAN					
Indicator	BVPI 12 Sickness Absence				
<p>Reasons for not meeting target</p> <p>The Council's target for 2013/14 is to achieve (not more than) 8.08 working days lost per employee, measured on a rolling 12 month basis. This equates to a quarterly target of 2.02 days per full time equivalent. There has been a small increase in the quarterly absence rate from 2.74 in Q2 to 2.88 in Q3.</p> <p>This slight increase is the continuing consequence of the cumulative effect of the increased number of long term sickness absences that have been present in the workforce for the last few months. However, these are reducing through the effective management of individual cases.</p> <p>Long term absence cases remain a key priority for all Managers and Staff. The cases are being closely monitored by Heads of Service and Service Managers supported by the Human Resources Team within the scope of the Council's Management of Sickness Absence Policy and with advice and assistance being provided from the Occupational Health Service.</p> <p>The last quarter has seen a rise in short term absence, which, to a degree, was anticipated due to the increased number of winter illnesses.</p> <p>The importance of return to work interviews and the short term absence process has been re-emphasised to managers as a means of addressing this slight increase.</p>					
<p>Brief Description of Proposed Remedial Action</p> <p>Again:</p> <ul style="list-style-type: none"> • Heads of service will continue to closely monitor sickness levels within their respective service areas and take urgent action as necessary in line with the Sickness Absence Policy • The HR team will continue to focus on providing detailed management information which will assist managers to effectively identify all short term cases of sickness absence which have exceed the agreed 'trigger' levels, together with all on-going long term cases of sickness absence. • The HR team will continue to meet with individual Heads of Service to provide advice and support to ensure managers have the continued skills and confidence to address absence issues appropriately. 					
<p>Resource Implications</p> <p>Timely interventions and practical support will continue to be needed from managers, which can make a real positive difference to attendance levels.</p> <p>The HR team will provide support and guidance to managers on the implementation of the revised policy.</p>					
<p>Priority High</p>					
<p>Future Targets Continue with existing target.</p>					
<p>Action Plan</p> <table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">Tasks to be undertaken</th> <th style="text-align: left;">Completion Date</th> </tr> </thead> <tbody> <tr> <td>See proposed remedial action (above)</td> <td>Ongoing with sickness absence levels continuing to be reported on a monthly basis</td> </tr> </tbody> </table>		Tasks to be undertaken	Completion Date	See proposed remedial action (above)	Ongoing with sickness absence levels continuing to be reported on a monthly basis
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See proposed remedial action (above)	Ongoing with sickness absence levels continuing to be reported on a monthly basis				



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	Improved	14
	Worse	8
	No change	5
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Shared Services¹

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Housing & Regeneration









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TS1-BV66a % Rent collected (Including arrears brought forward)	N/A	N/A	98.02%	98.15%	98.63%	98.41%	97.58%	97.58%	98.25%	97.00%			
HS1-WL111 % Housing repairs completed in timescale	95.79%	92.98%	94.62%	98.18%	98.66%	97.90%	97.20%	96.57%	96.46%	95.50%			
HS13-WL114 % LA properties with CP12 outstanding	0.19%	0.07%	0.01%	0.09%	0.08%	0.11%	0.07%	0.04%	0.01%	0%	Target based on legal requirement for all eligible properties to have certificate. Quarter performance is an average from months. There were 0 properties outstanding in December. Actions undertaken as outlined in the Improvement Plan at Appendix B1		
TS24a-BV212 GN Average time taken to re- let local authority housing (days) - GENERAL NEEDS	13.63	13.14	21.32	19.70	21.75	29.67	53.61	49.52	58.10	22.00	Improvement Plan at Appendix B2		
TS24b-BV212 SP Average time taken to re-let local authority housing (days) - SUPPORTED NEEDS	N/A	N/A	47.59	73.29	167.57	50.23	29.94	64.73	98.01	45.00	Improvement Plan at Appendix B3		

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Community Services











PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
WL08a Number of Crime Incidents	1,488	1,395	1,444	1,392	1,351	1,253	1,281	1,403	1,449	1,488			
WL18 Use of leisure and cultural facilities (swims and visits)	268,446	341,024	296,315	280,865	241,569	321,278	302,367	323,139	252,748	273,750	Seasonal variation means that Q3 is usually the lowest quarter. In addition, repair work during the period resulted in temporary closure of some facilities. No improvement plan beyond detail above.		

Planning









PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
NI 157a Processing of planning applications: Major applications	61.54%	22.22%	55.56%	80.00%	33.33%	80.00%	30.00%	77.78%	54.55%	65.00%	Performance represents 6 out of 11 complex applications. Outturn largely beyond the control of officers. A small number of major applications are received, often very complex, involving decisions being delegated to committee or subject to S106 agreements. No improvement plan beyond detail above.		
NI 157b Processing of planning applications: Minor applications	84.42%	85.46%	81.33%	82.09%	73.13%	75.86%	87.50%	84.62%	82.43%	75.00%			
NI 157c Processing of planning applications: Other applications	93.13%	99.20%	92.53%	92.54%	91.78%	89.23%	91.61%	93.02%	92.99%	85.00%			
WL24 % Building regulations applications determined within 5 weeks	80.60%	87.18%	79.29%	79.51%	66.20%	73.33%	80.00%	67.09%	75.61%	70.00%			

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Transformation

PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
BV12 Working Days Lost Due to Sickness Absence ³	2.28	1.90	2.26	2.42	2.14	2.31	2.63	2.74	2.88	2.02	Improvement Plan at Appendix B4		
BV8 % invoices paid on time	98.20%	97.84%	97.46%	96.98%	96.71%	97.82%	97.21%	97.03%	97.75%	98.24%	Head of Service's amber assessment: improvement plan not required.		
WL19b(ii) % Direct Dial calls answered within 10 seconds ⁴	82.49	83.17	79.20	78.49	78.38	79.47	79.55	80.18	80.50	82.21	Head of Service's amber assessment: improvement plan not required.		
WL90 % of Contact Centre calls answered	90.9%	87.8%	84.7%	85.7%	88.8%	89.9%	87.3%	93.6%	92.6%	90.6%			
WL108 Average answered waiting time for callers to the contact centre (seconds)	19.00	46.00	38.00	46.00	26.00	36.00	47.00	17.00	25.00	26.25			

Street Scene

PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
WL01 No. residual bins missed per 100,000 collections	68.38	44.94	49.96	63.36	65.40	87.09	64.78	63.54	65.40	70.00			
WL06 Average time taken to remove fly tips (days)	1.07	1.19	1.18	1.10	1.12	1.05	1.05	1.07	1.08	1.09			
NI 195a Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Litter	.83%	2.17%	N/A	.33%	1.00%	N/A ⁵	N/A	0.83% ⁶	1.67%	1.61%	Head of Service's amber assessment: improvement plan not required. Survey carried out three times each year. No data for Q1.		
NI 195b Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Detritus	13.43%	4.15%	N/A	6.49%	3.10%	N/A ⁵	N/A	7.09% ⁶	2.70%	7.33%	Survey carried out three times each year. No data for Q1.		

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PI Code & Short Name	Q3 2011/12	Q4 2011/12	Q1 2012/13	Q2 2012/13	Q3 2012/13	Q4 2012/13	Q1 2013/14	Q2 2013/14	Q3 2013/14	Current Target	Comments	Q3 13/14 vs Q3 12/13	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
NI 195c Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Graffiti	.67%	.33%	N/A	.67%	.00%	N/A ⁵	N/A	.33% ⁶	.00%	1.11%	Survey carried out three times each year. No data for Q1.		
NI 195d Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Fly-posting	0.00%	0.00%	N/A	0.00%	0.00%	N/A ⁵	N/A	0.00%	0.00%	0.00%	Survey carried out three times each year. No data for Q1.		
NI 191 Residual household waste per household (Kg)	123.97	124.36	121.91	122.3	131.59	116.18	104.64	111.36		123.48	Awaiting external confirmation of data		
NI 192 Percentage of household waste sent for reuse, recycling and composting	44.65%	42.52%	51.48%	52.74%	44.17%	40.73%	52.35%	42.16%		47.58%	Awaiting external confirmation of data		

Notes: ¹ Managed through One Connect Limited contract. Contractual targets are annual and set via SLA. Quarter targets are provided as a gauge for performance but are not contractual. One Connect Ltd is a joint venture between BT and LCC. From 1 April, revised arrangements between BT and LCC will mean that for WLBC, ICT and Revenues & Benefits services will continue to be delivered through existing structures but via BT Lancashire Services Ltd, a wholly owned subsidiary of BT.

² In line with current good practice, the 2013/14 outturns/targets do not include a value of 'credit on accounts' resulting in the outturn being lower than if credits were still included. Quarter outturns of previous years are therefore not directly comparable. Including credit on accounts may inflate collection rates as it is probable that these credits will need to be refunded to the tax payer. When targets were set, assumed values of 0.54% CTax and 1.2% NNDR were applied. Although the contractual targets / annual SLAs do not include credits on account, an annual figure including credit on accounts will be provided at year end to allow a direct year-on-year comparison. This is not done quarterly, as the new Northgate system does not automatically include the data.

³ From Q3 2012-13 data does not include OCL seconded staff.

⁴ From Q1 2012-13 data does not include OCL seconded staff.

⁵ Data for Q4 was collected but not analysed due to a staff vacancy, subsequently filled. However, due to competing priorities this work has not taken place.

⁶ Data for Q2 has been restated. Outturns are on target.

'NI' and 'BV' coding retained for consistency/comparison although national reporting no longer applies.

Agenda Item 5(g)

Subject: Corporate Performance Indicators Q3 2013-2014

CORPORATE AND ENVIRONMENTAL OVERVIEW AND SCRUTINY COMMITTEE HELD ON 20 FEBRUARY 2014

175. QUARTERLY PERFORMANCE INDICATORS (Q3 2013/14)

Consideration was given to the report of the Transformation Manager which detailed performance monitoring data for the quarter ended 31 December 2013, as contained on pages 201 to 215 of the Book of Reports and also pages 217 to 222 giving details of a revised Appendix A.

The Partnership and Performance Officer attended the meeting and updated Members on the revisions to Appendix A as circulated and provided details of the amendments at paragraph 4.2 of the report in relation to the 31 indicators for Q3 to read:

- “16 met or exceeded target
- 5 indicators narrowly missed target; 7 were 5 % or more off target
- 1 is data only
- 2 indicators have data unavailable at the time of the report (*N191: Residual household waste per household; N192: Percentage of household waste sent for reuse, recycling and composting*).

As a general comparison, Q3 performance from 2012/13 suite gave 14 (from 32) indicators on target.”

In discussion Members raised questions and comments in respect of the following performance indicators:

- TS24a & b (Average time taken to re-let authority housing (days) – General Needs & Supported Needs – reasons for missed target; no. of houses empty; delays affecting re-letting (key staff absences; expansion of detail and reasons relating to the Kitchen Refurbishment Programme.)
- N191 (Residual household waste per household (Kg) – reason affecting receipt of data.

In relation to a question on the Members’ item “Choice-Based Lettings”, agreed at the last meeting, it was confirmed that a request had been submitted to the Assistant Director Housing and Regeneration (Minute 163 refers) and that the item was scheduled for inclusion on the agenda of the next meeting. A request was put forward that an invitation to attend be extended to the Portfolio Holder.

At the conclusion of the discussion it was agreed that there were concerns in relation to performance on the Kitchen Refurbishment Programme, as detailed in the Performance

Management Plans for PIs – TS24a & TS24b (Appendix B1 and B2), and the effect on the re-letting process.

RESOLVED: A That as a consequence of the discussion on the Quarterly Performance Indicators (Q3 2013/14), Performance Improvement Plans – Indicators: TS24a & TS24b, it was agreed that the following comment be referred to Cabinet:

“There are significant concerns about the performance of the Kitchen Refurbishments Programme and the associated re-letting process.”

B. That the Council’s performance against the indicator set for the quarter ended 31 December 2013 be noted.



AGENDA ITEM: 5(h)

CABINET: 18th MARCH 2014

Report of: Assistant Director Housing and Regeneration

Relevant Managing Director: Managing Director (Transformation)

Relevant Portfolio Holder: Councillor Mrs V. Hopley & Councillor A. Owens

**Contact for further information: Jonathan Mitchell (Extn. 5244)
(E-mail: jonathan.mitchell@westlancs.gov.uk)**

SUBJECT: HOUSING STRATEGY 2014-2019

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To seek Cabinet endorsement for Housing Strategy 2014 - 2019.

2.0 RECOMMENDATIONS

2.1 That the Housing Strategy 2014 – 2019 as shown at Appendix 5 be endorsed.

2.2 That the Housing Strategy 2014 – 2019 Action Plan as shown at Appendix 3 be endorsed.

2.3 That the Assistant Director Housing and Regeneration be authorised, after consultation with the relevant Portfolio Holder, to make any further minor amendments to the Housing Strategy 2014 – 2019 and Year 1 Action Plan.

2.4 That the Assistant Director Housing and Regeneration be authorised, after consultation with the relevant Portfolio Holder, to develop, on an annual basis a housing strategy action plan for years 2 to 5 inclusive.

3.0 BACKGROUND

- 3.1 West Lancashire Council last published a full housing strategy in 2004. It covered the period 2004-2009 and was approved as Fit for Purpose by Government Office North West.
- 3.2 There is no longer a statutory requirement for the Council to produce a Housing Strategy; however it is acknowledged that such documents can be key to providing strategic direction on housing related matters and help to support broader economic objectives. They can also be considered as a contextual document to support Local Investment Plans.
- 3.3 Government no longer provides guidance for local authorities about producing housing strategies. This was also clarified by the publication of the statutory guidance 'Creating Strong, Safe and Prosperous Communities' in 2008 which gives local authorities the discretion about how, when, and in what format they document their housing strategy.
- 3.4 Housing strategies are intended to:
- Provide an overview of housing related issues in the area
 - Identify any mismatch between housing supply and demand and identify issues such as matters related to housing conditions, affordability, needs of vulnerable groups etc.
 - Set out the key housing objectives for the authority and its partners
 - Establish priorities for action and spending priorities
 - Provide an action plan and policy direction to address the housing challenges and problems in the borough.
- 3.5 The Housing Strategy is intended to work in harmony with the Local Plan and other key local strategies.
- 3.6 Essentially, a Housing Strategy brings together and builds on a number of strategies which deal with aspects of housing and any other related activity that leads to the creation of an appropriate sustainable local housing offer.

4.0 CURRENT POSITION

- 4.1 A draft Housing Strategy 2014 – 2019 for West Lancashire as shown at Appendix 1, has been prepared and has been subject to an 8 week public consultation period which closed on 28 February 2014.
- 4.2 The consultation comments that have been received are summarised in Appendix 2.
- 4.3 Appendix 5 shows the Housing Strategy, as amended taking account the comments received. Amendments are shown as tracked changes.

- 4.4 Where appropriate Officers have provided commentary and suggestion on how the consultation comment has been addressed / included into the Housing Strategy.

5.0 HOUSING STRATEGY DEVELOPMENT PROCESS & CONTENT

- 5.1 Arc4 Housing Consultants were appointed to assist in developing a five year housing strategy for the period 2014-2019.

- 5.2 The process of producing the Strategy is summarized below.

Identifying the challenges and potential priorities

- 5.3 Our consultants carried out telephone interviews with key Council Officers and Managers and reviewed a range of relevant documentation at a local, regional and national level to get a sense of what type of strategic housing issues are facing West Lancashire.

- 5.4 The review work enabled our consultant to identify the areas which would then be used as discussion points in early stakeholder consultation.

Early Stakeholder Consultation

- 5.5 This was an important element of the work with a modest event being held late in 2012 at West Lancs Investment Centre. The purpose of the event was to try and tease out what the strategic housing objectives might look like.

- 5.6 Attendees at the consultation event included:

- Housing Developers / Registered Providers
- Housing Strategy, Economic and Planning Colleagues at Neighbouring Councils
- HCA
- Borough Council Elected Members
- Edge Hill University and Skelmersdale College
- LCC Colleagues
- Public
- Voluntary Sector / agencies
- Other stakeholders and partners

- 5.7 For those people who could not attend we issued housing strategy questionnaires that could be completed on-line. Two questionnaires were developed; one for professionals and one for members of the public. In addition, our consultants took telephone calls from those who wished to provide feedback in that manner using a free phone number that had been provided.

- 5.8 The emerging priorities were then used to help develop initial versions of the draft Housing Strategy.

Housing Strategy – Public Consultation

5.9 Following the work undertaken by Arc4, Council Officers refined the strategy document so that it took account of the local housing context of the Borough. Thereafter the Housing Strategy was made available for an eight week period of public consultation which started on 7 January 2014 and finished on 28 February 2014.

5.10 Consultation feedback was sought via:

- Direct mail of those who contributed to the first stage consultation as mentioned in (5.5) above.
- Press release to direct those parties interested in housing issues to a copy of the draft Housing Strategy 2014 – 2019 on the Council website in order that they can provide their consultation feedback.
- E-mail to all Council Members and Parish Clerks.
- Details placed on to Council web pages.
- Landlord Services Committee
- Executive Overview & Scrutiny Committee

Content of the Strategy – Delivery Objectives

5.11 The Housing Strategy is structured using the following delivery objectives:

- Achieve the right supply new homes including maximising affordable housing
- Regenerate and remodel areas of Skelmersdale
- Making the best use of all existing homes
- Encourage well managed and maintained homes across all tenures
- Encourage investment to meet specialist housing requirements
- Deliver the Council's Sustainable Energy Strategy 2012-2020 – residential and domestic sector objectives

5.12 The proposed Housing Strategy Vision is *“The provision of good quality housing in the right locations which also supports our economic and regeneration priorities, meets people’s changing needs and is situated within pleasant, safe and sustainable communities”*

5.13 The diagram on page 15 of the draft Strategy shows the Housing Strategy in the corporate context. Chapter 6 of the document sets out the key delivery actions for each of the six key objectives.

5.14 The Housing Strategy includes delivery actions under each of the key objectives.

Action Plan

5.15 An Action Plan is attached at Appendix 3.

6.0 SUSTAINABILITY IMPLICATIONS / COMMUNITY STRATEGY

- 6.1 The Housing Strategy complements the housing related objectives of West Lancashire Community Strategy which aims to provide more appropriate and affordable housing to meet the needs of local people.
- 6.2 The Housing Strategy takes account of other related strategy and plans across the Council which are focussed on addressing housing development growth in a manner that is sustainable and meets the housing needs of the Borough's residents.
- 6.3 There are no negative sustainability or community strategy implications by virtue of this report.

7.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 7.1 At this stage though no specific resource implications have been identified, key actions will need to be considered through future Service Action Plans.

8.0 RISK ASSESSMENT

- 8.1 Failure to develop a housing strategy which has clear evidenced based housing delivery objectives will mean that the Council will not be able to target resources effectively to address the housing requirements of the Borough.

9.0 CONCLUSION

- 9.1 Developing a Housing Strategy will provide direction on which strategic housing issues the Council wishes to address during the life of the Strategy.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

There is a direct impact on members of the public, employees, elected members and / or stakeholders. Therefore an Equality Impact Assessment is required. A formal equality impact assessment is attached as an Appendix to this report, the results of which have been taken into account in the Recommendations contained in this report

Appendices

Appendix 1 – Draft Housing Strategy 2014-2019 – Consultation Version
Appendix 2 – Consultation Comments Received

Appendix 3 – Year 1 Action Plan

Appendix 4 – EIA – Initial Assessment

Appendix 5 – Housing Strategy 2014 – 2019 – Amended in light of consultation

Appendix 6 - Minute of Landlord Services Committee (Cabinet Working Group) held on
12 March 2014 (to follow)



Housing Strategy 2014 to 2019

CONSULTATION DRAFT – JANUARY 2014





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Preface

We are delighted to introduce this housing strategy for West Lancashire, which provides the opportunity for us to explain our vision and delivery objectives over the next five years.

It has been developed against a backdrop of unprecedented change in national policy including fundamental reforms to planning policy, welfare benefits and the role and funding of social housing.

In developing this strategy we have ensured that we have engaged with and consulted with stakeholders. It is evidenced based and reflects the Council's Corporate priorities along with the housing related objectives of our Sustainable Community Strategy 2007 - 2017. This strategy also takes account of:

- Private Sector Housing Strategy 2006 - 2009
- Affordable Housing Strategy 2008 - 2013
- Homelessness Strategy 2007 - 2013
- Sustainable Energy Strategy 2012 - 2020
- Tenure Strategy 2013
- Local Plan 2012 – 2027
- HRA Business Plan 2012 -2042

In West Lancashire we recognise that the Borough has both opportunities and challenges. Ensuring that “we improve housing and deliver housing that meets the needs of local people” is a key focus for the Council and contributes to sustainable regeneration and growth, and a Borough which looks and feels cared for. We retain and manage our Council Housing stock and so understand that access to good quality homes at the right price, in the right location and in sustainable neighbourhoods is important for our residents and those households looking to relocate to the area with the aim of investing and making their home in our Borough.

Housing is therefore important to us and helps to deliver our Corporate priorities, which take account of our need to manage reducing budgets to deliver public services for our residents. This means as we move forward, we need to remain prudent, be cost effective and innovative in our approaches and continue to work more closely with existing partners and seek out different ways of working with new partners to help deliver the right housing offer.

We recognise that everyone's needs are different, and we are committed to ensuring that housing and services meet a wide range of specialist housing needs. Housing will play a crucial role in our economic success and is a central component of people's lives.

We have already achieved much, following the publication of our last housing strategy 2004-2009 and we have worked positively with our partners in improving housing, the housing offer and the lives of local people as a result. We wish to build upon this success and this housing strategy allows us an opportunity to refocus our priorities within the current strategic delivery context.

We are committed to trying new approaches and doing things differently as we seek to address our most pressing housing issues. We do not have the resources to do everything, so in developing this housing strategy we realise we will have to work increasingly with private, statutory and voluntary sector partners to achieve our objectives.

The Action Plan with this housing strategy will be reviewed regularly as part of our existing Service Action Planning arrangements. This will allow progress to be monitored and delivery outcomes to be measured.

Finally, we would like to thank all those who responded to our consultation and who have otherwise contributed to this Strategy, and we look forward to working with our partners to turn this strategy in to reality.



Bob Livermore
Assistant Director Housing and
Regeneration



Adrian Owens
Portfolio Holder for Housing
(Finance), Regeneration and Estates



Val Hopley
Portfolio Holder for
Landlord Services

Housing Strategy for West Lancashire – An Executive Summary

West Lancashire Borough Councils' housing strategy sets out our strategic housing delivery objectives which we aim to address over the five-year period from 2014 to 2019. Housing market conditions and housing needs will change over time, but it is important to establish direction and to set out strategies and targets for improving housing circumstances in the short to medium term.

We have based our strategy and action plan on analysis of our housing market and housing needs. Equally importantly, we have consulted widely with people in housing need and other stakeholders. This consultation process has influenced the objectives we have established. Achievement of these objectives will be subject to resource availability. Our key delivery actions which accompany our housing strategy objectives are shown on page 7. Our housing strategy delivery objectives are:

- ✚ Achieve the right supply of new homes including maximising affordable housing
- ✚ Regenerate and remodel areas of Skelmersdale
- ✚ Make the best use of all existing homes
- ✚ Encourage well managed and maintained homes across all tenures
- ✚ Encourage investment to meet specialist housing requirements
- ✚ Deliver the Council's Sustainable Energy Strategy 2012- 2020 Residential and Domestic Sector objectives.

Analysis of needs – Housing sector issues

The profile of West Lancashire as a whole is one of a Borough with high demand for housing in the private and public sector, with house prices more than 30% higher than Lancashire's average.

House price data suggests that there are three main housing markets. These consist of Skelmersdale, Ormskirk and the more rural areas of the Borough, containing smaller towns and villages. The housing issues within each area range from extremely low to high demand for accommodation.

Our population is growing – The 2001 Census recorded a Borough population of 108,400 and the Census in 2011 recorded a population increase of 2.1% to 110,700. Population projections predict that by 2031 the population will be in the region of 120,900. We need to cater for this growth and will do so in line with our Local Plan 2012-2027.

It's ageing - We know that our population is ageing and that by 2035, there will be 10,300 more people aged 60 and over, and 7,200 people aged 75 and over. This is likely to increase demand for housing related support and other forms of social care to enable residents to remain in their own homes.

It's expensive - We know it's expensive to buy a home in most parts of the Borough and that in 2010 we had an annual affordable housing shortfall of 214 units (homes) per year. While affordable housing has been developed we still have growing levels of unmet need each year.

Added to this is the fact that we know that economically active households, particularly those who would traditionally be classed as first time buyer households, struggle to find housing at an affordable price in our Borough and as a result they move away. We need to ensure we are providing the 'right' type of housing offer to retain and attract younger and economically active growing families and first time buyers while at the same time provide suitable housing for older people.

Private Sector Housing - We need to make more of the private rented sector, including ensuring homes that are let are well managed and maintained. The private rented sector can assist, in part, with some of the matters mentioned above by providing rented homes as an extension to the social rented sector, where waiting lists can mean a significant wait before rehousing occurs. It can also act as an alternative tenure for households currently unable to access the home ownership ladder.

Our Private Sector Stock (PRS) condition survey 2010 identifies that there are properties in the private sector that still need investment and in some instances this can impact on the occupiers' health. Funding to address these issues is limited and so we need to consider how we can tackle stock condition and also advise and support householders to make their homes more energy efficient. This will also help address the issue of fuel poverty experienced by some households in the Borough.

Skelmersdale - The new town of Skelmersdale was built in the 1960's, and was the first new town in the North West. Skelmersdale faces a number of challenges in terms of its housing market, physical design and environment and these are considered in the main text of the housing strategy.

Skelmersdale Town Centre – The Council is keen to improve the attractiveness and functionality of Skelmersdale Town Centre. While it is well used it does not offer the shopping experience that can exist elsewhere in the region, which in many cases now offer entertainment venues, such as cinema or bowling and tend to include a range of well known eating establishments. Such facilities in themselves provide a reason for people to visit and can help to create a vibrant night time economy. Such facilities would provide an alternative purpose for visiting other than for day time shopping.

To help with this issue the Council and the Homes and Community Agency (HCA) approved a Supplementary Planning Document and master plan in 2008. We are working with St Modwen, a regeneration company to bring the aims of the master plan to fruition and improving the housing offer and range of tenures available is seen as a significant driver in the area's redevelopment with the masterplan including the development of high quality market housing, for sale and to rent, low cost market housing and affordable housing. This work is intended to help improve the local economy by increasing visitors and enhance the overall appeal of the area. Planning permission has now been granted for a supermarket, cinema and other retail and leisure facilities in the Town Centre.

Work is on-going to achieve our town centre aspirations, and the Council, working in partnership with the HCA identified land, and is marketing, where appropriate, sites suitable for residential housing development. In September 2011, West Lancashire College opened its doors to a brand new state-of-the-art campus situated in the town centre. Added to this is to be the development of a £2 million youth zone by the County Council, consisting of a two-storey facility on land based to the north of Skelmersdale police station.

Other relevant themes and housing market challenges - We have highlighted in this executive summary some of the issues which we have considered during the development of this housing strategy. They relate mainly to our housing market and housing supply, making the best use of existing stock, the impact of population growth and changes in age profile in the years to come. The main housing strategy document introduces other housing related matters that have also influenced the delivery objectives that this strategy will focus upon.

Resources - Delivering this housing strategy will require a significant amount of inward investment and there are likely to be competing financial "demands" in trying to achieve them. It is clear that the authority is not in a position to finance all its aspirations from existing resources and so all avenues will be considered to help make progress. To that end we are strongly committed to working in partnership to pursue all funding opportunities, which will allow this authority to deliver real and sustainable solutions, which meet its housing challenges.

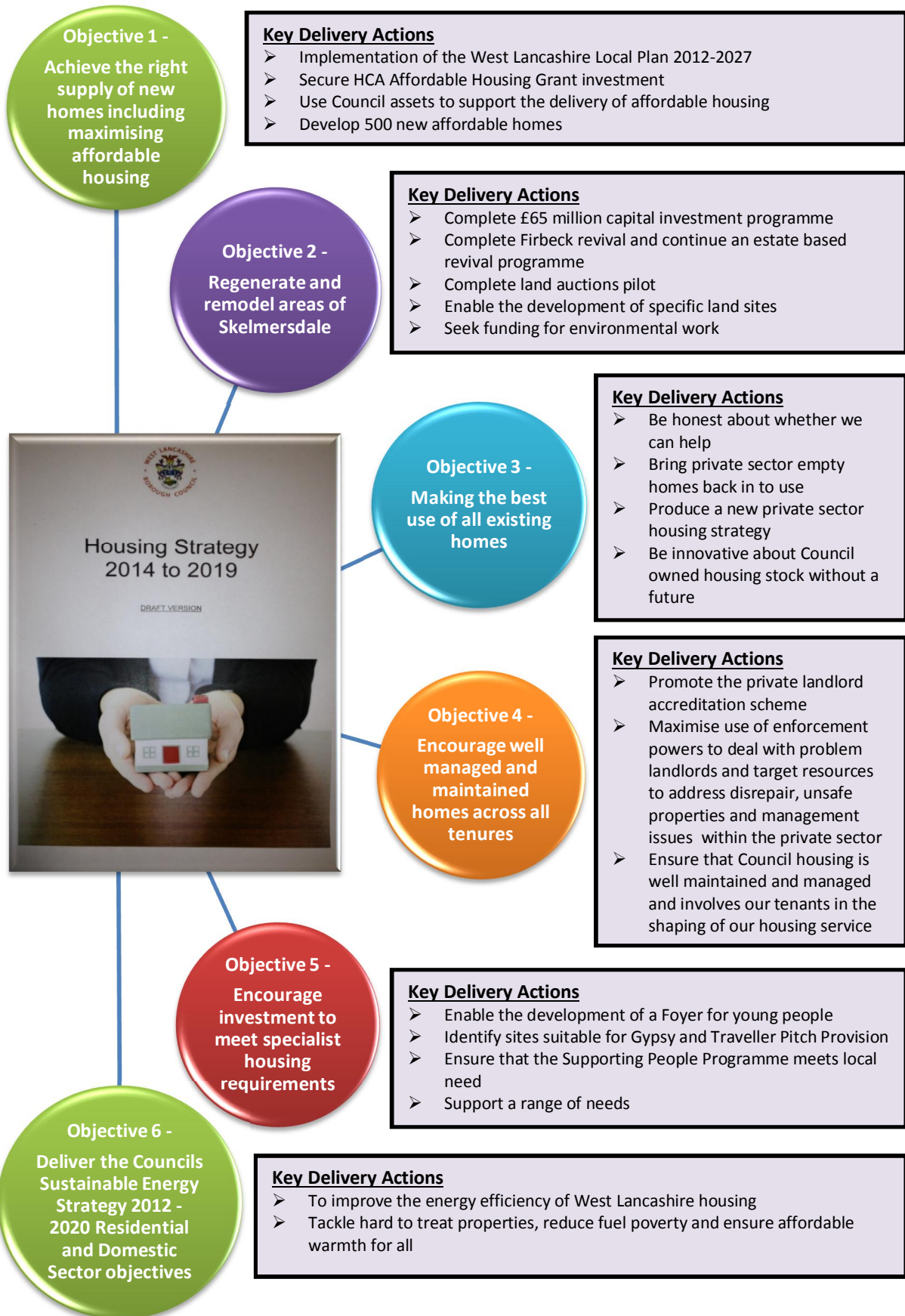
Progress since our last housing strategy

We have made good progress following the publication of our last housing strategy 2004-2009. Below is a summary of some of the achievements:

- Since 2005 secured £10 million Homes and Community Agency grant which has provided 271 affordable dwellings with total scheme cost of £34.5 million, including a 111 Unit Extra Care Scheme in Ormskirk and the Council building 17 homes in Elmstead in Skelmersdale;
- The Council Housing stock is now self-financing which has enabled total investment of £65 million in property improvements to Council housing to commence, including £5 million to be invested to support the revival of Firbeck;
- Established a partnership arrangement with Regenda Housing Group to develop affordable housing in Borough called The Affordable Housing Capital Partnership Scheme;
- Significant energy efficient improvements to Council housing stock to provide long term fuel efficiencies, reduce fuel poverty and ensure affordable warmth for tenants. Measures include insulation programmes, including external wall insulation, boiler replacements, fuel switching, and installation of renewable technologies including biomass, air source heat pump, and solar photovoltaic panels.
- Becoming a pilot for land auctions – One of three councils country wide. This pilot has the potential to provide affordable and market housing to the area;
- Establishing a Transfer Incentive Scheme to enable Council Tenants to Downsize in to smaller Council property therefore making better use of existing Council Stock;
- Achieving and maintaining the Decent Home Standard in Council Housing;
- Becoming a member of People Power Collective Energy Switching Scheme which will help Lancashire residents to find out if they can save money by switching energy providers.

West Lancashire's Housing Strategy 2014 – 2019

(Strategic housing objectives and key delivery actions)



Introduction

1.0 Profile

West Lancashire has a population of 110,700¹ spread across a mix of vibrant towns and villages sitting alongside tranquil countryside which covers an area of 38,109 hectares and contains the greatest proportion of Green Belt land in England.

The Borough is complex and diverse in its nature, and includes rural areas together with the urban conurbation of Skelmersdale and the key service centres of Ormskirk, Aughton and Burscough. The majority of residents live in these settlements.

There are three distinct rural areas; the Northern, Eastern and Western Parishes, containing a number of villages, the largest of which are the linear settlements of Tarleton and Hesketh Bank.

Our geographical location in the North West of England is unique. We have a dual identity, being the southernmost Borough in the County of Lancashire, whilst also located within the Liverpool City Region and adjacent to the Manchester City Region .

The Borough is also adjacent to a number of large urban areas, including Southport to the west, Liverpool and parts of Knowsley to the south, St Helens and Wigan to the east and Chorley, Leyland and Preston to the north east. It is a popular area for commuting to other parts of Lancashire and Manchester, whilst there are particularly strong links with the economy of Liverpool.

There is motorway access to Liverpool via the M58 and to Preston, Wigan and St Helens via the M6. This defines one of the key features of the West Lancashire housing market which is the strong linkages with surrounding areas which generates demand for housing in the area from higher income groups and those willing to commute, which can create affordability problems for those on lower incomes.

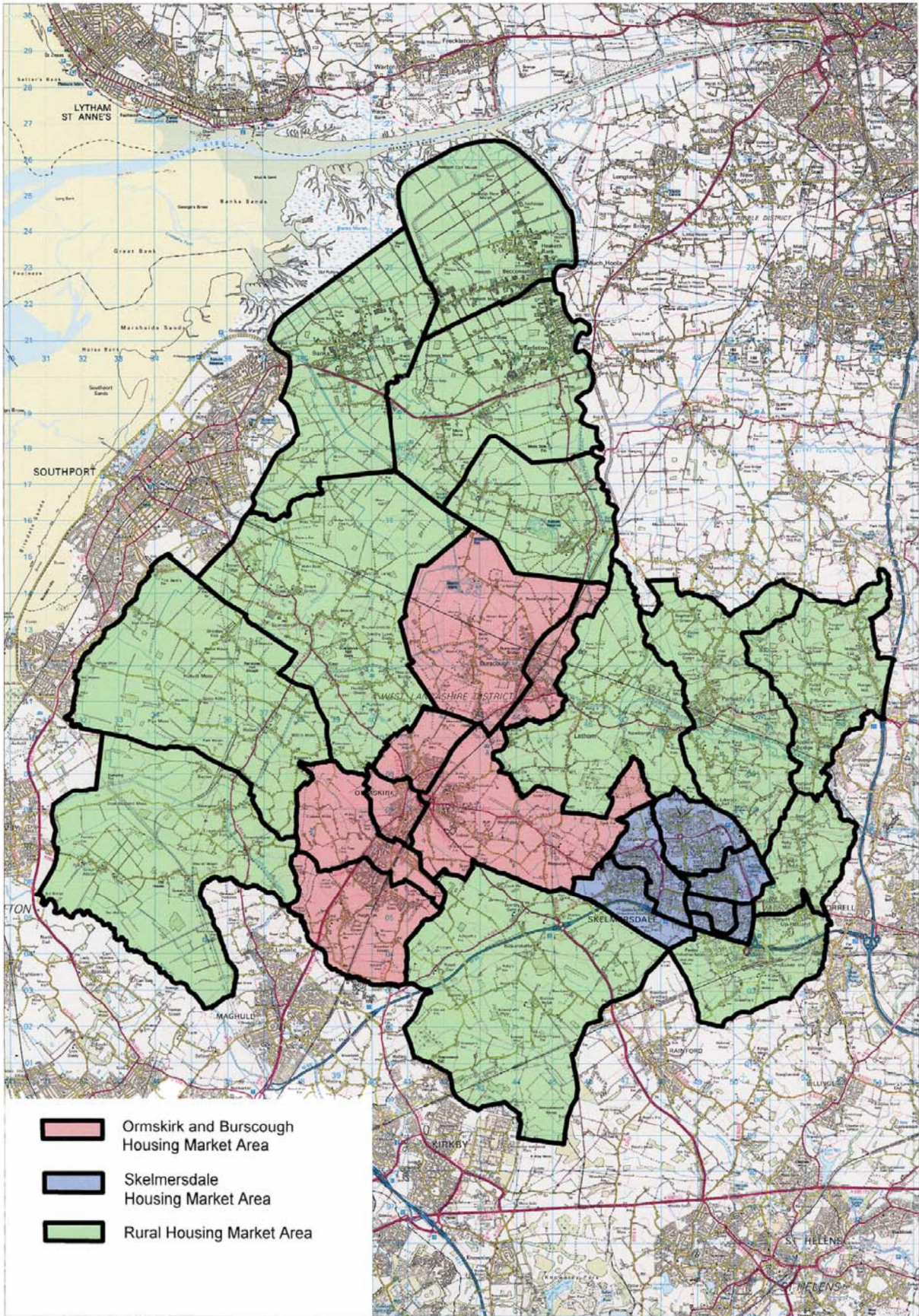
Our analysis suggests that there are three main housing markets. These are:

- Skelmersdale which as well as being a free-standing employment centre and settlement has house prices which are typically below those elsewhere in the Borough;
- Ormskirk which is also a free standing settlement and employment centre along with Burscough and Aughton;
- The more rural areas of the Borough, containing smaller towns and villages. These areas are generally distinguished by higher prices and in some cases a commuter function associated with employment centres outside the Borough. This sub-market covers a large area with significant differences in accessibility to large employment centres.

The profile of West Lancashire as a whole is one of a Borough with high demand for housing in the private and public sector, with house prices more than 30% higher than Lancashire's average.

These housing markets present us with a challenge, particularly because housing issues within each area range from extremely low to high demand for accommodation.

¹ Census 2011



The purpose of a housing strategy

2.0 The purpose of a housing strategy

The Government is determined that local authorities must become more strategic in their thinking, developing plans for the longer term to deliver measurable outcomes.

In housing, the agenda has moved on from the requirement to produce a “fit for purpose” housing strategy to having an excellent strategic approach – requiring us to be clear about our direction for housing and how we will enable delivery – and communicate this to the right people, in the right way, to the benefit of our communities.

Housing led initiatives can contribute to improving skills, education and employment chances, whilst ill health can be improved and alleviated by living in homes which are adaptable and located in safe and supportive environments. Local housing authorities’ work in producing housing strategies has been a lever for economic and social change in many areas, reflecting a shift towards ensuring local housing markets meet local demands, rather than a narrower focus on directly providing social housing.

In essence a housing strategy is a plan that considers housing issues in an area and sets out how to tackle them over a given period of time, having regard to identified housing needs and the resources available. It reflects the important strategic and enabling role of the Council in place shaping and meeting and facilitating housing needs in the Borough. It also has to consider the delivery and policy context applicable at the time of its development and evolve as policies change. Chapter 3 considers the current national, regional and local policy context in which this housing strategy should be considered.

The housing strategy is intended to be an over-arching document that establishes priorities for action, both by the local authority and, where appropriate, by other service providers and stakeholders and sets out a clear action plan.

The strategic housing role therefore has an important part to play in a number of locally based plans, as it can assist in promoting a joined-up approach to activity that helps support sustainable communities including:

- assess and plan for current and future housing needs of the local population;
- make the best use of existing housing stock;
- plan and facilitate new housing supply;
- work in partnership to facilitate commissioning of housing support services which link homes to support and other services that people need to live in them;
- have working partnerships that secure effective housing and neighbourhood management;
- ensure good design which encourages informal social mixing and support community cohesion within estates and neighbourhoods;
- support the economy by having the right number of homes of the right tenure and price for workers;
- link where people live to the services they want and need;
- ensure that all residents’ voices feed into shaping strategy by encouraging their participation of the housing strategy development process;
- improve poor housing and the corresponding health problems associated with such housing.

In overall terms a housing strategy aims to provide an appropriate balance of good quality housing, which meets the housing needs of the population, provides variety, choice and is accessible and contributes positively to the well-being of the citizens of the local authority area. It involves making the best use of the housing that is already there, as well as working effectively with the market to supply new homes. It is also about looking and working across all housing tenures, and ensuring that appropriate links are made to the support services which people need to live in their homes.

National, regional and local context

3.0 West Lancashire's housing strategy within a national context

The Government's stated aim is to deliver a nationally sustainable and resilient economy that is rebalanced across regions and sectors (public, private, voluntary and community). Since the Coalition Government has come to power it has stressed its commitment to decentralisation, localism and the 'Big Society', and its 'Programme for Government' set the scene for a radical devolution of power to local authorities and community groups; critical to this has been the 'Localism Act 2011' which included measures to reform the planning system, social housing and the Council housing financial system. One of the key elements that the Act provided was reform to ensure that decisions about housing are taken locally.

The Government's Housing Strategy 'Laying the Foundations: A Housing Strategy for England' 2011 set out its intended direction of travel for housing, its role in the wider economy and its contribution to social mobility. Government want to see primacy of home ownership, social housing as welfare, and an increasing role for the private rented sector. The key elements of this strategy are summarised below:

- An agenda of growth in housing delivery, recognising the positive role that housing and its construction has in supporting economic growth of the economy, increasing employment opportunities and supporting inward investment. This is underpinned by a number of private sector led funding initiatives such as The Regional Growth Fund, designed to support public sector dependent economies to private sector led growth. The Government introduced the New Homes Bonus to specifically encourage housing growth;
- The introduction of the new National Planning Policy Framework, is designed to simplify and speed up the planning system and has a presumption in favour of development. The framework requires West Lancashire to work more closely with local communities to deliver homes, jobs and infrastructure needed for a growing population;
- Within overall housing growth priorities there is a commitment to deliver more affordable housing and bring empty homes back into use to support new affordable housing delivery. This has been supported through Government funding focused around the Affordable Rent Model introduced in April 2011, which utilises higher rent and lower Government grant levels;
- Access to social housing has been a key focus of the Government's social housing reform agenda. The priorities are to ensure that affordable housing is available to those who need it for as long as they need it and this has seen the ending of 'tenancies for life'. Local authorities now have the flexibility to offer minimum fixed term tenancies to households moving into social housing stock. Alongside social housing reform sits the reform to the welfare system, which with its changes to benefit, eligibility and entitlement, will impact significantly on housing supply and demand. These changes affect both social and private sector tenants;
- The Government sees the provision of a healthy, well managed private rented sector as essential to meeting housing need and demand and it is focusing on raising standards within the sector, and for local authorities to address fitness and disrepair issues. This is very much in line with the Government's aim to improve health outcomes whilst reducing health inequalities. The Government is keen to increase the supply of private sector homes for rent by supporting investment in new private rented provision; it sees the growth in the private rented sector as underpinning economic growth as it allows greater mobility of people and skills;
- The Government recognises that older people are living longer and wants to see a better deal provided for older people, with greater choice and support to live independently. The Government is committed to ensuring that housing and planning policies positively reflect the wide range of circumstances and lifestyles of older people, who already occupy nearly a third of all homes. In terms of safeguarding vulnerable adults, housing has a strong role to play alongside social services, health, the police and other agencies. The Care and Support Bill introduced in May 2013 sets out a new safeguarding power, and places a duty on local authorities, in our case, Lancashire County Council, to respond to safeguarding concerns by making enquiries as necessary to decide on whether, and what, action is needed;

- In August 2012 the Government published its Homelessness Strategy, 'Making every contact count: A joint approach to preventing homelessness'. The Strategy focuses on prevention and aims to 'make sure that every contact local agencies make with vulnerable people and families really counts.';
- The Government continues its commitment to delivering Zero Carbon homes and, along with other binding carbon reduction targets by the previous Government, makes energy efficiency and tackling fuel poverty key issues for housing. Tackling energy efficiency in existing housing stock remains the sector's biggest challenge, and therefore utilising the Green Deal is important;
- Housing is seen by Government as key to creating and sustaining local communities. It is seen as contributing to the economy and supporting economic growth and employment, both directly and indirectly, which is why housing issues need to be addressed at a local level but in a planned and strategic way. The primary role of West Lancashire is to understand and address the needs and aspirations of communities while having regard to the National Context.

3.1 West Lancashire's housing strategy within a regional context

One of the strengths of the West Lancashire Borough is its geographical location. While we are included in the Liverpool City Region (North)², not all of West Lancashire in housing market terms, is influenced by this connection. We are also influenced by Greater Manchester City Region and being part of the three tier arrangement of Lancashire County and Parish Council's in many areas; we are aware of significant housing market linkages between the northern part of West Lancashire and Central Lancashire. This geographical placement means we have strong linkages with surrounding areas which generate demand for housing in our locality from higher income groups and those willing to commute; this creates affordability problems for those on lower incomes.

While the Government's decentralisation and austerity agenda has dismantled the regional tier of Government, it is still important for us to understand the nature of West Lancashire's placement within the region and how the City regions and neighbouring authorities housing and economic issues and aspirations could impact upon us. We highlight some of the regional influences below.

3.2 The Liverpool City Region

We are part of the Liverpool City Region (North) and its' economic and strategic influence is relevant to West Lancashire. With the abolition of Regional Development Agencies, Local Enterprise Partnerships (LEP's) have become the focus of activity in delivering economic growth. LEP's are responsible for determining local economic priorities and undertaking activities to drive economic growth and local job creation. The Liverpool City Region LEP want to see growth and increased productivity and a rebalanced economy focusing on private sector led growth driven by low carbon economy, knowledge economy, visitor economy and SuperPort. West Lancashire is not currently within the Liverpool City Region LEP but hopes to work closely with it given the functional economic geography of the area. The Council will also continue to work closely with partners, including the LEP in Lancashire.

The Liverpool Local Investment Plan (LIP2) published in August 2012 responds to the changed political and economic landscape and its vision underpins the priorities of the LEP.

It 'sets out how the Liverpool City Region will create the environment to stimulate the private sector market to accelerate growth, rebalance the economy and deliver housing and neighbourhoods where people choose to live, work and visit'.

Its priorities include investment in transformational sectors and strategic locations and supporting investment through planning, infrastructure and site availability, maximising public sector investment impact and land assets, developing global markets and increasing the number of residents in work. This may afford opportunities for West Lancashire and so continued dialogue and partnership working on housing and economic issues remains important to us.

The Homes and Communities agency states that

'Housing will play a key role in supporting the City Region's economic ambitions. LIP2 has made a commitment to improve the choice and quality of homes and neighbourhoods. It will focus on ensuring existing stock is energy efficient,

² Liverpool City Region (North) comprises of Wirral, Liverpool, Sefton, Knowsley and West Lancashire.

providing mixed tenure homes to meet the needs of local people. Bringing 16,400 long term empty properties back into use, tackling deprivation and worklessness and encouraging private sector led housing building'.

3.3 Lancashire

The Lancashire Strategic Housing Partnership is made up of three separate sub regions: Central Lancashire, Pennine Lancashire and Mid Lancashire. West Lancashire forms part of Mid Lancashire.

The Mid Lancashire Housing Contextual statement 2012-2015, sets out the priorities for housing across the Mid Lancashire area of Lancaster, Preston, South Ribble, Chorley, Ribble Valley and West Lancashire. These authorities, along with Lancashire County Council, have agreed to:

- Maximise the potential of Mid Lancashire's key economic development and regeneration activities;
- Ensure that infrastructure that supports the area is capable of supporting challenging economic growth ambitions; and
- Capitalise on the area's unique educational attributes to support and sustain commitment to a knowledge led economy.

Underpinning the Housing Contextual Statement, the Local Investment Plan (LIP) for Mid Lancashire was published in May 2012. The LIP puts forward the case for investment in housing and regeneration across the sub region. Set within the context of the Lancashire Local Enterprise Partnership, the LIP considers all relevant strategic priorities for investment, and develops a set of thematic priorities that bring together aspirations, needs and potential; these include:

- Delivering significant sustainable housing growth and regeneration to meet demographic and economic needs;
- Integrating housing and economic potential to maximise investment in both;
- Delivering affordable housing to meet economic and social needs;
- Providing better life chances for communities;
- Creating and maintaining places where people want to live; and
- Making the best use of assets and achieving more for less.

These themes are also articulated spatially within the LIP following an exercise to consider potential housing sites and areas against the thematic priorities. This work produced a portfolio of potential housing sites and areas considered to be the key strategic sites for initial investment in the sub region; these sites include Skelmersdale Town Centre in West Lancashire. A refresh of Lancashire LIP is underway and expected to be issued before the end of 2014/15.

We remain committed to the Mid Lancashire Housing Partnership and will continue to work to deliver housing priorities developed through the Mid Lancashire Housing Contextual Statement and Local Investment Plan

3.4 Opportunity

The economic and housing agendas in both the Liverpool City Region and Lancashire provide significant opportunities for West Lancashire. New employment opportunities are likely to present themselves and local business will be able to benefit. West Lancashire will be positioning itself to ensure that it is considered as an attractive place to live and work and that local people can benefit from opportunities that develop through our regional partnerships

In overall terms we recognise the importance of and need to be part of and influence relevant housing and economic agendas beyond that of our own Borough Council boundary. With that in mind we aim to maximise any opportunities and work within any partnership arrangements across Liverpool, Manchester and Lancashire to enable us to achieve our broader Council objectives.

3.5 West Lancashire's housing strategy within a local context

Housing is one important element to the economic prosperity and growth of West Lancashire. The West Lancashire Local Strategic Partnership, now replaced by One West Lancashire, prepared a sustainable Community Strategy for West Lancashire 2007-2017. One of the key objectives is 'To provide more appropriate and affordable housing to meet the needs of local people' and One West Lancashire has reconfirmed its commitment to retain this as a strategic objective.

The Council's vision is:

To be a Council to be proud of, delivering services that are lean, local and fair.

Our Corporate Priorities are:

- Balancing the budget and providing the best possible services within the resources available;
- Focussing upon sustainable regeneration and growth within the Borough;
- Caring for our Borough by delivering the small improvements that can make a big difference.

Our services will continue to prioritise the following, subject to affordability:

- Protect and improve the environment and keep our streets clean and tidy;
- Combat crime and the fear of crime;
- Work to create opportunities for and retain good quality jobs in particular for local people;
- To be a top performing landlord;
- Improve housing and deliver housing that meets the needs of local people, including affordable housing;
- Provide opportunities for leisure and culture that together with other council services contribute to healthier communities.

The vision within the Local Plan is underpinned by the delivery of good quality housing in terms of price, type, tenure, size and location in sustainable neighbourhoods supported by quality services, amenities and good transport links and this is reflected within the key objectives within the plan to '*provide a range of new housing types in appropriate locations to meet the needs to West Lancashire's population, including affordable housing and specialist accommodation.*'

The vision for the housing strategy is:

The provision of good quality housing which meets people's changing needs and is located within pleasant, safe and sustainable communities.

Diagram 1 below shows the housing strategy as it sits within the Corporate context of the authority.

Chapter 5 highlights the housing market challenges we face.

Diagram 1 – Housing Strategy in the Corporate Context



What has changed since the last strategy?

4.0 Introduction

Since our last housing strategy there have been significant changes to the policy context within which we operate. These are:

- Welfare Reform Agenda which has changed the way that housing benefit is paid in the social rented sector and private rented sector along with the phased introduction of Universal Credit from October 2013;
- New ways of funding new affordable homes;
- Changes to the way in which social housing is let to people in housing need;
- Our Council housing is now self-financing;
- The way in which housing is planned for and built potentially makes it more difficult to deliver affordable housing;
- Much less money to fund our priorities

We outline below some of the most relevant changes and impacts for housing and local people in West Lancashire and how the Council has responded to date.

4.1 Welfare reforms

The Welfare Reform Act, introduced by the Government, changes the way welfare support is calculated, decided and paid. For tenants living in the private rented sector, changes on the amount of housing benefit available already limit the choice of properties that are available to them within Local Housing Allowance payments.

In April 2013, social housing tenants, of working age, living in a home larger than their household needs, have had their housing benefit reduced. If they are deemed to have one spare room, their benefit will reduce by 14%. If they have two or more spare rooms, there will be a 25% reduction. As at December 2013 this change affects approximately 950 Council tenants in West Lancashire and places an increasing importance on the Council encouraging and facilitating our tenants to transfer to appropriately sized accommodation. There are other changes within the Welfare Reform Bill and the Council is working alongside a number of different partners to ensure that local people remain informed and where possible supported. In the case of Council housing, we are already supporting tenants through the appointment of a financial inclusion officer and additional staff to help tenants examine what options are available to them.

Welfare reform will also impact upon some of the tenants of private landlords and other registered providers of social housing. Tenants affected by these changes may therefore need advice and assistance to support them manage any financial impact so that they can retain their tenancy or explore their housing options if they need to move to smaller accommodation.

We do recognise that welfare reforms will have a financial impact for some households and so we have commenced work to develop a cross tenure financial inclusion strategy to provide a co-ordinated approach to assist households to maximise their incomes and their ability to manage their money effectively.

4.2 Funding for affordable housing

On a national level, the grant from the Homes and Community Agency (HCA) for affordable housing development over the period 2011-15 has reduced and is about 50% less than during the previous four year period. Despite the decrease in grant in real terms during the period 2011-2015, the Government developed a new tenure, known as 'Affordable Rent'. The new tenure approach was intended to sustain levels of affordable housing development by enabling social housing providers to charge higher rents, at up to 80% of market levels, and use the increased rental income to support additional borrowing to compensate for the reduced grant.

The Council recognises the importance of increasing the number of affordable homes that are built in West Lancashire, and this remains an on-going priority for the Council which has been underpinned by the Council committing its own funding and land to support new schemes.

The Council works strategically with its Registered Provider (RP) partners and the HCA to continue its success of levering in grant investment to the Borough from the National Affordable Housing Programme. Since 2005 our joint working has helped secure £10 million HCA grant investment and has provided 271 affordable dwellings with total scheme cost of £34.5 million. This is a significant amount of inward investment into our Borough.

4.3 Access to affordable housing

Access to social housing has been a key focus for the Government, and through the Localism Act 2011 social landlords have the option of introducing fixed term tenancies which have given social housing providers the ability to provide a fixed term tenancy rather than having to provide a 'lifetime' tenancy.

In 2013 the Council published a tenure strategy which lists the type of tenancies the Council will make available. The Council aims to make the best use of social housing stock whilst also maintaining cohesive and stable communities and has chosen to introduce five year fixed term tenancies. For the majority of new tenants this will mean that following a satisfactory introductory period of the tenancy (the first 12 months) tenancies will be then offered on a fixed term of five years. There are certain exceptions to this approach where lifetime tenancies will remain.

The Act also provides powers to allow local housing authorities to exclude those with no statutory priority for social housing from applying for it. Following review and consultation the Council published a new allocations policy in 2013 which changed who can apply for its social housing. This new policy approach takes account of the fact that Council housing is a limited resource and that some households on the Council's Housing Register have a reduced chance of ever being allocated a property because priority is given to those in the greatest housing need. The Council knows that many families work hard and are on relatively low incomes and so the Register recognises and provide some preference to households that can demonstrate that they are working or making a contribution to the community in other ways, e.g. volunteering or training. Members of the British Armed Forces with a local connection to West Lancashire and seeking accommodation on discharge are also recognised.

Council housing is the main source of affordable housing in the Borough with RP's providing in the region of 1000 affordable homes. The Council has established nomination rights to most of these homes and works closely with RP's to allocate them in line with the principles established by our Allocation Policy 2013.

4.4 Council housing finance reform

The Localism Act 2011 has been the vehicle for reforming the system for financing Council housing by introducing a model known as self-financing. Previously, the Government have decided the level of rent that local authorities could charge, this was then 'pooled' nationally and redistributed in line with an agreed formula which took into account a number of things, such as the cost of managing housing stock. West Lancashire was a loser under this arrangement in that up to £6.2 million pounds per year of rental income out of £20 million was paid into this national pool.

West Lancashire has now come out of this system and is a self-financing local authority, which means that we have effectively "bought ourselves out" of the national subsidy arrangement, and have taken on debt in the region of £88 million. The benefits of this is that we can now retain all of the rent paid by tenants for use within West Lancashire.

As a landlord, we have developed a 30 year business plan that has structured the repayment of this debt in a way that enables us to maximise the level of investment into our housing stock. Specifically, we have profiled the repayment of this debt to enable us to invest £65 million in our housing stock during the first five years of our business plan. This is already resulting in significant improvements to many tenants' homes.

The long term viability of the business plan is of course dependent upon rental income being charged and received. With this in mind our business plan is underpinned by a risk assessment which is reviewed regularly to ensure that identified risks including that of Welfare Reform implications are managed effectively.

4.5 Planning Reform and the national planning policy framework

The Government regards effective planning policy as key to the delivery of new housing supply. To this end a fundamental review of planning policy has been undertaken culminating in the introduction of the National Planning Policy Framework.

The National Planning Policy Framework was published in March 2012 and stresses the need for Councils to work with communities and businesses to seek opportunities for sustainable growth to rebuild the economy; helping to deliver the homes, jobs, and infrastructure needed for a growing population whilst protecting the environment. The emphasis is on developing viable housing sites. In the current economic climate, where values in some areas have dropped and sites purchased some time ago for much higher values than they are worth today, can mean that achieving housing development can become challenging. The economic viability of some sites can be further affected by the requirement to provide affordable housing. This can mean that it becomes increasingly difficult for a Council to negotiate the level of affordable housing that it needs to deliver. Innovative approaches to assist in meeting affordable housing targets are needed.

In addition, the Government has also announced a series of planning and housing measures aimed at facilitating housing growth that enable developers to **renegotiate Section 106 agreements**: legislation now allows any developer of a site deemed unviable due to affordable housing planning obligations to appeal with immediate effect. The Planning Inspectorate will then review the application to determine the number of affordable homes that need to be removed to reach viability. The original Section 106 agreement will then be suspended for a three year period.

Another change introduced is the Community Infrastructure Levy (commonly called 'CIL'). It is a planning charge, introduced by the Planning Act 2008. It came into force on 6 April 2010 through the Community Infrastructure Levy Regulations 2010 and allows local authorities in England and Wales to raise funds from developers who are undertaking new building projects in their area. The money can be used to pay for a wide range of infrastructure that is needed as a result of development. This can include things like transport schemes, green spaces and the maintenance of new infrastructure. In West Lancashire we are aiming to introduce CIL in May 2014. Affordable housing contribution will not be included in CIL and will continue to be negotiated through Section 106 agreements.

4.6 West Lancashire Local Plan 2012-2027

In October 2013, the Council adopted a new local plan which guides future development within West Lancashire over the 15 year period to 2027 and sets out:

- The distinctive features, issues and challenges in the Borough;
- A vision of how we would like the Borough to be in 15 years time;
- What we need to do to achieve this vision;
- Key policies to help meet our goals.

It contains clear objectives for housing 'to provide a range of new housing types in appropriate locations to meet the needs of West Lancashire's population'. This will include delivering these on brownfield sites where the sites are available, viable and deliverable. They will also be concentrated, where available, in the major urban areas, where services and transport facilities are established. The plan allows for the delivery of 4,860 net new dwellings with 2000 of the homes being in Skelmersdale. Over the plan period this breaks down to 302 per year for the period 2012-2017 and 335 per year for the period 2017-2027.

The following chapter considers our housing challenges.

The challenges in our housing market

5.0 Introduction

Our Borough is predominately rural in nature and is widely recognised as a very popular place to live but we also face a number of challenges which are explained in this chapter:

5.1 Population growth

Our population is growing – The 2001 Census recorded a Borough population of 108,400 and the Census in 2011 recorded a population increase of 2.1% to 110,700. Population projections predict that by 2031 the population will be in the region of 120,900. We need to cater for this growth and will do so in line with our Local Plan 2012-2027.

Within our existing population, the age profile in West Lancashire is generally older than that of the sub region, region and England; we have more residents aged over 40 and fewer under this age. However, there are variations in the population age structure between settlements. In general, the rural areas of West Lancashire are more attractive to people of middle or retirement age, whilst Skelmersdale has a younger, more varied population structure.

England experienced a baby boom of 6.9 million live births between 2001 and 2013. In 2020, the first children from this boom will be turning into ambitious young men and women, looking to move out, find work and kick-start their adult lives. We know already that West Lancashire is losing younger households to other areas, and this is a cause for concern because younger people support economic growth and ensure the future supply of a skilled and active labour force.

This means that one of our priorities is to deliver more homes for the future needs of our residents. In doing so our housing offer must be realistic and market facing and we must consider how best to encourage development by using all the tools at our disposal including seeking out new models for housing delivery. Our Housing Need Survey of 2010 and other housing data research highlights a need to ensure we are providing the 'right' type of housing offer to retain and attract younger and economically active growing families and first time buyers.

5.2 An ageing population

We know that our population is ageing and the number aged 60 and over is projected to increase by 35.5% from current levels, and the number aged 75 and over by 77.4% to 2035. This means by 2035, there will be 10,300 more people aged 60 and over and 7,200 people aged 75 and over. This is likely to increase demand for housing related support and other forms of social care to enable residents to remain in their own homes. It is therefore important to work to develop suitable housing tenure and property type housing offers, including specialist supported housing solutions for our ageing population.

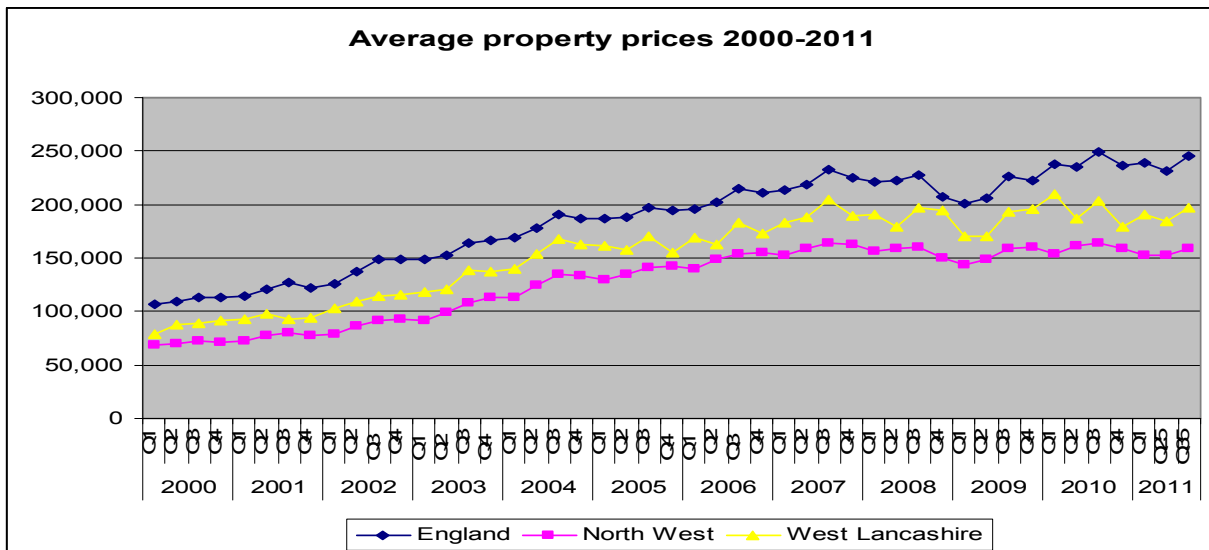
5.3 Specialist housing requirements

We recognise that there are specific vulnerable client groups who need particular types of housing to help them have an opportunity to live independently. We already work with Lancashire County Council Supporting People Team and other statutory agencies in health and social care services to try to assist in increasing accommodation provision. We know from these agencies that the lack of appropriate supported accommodation options available has meant that people have been placed in out-of- area residential placements, moving them away from their localities – family, friends and community infrastructure.

We want to work with health and social care statutory agencies to stop this happening. We have the desire to assist, however the challenge is providing the right type of accommodation along with the right model of support that proves both economically viable and provides a suitable housing solution for the particular client group.

5.4 It is expensive to buy a home

Buying a home in West Lancashire is relatively expensive. Average prices and lower quartile prices (usually targeted at first time buyer) are higher for West Lancashire than the North West average. Over the period January to the end of July 2013 the average house price was £197,882, with £219,469 for a new build property. This means that there are cheaper properties in neighbouring local authorities to West Lancashire, a key factor in attracting households to the area. Such households trying to get on the housing ladder can access more affordable areas outside of the Borough and in some instances do relocate to a cheaper home in another Borough. This may also mean that they are not able to live close to their families. The chart below demonstrates how West Lancashire house prices are consistently higher than the North West average.



House price is just one aspect of the issue of affordability. Household incomes need to be understood along with other factors such as changes to financial institutions lending criteria or deposit requirements for those wishing to buy a home.

The contraction in the mortgage market and increase in deposits required to purchase a property has made home ownership even less accessible for first time buyers in the Borough and there are a growing number of households that make up what has become known as the 'excluded middle market'; those unable to access home ownership and unlikely to qualify for social housing. It is important that we have a housing offer for this group.

The Government has responded with different house purchase initiatives to help households bridge the deposit gap, usually with equity loan type products. While these products are helpful, they do not assist all household income types and so we need to ensure that purchasers in West Lancashire can access a range of low cost home ownership products, such as shared ownership and shared equity; which are currently in short supply.

New build properties are always popular with first time buyers, having relatively low maintenance costs, and are often offered with a number of moving in 'incentives'. However, average new build prices in the Borough in 2012 were £183,259. This means that a household would require an income of £52,359 to afford to buy an average new build home if they had no existing equity. The most affordable new build properties are in Skelmersdale at circa £143,000, which would require a household income of £40,857. The average household income in the Borough is £35/36,000.

It is clearly important that we have a housing offer that will not only meet affordable housing need but also help retain and attract younger and economically active growing families and first time buyer households. This will help assist in economic growth and ensure the future supply of a skilled and active labour force. Low Cost Home Ownership products can be helpful as part of that housing offer.

The table below illustrates the ratio of median house price to median earnings average earnings in relation to neighbouring authorities and Liverpool and Lancashire wide. This table further demonstrates that housing affordability is an issue in the Borough and that neighbouring authorities are likely to be more appealing to prospective purchasers from a house price perspective.

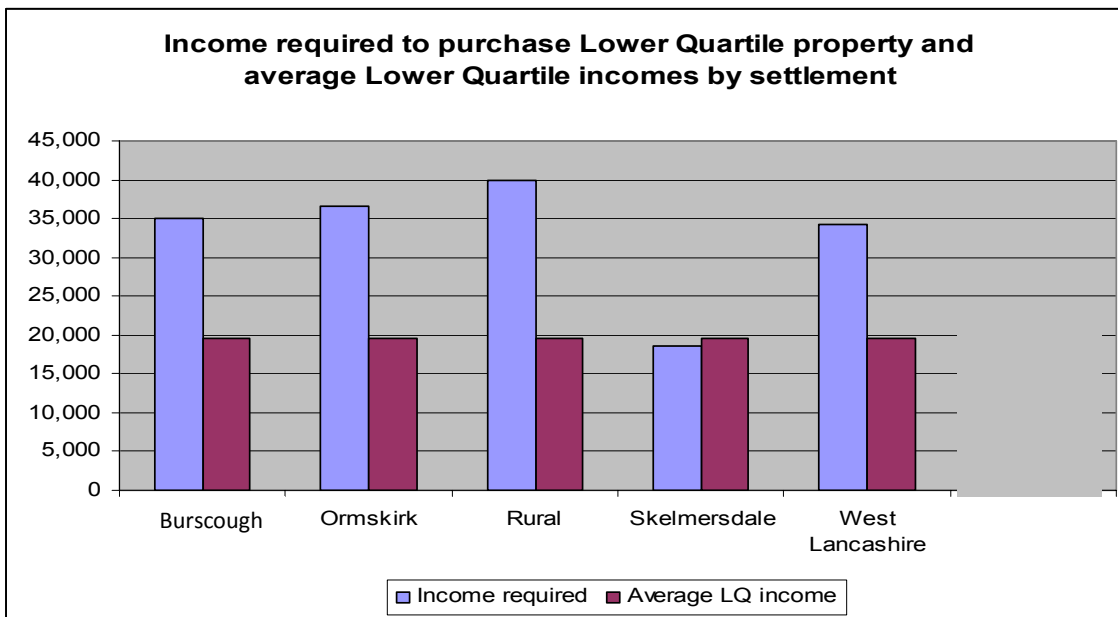
Location	Ratio as at 2012
West Lancashire	6.53
Chorley	6.25
South Ribble	6.13
Sefton	6.06
Wigan	5.00
St Helens	4.76
Knowsley	4.15
Lancashire Wide	5.40
Liverpool	4.12

The Local Plan (2012-27) anticipates a significant increase in housing delivery from 2015 onwards. This will provide an opportunity, in part, to address affordability issues as there is a planning policy requirement to provide affordable housing where certain criteria are met.³

5.5 We need more affordable housing

As stated previously housing is relatively expensive in West Lancashire. This coupled with a households income and lending criteria can affect whether a household is able to find housing, whether to rent or buy within their household budget.

However, when household income is considered within the context of a household trying to gain access to the housing ladder, then even the cheapest of homes, remain unaffordable for some households. The chart below shows the income required to purchase lower quartile property and average lower quartile incomes by settlement.



According to data at July 2013 there were a total of 3,380 households on the Council's Housing Register. The last full assessment of housing need undertaken in 2009 by Fordham Research and published in 2010 estimated an annual net shortfall for affordable housing of 214 units per year. The assessment went further and suggested that the tenure mix should comprise mainly of social rent units at 80% of all new affordable housing and the 20% remainder being in the form of intermediate housing products⁴.

³ Policy RS2 of the Local Plan provides further information.

⁴ 'Intermediate' housing is a term which refers to housing which falls between 'social housing' (such as traditional rented council housing) and 'open market' housing; it is intended to bridge the gap between the two. It was noticed that as house prices increased, the gap between social housing and open market housing grew, meaning people often could not afford to progress from social housing to owning their own home. Intermediate housing tries to bridge the gap as 'more affordable', sitting below open market prices but above social housing

The social housing stock available for those in housing need is low compared to the average levels in the North West (18.6%). Social housing represents 15.1% (7,000) of the total housing stock in the Borough (47,000). This, alongside the Borough's proportionately higher house prices, means that access to affordable housing is limited in West Lancashire.

Affordable housing is also geographically limited in West Lancashire. The chart above shows that the majority of it is located in Skelmersdale. This is an important factor, and one we need to consider when looking at affordable housing requirements and supply at local level. While there has been significant affordable housing development success in recent years, there still remains a pressing need for affordable housing in the Borough, particularly in rural areas and the towns of Ormskirk, Burscough and Aughton.

Rebalancing the housing market, to increase the proportion of affordable housing outside of Skelmersdale and increase the proportion of affordable housing for families and accommodation for older people in Skelmersdale, will be a priority within our overall plan to increase the supply of affordable housing across the Borough.

Building homes to the Lifetime Homes standard is also important and the Local Plan 2012-2027 expects all affordable housing units to be built to Lifetime Homes Standards.

5.6 We need to make more of the private rented sector

In September 2012, the Government announced a range of proposals to encourage the provision of new homes to meet the country's demographic needs and to help generate local economic growth. As part of that announcement, Government established a Build to Rent Fund to invest £200m in housing developments to ensure that the high quality rented homes that are needed are delivered. They recognised that demand for market rented homes is increasing in many parts of the country and that this sector could:

- be a very effective extension to the social rented sector, where lengthy waiting lists and allocations based predominately on need mean that many households are less likely to ever gain access to it;
- and it can also support those households who are now unable to access the home ownership ladder given the tightened mortgage lending restrictions and increased deposit requirements.

In West Lancashire we have seen an increase in the total number of properties coming onto the market from 675 in 2009 to 1,028 in 2012; an increase of 52.3% (Vizzihome). The growth in part is likely to be the expanding student population and also as a result of the Borough attracting migrant workers working within the local rural economy.

Although there has been an increase in the supply of private rented accommodation since 2009, only 30% of all properties coming to the market have been within the Local Housing Allowance caps. Households relying on housing benefit to pay their rent lack choice in the existing private rented market. This will be further constrained by the financial impact upon those households as a result of bedroom tax and remaining Welfare Reform changes.

In July 2013 the Council Housing Allocation policy changed to provide increased priority for social housing to those applicants who demonstrate a commitment to contribute to the Borough's economic growth as working households or who make a contribution by their contribution within communities. This will assist some economically active households but those remaining will still be reliant upon the private sector housing to obtain housing.

This means there is potentially an important role for the private rented sector both in meeting people's housing needs, and in supporting economic growth by enabling people to move to and / or move within the Borough to take up jobs and respond to their households changing circumstances.

We recognise that the private rented sector, if managed effectively, could help provide an alternative housing offer to those households, who are unable to purchase a home. The Council will consider it's role carefully in respect of this growing sector and whether it is appropriate to encourage build to rent and other options to expand this tenure, whilst also aiming to improve overall housing quality and its management.

5.7 Many properties still need investment

The relationship between poor housing and poor health has been recognised for a long time. Poor housing has a direct impact on the number of accidents in the home, educational achievement and general well being. In addition to the wider benefits to society of improving housing, there is a direct benefit to the NHS through reduced injury rates and treatment costs where the condition of housing is improved.

Our 2010 Private Sector House Condition Survey provides in depth information about stock condition in the Borough and identifies that where homes have failed the decent home standard or the Housing Health and Safety Rating System introduced in 2004, there is often a correlation between improvement works being required but the residing household not being able to afford them. This means that some households will be unable to fund the required improvements to their homes, improvements that could remedy problems such as inadequate heating, damp and mould and any associated health conditions

5.8 Promoting energy efficient homes

The Climate Change Act 2008 aims to help the transition towards a low-carbon economy in the UK and includes legally binding target of at least an 80% cut in greenhouse gas emissions by 2050. The Act commits the UK to reduce household CO2 emissions to almost zero over the next four decades. The Government's flagship policy to achieve energy reduction in buildings is the Green Deal – a loan scheme for householders and business to finance energy related home improvements.

In West Lancashire we are aware that the mean SAP rating of privately owned properties in West Lancashire is 53 as reported in the Councils 2010 Private Sector Stock Condition survey. This is better than the national average of 48, but there is scope to reduce emissions from this sector. Typically, the lower SAP ratings are found in older, pre-1919 dwellings and converted flats, which suffer with high heat loss. The privately rented dwellings across the Borough have a mean SAP rating of 51.

The same Housing Stock Condition Survey identified that 43% of privately owned properties have less than 200mm of loft insulation with 2.9% having no loft insulation at all and that many properties in Skelmersdale which were built using structural pre-cast concrete units with solid external walls are thermally inefficient and difficult to improve, in terms of thermal efficiency.

The Government is also committed to tackling the issue of vulnerable people being unable to afford to heat their homes. The national fuel poverty strategy aims to end fuel poverty by 2016.

With these Government objectives in mind and our own desire to improving the energy efficiency of the housing in West Lancashire, this has been set as a priority for the Council as defined within its sustainable energy strategy 2012 - 2020.

5.9 Other relevant themes and housing market challenges

We have highlighted above some of the issues that we aim to address in this housing strategy. They relate mainly to our housing market and the issue of housing supply, making the best use of existing stock, the impact of population growth and changes in age profile in the years to come.

However housing strategies also consider other issues. These are introduced in the next chapter, all of which make up the housing strategy objectives that we have chosen to focus upon during the life of this Housing Strategy. Our housing market issues are summarised below:

- We have an ageing population and this will mean we will have to deliver an increasing range of tailored housing solutions for this client group, and where appropriate promote the use of our own Home Care Link monitoring service and assistive technology to help households remain independent in their own homes;
- Research suggests that younger households are leaving West Lancashire to move to adjacent Borough's, often in search of more housing choice at a price they can afford. Our housing need survey 2010 indicates a need for smaller (2 bed) starter homes for first time buyers;
- The housing market is polarised with affordable housing being geographically concentrated in Skelmersdale, reducing the choice of location for people who want to access affordable housing. Whilst in house price terms, there is a good supply of affordable housing in Skelmersdale it does not meet with prospective purchaser house type aspirations. There is also a shortage of accommodation that meets the housing aspirations of older people, with some Council sheltered property not proving

popular by virtue of size and design. Similarly there is a shortage of smaller affordable housing units for young families to suit their housing aspirations;

- There is a need to increase supply of affordable housing in rural areas and Ormskirk, Burscough and Aughton;
- It is important that we develop a housing offer for the excluded middle market to either access home ownership using Low Cost Home Ownership products such as shared ownership and shared equity or to facilitate the private rented sector to provide a good quality alternative;
- There are increasing demands for private rented sector. This is a growing sector and we need to facilitate and encourage an increased supply of good quality, well managed properties;
- There is a need to continue to support the green agenda and improve the energy efficiency of the housing in West Lancashire. This will assist households with their energy housing costs, help to alleviate fuel poverty and contribute to CO2 reductions;
- We need to ensure that our placement and relationships within the Lancashire, Liverpool and Manchester geographical context enables us to actively support our strategic housing priorities.

Our housing strategy objectives

6.0 Introduction

In developing our housing strategy objectives we have examined housing data, reviewed our existing policies, and identified potential areas for priority for the Council. Based on these findings; the wider strategic housing agenda and following discussions with officers, we then consulted with residents of the Borough and relevant partners to identify the housing strategy priorities for the Council over the next five years.

Throughout the consultation process we made clear that the Council had finite resources. It was acknowledged that the Council, as it worked on delivering this housing strategy, would therefore have to:

- ⇒ **Manage housing demand** by having mature and honest conversations with our customers so that they have realistic expectations by virtue of the provision of quality advice, so that they understand the housing options available to them. From that point they can exercise choice, perhaps amend their housing expectations which may enable them to find their own solutions to their housing circumstance.

We have chosen six housing strategy delivery objectives which are discussed further in this section.

6.1 Objective 1 - Achieve the right supply of new homes including maximising affordable housing

For this objective we want to encourage a choice of homes that meets the needs of our existing residents and provides a suitable housing offer for those households wishing to invest and make their home in West Lancashire. We want to develop high quality new homes in locations where people want to live and that support economic growth and we want to ensure that there is a choice of different tenures available.

This has been difficult given the economic conditions in recent years which made it necessary for housing developers to display caution when they have looked to develop housing sites. However, there has been consistent interest by developers in delivering new homes in our Borough, although now, we are noticing that interest culminating in receipt of actual planning applications. This is positive and we would wish to work with developers and other housing providers to create a housing offer which is appropriate for West Lancashire.

The West Lancashire Local Plan 2012 – 2027 is central to increasing housing supply and it intends that the needs of all sectors of the community are intended to be catered for through the provision of lifetime homes where this is deemed to be appropriate. The Local Plan requires that in housing schemes of 15 dwellings or more, 20% of new residential units should be designed specifically as accommodation suitable for the elderly. This will assist in part, to providing a housing offer suitable for our ageing population, although further work will need to be undertaken to ensure that there is range of tenure options suitable for this household group. Additionally we will ensure that smaller homes are provided for First Time Buyers with a range of purchase options such as shared equity and shared ownership.

The plan allows for the delivery of 4,860 net new dwellings with 2000 of the homes being in Skelmersdale.

Over the plan period this breaks down to:

- 302 per year 2012-2017
- 335 per year 2017-2027

We aim to create sustainable communities and promote sustainable development and we will seek out new ways of delivering housing supply in the future. We will explore and consider a number of options which are likely to include developing new delivery vehicles where the public sector takes on risk (and profit) alongside other public and private sector partners; these will make best use of public sector assets, particularly land, and we are aiming to maximise new investment sources such as the New Homes Bonus, and think more innovatively about how we can use funding sources to bring new housing supply forward.

We will also explore any pilot opportunities to try out different delivery approaches. Most recently the Council became just one of three Councils in the Country to work with the Homes and Communities agency to

undertake a Land Auctions pilot. The pilot project tests the land disposal elements of a proposed national community Land Auction model, which could potentially replace the current planning system for the provision of new homes. The pilot began in 2012 and will last for two years, during which time development sites will be brought forward which meet the objectives of the Local Plan. It is anticipated that the sale of at least part of the land will take place during the early part of this housing strategy. Dependent upon which site(s) are selected, there is the potential for a significant sum of money to be raised which can then be used, through the Capital Programme, to invest in the priorities of the Council.

6.2 Objective 2 - Regenerate and remodel areas of Skelmersdale

Skelmersdale was designated in 1961 and was the first new town in the North West. The town has a population of 35,000 (Census 2011), has a good central location, near main transport routes such as the M58 and M6 and has excellent links with the wider region. The town was initially intended to accommodate population overspill from Liverpool with the former New Town being established as part of an overall masterplan, which included provision for a new town centre comprising new retail, leisure, services and commercial facilities.

Work started on the new town centre in the late 1960s and was initially seen as a great success. Over the course of the last 20 years the town has struggled to compete with larger and more successful centres and as a consequence its influence and popularity has declined.

For many years West Lancashire Borough Council has recognised the need to regenerate the town by improving existing facilities and attracting new retail and leisure elements. In addition the housing offer in Skelmersdale is such that it has led to an imbalance in the local housing market with there being evidence of:

- Some areas of low demand, in both social housing and owner occupied stock, associated with poor design and/or neighbourhood reputation;
- High housing densities and poor estate layout can contribute to feelings of insecurity;
- Relatively low house prices, and a lack of variety in housing types, leading to more affluent households moving out of the area;
- Some evidence of properties being bought up by absentee private landlords, with unstable private tenancies undermining the sustainability of some neighbourhoods;
- Relatively high concentrations of deprivation in some areas.

This is not unusual in former New Towns as reported in the DTLR Report (2002) 'The New Towns: Their Problems & Future' which highlights some of the problems faced by former new towns, including Skelmersdale.

The town is known to have a higher percentage of people affected by a long-term illness, or a physical health problem, than elsewhere in the Borough and this means there is a continuing and long-term demand for specialist and adapted accommodation.

There has been, in the last decades or so, building of new private housing estates on the outskirts of the town. These estates have proved popular and some of the houses are in the top income-purchasing band, however there is still a need to diversify the style and range of residential accommodation available and for this work to be complemented by the Town Centre Regeneration.

In order to address the issues mentioned above a Supplementary Planning Document and masterplan was developed and adopted in 2008, with housing as a significant driver in the area's redevelopment. The masterplan includes the development of high quality market housing, for sale and to rent, low cost market housing and affordable housing.

6.3 Objective 3 - Make the best use of all existing homes

Making the best use of the existing housing we have whether in the private sector or that social housing owned by the Council and Registered Providers will play a central role in meeting housing need and demand as well as enabling housing choice.

It is important to use existing housing stock effectively, including reducing long term empty properties. We wish to make the best use of all existing homes available across the Borough, to connect people to an improved housing offer whether that be a larger or smaller home or a home with an adaptation.

6.4 Objective 4 - Encourage well managed and maintained homes across all tenures

Many households aspire to homeownership yet are unable to buy their own property. This often means that they will seek to obtain housing by renting from either a private landlord, the Council or other Registered Providers. Some households are happy to rent and find that it suits their lifestyles. Irrespective of their tenure preference though, households who rent, will expect their home to be well managed and well maintained.

This Council seeks to encourage, professional housing management across West Lancashire. We are also mindful that we are the largest landlord in the Borough and that our own approach needs to reflect the high standards that we expect by other landlords within the private rented sector and social housing owned by the Registered Providers.

There are enforcement tools available to the Council to ensure that property is maintained and managed in line with legislation. The Council would prefer to inform and educate any offending landlords to allow them opportunity to respond in a manner that would mean enforcement is not required. Sometimes this approach is all that is required as the landlord has not been fully aware of what is required from them. We will though, continue to use enforcement powers when necessary.

6.5 Objective 5 - Encourage investment to meet specialist housing requirements

We are keen to encourage investment in the Borough to help assist in meeting specialist housing requirements. Vulnerable client groups such as those with a learning disability, physical disability, those subject to domestic abuse, sensory impairment, including those with mental health issues sometimes require both accommodation and appropriate support to help sustain independent living. Dependant on the circumstances then such support may also be required for young people who are affected by homelessness, are estranged from home or in need of appropriate support for some other reason. Older people's health or social circumstances can also mean that on a case by case basis, older members of the population may need access to specialist housing and/ or support.

This is a diverse area of development that not only requires use of capital assets but also revenue funding to support the provision of the required support services. Encouraging investment and achieving delivery will be challenging in the current environment as budgets continue to be squeezed. The Council, along with statutory agency colleagues across the social care and health spectrum will need to work together and explore the availability of funding streams and delivery models to support investment. This will include exploring funding availability from the recently established Clinical Commissioning Groups (CCGs) who replaced Primary Care Trusts (PCTs) from March 2012.

6.6 Objective 6 – Deliver the Council's sustainable energy strategy 2012- 2020 Residential and Domestic Sector objectives.

West Lancashire Borough Council has produced and published a sustainable energy strategy 2012-2020. It covers a number of themes which recognise that climate change is an internationally important problem and that we can play a significant part in tackling the issue locally. It refers to housing sector issues under a theme described as the Residential and Domestic Sector. It has two delivery objectives identified as follows:

- To improve the energy efficiency of West Lancashire housing;
- Tackle hard to treat properties, reduce fuel poverty, and ensure affordable warmth for all

It is important to recognise the importance of this work, hence reference being made to it in this strategy as housing has a significant role to play in terms of reducing fuel poverty, improving the energy efficiency of existing housing stock and ensuring that all new housing built is sustainable.

6.7 Summary of our housing strategy objectives.

We show in the next few pages the high level actions which we consider will make the greatest impact to achieving the following six objectives:

- ✚ Achieve the right supply of new homes including maximising affordable housing;
- ✚ Regenerate and remodel areas of Skelmersdale;
- ✚ Make the best use of all existing homes;
- ✚ Encourage well managed and maintained homes across all tenures;
- ✚ Encourage investment to meet specialist housing requirements;
- ✚ Deliver the Council's Sustainable Energy Strategy 2012- 2020 Residential and Domestic Sector objectives.

Objective 1 - Achieve the right supply of new homes including maximising affordable housing

Delivery Action - Implementation of the West Lancashire Local Plan 2012-2027.

The plan sets out a clear objective for housing, 'to provide a range of new housing types in appropriate locations to meet the needs of West Lancashire's population'.

Implementation of the plan will result in acceptable land sites delivering new homes, jobs and training opportunities for residents of the borough and additional affordable housing through use of planning policy.

Policy RS2 of the West Lancashire Local Plan 2012-2027 requires that at least 25% of units in residential schemes of 8 dwellings and above be affordable.

Delivery Action - Secure HCA Affordable Housing Grant investment .

We will ensure that, through joint working with Registered Providers, we secure inward investment from the Homes and Community Agency to develop affordable housing.

Delivery Action - Use Council assets to support the delivery of affordable housing.

We will use Council land and / or other assets, where appropriate, to support the delivery of affordable housing. This will encourage investment in the Borough while also meeting affordable housing need. This includes using our existing partnership arrangement with Regenda Housing Group.

Delivery Action - Develop 500 new affordable homes.

We wish to encourage and enable the delivery of no less than 500 affordable homes during the life of this housing strategy which shall consist of a range of affordable housing tenures including, where appropriate, tenure suitable for First Time Buyers. This will be achieved by using planning policy requirements, development of 100% affordable housing schemes and a modest council new build programme where it is affordable and contributes to Objective 2.

Objective 2 - Regenerate and remodel areas of Skelmersdale

Delivery Action - Complete £65 million capital investment programme.

The majority of the Council housing stock is in Skelmersdale. We have embarked upon a five year £65 million capital investment programme which will significantly improve all our housing to the benefit of our tenants. The works include new bathrooms, kitchens, windows, energy efficiency improvements and other measures.

We aim to deliver the programme on time and in budget.

Delivery Action - Complete Firbeck revival and continue an estate based revival programme.

A Birch Green estate, known locally as Firbeck is benefitting from significant investment from the programme mentioned above. It involves a £5.5 million capital investment programme.

This comprehensive scheme will see existing homes improved along with some small scale demolition and regeneration provided by new homes being built. There will also be improvement to the street scene.

A second revival scheme will be identified and completed during the life of this housing strategy.

Delivery Action - Complete land auctions pilot.

The Council is participating in a land auctions pilot. This is intended to support our approach of stimulating housing growth and diversification of the housing offer in Skelmersdale and may generate capital receipts to assist further with this work. There is the potential for up to 650 new homes to be provided through the land auctions pilot across sites in Whalleys.

Delivery Action - Enable the development of specific land sites.

We intend to support the housing element of our Town Centre Masterplan and diversification of the housing offer through disposal and development of land at Findon, Delph Clough and former Skelmersdale Sports Centre. There is the potential for around 270 new homes to be provided across the three sites.

Delivery Action - Seek funding for environmental work.

In contrast to our current capital investment in our Council housing stock, our ability to invest in the environment is significantly limited, yet we are aware of the benefits of doing so. We will seek to secure any suitable funding opportunities to lever in investment to enable wider scale environmental improvements to our housing estates.

Objective 3 - Making the best use of all existing homes.

Delivery Action - Provide housing advice.

In the context of high house prices and rents, pressures on the supply of new affordable housing and welfare reform, we may well see an increase in the number of people approaching the Council because they are experiencing problems with their housing – we currently experience around 1700 enquiries a year for housing but we cannot help everyone.

People need to be able to make informed decisions and understand what broader housing options are available to them to help them with their housing issue. We will provide appropriate support and quality advice so that our customers have realistic expectations, and we will help people exercise choice and find their own solutions to housing problems. Providing easy access to good quality housing advice for those experiencing problems with their housing is important. People want us to be honest about their chances of being rehoused.

Delivery Action - Bring private sector empty homes back in to use.

In September 2013, 1300 privately-owned homes in West Lancashire were empty. Of these 600 had been empty for six months or more. We are committed to bringing empty homes back into use and have found that charging Council Tax at 150% for properties empty for 2 years or more has had a positive impact on the number of empty properties. We will however, explore other approaches that could assist further in reducing the number of empty homes in West Lancashire.

Delivery Action - Produce a new private sector housing strategy.

Our previous private sector housing strategy covered the period 2006-2009. A new strategy will take account of the current policy and delivery context and will shape strategic direction related to empty homes, fuel poverty, house condition, other relevant private sector themes and funding availability.

Delivery Action - Be innovative about Council owned housing stock without a future.

We know, that a very small proportion of our properties have come to the end of their natural life and their future use needs to be reviewed. This may be because they don't meet modern day family living or because they cannot support the changing needs of older people. Where this is the case, we will undertake an options appraisal to consider alternative uses for the building or the land

Objective 4 - Encourage well managed and maintained homes across all tenures

Delivery Action - Promote the private landlord accreditation scheme.

West Lancashire's Landlord Accreditation Scheme (WLLAS) was established in February 2012. The scheme is administered by the Residential Landlords Association (RLA) and has accredited four landlords to date. The aim of the scheme is to improve property and management standards in the private rented sector. Accredited landlords will have access to RLA's training resources and legal support and a host of other benefits. The scheme is open to all landlords and has been particularly supported by Edge Hill University and Edge Hill Students Union. The scheme will continue to be promoted to raise awareness and encourage take up amongst non student landlords.

Delivery Action - Maximise use of enforcement powers to deal with problem landlords and target resources to address disrepair, unsafe properties and management issues within the private rented sector.

A large proportion of private landlords do provide good quality accommodation and fulfil their legal obligations. However where this is not the case we will maximise use of the enforcement powers available. This approach mirrors the expectation of Government in line with the Department Communities and Local Government guidance issued to local authorities about dealing with problem landlords in August 2012. We do often find that where there are problems, they can be remedied with the Council providing advice and support. In some instances the landlord may be inexperienced and so we provide them with guidance so that they can comply with their legal obligations.

Delivery Action - Ensure that Council housing is well maintained, managed and involves our tenants in the shaping of our housing service.

The Council owns and manages 6,200 homes and we aim to be a top performing landlord. That aspiration from a Council housing function perspective consists of a number of important components as follows:

Make our customers our number one priority; Be in the top 25% of performers nationally; Give our tenants the best possible value for their money; Support local people to be more independent; Tackle any incidents of anti-social behaviour in partnership with our community safety partners; Provide jobs that are rewarding and help people develop; use our spending power to help local businesses and provide local jobs and so help West Lancashire grow.

Objective 5 - Encourage investment to meet specialist housing requirements

Delivery Action - Enable the development of a Foyer for young people.

Many young people become homeless after leaving care or following parental disputes or for other reasons. The Birchwood Centre, based in Skelmersdale provide a service for young people (16-25 years old) to help prevent homelessness. They approached the Council to seek support for the development of a Foyer, a place where young people can live and receive integrated support to help them to achieve their goals and move onto independent accommodation. The Council supports the principle of the development of a Foyer and is satisfied that there is a need for such provision and have agreed to use our enabling role to try and bring the statutory and voluntary sector together to develop a Foyer in West Lancashire.

Delivery Action - Identify sites suitable for Gypsy and Traveller pitch provision.

Apart from one pitch with planning permission, there are no authorised sites for Gypsies and Travellers in the Borough, although there is an authorised site for Travelling Showpeople, located in Burscough. The Council is currently preparing a planning document to allocate two types of sites, those which may be used for Travellers to base themselves throughout most of the year, or for Travelling Showpeople to live and store their equipment outside their touring season, and sites to meet the short term transit needs of Travellers who are passing through West Lancashire.

The authority is required by national planning policy to ensure that enough sites in West Lancashire are made available to meet the needs of the travelling community. If the Council does not comply with this obligation, it will be more vulnerable to the establishment of illegal encampments and sites in the Borough. The lack of allocated sites weakens the ability of the Council to take quick and effective action to secure the removal of such encampments and sites.

Delivery Action - Ensure that the Supporting People (SP) Programme meet local need.

SP is the government programme which provides housing related support services for vulnerable people to maintain their tenancy and independent living. It is administered locally by Lancashire County Council with Borough Councils input about service provision in their locality. The SP Programme faces budget reductions and so it is important to influence positively and try different delivery models to ensure that services continue to meet local needs.

Delivery Action - Support a range of needs.

We are aware of a lack of specialist accommodation options to support a range of needs including those with physical disabilities and sensory impairment, those subject to domestic abuse, mental health problems and learning disabilities. We will work with specialist partners to ensure that we can assist with suitable accommodation options. The Council will be reliant on solid partnership arrangements being formed, supported with funding and a clear understanding of the accommodation models proposed.

Objective 6 - Deliver the Council's sustainable energy strategy 2012- 2020 Residential and Domestic Sector objectives.

To improve the energy efficiency of West Lancashire Housing

The Delivery Actions are:

- Sign up to "Climate Local";
- Increase the number of properties with the recommended level of loft and cavity wall insulation;
- Provide an easily accessible and helpful advice service for households across all tenures;
- Continue to progress the energy efficiency work programme on Council owned properties;
- Secure maximum funding from all available sources for energy efficiency projects;
- Work with landlords to improve energy standards in the private rented sector;
- Aid successful roll out of the Government's Green Deal so that it is promoted locally to householders
- Produce a HECA progress report on an annual basis.

Tackle hard to treat properties, reduce fuel poverty, and ensure affordable warmth for all

The Delivery Actions are:

- Identify opportunities to retrofit hard to treat homes in the private sector;
- Lead by example by continuing to tackle fuel poverty in Council housing;
- Explore opportunities for fuel switching;
- Aid the implementation for fuel poverty referral system;
- Consider projects specifically focussed on the vulnerable groups within our communities.

The delivery actions shown above are taken from the Council's sustainable energy strategy 2012-2020. They can be found in the Residential and Domestic Sector theme of that strategy along with further information about other planned activity to help support the Council's sustainable energy aspirations.

Resourcing and monitoring the housing strategy

7.0 Introduction

We are mindful that we are aiming to deliver this housing strategy at a time when nationally, lowering the national deficit is central to the Governments national policy agenda. Integral to this is the expectation that the private sector and local communities will deliver services in place of the public sector. Public spending has been reduced and this has meant that the Council has needed to achieve revenue savings of around 30% over the period 2011-2015. To balance the Council's budget in this context means constant, managed change and is reflected and underpinned by our Corporate Business Plan 2011 – 2015. Since the implementation of our Corporate Business Plan significant inroads have been made with £4.9 million identified of permanent revenue savings towards the £5.7 million we anticipate is required.

Delivering a housing strategy in such circumstances where funding in the public sector is reduced will mean that partnership working to deliver this strategy may become more challenging as resources become more stretched. The Action Plan that accompanies this housing strategy is therefore presented in a manner that looks at tackling our housing strategy challenges over the short, medium and longer term. This allows for flexibility to respond to funding opportunities and / or funding issues.

It is also important to note the distinction between funding of housing between that of Council housing and the rest of the housing stock (private sector) in the Borough.

- ❖ Council housing and improvements to Council housing stock is funded through receipt of rents paid by Council tenants. Council housing operates a Housing Revenue Account and is not subsidised by any Council Tax revenue. Council housing, although operated and administered by the Council, has its own income stream, through the rent it receives, in which to operate, manage and maintain its service and housing stock. Rental income received from Council tenants cannot be used to improve private sector housing. Registered Providers operate in a similar manner. The Council housing service, since 2012, operates under a self-financing model. Through that model the service has been able to borrow money to enable for £65 million of capital investment to take place in the Council housing stock. This is in stark contrast to the funds available to assist in improving private sector housing.
- ❖ Income received by the Council through collection of Council Tax is used to achieve the Corporate Priorities of the Council. As mentioned above public spending nationally has been reduced and this means the Councils financial ability to support housing initiatives that help to improve private sector housing is limited.

7.1 Resources

There are significant resources required in order to deliver the objectives set out in this housing strategy. Staffing resources are key to this and span across many teams both internal and external to the Council. In addition to this, the Council owns land and property assets which are considered possible for housing use (considered on a site by site basis) on an on-going basis through the work of our SAMP – Strategic Asset Management Plan.

Any funds made available to support this housing strategy will need to satisfy the following five principles that underpin all of our financial decisions:

- financial planning based upon realistic and prudent assumptions about the resources available to the Council and its partners
- capital and revenue resources used in such a manner as to extend and enhance finances under our direct control
- priorities aligned to local, regional and national funding streams to maximise capital income
- service users, residents and partners influence and participate in financial decision-making processes
- pro-active approaches to new funding opportunities

In addition to the above principles, the Council assesses its capital requirements using a system to rank proposed capital schemes against a range of criteria that are set out in our capital strategy and asset management plan. These criteria cover a wide range of factors including corporate and service objectives and priorities, external funding levered in, partnership working, revenue implications, and the results of stakeholder consultation. This formalised system of assessment ensures compliance with agreed priorities and is administered in line with the Councils budgeting cycle.

There are sources of funding to help support some aspects of delivery, however we will also have to try and maximise external funding opportunities as they present themselves, work with partners and think creatively about the use of any of our own funds and assets to support our housing strategy objectives. Paragraphs 8.1 to 8.7 refer to existing funding types / routes / opportunities.

7.2 Housing Revenue Account

Council housing - As a stock retained landlord the council produces a Housing Business Plan. The plan considers the capital investment needs of our housing stock to ensure that we keep our properties to a high standard. The plan also considers if there are any particular investment needs to assist in regenerating parts of our Council housing estates and takes account of the need to have appropriate staffing levels to manage the Council house service. Our Housing Business Plan can be viewed on our Council web pages at www.westlancs.gov.uk

7.3 Right to Buy Receipts

Legislation allows for most Council Tenants to exercise their right to buy their Council home. Under existing rules, when a Council home is sold, the Council is able to keep a proportion of the sales receipt which can then be used to fund new affordable housing units.

It is not possible to forecast how many homes will be sold in any financial year, however receipts from such sales can be used to support affordable housing development or regeneration.

7.4 National Affordable Housing Programme

Affordable housing – The Homes and Community agency (HCA) is a Government agency that aims to meet Government aspirations to develop affordable homes across the Country. The HCA provide affordable housing grant to Registered Providers of Social Housing to develop affordable housing. Grant is awarded via a bidding cycle where bid applications are considered against specific criteria. The amount of grant provided does not cover the full build cost and so the Registered Provider will have to fund the gap between the development cost and the amount of grant received. West Lancashire Borough Council is able to bid for HCA Affordable Grant Programme funding and may explore this route if viable.

The Council will, however, continue to work hard to maximise the amount of HCA grant provided to this authority.

7.5 Affordable Housing Capital Fund

The Council has also committed capital resources of £650k to help achieve its affordable housing delivery aspirations. This resource has been committed to a partnership arrangement with Regenda Housing Group who have ensured that their Development Teams capacity has been enhanced to deliver success through this arrangement. The partnership was originally intended to achieve delivery of up to 32 affordable housing units, however by using this fund and working with the HCA we will exceed this original delivery target with current live schemes leading to the development of up to 65 affordable units. Start on sites are planned for 2014/15 and scheme completions anticipated in 2015/16. Further affordable housing units will be delivered through this arrangement.

7.6 Supporting People Programme

The Supporting People Programme, administered by Lancashire County Council, funds housing related support services for specific vulnerable client groups across the County. The Council will need to work closely with the Supporting People Team to ensure that appropriate housing related support services are funded in West Lancashire.

7.7 CCG's Commissioning

Clinical Commissioning Groups (CCGs) replaced Primary Care Trusts (PCTs) from March 2012 when the 2010 White Paper "Equity and Excellence: Liberating the NHS" became law under the Health and Social Care Act 2012. This was part of the Government's wider desire to create a clinically driven commissioning system that is more sensitive to the needs of patients. This new arrangement does not particularly bring with it any significant additional funds, however its new operational focus may afford funding opportunities across mental health and learning disability. This will be particularly explored when aiming to deliver positive outcomes for Objective 5 - Encourage investment to meet specialist housing requirements.

7.8 Monitoring

The Council produces a number of strategies and plans directed at achieving our vision and priorities. These plans and strategies contain numerous tasks and targets which, when completed successfully, are the building blocks of our success.

To keep track of our progress we use a performance monitoring framework. This helps us monitor progress and take any remedial action to make sure that what is supposed to be done gets done. Each of our service areas produce Service Action Plans which reflect the key delivery actions we are working on as contained in our strategies and plans. These are monitored regularly through our monitoring framework with performance updates being provided to relevant service managers and service heads. Performance and achievement is also reported to our Elected Members in line with our constitution so that progress is fully understood.

The housing strategy action plan will be monitored as part of the process outlined above.

FEEDBACK FROM HOUSING STRATEGY CONSULTATION

CONSULTATION FEEDBACK	OUR RESPONSE
<p>From - Mark Longley@CBRE</p> <p>I've had a look through this and I think it's a really good document and very clear on the challenges faced.</p> <p>The strategy does mention older people and the challenges in that market and also other areas of specialist need. I wonder though whether it could be more explicit on extra care and reference the County's emerging strategy on extra care and the need to invest in extra care solutions to ensure that older people have a range of options open to them that enable services to them to remain effective and affordable. Also the role that investing in designated accommodation for older people plays in releasing their existing homes back in to the market.</p> <p>We've identified a need for the county and partners to play a proactive role in promoting extra care as the market is unlikely to bring schemes forward at sufficient pace, in the right locations, on its own.</p>	<p>Noted – no direct change to the strategy is required.</p> <p>Page 25, Section 6.1, third paragraph – the following has been added, <i>“As part of our approach we will be mindful of Lancashire County Councils planned Extra Care Strategy for Lancashire which is due to be published during 2014.. West Lancashire does have a successful 111 unit Extra Care Scheme in Ormskirk and so we know that such schemes are popular and provide another housing option for older people”</i></p> <p>Noted – no direct change to the strategy is required.</p>
<p>From - Cllr May Blake</p> <p>May I make the point of ensuring that suitable housing is provided for older people wishing to downsize or move into more suitable accommodation.e.g. one or two bedroomed accommodation You will appreciate that with the increasing ongoing rise in older population that suitable size houses will be included in the strategy to meet the foreseeable demand.</p>	<p>Page 19, Section 5.1, fourth paragraph – the following has been added, <i>“...including downsizing opportunities for those households requiring smaller accommodation. Housing is a long term issue and we need to plan accordingly.</i></p> <p>Page 25, Section 6.1, first paragraph – the following has been added, <i>“...including a housing offer for those households wishing to downsize”</i></p>
<p>From - Sue Hird, Area Commissioning Manager (Central Lancashire), Adult Community Services</p> <p>The report is excellent and I see that mental health could come in objective 1 – right supply of new homes (this is where we could maybe consider adding supported accommodation for vulnerable people) and objective 5 of course.</p>	<p>Comments noted but no amendment made to the strategy. Objective 5 is intended to be the headline objective to address supported accommodation for vulnerable people although it is acknowledged that the right supply of new homes (objective 1), in broad terms should supply the housing requirements of all parts of our resident population.</p>

CONSULTATION FEEDBACK	OUR RESPONSE
<p>From – Labour Group Briefing</p> <p>No mention of caravan park tenants</p> <p>Note that older people are living longer and therefore remaining in their own homes for longer which has an impact on the flow of housing supply</p> <p>Note that there are different methods of construction that can be used for constructing accommodation / housing</p> <p>Consider introducing local authority mortgages, which also have, as part of repayment amount and ability for the householder to be building up a rainy day fund, in case of emergencies. Use different methods to invest mortgage interest return to further housing related priorities.</p> <p>Consider identifying a five year supply of council land that could be used for housing development purposes and make the sites oven ready.</p> <p>No mention of Extra Care in the strategy and there should be some reference to it so that we have clearly identified it as a potential need in the borough</p>	<p>We have not made specific reference to caravan park tenants as it has not been identified as a specific housing issue. Those tenants who occupy a holiday pitch are often limited to being allowed to occupy the caravan for a fixed number of weeks within any one year. Holiday pitches are not intended to be used as permanent residential pitch. Those tenants occupying holiday pitches and in need of permanent housing should consider their housing options and approach the Council and other relevant services to receive housing options advice.</p> <p>Page 19, Section 5.2, first paragraph – the following has been added, “...and remaining in their own homes for longer which has an impact on the flow of housing supply”.</p> <p>At the end of the same paragraph – the following has been added, “In instances where designated accommodation for older people is developed then it will also contribute to freeing up, what is usually a family type dwelling, back in to the market”..</p> <p>Page 26, Section 6.1 – the following has been added at the end of this section, “In the case of affordable housing development provided through our partnership working with Registered Providers, we will work with them to consider the benefits of using different construction approaches where it will assist in the increasing supply of affordable housing whilst meeting or surpassing existing construction standards”.</p> <p>We have not made reference to this within the strategy as this is not an approach the Council wishes to explore. There are already a number of mortgage products available in the market and this coupled with appropriate financial and housing options advice facilitates households to decide which housing option route is best for their circumstances.</p> <p>The Strategic Asset Management Project (SAMP) is reviewing the Councils land and buildings assets and deciding on their appropriate use to help the Councils’ priorities. This includes making land available for housing.</p> <p>Page 25, Section 6.1, third paragraph – the following has been added, “As part of our approach we will be mindful of Lancashire County Councils planned Extra Care Strategy for Lancashire which is due to be published during 2014. West Lancashire does have a successful 111 unit Extra Care Scheme in Ormskirk and so we know that such schemes are popular and provide another housing option for older people”</p>

CONSULTATION FEEDBACK	OUR RESPONSE
<p>From Scarisbrick Parish Council</p> <p>Scarisbrick Parish Council supports the view that there is a need for more affordable housing within the Borough. The Council echoes points made in your document that there is a pressing need for such accommodation within the rural areas. This reflects our own knowledge of individuals who were raised in the Parish, have family here, and indeed are employed within the Parish but travel to work every day from Skelmersdale because that is where the bulk of affordable housing is currently located.</p> <p>The Council understands the arguments put forward regarding the need for traveller sites. It does, however, note that sites currently put forward are primarily within rural parishes and away from the major settlements in West Lancashire. It believes that these are perhaps the least appropriate locations given the need for permanent sites, in particular, to have the necessary infrastructure support. Rural communities are less able to suddenly absorb increases in population that would inevitably increase pressure on shops, schools, healthcare facilities, and highways. The Council also believes that due consideration needs to be given to the purposes of including land within Green Belt when locating such sites.</p>	<p>Noted – no direct change to the strategy is required.</p> <p>This comment has been passed to Planning Policy colleagues for them to note.</p>
<p>From - Downholland Parish Council</p> <p>Downholland Parish Council are concerned that the strategy did not appear to make explicit provision for housing for older and disabled members of the rural communities</p>	<p>Page 27, Section 6.5, first paragraph – the following has been added, “...<i>in all parts of</i>” and, “<i>including our rural communities</i>”.</p> <p>The whole sentence now reads as, “<i>We are keen to encourage investment <u>in all parts of the Borough, including our rural communities</u> to help assist in meeting specialist housing requirements.</i>”</p>
<p>From - Halsall Parish Council</p> <p>Halsall Parish Council ask that WLBC ensure that the recommended percentage of affordable houses are included in any development and make stringent regard to possible flooding risk when granting planning consent to any development and consideration should also be given to the character of rural settlements so as not to change the character through numbers.</p>	<p>Noted – Planning applications for residential development are considered in line with existing planning policy. Planning policy covers a range of matters which includes affordable housing contributions and optimising these where viable, consultation on drainage / flood risk matters and considering the nature of the rural settlement.</p>

CONSULTATION FEEDBACK	OUR RESPONSE
<p>From - Birchwood Centre</p> <p><u>Response to Vision – Have we got it right?</u></p> <p>Yes, our only thoughts would be the ongoing “changing needs” as employment , austerity and a changing balance in demand, particularly homelessness and supported accommodation, continues across WLBC needs open honest discussion with current and future service providers to ensure services can be delivered flexibly and appropriately.</p> <p>Objective 1 = Yes</p> <p>Objective 2 = Yes. We would be interested in the process for the land auction pilots when further information is available.</p> <p>Objective 3 = Yes. The provision of good quality housing options to all customers presenting to us is crucial, working across agencies with housing options as both an online and in person experience is our view of the future success in this area. Bringing empty homes back into use is an excellent objective and can also build partnerships with the 3rd sector who may be interested in taking on such properties to assist them in growing their services, improving the housing offer and discharging some of the council’s statutory objectives.</p> <p>Objective 4 = Yes. We believe that our young people are at the heart of what we do and why we do it. One of our primary aims is to support them into the local community, independence, education and employment. The provision of tailored support specific to young people in the area is key the long term growth and sustainability of West Lancashire and it’s young people.</p> <p>Objective 5 = Yes. We are delighted that you recognise the need for Foyer development for 16-25 year olds in West Lancashire and look forward to a rewarding and productive partnership as the Foyer continues in the development process.</p> <p>Objective 6 = yes</p>	<p>Noted – We use various data sources including surveys to understand housing need across client groups so that we are aware and try and positively address any changes in demand within the context of joint working arrangements and resource availability.</p> <p>Noted – no direct change to the strategy is required.</p> <p>Noted – The Housing Strategy and Development Programme Manager will make contact to explain the Land Auctions Pilot.</p> <p>Noted including the potential interest by the third sector to assist in bringing empty homes back into use. Information will be sent to our Private Sector Housing Manager.</p> <p>Noted – no direct change to the strategy is required.</p> <p>Noted – no direct change to the strategy is required.</p> <p>Noted – no direct change to the strategy is required.</p>

CONSULTATION FEEDBACK	OUR RESPONSE
<p>From - Birchwood Centre – continued</p> <p><i>Other Comments</i></p> <p>The strategy is concise and well planned with sufficient detail as to be able to clearly interpret the direction of the council and its partners. We affirm the need for a Foyer for young people aged between 16 – 25 years of age in West Lancashire. We look forward to continuing our work with WLBC to improve the offer for our young people with the ongoing support of the council and its partners, involving ourselves in appropriate developments that suit our discipline with organisations that share our ethos and passion for the development of young people across West Lancashire.</p>	<p>Noted – no direct change to the strategy is required</p>
<p>From - Details of who has responded was not supplied</p> <p><u>Response to Vision – Have we got it right?</u></p> <p>Yes, pretty balanced approach reflecting the needs of the community</p> <p>Objective 1 – Affordable housing built to serve local communities should be made available to residents (sons and daughters) of people who live in these communities first</p> <p>Objective 2 – A lot of land area in Skelmersdale is under-utilised and incurs costs in grass cutting. More land should be released for local use such as sports pitches and community allotments as well housing as and when required.</p> <p>Objective 3 - Yes</p> <p>Objective 4 – Yes but poor quality housing being operated in Skelmersdale by private landlords can depress the quality of life of those living in the nearby area. The Council needs to be more forceful in dealing with properties that fall into this category. It is accepting that the Council only has limited powers in these areas.</p>	<p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required – Please see the Councils allocation policy which provides information about the allocations of Council housing in relation to local connection.</p> <p>Noted – no direct change to the strategy is required. The Strategic Asset Management Project (SAMP) is reviewing the Councils land and buildings assets and deciding on their appropriate use to help the Councils' priorities. This includes making land available for housing and other uses.</p> <p>Noted – no direct change to the strategy is required.</p> <p>Noted – no direct change to the strategy is required. There are enforcement tools available to the Council to ensure that property is maintained and managed in line with legislation. The Council would prefer to inform and educate any offending landlords to allow them opportunity to respond in a manner that would mean enforcement is not required. Sometimes this approach is all that is required as the landlord has not been fully aware of what is required from them. We will though, continue to use enforcement powers when necessary.</p>

CONSULTATION FEEDBACK	OUR RESPONSE
<p>From - Details of who has responded was not supplied continued</p> <p>Objective 5 – In setting up sites for travellers etc, the Council needs to generate income from those using the sites to be used to maintain and clean the sites after use. The same principle as in place in any campsite a member of the public uses. These sites have to be income generating rather than a cost to the local council tax payer.</p> <p>Objective 6 – I think these should be a third delivery action specifically related to an obligation to require refurbishment and or new build houses to incorporate micro generation schemes</p> <p><u>Other</u></p> <p>Minor corrections - Analysis of needs – Housing Sector Issues. Add the word “average” in the line, “with average house prices more than 30%etc”</p> <p>There is no mention of future large scale housing applications in the green belt areas of the Borough. These need to be addressed and a policy agreed so developers know what the position is.</p>	<p>Noted – no direct change to the strategy is required. This comment has been passed to Planning Policy colleagues for them to note.</p> <p>Noted – no direct change to the strategy is required.</p> <p>Corrected.</p> <p>Noted – no direct change to the strategy is required, however please note that as part of the Councils Implementation of the West Lancashire Local Plan 2012-2027 it is intended to develop development briefs for strategic housing sites. e.g. Yew Tree Farm, Grove Farm, Firswood Road</p>
<p>From - Overview and Executive</p> <p>Consideration was given to the report of the Assistant Director Housing and Regeneration as contained on pages 497 to 541 of the Book of Reports that informed members of the Draft Housing Strategy 2014-2019 currently out for consultation. The consultation period was scheduled to end on 28 February 2014.</p> <p>In discussion comments were made in respect of the following:</p> <ul style="list-style-type: none"> • Access to affordable housing – types/sizes available and/or being developed. • Responding to community needs and managing aspirations – lack of availability of 1 bedroom property in the Borough. • Housing market challenges. 	

<p>RESOLVED: That as a consequence of the discussion on the Housing Strategy 2014 to 2019 (Consultation Draft –January 2014), attached at Appendix B, it was agreed that the following comment be referred to Cabinet for consideration:</p> <p>“In the Strategy, look to be delivering the number of bedrooms people need.”</p>	<p>Page 19, Section 5.1, fourth paragraph – the following has been added,” ... including downsizing opportunities for those households requiring smaller accommodation. Housing is a long term issue and we need to plan accordingly”.</p>
<p>From - Wrightington Parish Council</p> <p>Commented on the Vision and agreed it was appropriate</p> <p>Also stated that objective 3 – making the best use of all existing homes – The Parish Council believe that primarily all the empty properties in the borough should be brought back into use to provide additional homes rather than developing brownfield sites in the first instance. No other comments.</p>	<p>Noted – no direct change to the strategy is required.</p> <p>Noted – no direct change to the strategy is required. The Council wishes to make best use of existing housing stock and so will continue to bring empty homes back into use using the powers it has available.</p>
<p>From - Anne-Sophie Bonton, Planning Officer</p> <p>Thank you for your email inviting comments on the above document.</p> <p>I wish to make the following comments:</p> <p>The document is supported, especially objective 2 – “Regenerate and remodel areas of Skelmersdale”. In so doing, the narrative should talk about this regeneration being a catalyst/driver of growth, exploiting Skelmersdale’s location advantages. As currently presented, it appears relatively introverted and isolationist. There is a clear fit with the West Lancashire Transport & Highways Masterplan’s objective of remodelling the public realm and highways. This should be highlighted.</p> <p>I understand that the Provision Planning Team have been working with West Lancashire Borough Council to identify any shortfall in school place provision, resulting from the developments proposed within this strategy. This information has been fed back to West Lancashire Borough Council separate to this consultation exercise.</p>	<p>Page 27, Section 6.1, a new final paragraph has been added, “<i>We see the regeneration activity linked to this objective as being a catalyst and driver of growth, exploiting Skelmersdale’s location advantages and aligned to this activity will be the strategic fit with the West Lancashire Transport and Highways Masterplan which aims to remodel the public realm and highway infrastructure. Being aware of the importance of transport connectively in such regeneration and remodelling work will assist in terms of long term sustainable development</i>”.</p> <p>Noted – no direct change to the strategy is required,</p>

CONSULTATION FEEDBACK	OUR RESPONSE
<p>From - The Skelmersdale Limited Partnership</p> <p>Vision – The vision should also reflect the need to ensure that the quantum of housing required by the Borough to meet its objectively assessed housing needs, as set out in the adopted West Lancashire Local Plan, is delivered and is provided in the right locations to support the spatial strategy and regeneration priorities of the Local Plan, particularly in respect of Skelmersdale. Whilst this is acknowledged in the objectives of the strategy it should also make specific reference to this requirement in the vision.</p> <p>Objective 1</p> <p>Yes – clear reference is made to the need to ensure delivery of West Lancashire’s housing requirement as set out in the Local Plan. The objective will also ensure that the majority of West Lancashire’s housing is directed to Skelmersdale, reflecting its role and status as a Regional Town and the principal settlement in the Borough and where growth and investment are to be directed. This will in turn have beneficial consequences in terms of the vitality and viability of the town centre as a whole, including the Concourse Centre which performs the role of the retail centre of the town. This supports regeneration principles identified as priorities in the adopted Local Plan.</p> <p>Objective 2 to 6 – no further comments</p>	<p>The Housing strategy vision has been amended from:</p> <p><i>“The provision of good quality housing which meets peoples changing needs and is located within pleasant , safe and sustainable communities”</i></p> <p>to:</p> <p><i>“The provision of good quality housing in the right locations which also supports our economic and regeneration priorities, meets people’s changing needs and is situated within pleasant, safe and sustainable communities”</i></p> <p>Noted – no direct change to the strategy is required,</p> <p>Noted – no direct change to the strategy is required,</p>
<p>From Ross Wess</p> <p>Objective 1 – Achieve the right supply of new homes including maximising affordable housing. Have we got this objective and the four key delivery actions right?</p> <ul style="list-style-type: none"> • The Local Plan 2012 – 2027 I agree as long as at least 25% of all new housing is affordable. • I agree that WLBC should secure the HCA Affordable Housing Grant but you must ensure that the need for affordable homes especially for first time buyers is met. 	<p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required</p>

CONSULTATION FEEDBACK	OUR RESPONSE
<p>From Ross Wess continued</p> <p>In some areas because of the lack of properties for older residents we have one person living in a three or four bedroom property. There is a serious lack of the right type of property for the older generation and this is stopping family properties becoming available especially in the rural areas.</p> <ul style="list-style-type: none"> • Use council assets – I agree. • Development of no less than 500 affordable homes – this is a priority for first time buyers <p>Objective 2 – Regenerate and remodel areas of Skelmersdale</p> <ul style="list-style-type: none"> • I agree with the completion of the capital Investment programme. • I agree that the Firbeck revival and other estates should be completed as soon as possible. • I disagree with the land auction pilot in Whalleys. I am concerned with the wording ‘may generate capital receipts’ and ‘potential for up to 650 new homes’. This is not positive enough. • I agree Enable the development of specific land sites. • I agree WLBC seek funding for environmental work. I agree. <p>Objective 3 – Making the best use of all existing homes</p> <ul style="list-style-type: none"> • Provide housing advice, I agree • Bring all empty private homes back into use. I agree, 	<p>Page 19, Section 5.1, fourth paragraph – the following has been added,” ... including downsizing opportunities for those households requiring smaller accommodation. Housing is a long term issue and we need to plan accordingly”.</p> <p>Page 27, Section 6.5, first paragraph – the following has been added, “...in all parts of” and, “including our rural communities”.</p> <p>The whole sentence now reads as, “We are keen to encourage investment in all parts of the Borough, including our rural communities to help assist in meeting specialist housing requirements.</p> <p>Noted – no direct change to the strategy is required Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required Noted – no direct change to the strategy is required</p> <p>Page 26, Section 6.1 – the following has been added, “<i>We seized the opportunity to participate in the pilot as it has the potential to stimulate housing growth and diversification of the housing offer in Skelmersdale by providing up to 650 new homes across sites in Whalleys</i>”.</p> <p>Noted – no direct change to the strategy is required Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required Noted – no direct change to the strategy is required</p>

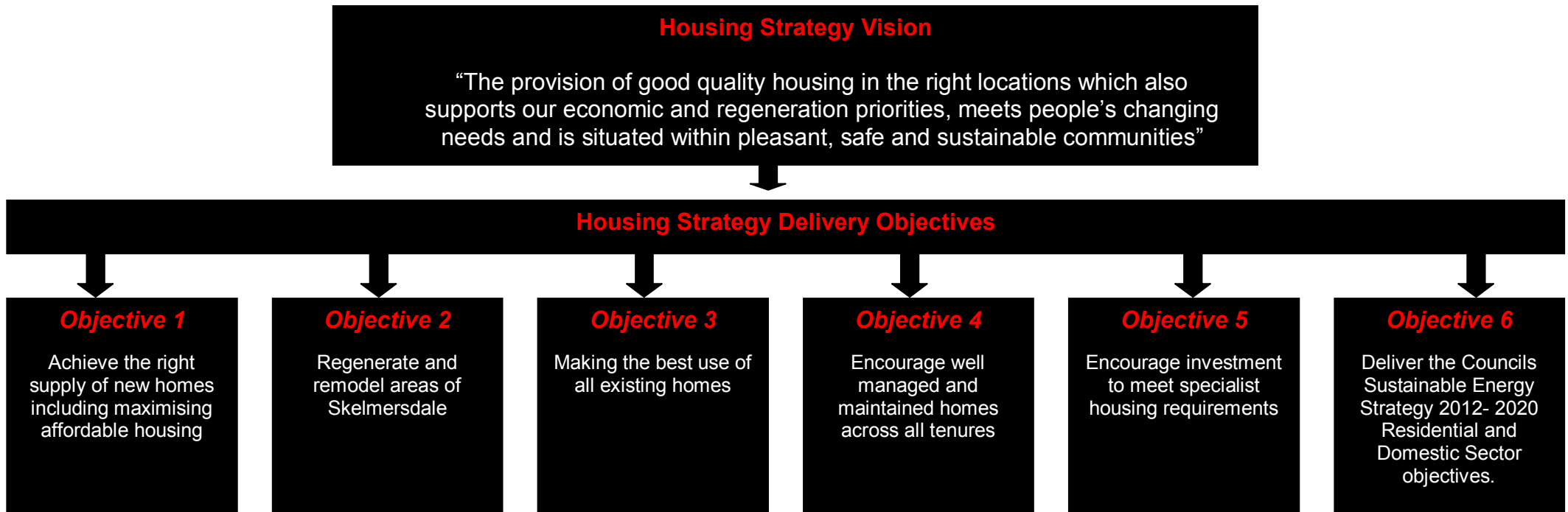
<p>especially with the increase to 150% in council tax. I live next door to a property that has been empty for over two years!</p> <ul style="list-style-type: none"> • Produce a new private housing strategy. I agree. • I agree with the options appraisal. <p>Objective 4 – Encourage well managed and maintained homes across all tenures. I agree with objective 4.</p> <p>Objective 5 – Encourage investment to meet specialist housing requirements. I agree with objective 5.</p> <p>Objective 6 – Deliver the Councils Sustainable Energy Strategy 2012-2020 Residential and Domestic Sector objectives. I agree in principal, although not all households want cavity wall insulation.</p> <p>Other - These objectives were obviously drawn up before the application to extend the Whitemoss Landfill site to four times the original size was put to the Planning Inspectorate. This site is far too close to residential and business properties and could cause a serious risk to health for those who live nearby. If this goes ahead it could be very difficult to sell quality homes and bring in new business this close to this hazardous waste site. Please see below taken from the Lancashire County Council and Blackpool Council Flood Strategy Management Consultation.</p> <p>6.1.1 The surface water flooding of 2007 caused significant amounts of damage across the UK. More recently there has been a number of surface water flooding events across Lancashire. The impacts of these events were significantly increased by the presence of development in areas that have since been identified at high risk of flooding. It is also possible that some developments may have increased the risk of flooding elsewhere through inappropriate drainage practices. If the developments in these areas had been planned with an awareness of these risks, much of the damage could have been avoided.</p> <p>West Lancashire Borough Council has a duty of care to all its residents especially those living in flood risk areas this must be taken into account when planning decisions are made.</p>	<p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required</p> <p>Noted – no direct change to the strategy is required . Planning applications for residential development are considered in line with existing planning policy. Planning policy covers a range of matters which includes consultation on drainage / flood risk matters.</p>
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Housing Strategy 2014 – 2019

ACTION PLAN for 2014/15 – Year 1

The diagram below shows our Housing Strategy Vision and our six delivery objectives. This Action Plan incorporates a number of delivery actions that will assist West Lancashire Borough Council to deliver its Housing Strategy Vision.



Monitoring

The Council produces a number of strategies and plans directed at achieving our vision and priorities. These plans and strategies contain numerous tasks and targets which, when completed successfully, are the building blocks of our success.

To keep track of our progress we use a performance monitoring framework. This helps us monitor progress and take any remedial action to make sure that what is supposed to be done gets done. Each of our service areas produce Service Action Plans which reflect the key delivery actions we are working on as contained in our strategies and plans. These are monitored regularly through our monitoring framework with performance updates being provided to relevant service managers and service heads. Performance and achievement is also reported to our Elected Members in line with our constitution so that progress is fully understood.

The Housing Strategy action plan will be monitored as part of the process outlined above.

All actions have an identified lead officer responsible for implementation and monitoring of the target

Listed below are the key abbreviations for each lead officer. The current post holder is also shown:

ADP	Assistant Director Planning (John Harrison)
ADHR	Assistant Director Housing and Regeneration (Bob Livermore)
SPIM	Strategic Planning and Implementation Manager (Peter Richards)
HPSHM	Homeless and Private Sector Housing Manager (Laura Lea)
HOM	Housing Operations Manager (Leigh McGarry)
E&VM	Estates and Valuation Manager (Rachel Kneale)
DADH&R	Deputy Asst. Director Housing & Regeneration (Ian Gill)
HS&DPM	Housing Strategy & Development Programme Manager (Jonathan Mitchell)
PSM	Property Services Manager (Phil Holland)
SHM	Strategic Housing Manager (Steve Jones)
ASPIM	Assistant Strategic Planning & Implementation Manager (Gillian Whitfield)
HNAM	Housing Needs and Allocations Manager (Nicola Bradley)
AM	Asset Manager (William Berkeley)
RMASM	Rent and Money Advice Service Manager (Stephen Jackson)

Objective 1
ACHIEVE THE RIGHT SUPPLY OF NEW HOMES INCLUDING MAXIMISING AFFORDABLE HOUSING

Action	Timescale/ milestones	Lead responsibility	Partners	Resources/ Conditional Upon	Targets	Anticipated outcomes/ impacts	Monitoring arrangements
1. Implementation of the West Lancashire Local Plan 2012-2027	<ul style="list-style-type: none"> As per Local Plan. See Planning web pages for details at www.westlancs.gov.uk 	ADP	<ul style="list-style-type: none"> Staff RP Providers Private developers Housing Strategy Local Economic Partnership 	<ul style="list-style-type: none"> Overall economic conditions Inward investment from HCA 	Development of 4860 net new dwellings during the plan period	<ul style="list-style-type: none"> A sustainable housing offer suitable for the housing and economic needs of the local population Provide New Homes Bonus for the Borough 	Planning Committee Cabinet and Council Reporting Service Action Plan Monitoring
2. Contribute to development of Master Plan / Development Briefs for Strategic Housing Sites e.g. Yew Tree Farm, Grove Farm, Firswood Road	<ul style="list-style-type: none"> In line with planning timetable 	HSDPM	<ul style="list-style-type: none"> Planning 	<ul style="list-style-type: none"> Existing officer time 	In line with planning timetable	<ul style="list-style-type: none"> Help provide direction in relation to affordable housing requirements and the provision of older persons accommodation 	Service Action Plan Monitoring
3. Secure HCA Affordable Housing Grant Investment.	<ul style="list-style-type: none"> As per HCA Grant Bid Programme.* <p>*There is not a fixed timetable but sites are identified ready for the opening of bid rounds.</p>	HSDPM	<ul style="list-style-type: none"> HCA RP Providers Planning Land agents Private developers 	<ul style="list-style-type: none"> Affordable Housing Fund National Affordable Housing Programme Council land and building assets as appropriate 	Achieve HCA inward grant investment over the life of the Housing Strategy to assist in the development of affordable housing	<ul style="list-style-type: none"> Increase the supply of affordable housing to help households in affordable housing need. Provide New Homes Bonus at higher rate 	Service Action Plan Monitoring

Action	Timescale/ Milestones	Lead responsibility	Partners	Resources/ Conditional Upon	Targets	Anticipated outcomes/ Impacts	Monitoring arrangements
<p>4. Achieve development of no less than 500 new affordable homes 2014-2019.</p> <p>Note:</p> <ul style="list-style-type: none"> - Aim to develop a minimum of 10 affordable housing units per settlement - Min of 20% of the 500 units to be for older households 	<ul style="list-style-type: none"> • Review overall delivery annually 	HSDPM	<ul style="list-style-type: none"> • HCA • RP Providers • Planning • Private developers • Legal 	<ul style="list-style-type: none"> • Affordable Housing Fund • National Affordable Housing Programme • Council land assets as appropriate • Section 106 affordable housing contributions 	<ul style="list-style-type: none"> • 2014/15 = 60 • 2015/16 = 110 • 2016/17 = 110 • 2017/18 = 110 • 2018/19 = 110 <p>Overall target is no less than 500 during the life of the housing strategy and shall include a range of dwelling types and bed sizes including 1 bed accommodation where it will meet housing need.</p>	<ul style="list-style-type: none"> • Increase the supply of affordable housing to help households in affordable housing need. • Provide New Homes Bonus at the higher rate <p><u>Important note</u></p> <p>The overriding target is 500 units to be achieved during the life of the strategy. The annual targets are indicated to help structure the delivery approach.</p>	Service Action Plan Monitoring
<p>5. Optimize affordable housing contribution provided through Section 106</p>	<ul style="list-style-type: none"> • Each planning application will be considered within planning timescales 	HSDPM	<ul style="list-style-type: none"> • Planning • RP Providers • Private developers • Legal 	<ul style="list-style-type: none"> • Economic viability of sites to support affordable housing contribution 	In line with Planning policy targets in respect of affordable housing contribution	<ul style="list-style-type: none"> • Obtain the maximum affordable housing contribution able to be supported by the economic viability of each site. 	Service Action Plan Monitoring
<p>6. Use Council land assets where appropriate to support the delivery of affordable housing</p>	<ul style="list-style-type: none"> • In line with the Strategic Asset Management Plan (SAMP) process. 	E&VM And HSDPM	<ul style="list-style-type: none"> • Estates and Regeneration SAMP Team • RP Providers • Affordable Housing Cabinet Group • Legal 	<ul style="list-style-type: none"> • Whether the site/s should be made available for affordable housing when considered against other corporate 	No target set as each site will be considered upon its merits.	<ul style="list-style-type: none"> • Increase the supply of affordable housing to help households in affordable housing need. • Provide New Homes Bonus at higher rate 	Cabinet reporting throughout the life of the SAMP project

				priorities.			
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Action	Timescale/ milestones	Lead responsibility	Partners	Resources/ Conditional Upon	Targets	Anticipated outcomes/ impacts	Monitoring arrangements
7. Identify land sites suitable for affordable housing development using our partnership with Regenda Housing Group.	<ul style="list-style-type: none"> Viable sites to be developed and completed in 2015 / 2016 / 2017 	HSDPM	<ul style="list-style-type: none"> Planning RP Provider Private developers Legal Land Agents HCA 	<ul style="list-style-type: none"> Use of Affordable Housing Fund 	Identify and assess viability for potential pipeline schemes.	<ul style="list-style-type: none"> Will provide details of land that can be used to develop affordable housing as required by our partnership arrangement. Provide New Homes Bonus at higher rate 	Service Action Plan Monitoring
8. Review current approaches for using S106 affordable housing obligations in order to meet local affordable housing need.	<ul style="list-style-type: none"> Complete review by March 2015 	HSDPM	<ul style="list-style-type: none"> Planning Legal Consultant Support 	<ul style="list-style-type: none"> Existing officer time Consultant budget 	Consideration of the affordable housing products that could be used via section 106 contribution	<ul style="list-style-type: none"> May assist in introducing other affordable housing products and/ or approaches that will broaden our affordable housing offer. 	Service Action Plan Monitoring
9. Promote all new affordable housing schemes	<ul style="list-style-type: none"> Commence promotion no less than six months ahead of intended scheme handover date. 	HSDPM	<ul style="list-style-type: none"> PR Unit Parish Councils Registered Providers Voids and Allocations Team 	<ul style="list-style-type: none"> Existing officer time 	On a scheme by scheme basis	<ul style="list-style-type: none"> Promote all new affordable housing schemes to the local community in good time so that applicants in affordable housing need are able register an interest and be considered for the new scheme in line with Council Allocation policy 	Service Action Plan Monitoring
10. Explore developing a LA new build programme	<ul style="list-style-type: none"> Report by March 2015 	ADHR HS&DPM	<ul style="list-style-type: none"> Finance Business Plan Legal 	<ul style="list-style-type: none"> Government Borrowing Headroom limits 		<ul style="list-style-type: none"> Will provide identification and due consideration of the issues that will need to be considered in trying to develop a LA New Build programme including factors relating to physical 	Service Action Plan Monitoring

						build of dwellings and funding availability such as HCA grant, right to buy receipts and borrowing headroom.	
11. Develop Affordable Housing SPD / Developer Guide	<ul style="list-style-type: none"> • Complete / Adopt by December 2014 	ASPIM	<ul style="list-style-type: none"> • Housing Strategy 	<ul style="list-style-type: none"> • Existing officer time 		<ul style="list-style-type: none"> • A reference document that assists housing developers to understand the Councils affordable housing requirements and how they should be delivered. 	Service Action Plan Monitoring
12. Review impact of CIL upon the provision of affordable housing in line with planning policy	<ul style="list-style-type: none"> • Commencing monitoring from CIL introduction • Produce review report two years after first CIL eligible application 	ASPIM HSDPM	<ul style="list-style-type: none"> • Planning 	<ul style="list-style-type: none"> • CIL introduction • Existing officer time 		<ul style="list-style-type: none"> • Determine if the introduction of CIL and the scale of charges is having an adverse impact upon the level of affordable housing being provided. 	Service Action Plan Monitoring

Objective 2
REGENERATE AND REMODEL AREAS OF SKELMERSDALE

Action	Timescale/ milestones	Lead responsibility	Partners	Resources/ Conditional Upon	Targets	Anticipated outcomes/ impacts	Monitoring arrangements
13. Complete £65 Million Capital Investment Programme	<ul style="list-style-type: none"> The Capital Investment Programme is of five year duration. Please refer to the Housing Business Plan for full details of delivery milestones located at www.westlancs.gov.uk 	PSM	<ul style="list-style-type: none"> Response & cyclical maintenance contractors. Partner Contractors 	<ul style="list-style-type: none"> Capital Programme 	Please refer to Housing Business Plan.	<ul style="list-style-type: none"> Improvements in Council Housing Stock 	DMT Business Plan Working Group Service Action Plan Monitoring
14. Commence clearance of area occupied by Findon / Firbeck flats	<ul style="list-style-type: none"> Clearance of 90% of the flats by April 2014. 	PM	<ul style="list-style-type: none"> Demolition contractors Legal . 	<ul style="list-style-type: none"> Funding has been identified for demolitions and clearance works. Vacation of occupiers 	Flats to be cleared and site prepared for future redevelopment	<ul style="list-style-type: none"> Clear the site ready for redevelopment as part of Firbeck revival activity. 	Monitoring by Project team Cabinet Working Group
15. Consider delivery options to redevelop the sites that have been cleared as part of Firbeck revival programme.	<ul style="list-style-type: none"> Decide which approach will be used to redevelop the sites Seek HCA funding and a delivery partner if required Commission redevelopment 	ADHR	<ul style="list-style-type: none"> Housing Strategy RP HCA Consultant to assist with options appraisal Planning Legal 	<ul style="list-style-type: none"> Viability appraisal Consideration of funding approaches / options HCA HRA borrowing headroom. 	2015/16 - Phase 1 site - Physical build commences	<ul style="list-style-type: none"> Improve the street scene and broader housing offer in the area and make additional affordable housing available in the locality. 	Monitoring by Project team Cabinet Working Group

	work.						
16. Complete Land Auctions Pilot – Whalleys	<ul style="list-style-type: none"> • End of March 2014 	E&VM	<ul style="list-style-type: none"> • HCA • Partnership Officer • Planning • Private Developers • RP Providers • Legal • HCA Development Partner Panel 	<ul style="list-style-type: none"> • Project Budget Established • Market conditions / appetite for housing developers to acquire the sites 		<ul style="list-style-type: none"> • The provision of sites that are ready for developers to acquire that have outline planning permission secured. • As sites are acquired then the work will have enabled an: <ul style="list-style-type: none"> - increase in housing supply including affordable housing. - a diversification of the local housing offer. - provide new homes bonus and capital receipt for the Council 	Monitoring by Project team and by Cabinet Reporting
17. Enable the development of Findon, Delph Clough and site of former Skelmersdale Sports Centre	<ul style="list-style-type: none"> • Market engagement commences Autumn 2014 	DADH&R	<ul style="list-style-type: none"> • Housing Strategy • Private Developers • Planning • RP Providers • Legal 	<ul style="list-style-type: none"> • Existing officer time 	Engage with housing developers and consider how best to enable development of the sites	<ul style="list-style-type: none"> • Outcome to support regeneration of Skelmersdale Town Centre • Improvements to economic and social indicators • Increase in housing supply including affordable housing 	Service Action Plan Monitoring
18. Review and develop second revival scheme and where appropriate remodel or dispose of housing stock.	<ul style="list-style-type: none"> • Identify next revival scheme March 2014 • Commence public consultation on the preferred option and present a further report to Cabinet in due course 	AM PSM ADHR	<ul style="list-style-type: none"> • Estates and Valuation Team • Tenants / Resident Groups • Legal 	<ul style="list-style-type: none"> • Existing officer time initially but may need consultant support. • HRA funding 		<ul style="list-style-type: none"> • Will identify where the second revival scheme / remodelling activity will be focused and scope initial activity required • Ensure that any remodelling / disposal decisions in respect of Council housing stock is endorsed by Estates and Valuation Team. 	Service Action Plan Monitoring

Objective 3
MAKING THE BEST USE OF ALL EXISTING HOMES

Action	Timescale/ milestones	Lead responsibility	Partners	Resources/ Conditional Upon	Targets	Anticipated outcomes/ impacts	Monitoring arrangements
19. Be honest about whether we can help by ensuring the provision of regularly reviewed and updated information about Council Services.	<ul style="list-style-type: none"> Review existing web pages and documents every six months to ensure they are appropriate Ensure staff are aware of Council services and where to sign post customers too if required. 	Service Heads	<ul style="list-style-type: none"> Web Champions All staff 	<ul style="list-style-type: none"> Existing officer time 		<ul style="list-style-type: none"> This action relates to the provision of accurate information and appropriate advice to our customers so it enables households to make informed choices about their housing options in relation to their query. 	Service Action Plan Monitoring Team Meetings
20. Develop financial inclusion strategy	<ul style="list-style-type: none"> 01-May-2014 - Complete draft FI strategy 30-Jun-2014 - Consultation with customers and feedback 30-Sep-2014 - Finalise FI strategy and present to Council 	RMASM	<ul style="list-style-type: none"> PR Section Tenants Groups 	<ul style="list-style-type: none"> Existing officer time 		<ul style="list-style-type: none"> The development a financial inclusion strategy which will be aimed at supporting Council tenants through Welfare Reform. 	Service Action Plan Monitoring
21. Bring private sector empty homes back in to use	<ul style="list-style-type: none"> On-going activity 	H&PSHM	<ul style="list-style-type: none"> Legal Partner Agencies Building Control 	<ul style="list-style-type: none"> Existing officer time 		<ul style="list-style-type: none"> Brings empty housing back into use May attract New Homes Bonus Improve street scene 	Service Action Plan Monitoring

<p>22.</p> <p>Produce a new Private Sector Housing Strategy</p>	<ul style="list-style-type: none"> • Commence July 14 • September 2014 Cabinet 	<p>H&PSHM</p>	<ul style="list-style-type: none"> • Partner Agencies • Housing Strategy • Neighbouring local authorities • Legal 	<ul style="list-style-type: none"> • Existing officer time 		<ul style="list-style-type: none"> • Identification of private sector housing delivery objectives and the development of an action plan to address the private sector housing challenges and issues in the borough 	<p>Service Action Plan Monitoring</p>
<p>23.</p> <p>Review all housing association nomination agreements</p>	<ul style="list-style-type: none"> • Commence review in August 2014 • Complete by March 2015 	<p>HSDPM</p>	<ul style="list-style-type: none"> • Voids and Allocations • Legal 	<ul style="list-style-type: none"> • Existing officer time 	<p>Optimise take up of Local authority nominations in line with nomination rights.</p>	<ul style="list-style-type: none"> • Will enable the nomination process to be understood by our RP colleagues within the context of West Lancs HomeFinder and any local connection criteria. In addition will assist in maximising the take up of L/A nominations 	<p>Service Action Plan Monitoring</p>

Objective 4
ENCOURAGE WELL MANAGED AND MAINTAINED HOMES ACROSS ALL TENURES

Action	Timescale/ milestones	Lead responsibility	Partners	Resources/ Conditional Upon	Targets	Anticipated outcomes/ impacts	Monitoring arrangements
24. Promote the Private Landlord Accreditation Scheme	<ul style="list-style-type: none"> On-going 	H&PSHM	<ul style="list-style-type: none"> Landlord Forum PR Benefits and Revenues 	<ul style="list-style-type: none"> Existing officer time 	To increase membership of private landlords participating in the scheme.	<ul style="list-style-type: none"> Attract more landlords to register with the scheme and encourage improved management and maintenance of private tenancies. 	Service Action Plan Monitoring
25. Maximise use of enforcement powers to deal with problem landlords and target resources to address disrepair, unsafe properties and management issues within the private rented sector	<ul style="list-style-type: none"> As and when required 	H&PSHM	<ul style="list-style-type: none"> Legal Building control PR 	<ul style="list-style-type: none"> Existing officer time 	In line with any local and / or statutory timescales.	<ul style="list-style-type: none"> Appropriate use of enforcement powers where required. 	Cabinet report / Member updates
26. Review Tenure Strategy and Policy	<ul style="list-style-type: none"> Commence light touch review in July 2014 	SHM	<ul style="list-style-type: none"> Voids and Allocations Legal Registered Providers Neighbouring authorities 	<ul style="list-style-type: none"> Existing officer time 		<ul style="list-style-type: none"> The light touch review is intended to establish whether the policy and strategy is 	Service Action Plan Monitoring

Objective 5

ENCOURAGE INVESTMENT TO MEET SPECIALIST HOUSING REQUIREMENTS

Action	Timescale/ milestones	Lead responsibility	Partners	Resources/ Conditional Upon	Targets	Anticipated outcomes/ impacts	Monitoring arrangements
27. Enable the development of a Foyer for young people	<ul style="list-style-type: none"> The Council will use its enabling role to signpost the Birchwood Centre to information and expertise so that they can fully explore the viability of developing a Foyer taking account of delivery / funding considerations 	HSDPM	<ul style="list-style-type: none"> Birchwood Centre Supporting People Other contributors working with the Birchwood Centre. 	<ul style="list-style-type: none"> The Birchwood Centre / their chosen partner developing a viable business plan and securing capital and revenue funding and overcoming any associated development challenges Suitable development site 		<ul style="list-style-type: none"> The development of a Foyer for vulnerable young people, to improve their well-being, provide training, development of independent living skills along with mediation and counselling where required and other support / coaching activity to develop the young people to achieve their full potential. 	Service Action Plan Monitoring
28. Identify sites suitable for Gypsy and Traveller Pitch Provision	<ul style="list-style-type: none"> In line with Planning time scales 	SPIM	<ul style="list-style-type: none"> Planning Gypsy Group Legal 	<ul style="list-style-type: none"> Existing officer time Endorsement by Planning Inspectorate 	Allocate Gypsy and Traveller / Travelling Show people sites to meet assessed locally arising needs.	<ul style="list-style-type: none"> Provision of sites to meet the needs of the travelling community in compliance with national policy. Improve the ability of the Council to take swift and effective action in the light of unauthorised encampments. 	Through existing reporting structures to Members

<p>29.</p> <p>Work with the Supporting People (SP) Team to support the needs of vulnerable clients groups including consideration of further Extra Care provision in the borough.</p>	<ul style="list-style-type: none"> • On-going • Also in line with Supporting People contract renewal schedule 	<p>HSDPM</p>	<ul style="list-style-type: none"> • SP Team • Support Providers 	<ul style="list-style-type: none"> • Existing officer time • SP Budget • HCA 		<ul style="list-style-type: none"> • An on-going understanding of the housing related support needs of vulnerable client groups • A mechanism to contribute to shaping service delivery and remodelling services where appropriate within the context of improving services and SP funding availability. • A consideration of the emerging LCC Supporting People Extra Care Strategy as it relates to West Lancashire. 	<p>Service Action Plan Monitoring</p>
<p>30.</p> <p>Work with Lancashire County Council, Health, CCG and RPs to develop housing solutions for a range of client groups such as those with learning disability, mental health difficulties, physical disability and other client groups where need is identified.</p>	<ul style="list-style-type: none"> • 2014/15 - Identify need for each client group • 2014/15 - Work with partners to explore delivery options and viability • Where viable options exist, develop delivery action plan for implementation during this strategy period. 	<p>HSDPM</p>	<ul style="list-style-type: none"> • SP Team • HCA • CCG • Carers Groups • Health • LCC • Registered Providers 	<ul style="list-style-type: none"> • Existing officer time • HCA • RP partners • Partner Funds 		<ul style="list-style-type: none"> • Work with partners to identify broader housing requirements required for specific vulnerable client groups and determine if accommodation solutions can be developed. Where appropriate scope out work activity and build into housing strategy action plan during this strategy period. • Provide accommodation options in West Lancashire for vulnerable client groups. 	<p>Service Action Plan Monitoring</p>

Objective 6
DELIVER THE COUNCILS SUSTAINABLE ENERGY STRATEGY 2012-2020 “RESIDENTIAL AND DOMESTIC” SECTOR THEME

Action	Timescale/ milestones	Lead responsibility	Partners	Resources/ Conditional Upon	Targets	Anticipated outcomes/ impacts	Monitoring arrangements
31. To improve the energy efficiency of West Lancashire Housing	<ul style="list-style-type: none"> Please refer to the Sustainable Energy Strategy 2012-2020 for full details of delivery milestones located at www.westlancs.gov.uk 	WLBC / Private Sector Housing Service	<ul style="list-style-type: none"> As described in the Sustainable Energy Strategy 2012-2020. 	<ul style="list-style-type: none"> As described in the Sustainable Energy Strategy 2012-2020 	Targets across each action range from on-going, short term and medium term.	<ul style="list-style-type: none"> There are 8 delivery actions attached to this element of the Sustainable Energy Strategy 2012-2020. 	Service Action Plan Monitoring
32. Tackle hard to treat properties, reduce fuel poverty and ensure affordable warmth for all.	<ul style="list-style-type: none"> Please refer to the Sustainable Energy Strategy 2012-2020 for full details of delivery milestones located at www.westlancs.gov.uk 	WLBC / Private Sector Housing Service	<ul style="list-style-type: none"> As described in the Sustainable Energy Strategy 2012-2020. 	<ul style="list-style-type: none"> As described in the Sustainable Energy Strategy 2012-2020 	Targets across each action range from on-going, short term and medium term.	<ul style="list-style-type: none"> There are 5 delivery actions attached to this element of the Sustainable Energy Strategy 2012-2020 	Service Action Plan Monitoring

Appendix 4: Equality Impact Assessment - process for services, policies, projects and strategies

1.	<p>Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service/policy/strategy/decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people:</p> <p><i>People of different ages – including young and older people</i> <i>People with a disability;</i> <i>People of different races/ethnicities/ nationalities;</i> <i>Men; Women;</i> <i>People of different religions/beliefs;</i> <i>People of different sexual orientations;</i> <i>People who are or have identified as transgender;</i> <i>People who are married or in a civil partnership;</i> <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave;</i> <i>People living in areas of deprivation or who are financially disadvantaged.</i></p>	<p>No - The housing strategy is intended to assist in meeting the housing needs of our local communities.</p> <p>In developing the housing strategy it takes account of a range of data sources and housing needs surveys to help determine what housing issues exist in the area and from this information, key delivery objectives have been identified.</p> <p>The Housing Strategy Vision is to: <i>“The provision of good quality housing, that is affordable, which meets people’s changing needs and is located within pleasant, safe and sustainable communities”</i></p> <p>The Housing Strategy aims to increase housing supply and that existing housing is used effectively to best meet housing need. This will have a positive impact across all the EIA groups who are regarded as being in housing need in line with recognised national guidance, legislation and policy.</p>
2.	<p>What sources of information have you used to come to this decision?</p>	<p>The Council holds a range of information in the form of surveys and other data types that helps the Council understand the Borough housing situation and the housing issues faced by our residents. Such information includes stock condition survey, the Council housing register and Housing Need Survey 2010. We are also able to access other data that that helps in our understanding of our housing markets and if there are any specific issues faced by vulnerable housing client groups.</p> <p>This information helped the Council to identify local housing issues. Consultation then took place with our partners, stakeholders and members of the public which led to the shaping of the housing delivery objectives now included in the housing strategy.</p>
3.	<p>How have you tried to involve people/groups in developing your service/policy/strategy or in making your decision (including decisions to cut or change a service or policy)?</p>	<p>Consultation has taken place with our partners, stakeholders and members of the public to shape the housing delivery objectives contained in the housing strategy.</p> <p>It is now intended to share the housing strategy, through an eight week consultation exercise, to allow a further opportunity to ensure that this strategy has captured the housing issues that need to be considered in the Borough.</p>
4.	<p>Could your service/policy/strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:-</p> <p><i>Eliminate discrimination, harassment and victimisation;</i> <i>Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people);</i> <i>Foster good relations between people who share a protected characteristic and those who do not share it.</i></p>	<p>It will not alter our continued duty on Equality.</p> <p>The housing strategy will assist in the Council meeting its duties under the Equality Act 2010.</p>
5.	<p>What actions will you take to address any issues raised in your answers above</p>	<p>N/A</p>



Housing Strategy 2014 to 2019

AMENDED VERSION AS AT 4 MARCH 2014.

THIS VERSION TAKES ACCOUNT OF CONSULTATION COMMENTS RECEIVED
DURING THE CONSULTATION PERIOD OF 7 JANUARY 2014 TO 28 FEBRUARY 2014.

AMENDMENTS ARE SHOWN USING TRACKED CHANGES

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Preface

We are delighted to introduce this housing strategy for West Lancashire, which provides the opportunity for us to explain our vision and delivery objectives over the next five years.

It has been developed against a backdrop of unprecedented change in national policy including fundamental reforms to planning policy, welfare benefits and the role and funding of social housing.

In developing this strategy we have ensured that we have engaged with and consulted with stakeholders. It is evidenced based and reflects the Council's Corporate priorities along with the housing related objectives of our Sustainable Community Strategy 2007 - 2017. This strategy also takes account of:

- Private Sector Housing Strategy 2006 - 2009
- Affordable Housing Strategy 2008 - 2013
- Homelessness Strategy 2007 - 2013
- Sustainable Energy Strategy 2012 - 2020
- Tenure Strategy 2013
- Local Plan 2012 – 2027
- HRA Business Plan 2012 -2042

In West Lancashire we recognise that the Borough has both opportunities and challenges. Ensuring that “we improve housing and deliver housing that meets the needs of local people” is a key focus for the Council and contributes to sustainable regeneration and growth, and a Borough which looks and feels cared for. We retain and manage our Council Housing stock and so understand that access to good quality homes at the right price, in the right location and in sustainable neighbourhoods is important for our residents and those households looking to relocate to the area with the aim of investing and making their home in our Borough.

Housing is therefore important to us and helps to deliver our Corporate priorities, which take account of our need to manage reducing budgets to deliver public services for our residents. This means as we move forward, we need to remain prudent, be cost effective and innovative in our approaches and continue to work more closely with existing partners and seek out different ways of working with new partners to help deliver the right housing offer.

We recognise that everyone's needs are different, and we are committed to ensuring that housing and services meet a wide range of specialist housing needs. Housing will play a crucial role in our economic success and is a central component of people's lives.

We have already achieved much, following the publication of our last housing strategy 2004-2009 and we have worked positively with our partners in improving housing, the housing offer and the lives of local people as a result. We wish to build upon this success and this housing strategy allows us an opportunity to refocus our priorities within the current strategic delivery context.

We are committed to trying new approaches and doing things differently as we seek to address our most pressing housing issues. We do not have the resources to do everything, so in developing this housing strategy we realise we will have to work increasingly with private, statutory and voluntary sector partners to achieve our objectives.

The Action Plan with this housing strategy will be reviewed regularly as part of our existing Service Action Planning arrangements. This will allow progress to be monitored and delivery outcomes to be measured.

Finally, we would like to thank all those who responded to our consultation and who have otherwise contributed to this Strategy, and we look forward to working with our partners to turn this strategy in to reality.



Bob Livermore
Assistant Director Housing and
Regeneration



Adrian Owens
Portfolio Holder for Housing
(Finance), Regeneration and Estates



Val Hopley
Portfolio Holder for
Landlord Services

Housing Strategy for West Lancashire – An Executive Summary

West Lancashire Borough Councils' housing strategy sets out our strategic housing delivery objectives which we aim to address over the five-year period from 2014 to 2019. Housing market conditions and housing needs will change over time, but it is important to establish direction and to set out strategies and targets for improving housing circumstances in the short to medium term.

We have based our strategy and action plan on analysis of our housing market and housing needs. Equally importantly, we have consulted widely with people in housing need and other stakeholders. This consultation process has influenced the objectives we have established. Achievement of these objectives will be subject to resource availability. Our key delivery actions which accompany our housing strategy objectives are shown on page 7. Our housing strategy delivery objectives are:

- ✦ Achieve the right supply of new homes including maximising affordable housing
- ✦ Regenerate and remodel areas of Skelmersdale
- ✦ Make the best use of all existing homes
- ✦ Encourage well managed and maintained homes across all tenures
- ✦ Encourage investment to meet specialist housing requirements
- ✦ Deliver the Council's Sustainable Energy Strategy 2012- 2020 Residential and Domestic Sector objectives.

Analysis of needs – Housing sector issues

The profile of West Lancashire as a whole is one of a Borough with high demand for housing in the private and public sector, with average house prices more than 30% higher than Lancashire's average.

House price data suggests that there are three main housing markets. These consist of Skelmersdale, Ormskirk and the more rural areas of the Borough, containing smaller towns and villages. The housing issues within each area range from extremely low to high demand for accommodation.

Our population is growing – The 2001 Census recorded a Borough population of 108,400 and the Census in 2011 recorded a population increase of 2.1% to 110,700. Population projections predict that by 2031 the population will be in the region of 120,900. We need to cater for this growth and will do so in line with our Local Plan 2012-2027.

It's ageing - We know that our population is ageing and that by 2035, there will be 10,300 more people aged 60 and over, and 7,200 people aged 75 and over. This is likely to increase demand for housing related support and other forms of social care to enable residents to remain in their own homes.

It's expensive - We know it's expensive to buy a home in most parts of the Borough and that in 2010 we had an annual affordable housing shortfall of 214 units (homes) per year. While affordable housing has been developed we still have growing levels of unmet need each year.

Added to this is the fact that we know that economically active households, particularly those who would traditionally be classed as first time buyer households, struggle to find housing at an affordable price in our Borough and as a result they move away. We need to ensure we are providing the 'right' type of housing offer to retain and attract younger and economically active growing families and first time buyers while at the same time provide suitable housing for older people.

Private Sector Housing - We need to make more of the private rented sector, including ensuring homes that are let are well managed and maintained. The private rented sector can assist, in part, with some of the matters mentioned above by providing rented homes as an extension to the social rented sector, where waiting lists can mean a significant wait before rehousing occurs. It can also act as an alternative tenure for households currently unable to access the home ownership ladder.

Our Private Sector Stock (PRS) condition survey 2010 identifies that there are properties in the private sector that still need investment and in some instances this can impact on the occupiers' health. Funding to address these issues is limited and so we need to consider how we can tackle stock condition and also advise and support householders to make their homes more energy efficient. This will also help address the issue of fuel poverty experienced by some households in the Borough.

Skelmersdale - The new town of Skelmersdale was built in the 1960's, and was the first new town in the North West. Skelmersdale faces a number of challenges in terms of its housing market, physical design and environment and these are considered in the main text of the housing strategy.

Skelmersdale Town Centre – The Council is keen to improve the attractiveness and functionality of Skelmersdale Town Centre. While it is well used it does not offer the shopping experience that can exist elsewhere in the region, which in many cases now offer entertainment venues, such as cinema or bowling and tend to include a range of well known eating establishments. Such facilities in themselves provide a reason for people to visit and can help to create a vibrant night time economy. Such facilities would provide an alternative purpose for visiting other than for day time shopping.

To help with this issue the Council and the Homes and Community Agency (HCA) approved a Supplementary Planning Document and master plan in 2008. We are working with St Modwen, a regeneration company to bring the aims of the master plan to fruition and improving the housing offer and range of tenures available is seen as a significant driver in the area's redevelopment with the masterplan including the development of high quality market housing, for sale and to rent, low cost market housing and affordable housing. This work is intended to help improve the local economy by increasing visitors and enhance the overall appeal of the area. Planning permission has now been granted for a supermarket, cinema and other retail and leisure facilities in the Town Centre.

Work is on-going to achieve our town centre aspirations, and the Council, working in partnership with the HCA identified land, and is marketing, where appropriate, sites suitable for residential housing development. In September 2011, West Lancashire College opened its doors to a brand new state-of-the-art campus situated in the town centre. Added to this is to be the development of a £2 million youth zone by the County Council, consisting of a two-storey facility on land based to the north of Skelmersdale police station.

Other relevant themes and housing market challenges - We have highlighted in this executive summary some of the issues which we have considered during the development of this housing strategy. They relate mainly to our housing market and housing supply, making the best use of existing stock, the impact of population growth and changes in age profile in the years to come. The main housing strategy document introduces other housing related matters that have also influenced the delivery objectives that this strategy will focus upon.

Resources - Delivering this housing strategy will require a significant amount of inward investment and there are likely to be competing financial "demands" in trying to achieve them. It is clear that the authority is not in a position to finance all its aspirations from existing resources and so all avenues will be considered to help make progress. To that end we are strongly committed to working in partnership to pursue all funding opportunities, which will allow this authority to deliver real and sustainable solutions, which meet its housing challenges.

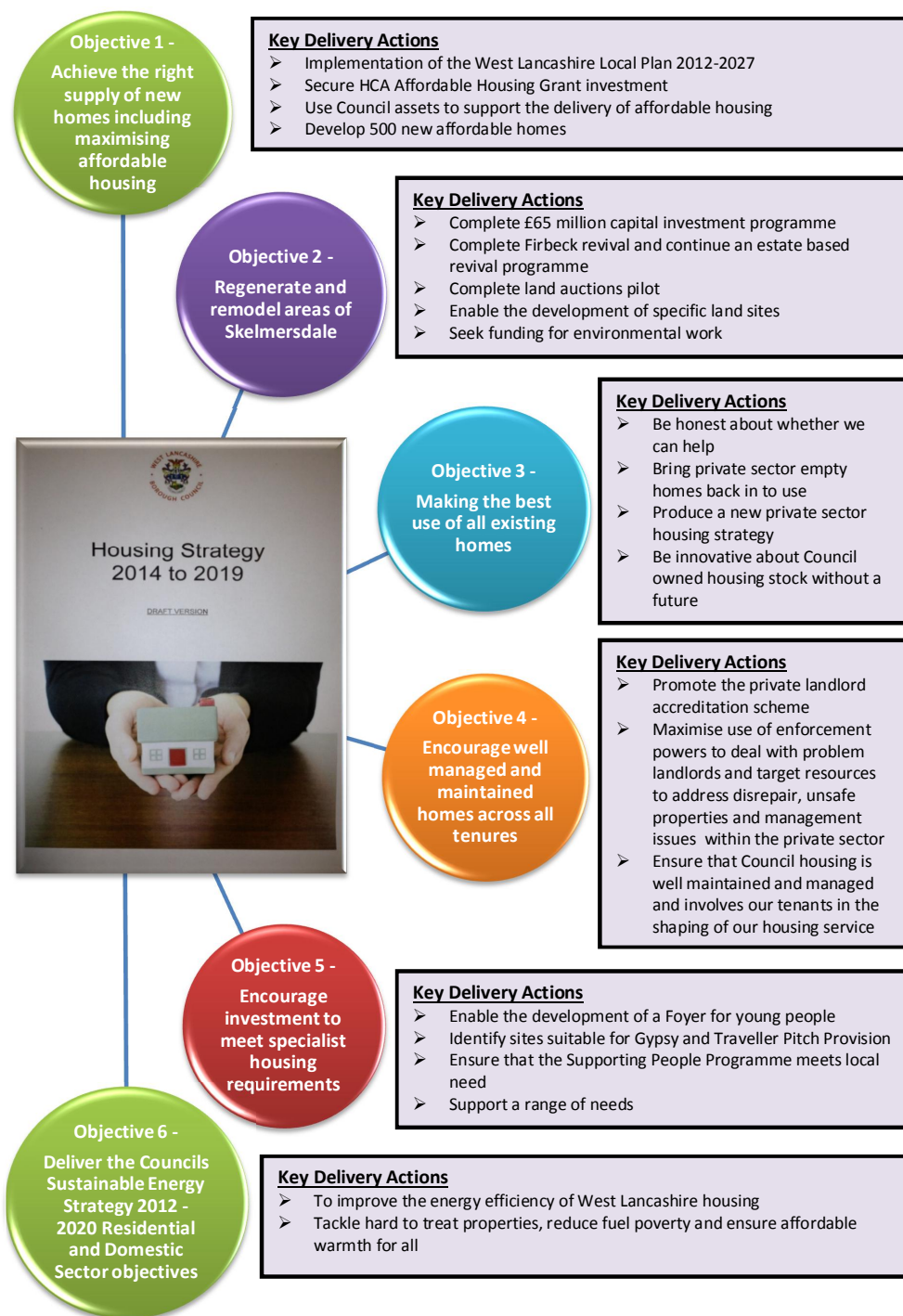
Progress since our last housing strategy

We have made good progress following the publication of our last housing strategy 2004-2009. Below is a summary of some of the achievements:

- Since 2005 secured £10 million Homes and Community Agency grant which has provided 271 affordable dwellings with total scheme cost of £34.5 million, including a 111 Unit Extra Care Scheme in Ormskirk and the Council building 17 homes in Elmstead in Skelmersdale;
- The Council Housing stock is now self-financing which has enabled total investment of £65 million in property improvements to Council housing to commence, including £5 million to be invested to support the revival of Firbeck;
- Established a partnership arrangement with Regenda Housing Group to develop affordable housing in Borough called The Affordable Housing Capital Partnership Scheme;
- Significant energy efficient improvements to Council housing stock to provide long term fuel efficiencies, reduce fuel poverty and ensure affordable warmth for tenants. Measures include insulation programmes, including external wall insulation, boiler replacements, fuel switching, and installation of renewable technologies including biomass, air source heat pump, and solar photovoltaic panels.
- Becoming a pilot for land auctions – One of three councils country wide. This pilot has the potential to provide affordable and market housing to the area;
- Establishing a Transfer Incentive Scheme to enable Council Tenants to Downsize in to smaller Council property therefore making better use of existing Council Stock;
- Achieving and maintaining the Decent Home Standard in Council Housing;
- Becoming a member of People Power Collective Energy Switching Scheme which will help Lancashire residents to find out if they can save money by switching energy providers.

West Lancashire's Housing Strategy 2014 – 2019

(Strategic housing objectives and key delivery actions)



Chapter 1

Introduction

1.0 Profile

West Lancashire has a population of 110,700¹ spread across a mix of vibrant towns and villages sitting alongside tranquil countryside which covers an area of 38,109 hectares and contains the greatest proportion of Green Belt land in England.

The Borough is complex and diverse in its nature, and includes rural areas together with the urban conurbation of Skelmersdale and the key service centres of Ormskirk, Aughton and Burscough. The majority of residents live in these settlements.

There are three distinct rural areas; the Northern, Eastern and Western Parishes, containing a number of villages, the largest of which are the linear settlements of Tarleton and Hesketh Bank.

Our geographical location in the North West of England is unique. We have a dual identity, being the southernmost Borough in the County of Lancashire, whilst also located within the Liverpool City Region and adjacent to the Manchester City Region.

The Borough is also adjacent to a number of large urban areas, including Southport to the west, Liverpool and parts of Knowsley to the south, St Helens and Wigan to the east and Chorley, Leyland and Preston to the north east. It is a popular area for commuting to other parts of Lancashire and Manchester, whilst there are particularly strong links with the economy of Liverpool.

There is motorway access to Liverpool via the M58 and to Preston, Wigan and St Helens via the M6. This defines one of the key features of the West Lancashire housing market which is the strong linkages with surrounding areas which generates demand for housing in the area from higher income groups and those willing to commute, which can create affordability problems for those on lower incomes.

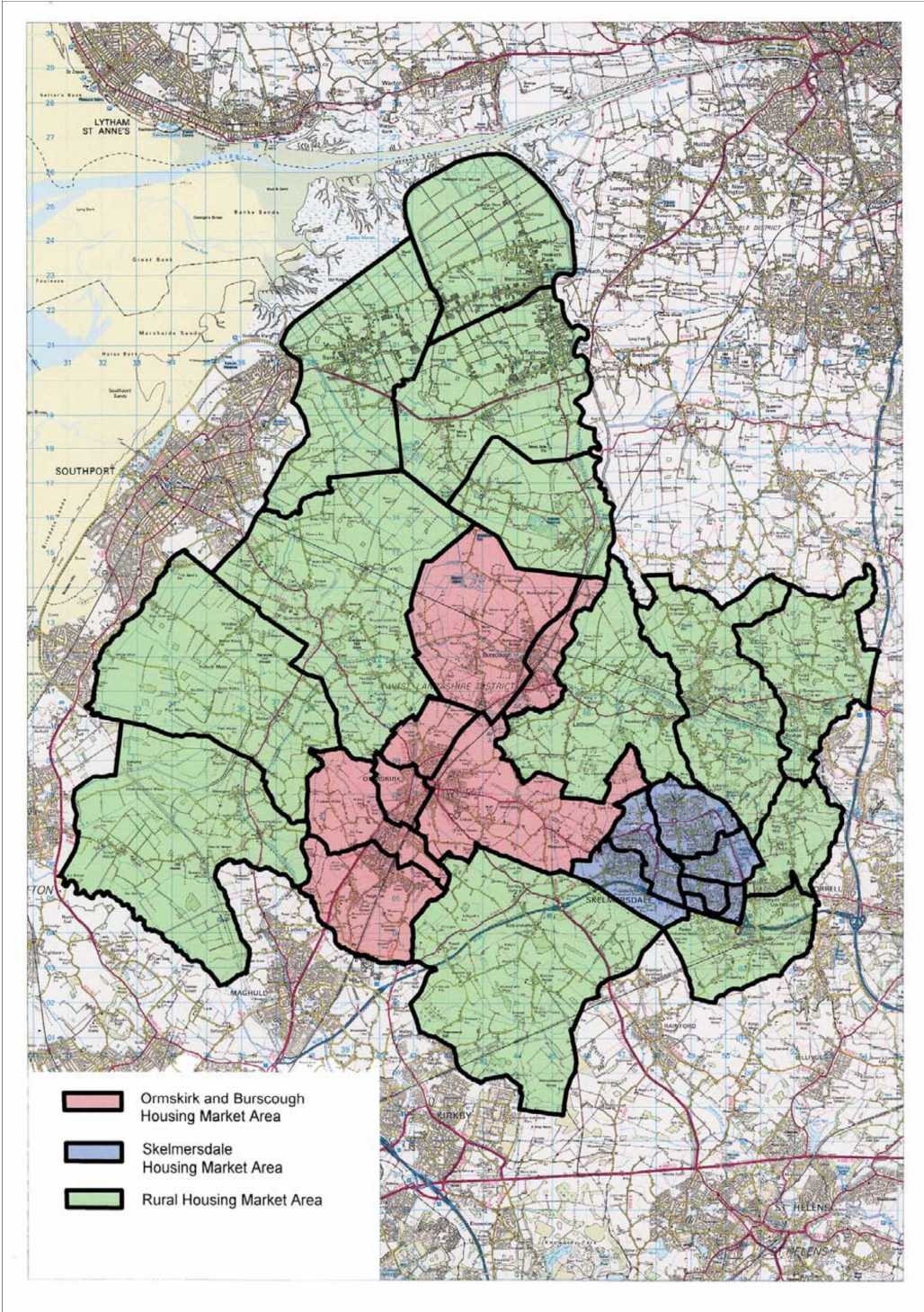
Our analysis suggests that there are three main housing markets. These are:

- Skelmersdale which as well as being a free-standing employment centre and settlement has house prices which are typically below those elsewhere in the Borough;
- Ormskirk which is also a free standing settlement and employment centre along with Burscough and Aughton;
- The more rural areas of the Borough, containing smaller towns and villages. These areas are generally distinguished by higher prices and in some cases a commuter function associated with employment centres outside the Borough. This sub-market covers a large area with significant differences in accessibility to large employment centres.

The profile of West Lancashire as a whole is one of a Borough with high demand for housing in the private and public sector, with house prices more than 30% higher than Lancashire's average.

These housing markets present us with a challenge, particularly because housing issues within each area range from extremely low to high demand for accommodation.

¹ Census 2011



Chapter 2

The purpose of a housing strategy

2.0 The purpose of a housing strategy

The Government is determined that local authorities must become more strategic in their thinking, developing plans for the longer term to deliver measurable outcomes.

In housing, the agenda has moved on from the requirement to produce a “fit for purpose” housing strategy to having an excellent strategic approach – requiring us to be clear about our direction for housing and how we will enable delivery – and communicate this to the right people, in the right way, to the benefit of our communities.

Housing led initiatives can contribute to improving skills, education and employment chances, whilst ill health can be improved and alleviated by living in homes which are adaptable and located in safe and supportive environments. Local housing authorities’ work in producing housing strategies has been a lever for economic and social change in many areas, reflecting a shift towards ensuring local housing markets meet local demands, rather than a narrower focus on directly providing social housing.

In essence a housing strategy is a plan that considers housing issues in an area and sets out how to tackle them over a given period of time, having regard to identified housing needs and the resources available. It reflects the important strategic and enabling role of the Council in place shaping and meeting and facilitating housing needs in the Borough. It also has to consider the delivery and policy context applicable at the time of its development and evolve as policies change. Chapter 3 considers the current national, regional and local policy context in which this housing strategy should be considered.

The housing strategy is intended to be an over-arching document that establishes priorities for action, both by the local authority and, where appropriate, by other service providers and stakeholders and sets out a clear action plan.

The strategic housing role therefore has an important part to play in a number of locally based plans, as it can assist in promoting a joined-up approach to activity that helps support sustainable communities including:

- assess and plan for current and future housing needs of the local population;
- make the best use of existing housing stock;
- plan and facilitate new housing supply;
- work in partnership to facilitate commissioning of housing support services which link homes to support and other services that people need to live in them;
- have working partnerships that secure effective housing and neighbourhood management;
- ensure good design which encourages informal social mixing and support community cohesion within estates and neighbourhoods;
- support the economy by having the right number of homes of the right tenure and price for workers;
- link where people live to the services they want and need;
- ensure that all residents’ voices feed into shaping strategy by encouraging their participation of the housing strategy development process;
- improve poor housing and the corresponding health problems associated with such housing.

In overall terms a housing strategy aims to provide an appropriate balance of good quality housing, which meets the housing needs of the population, provides variety, choice and is accessible and contributes positively to the well-being of the citizens of the local authority area. It involves making the best use of the housing that is already there, as well as working effectively with the market to supply new homes. It is also about looking and working across all housing tenures, and ensuring that appropriate links are made to the support services which people need to live in their homes.

Chapter 3

National, regional and local context

3.0 West Lancashire's housing strategy within a national context

The Government's stated aim is to deliver a nationally sustainable and resilient economy that is rebalanced across regions and sectors (public, private, voluntary and community). Since the Coalition Government has come to power it has stressed its commitment to decentralisation, localism and the 'Big Society', and its 'Programme for Government' set the scene for a radical devolution of power to local authorities and community groups; critical to this has been the 'Localism Act 2011' which included measures to reform the planning system, social housing and the Council housing financial system. One of the key elements that the Act provided was reform to ensure that decisions about housing are taken locally.

The Government's Housing Strategy 'Laying the Foundations: A Housing Strategy for England' 2011 set out its intended direction of travel for housing, its role in the wider economy and its contribution to social mobility. Government want to see primacy of home ownership, social housing as welfare, and an increasing role for the private rented sector. The key elements of this strategy are summarised below:

- An agenda of growth in housing delivery, recognising the positive role that housing and its construction has in supporting economic growth of the economy, increasing employment opportunities and supporting inward investment. This is underpinned by a number of private sector led funding initiatives such as The Regional Growth Fund, designed to support public sector dependent economies to private sector led growth. The Government introduced the New Homes Bonus to specifically encourage housing growth;
- The introduction of the new National Planning Policy Framework, is designed to simplify and speed up the planning system and has a presumption in favour of development. The framework requires West Lancashire to work more closely with local communities to deliver homes, jobs and infrastructure needed for a growing population;
- Within overall housing growth priorities there is a commitment to deliver more affordable housing and bring empty homes back into use to support new affordable housing delivery. This has been supported through Government funding focused around the Affordable Rent Model introduced in April 2011, which utilises higher rent and lower Government grant levels;
- Access to social housing has been a key focus of the Government's social housing reform agenda. The priorities are to ensure that affordable housing is available to those who need it for as long as they need it and this has seen the ending of 'tenancies for life'. Local authorities now have the flexibility to offer minimum fixed term tenancies to households moving into social housing stock. Alongside social housing reform sits the reform to the welfare system, which with its changes to benefit, eligibility and entitlement, will impact significantly on housing supply and demand. These changes affect both social and private sector tenants;
- The Government sees the provision of a healthy, well managed private rented sector as essential to meeting housing need and demand and it is focusing on raising standards within the sector, and for local authorities to address fitness and disrepair issues. This is very much in line with the Government's aim to improve health outcomes whilst reducing health inequalities. The Government is keen to increase the supply of private sector homes for rent by supporting investment in new private rented provision; it sees the growth in the private rented sector as underpinning economic growth as it allows greater mobility of people and skills;
- The Government recognises that older people are living longer and wants to see a better deal provided for older people, with greater choice and support to live independently. The Government is committed to ensuring that housing and planning policies positively reflect the wide range of circumstances and lifestyles of older people, who already occupy nearly a third of all homes. In terms of safeguarding vulnerable adults, housing has a strong role to play alongside social services, health, the police and other agencies. The Care and Support Bill introduced in May 2013 sets out a new safeguarding power, and places a duty on local authorities, in our case, Lancashire County Council, to respond to safeguarding concerns by making enquiries as necessary to decide on whether, and what, action is needed;

- In August 2012 the Government published its Homelessness Strategy, 'Making every contact count: A joint approach to preventing homelessness'. The Strategy focuses on prevention and aims to 'make sure that every contact local agencies make with vulnerable people and families really counts.';
- The Government continues its commitment to delivering Zero Carbon homes and, along with other binding carbon reduction targets by the previous Government, makes energy efficiency and tackling fuel poverty key issues for housing. Tackling energy efficiency in existing housing stock remains the sector's biggest challenge, and therefore utilising the Green Deal is important;
- Housing is seen by Government as key to creating and sustaining local communities. It is seen as contributing to the economy and supporting economic growth and employment, both directly and indirectly, which is why housing issues need to be addressed at a local level but in a planned and strategic way. The primary role of West Lancashire is to understand and address the needs and aspirations of communities while having regard to the National Context.

3.1 West Lancashire's housing strategy within a regional context

One of the strengths of the West Lancashire Borough is its geographical location. While we are included in the Liverpool City Region (North)², not all of West Lancashire in housing market terms, is influenced by this connection. We are also influenced by Greater Manchester City Region and being part of the three tier arrangement of Lancashire County and Parish Council's in many areas; we are aware of significant housing market linkages between the northern part of West Lancashire and Central Lancashire. This geographical placement means we have strong linkages with surrounding areas which generate demand for housing in our locality from higher income groups and those willing to commute; this creates affordability problems for those on lower incomes.

While the Government's decentralisation and austerity agenda has dismantled the regional tier of Government, it is still important for us to understand the nature of West Lancashire's placement within the region and how the City regions and neighbouring authorities housing and economic issues and aspirations could impact upon us. We highlight some of the regional influences below.

3.2 The Liverpool City Region

We are part of the Liverpool City Region (North) and its' economic and strategic influence is relevant to West Lancashire. With the abolition of Regional Development Agencies, Local Enterprise Partnerships (LEP's) have become the focus of activity in delivering economic growth. LEP's are responsible for determining local economic priorities and undertaking activities to drive economic growth and local job creation. The Liverpool City Region LEP want to see growth and increased productivity and a rebalanced economy focusing on private sector led growth driven by low carbon economy, knowledge economy, visitor economy and SuperPort. West Lancashire is not currently within the Liverpool City Region LEP but hopes to work closely with it given the functional economic geography of the area. The Council will also continue to work closely with partners, including the LEP in Lancashire.

The Liverpool Local Investment Plan (LIP2) published in August 2012 responds to the changed political and economic landscape and its vision underpins the priorities of the LEP.

It 'sets out how the Liverpool City Region will create the environment to stimulate the private sector market to accelerate growth, rebalance the economy and deliver housing and neighbourhoods where people choose to live, work and visit'.

Its priorities include investment in transformational sectors and strategic locations and supporting investment through planning, infrastructure and site availability, maximising public sector investment impact and land assets, developing global markets and increasing the number of residents in work. This may afford opportunities for West Lancashire and so continued dialogue and partnership working on housing and economic issues remains important to us.

The Homes and Communities agency states that

'Housing will play a key role in supporting the City Region's economic ambitions. LIP2 has made a commitment to improve the choice and quality of homes and neighbourhoods. It will focus on ensuring existing stock is energy efficient,

² Liverpool City Region (North) comprises of Wirral, Liverpool, Sefton, Knowsley and West Lancashire.

providing mixed tenure homes to meet the needs of local people. Bringing 16,400 long term empty properties back into use, tackling deprivation and worklessness and encouraging private sector led housing building'.

3.3 Lancashire

The Lancashire Strategic Housing Partnership is made up of three separate sub regions: Central Lancashire, Pennine Lancashire and Mid Lancashire. West Lancashire forms part of Mid Lancashire.

The Mid Lancashire Housing Contextual statement 2012-2015, sets out the priorities for housing across the Mid Lancashire area of Lancaster, Preston, South Ribble, Chorley, Ribble Valley and West Lancashire. These authorities, along with Lancashire County Council, have agreed to:

- Maximise the potential of Mid Lancashire's key economic development and regeneration activities;
- Ensure that infrastructure that supports the area is capable of supporting challenging economic growth ambitions; and
- Capitalise on the area's unique educational attributes to support and sustain commitment to a knowledge led economy.

Underpinning the Housing Contextual Statement, the Local Investment Plan (LIP) for Mid Lancashire was published in May 2012. The LIP puts forward the case for investment in housing and regeneration across the sub region. Set within the context of the Lancashire Local Enterprise Partnership, the LIP considers all relevant strategic priorities for investment, and develops a set of thematic priorities that bring together aspirations, needs and potential; these include:

- Delivering significant sustainable housing growth and regeneration to meet demographic and economic needs;
- Integrating housing and economic potential to maximise investment in both;
- Delivering affordable housing to meet economic and social needs;
- Providing better life chances for communities;
- Creating and maintaining places where people want to live; and
- Making the best use of assets and achieving more for less.

These themes are also articulated spatially within the LIP following an exercise to consider potential housing sites and areas against the thematic priorities. This work produced a portfolio of potential housing sites and areas considered to be the key strategic sites for initial investment in the sub region; these sites include Skelmersdale Town Centre in West Lancashire. A refresh of Lancashire LIP is underway and expected to be issued before the end of 2014/15.

We remain committed to the Mid Lancashire Housing Partnership and will continue to work to deliver housing priorities developed through the Mid Lancashire Housing Contextual Statement and Local Investment Plan

3.4 Opportunity

The economic and housing agendas in both the Liverpool City Region and Lancashire provide significant opportunities for West Lancashire. New employment opportunities are likely to present themselves and local business will be able to benefit. West Lancashire will be positioning itself to ensure that it is considered as an attractive place to live and work and that local people can benefit from opportunities that develop through our regional partnerships

In overall terms we recognise the importance of and need to be part of and influence relevant housing and economic agendas beyond that of our own Borough Council boundary. With that in mind we aim to maximise any opportunities and work within any partnership arrangements across Liverpool, Manchester and Lancashire to enable us to achieve our broader Council objectives.

3.5 West Lancashire's housing strategy within a local context

Housing is one important element to the economic prosperity and growth of West Lancashire. The West Lancashire Local Strategic Partnership, now replaced by One West Lancashire, prepared a sustainable Community Strategy for West Lancashire 2007-2017. One of the key objectives is 'To provide more appropriate and affordable housing to meet the needs of local people' and One West Lancashire has reconfirmed its commitment to retain this as a strategic objective.

The Council's vision is:

To be a Council to be proud of, delivering services that are lean, local and fair.

Our Corporate Priorities are:

- Balancing the budget and providing the best possible services within the resources available;
- Focussing upon sustainable regeneration and growth within the Borough;
- Caring for our Borough by delivering the small improvements that can make a big difference.

Our services will continue to prioritise the following, subject to affordability:

- Protect and improve the environment and keep our streets clean and tidy;
- Combat crime and the fear of crime;
- Work to create opportunities for and retain good quality jobs in particular for local people;
- To be a top performing landlord;
- Improve housing and deliver housing that meets the needs of local people, including affordable housing;
- Provide opportunities for leisure and culture that together with other council services contribute to healthier communities.

The vision within the Local Plan is underpinned by the delivery of good quality housing in terms of price, type, tenure, size and location in sustainable neighbourhoods supported by quality services, amenities and good transport links and this is reflected within the key objectives within the plan to 'provide a range of new housing types in appropriate locations to meet the needs to West Lancashire's population, including affordable housing and specialist accommodation.'

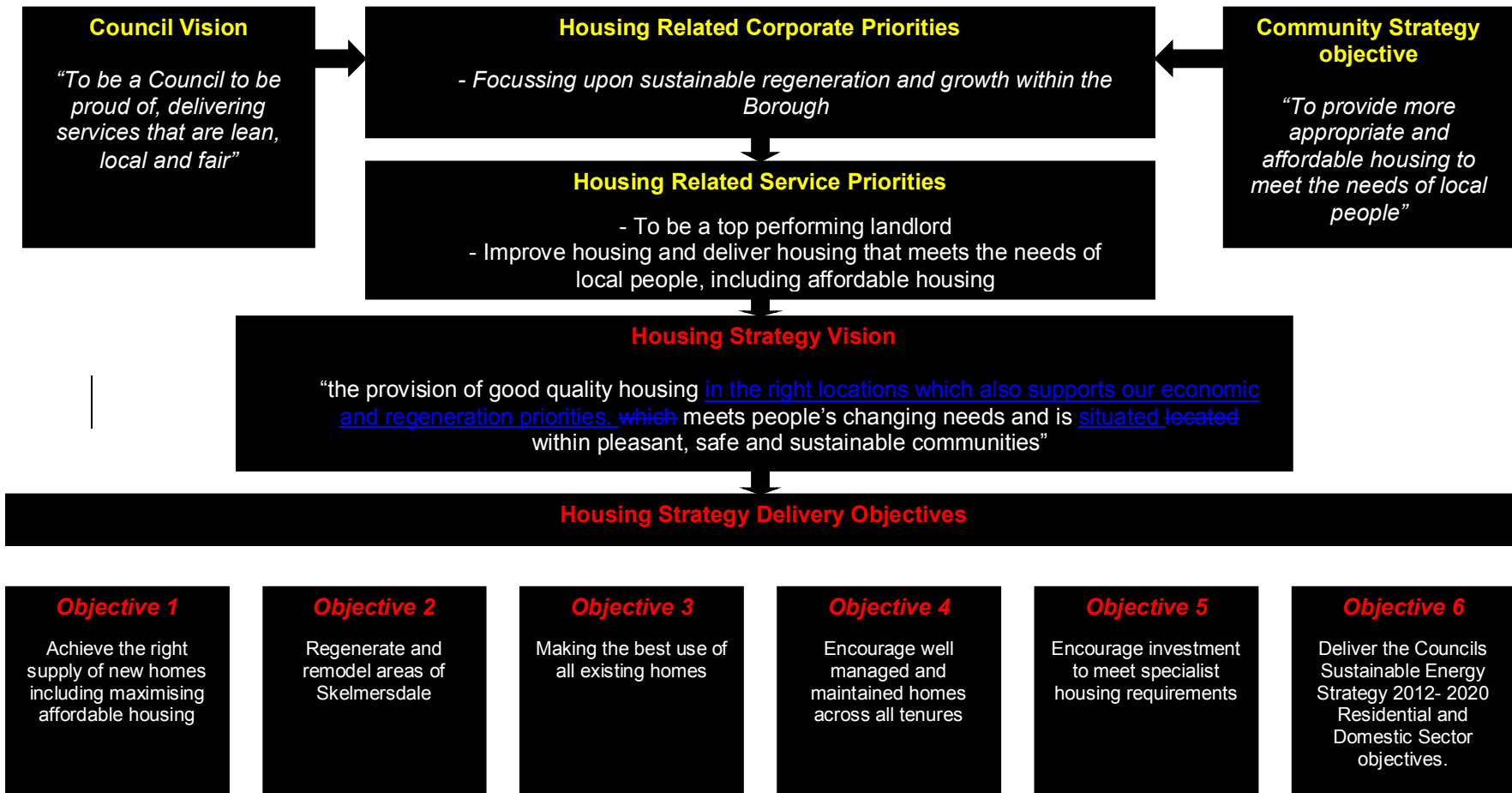
The vision for the housing strategy is:

The provision of good quality housing, in the right locations which also supports our economic and regeneration priorities, which meets people's changing needs and is situated located within pleasant, safe and sustainable communities.

Diagram 1 below shows the housing strategy as it sits within the Corporate context of the authority.

Chapter 5 highlights the housing market challenges we face.

Diagram 1 – Housing Strategy in the Corporate Context



Chapter 4

What has changed since the last strategy?

4.0 Introduction

Since our last housing strategy there have been significant changes to the policy context within which we operate. These are:

- Welfare Reform Agenda which has changed the way that housing benefit is paid in the social rented sector and private rented sector along with the phased introduction of Universal Credit from October 2013;
- New ways of funding new affordable homes;
- Changes to the way in which social housing is let to people in housing need;
- Our Council housing is now self-financing;
- The way in which housing is planned for and built potentially makes it more difficult to deliver affordable housing;
- Much less money to fund our priorities

We outline below some of the most relevant changes and impacts for housing and local people in West Lancashire and how the Council has responded to date.

4.1 Welfare reforms

The Welfare Reform Act, introduced by the Government, changes the way welfare support is calculated, decided and paid. For tenants living in the private rented sector, changes on the amount of housing benefit available already limit the choice of properties that are available to them within Local Housing Allowance payments.

In April 2013, social housing tenants, of working age, living in a home larger than their household needs, have had their housing benefit reduced. If they are deemed to have one spare room, their benefit will reduce by 14%. If they have two or more spare rooms, there will be a 25% reduction. As at December 2013 this change affects approximately 950 Council tenants in West Lancashire and places an increasing importance on the Council encouraging and facilitating our tenants to transfer to appropriately sized accommodation. There are other changes within the Welfare Reform Bill and the Council is working alongside a number of different partners to ensure that local people remain informed and where possible supported. In the case of Council housing, we are already supporting tenants through the appointment of a financial inclusion officer and additional staff to help tenants examine what options are available to them.

Welfare reform will also impact upon some of the tenants of private landlords and other registered providers of social housing. Tenants affected by these changes may therefore need advice and assistance to support them manage any financial impact so that they can retain their tenancy or explore their housing options if they need to move to smaller accommodation.

We do recognise that welfare reforms will have a financial impact for some households and so we have commenced work to develop a cross tenure financial inclusion strategy to provide a co-ordinated approach to assist households to maximise their incomes and their ability to manage their money effectively.

4.2 Funding for affordable housing

On a national level, the grant from the Homes and Community Agency (HCA) for affordable housing development over the period 2011-15 has reduced and is about 50% less than during the previous four year period. Despite the decrease in grant in real terms during the period 2011-2015, the Government developed a new tenure, known as 'Affordable Rent'. The new tenure approach was intended to sustain levels of affordable housing development by enabling social housing providers to charge higher rents, at up to 80% of market levels, and use the increased rental income to support additional borrowing to compensate for the reduced grant.

The Council recognises the importance of increasing the number of affordable homes that are built in West Lancashire, and this remains an on-going priority for the Council which has been underpinned by the Council committing its own funding and land to support new schemes.

The Council works strategically with its Registered Provider (RP) partners and the HCA to continue its success of leveraging in grant investment to the Borough from the National Affordable Housing Programme. Since 2005 our joint working has helped secure £10 million HCA grant investment and has provided 271 affordable dwellings with total scheme cost of £34.5 million. This is a significant amount of inward investment into our Borough.

4.3 Access to affordable housing

Access to social housing has been a key focus for the Government, and through the Localism Act 2011 social landlords have the option of introducing fixed term tenancies which have given social housing providers the ability to provide a fixed term tenancy rather than having to provide a 'lifetime' tenancy.

In 2013 the Council published a tenure strategy which lists the type of tenancies the Council will make available. The Council aims to make the best use of social housing stock whilst also maintaining cohesive and stable communities and has chosen to introduce five year fixed term tenancies. For the majority of new tenants this will mean that following a satisfactory introductory period of the tenancy (the first 12 months) tenancies will be then offered on a fixed term of five years. There are certain exceptions to this approach where lifetime tenancies will remain.

The Act also provides powers to allow local housing authorities to exclude those with no statutory priority for social housing from applying for it. Following review and consultation the Council published a new allocations policy in 2013 which changed who can apply for its social housing. This new policy approach takes account of the fact that Council housing is a limited resource and that some households on the Council's Housing Register have a reduced chance of ever being allocated a property because priority is given to those in the greatest housing need. The Council knows that many families work hard and are on relatively low incomes and so the Register recognises and provide some preference to households that can demonstrate that they are working or making a contribution to the community in other ways, e.g. volunteering or training. Members of the British Armed Forces with a local connection to West Lancashire and seeking accommodation on discharge are also recognised.

Council housing is the main source of affordable housing in the Borough with RP's providing in the region of 1000 affordable homes. The Council has established nomination rights to most of these homes and works closely with RP's to allocate them in line with the principles established by our Allocation Policy 2013.

4.4 Council housing finance reform

The Localism Act 2011 has been the vehicle for reforming the system for financing Council housing by introducing a model known as self-financing. Previously, the Government have decided the level of rent that local authorities could charge, this was then 'pooled' nationally and redistributed in line with an agreed formula which took into account a number of things, such as the cost of managing housing stock. West Lancashire was a loser under this arrangement in that up to £6.2 million pounds per year of rental income out of £20 million was paid into this national pool.

West Lancashire has now come out of this system and is a self-financing local authority, which means that we have effectively "bought ourselves out" of the national subsidy arrangement, and have taken on debt in the region of £88 million. The benefits of this is that we can now retain all of the rent paid by tenants for use within West Lancashire.

As a landlord, we have developed a 30 year business plan that has structured the repayment of this debt in a way that enables us to maximise the level of investment into our housing stock. Specifically, we have profiled the repayment of this debt to enable us to invest £65 million in our housing stock during the first five years of our business plan. This is already resulting in significant improvements to many tenants' homes.

The long term viability of the business plan is of course dependent upon rental income being charged and received. With this in mind our business plan is underpinned by a risk assessment which is reviewed regularly to ensure that identified risks including that of Welfare Reform implications are managed effectively.

4.5 Planning Reform and the national planning policy framework

The Government regards effective planning policy as key to the delivery of new housing supply. To this end a fundamental review of planning policy has been undertaken culminating in the introduction of the National Planning Policy Framework.

The National Planning Policy Framework was published in March 2012 and stresses the need for Councils to work with communities and businesses to seek opportunities for sustainable growth to rebuild the economy; helping to deliver the homes, jobs, and infrastructure needed for a growing population whilst protecting the environment. The emphasis is on developing viable housing sites. In the current economic climate, where values in some areas have dropped and sites purchased some time ago for much higher values than they are worth today, can mean that achieving housing development can become challenging. The economic viability of some sites can be further affected by the requirement to provide affordable housing. This can mean that it becomes increasingly difficult for a Council to negotiate the level of affordable housing that it needs to deliver. Innovative approaches to assist in meeting affordable housing targets are needed.

In addition, the Government has also announced a series of planning and housing measures aimed at facilitating housing growth that enable developers to **renegotiate Section 106 agreements**: legislation now allows any developer of a site deemed unviable due to affordable housing planning obligations to appeal with immediate effect. The Planning Inspectorate will then review the application to determine the number of affordable homes that need to be removed to reach viability. The original Section 106 agreement will then be suspended for a three year period.

Another change introduced is the Community Infrastructure Levy (commonly called 'CIL'). It is a planning charge, introduced by the Planning Act 2008. It came into force on 6 April 2010 through the Community Infrastructure Levy Regulations 2010 and allows local authorities in England and Wales to raise funds from developers who are undertaking new building projects in their area. The money can be used to pay for a wide range of infrastructure that is needed as a result of development. This can include things like transport schemes, green spaces and the maintenance of new infrastructure. In West Lancashire we are aiming to introduce CIL in May 2014. Affordable housing contribution will not be included in CIL and will continue to be negotiated through Section 106 agreements.

4.6 West Lancashire Local Plan 2012-2027

In October 2013, the Council adopted a new local plan which guides future development within West Lancashire over the 15 year period to 2027 and sets out:

- The distinctive features, issues and challenges in the Borough;
- A vision of how we would like the Borough to be in 15 years time;
- What we need to do to achieve this vision;
- Key policies to help meet our goals.

It contains clear objectives for housing 'to provide a range of new housing types in appropriate locations to meet the needs of West Lancashire's population'. This will include delivering these on brownfield sites where the sites are available, viable and deliverable. They will also be concentrated, where available, in the major urban areas, where services and transport facilities are established. The plan allows for the delivery of 4,860 net new dwellings with 2000 of the homes being in Skelmersdale. Over the plan period this breaks down to 302 per year for the period 2012-2017 and 335 per year for the period 2017-2027.

The following chapter considers our housing challenges.

Chapter 5

The challenges in our housing market

5.0 Introduction

Our Borough is predominately rural in nature and is widely recognised as a very popular place to live but we also face a number of challenges which are explained in this chapter:

5.1 Population growth

Our population is growing – The 2001 Census recorded a Borough population of 108,400 and the Census in 2011 recorded a population increase of 2.1% to 110,700. Population projections predict that by 2031 the population will be in the region of 120,900. We need to cater for this growth and will do so in line with our Local Plan 2012-2027.

Within our existing population, the age profile in West Lancashire is generally older than that of the sub region, region and England; we have more residents aged over 40 and fewer under this age. However, there are variations in the population age structure between settlements. In general, the rural areas of West Lancashire are more attractive to people of middle or retirement age, whilst Skelmersdale has a younger, more varied population structure.

England experienced a baby boom of 6.9 million live births between 2001 and 2013. In 2020, the first children from this boom will be turning into ambitious young men and women, looking to move out, find work and kick-start their adult lives. We know already that West Lancashire is losing younger households to other areas, and this is a cause for concern because younger people support economic growth and ensure the future supply of a skilled and active labour force.

This means that one of our priorities is to deliver more homes for the future needs of our residents [including downsizing opportunities for those households requiring smaller accommodation. Housing is a long term issue and we need to plan accordingly. In doing so](#) our housing offer ~~will need to~~ [must](#) be realistic and market facing and we must consider how best to encourage development by using all the tools at our disposal including seeking out new models for housing delivery. Our Housing Need Survey of 2010 and other housing data research highlights a need to ensure we are providing the 'right' type of housing offer to [also](#) retain and attract younger and economically active growing families and first time buyers.

5.2 An ageing population

We know that our population is ageing [and remaining in their own homes for longer which has an impact on the flow of housing supply](#). The number aged 60 and over is projected to increase by 35.5% from current levels, and the number aged 75 and over by 77.4% to 2035. This means by 2035, there will be 10,300 more people aged 60 and over and 7,200 people aged 75 and over. This is likely to increase demand for housing related support and other forms of social care to enable residents to remain in their own homes. It is therefore important to work to develop suitable housing tenure and property type housing offers, including specialist supported housing solutions for our ageing population. [In instances where designated accommodation for older people is developed then it will also contribute to freeing up, what is usually a family type dwelling, back in to the market.](#)

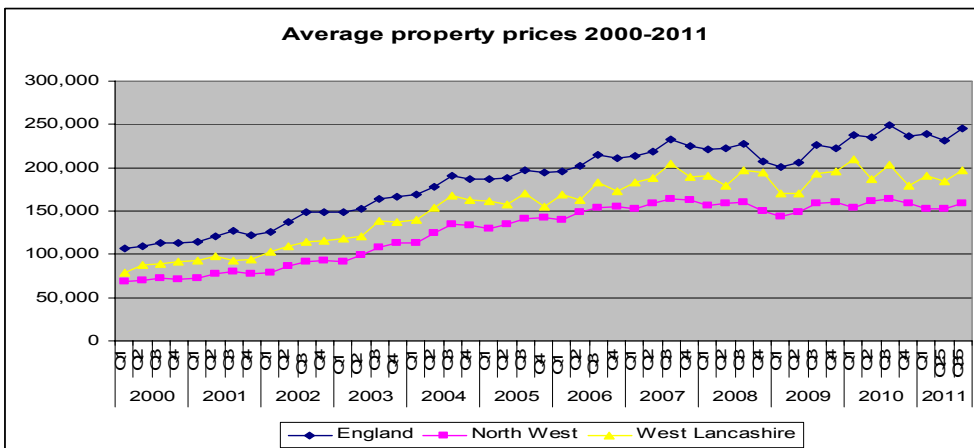
5.3 Specialist housing requirements

We recognise that there are specific vulnerable client groups who need particular types of housing to help them have an opportunity to live independently. We already work with Lancashire County Council Supporting People Team and other statutory agencies in health and social care services to try to assist in increasing accommodation provision. We know from these agencies that the lack of appropriate supported accommodation options available has meant that people have been placed in out-of- area residential placements, moving them away from their localities – family, friends and community infrastructure.

We want to work with health and social care statutory agencies to stop this happening. We have the desire to assist, however the challenge is providing the right type of accommodation along with the right model of support that proves both economically viable and provides a suitable housing solution for the particular client group.

5.4 It is expensive to buy a home

Buying a home in West Lancashire is relatively expensive. Average prices and lower quartile prices (usually targeted at first time buyer) are higher for West Lancashire than the North West average. Over the period January to the end of July 2013 the average house price was £197,882, with £219,469 for a new build property. This means that there are cheaper properties in neighbouring local authorities to West Lancashire, a key factor in attracting households to the area. Such households trying to get on the housing ladder can access more affordable areas outside of the Borough and in some instances do relocate to a cheaper home in another Borough. This may also mean that they are not able to live close to their families. The chart below demonstrates how West Lancashire house prices are consistently higher than the North West average.



House price is just one aspect of the issue of affordability. Household incomes need to be understood along with other factors such as changes to financial institutions lending criteria or deposit requirements for those wishing to buy a home.

The contraction in the mortgage market and increase in deposits required to purchase a property has made home ownership even less accessible for first time buyers in the Borough and there are a growing number of households that make up what has become known as the 'excluded middle market'; those unable to access home ownership and unlikely to qualify for social housing. It is important that we have a housing offer for this group.

The Government has responded with different house purchase initiatives to help households bridge the deposit gap, usually with equity loan type products. While these products are helpful, they do not assist all household income types and so we need to ensure that purchasers in West Lancashire can access a range of low cost home ownership products, such as shared ownership and shared equity; which are currently in short supply.

New build properties are always popular with first time buyers, having relatively low maintenance costs, and are often offered with a number of moving in 'incentives'. However, average new build prices in the Borough in 2012 were £183,259. This means that a household would require an income of £52,359 to afford to buy an average new build home if they had no existing equity. The most affordable new build properties are in Skelmersdale at circa £143,000, which would require a household income of £40,857. The average household income in the Borough is £35,360,000.

It is clearly important that we have a housing offer that will not only meet affordable housing need but also help retain and attract younger and economically active growing families and first time buyer households. This will help assist in economic growth and ensure the future supply of a skilled and active labour force. Low Cost Home Ownership products can be helpful as part of that housing offer.

The table below illustrates the ratio of median house price to median earnings average earnings in relation to neighbouring authorities and Liverpool and Lancashire wide. This table further demonstrates that housing affordability is an issue in the Borough and that neighbouring authorities are likely to be more appealing to prospective purchasers from a house price perspective.

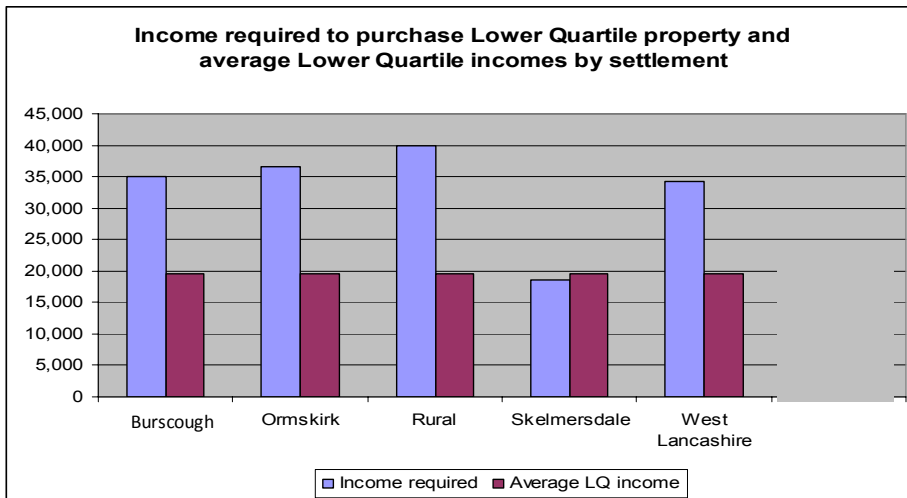
Location	Ratio as at 2012
West Lancashire	6.53
Chorley	6.25
South Ribble	6.13
Sefton	6.06
Wigan	5.00
St Helens	4.76
Knowsley	4.15
Lancashire Wide	5.40
Liverpool	4.12

The Local Plan (2012-27) anticipates a significant increase in housing delivery from 2015 onwards. This will provide an opportunity, in part, to address affordability issues as there is a planning policy requirement to provide affordable housing where certain criteria are met.³

5.5 We need more affordable housing

As stated previously housing is relatively expensive in West Lancashire. This coupled with a households income and lending criteria can affect whether a household is able to find housing, whether to rent or buy within their household budget.

However, when household income is considered within the context of a household trying to gain access to the housing ladder, then even the cheapest of homes, remain unaffordable for some households. The chart below shows the income required to purchase lower quartile property and average lower quartile incomes by settlement.



According to data at July 2013 there were a total of 3,380 households on the Council's Housing Register. The last full assessment of housing need undertaken in 2009 by Fordham Research and published in 2010 estimated an annual net shortfall for affordable housing of 214 units per year. The assessment went further and suggested that the tenure mix should comprise mainly of social rent units at 80% of all new affordable housing and the 20% remainder being in the form of intermediate housing products⁴.

³ Policy RS2 of the Local Plan provides further information.

⁴ 'Intermediate' housing is a term which refers to housing which falls between 'social housing' (such as traditional rented council housing) and 'open market' housing; it is intended to bridge the gap between the two. It was noticed that as house prices increased, the gap between social housing and open market housing grew, meaning people often could not afford to progress from social housing to

The social housing stock available for those in housing need is low compared to the average levels in the North West (18.6%). Social housing represents 15.1% (7,000) of the total housing stock in the Borough (47,000). This, alongside the Borough's proportionately higher house prices, means that access to affordable housing is limited in West Lancashire.

Affordable housing is also geographically limited in West Lancashire. The chart above shows that the majority of it is located in Skelmersdale. This is an important factor, and one we need to consider when looking at affordable housing requirements and supply at local level. While there has been significant affordable housing development success in recent years, there still remains a pressing need for affordable housing in the Borough, particularly in rural areas and the towns of Ormskirk, Burscough and Aughton.

Rebalancing the housing market, to increase the proportion of affordable housing outside of Skelmersdale and increase the proportion of affordable housing for families and accommodation for older people in Skelmersdale, will be a priority within our overall plan to increase the supply of affordable housing across the Borough.

Building homes to the Lifetime Homes standard is also important and the Local Plan 2012-2027 expects all affordable housing units to be built to Lifetime Homes Standards.

5.6 We need to make more of the private rented sector

In September 2012, the Government announced a range of proposals to encourage the provision of new homes to meet the country's demographic needs and to help generate local economic growth. As part of that announcement, Government established a Build to Rent Fund to invest £200m in housing developments to ensure that the high quality rented homes that are needed are delivered. They recognised that demand for market rented homes is increasing in many parts of the country and that this sector could:

- be a very effective extension to the social rented sector, where lengthy waiting lists and allocations based predominately on need mean that many households are less likely to ever gain access to it;
- and it can also support those households who are now unable to access the home ownership ladder given the tightened mortgage lending restrictions and increased deposit requirements.

In West Lancashire we have seen an increase in the total number of properties coming onto the market from 675 in 2009 to 1,028 in 2012; an increase of 52.3% (Vizzihome). The growth in part is likely to be the expanding student population and also as a result of the Borough attracting migrant workers working within the local rural economy.

Although there has been an increase in the supply of private rented accommodation since 2009, only 30% of all properties coming to the market have been within the Local Housing Allowance caps. Households relying on housing benefit to pay their rent lack choice in the existing private rented market. This will be further constrained by the financial impact upon those households as a result of bedroom tax and remaining Welfare Reform changes.

In July 2013 the Council Housing Allocation policy changed to provide increased priority for social housing to those applicants who demonstrate a commitment to contribute to the Borough's economic growth as working households or who make a contribution by their contribution within communities. This will assist some economically active households but those remaining will still be reliant upon the private sector housing to obtain housing.

This means there is potentially an important role for the private rented sector both in meeting people's housing needs, and in supporting economic growth by enabling people to move to and / or move within the Borough to take up jobs and respond to their households changing circumstances.

We recognise that the private rented sector, if managed effectively, could help provide an alternative housing offer to those households, who are unable to purchase a home. The Council will consider its role carefully in respect of this growing sector and whether it is appropriate to encourage build to rent and other options to expand this tenure, whilst also aiming to improve overall housing quality and its management.

owning their own home. Intermediate housing tries to bridge the gap as 'more affordable', sitting below open market prices but above social housing

5.7 Many properties still need investment

The relationship between poor housing and poor health has been recognised for a long time. Poor housing has a direct impact on the number of accidents in the home, educational achievement and general well being. In addition to the wider benefits to society of improving housing, there is a direct benefit to the NHS through reduced injury rates and treatment costs where the condition of housing is improved.

Our 2010 Private Sector House Condition Survey provides in depth information about stock condition in the Borough and identifies that where homes have failed the decent home standard or the Housing Health and Safety Rating System introduced in 2004, there is often a correlation between improvement works being required but the residing household not being able to afford them. This means that some households will be unable to fund the required improvements to their homes, improvements that could remedy problems such as inadequate heating, damp and mould and any associated health conditions

5.8 Promoting energy efficient homes

The Climate Change Act 2008 aims to help the transition towards a low-carbon economy in the UK and includes legally binding target of at least an 80% cut in greenhouse gas emissions by 2050. The Act commits the UK to reduce household CO2 emissions to almost zero over the next four decades. The Government's flagship policy to achieve energy reduction in buildings is the Green Deal – a loan scheme for householders and business to finance energy related home improvements.

In West Lancashire we are aware that the mean SAP rating of privately owned properties in West Lancashire is 53 as reported in the Councils 2010 Private Sector Stock Condition survey. This is better than the national average of 48, but there is scope to reduce emissions from this sector. Typically, the lower SAP ratings are found in older, pre-1919 dwellings and converted flats, which suffer with high heat loss. The privately rented dwellings across the Borough have a mean SAP rating of 51.

The same Housing Stock Condition Survey identified that 43% of privately owned properties have less than 200mm of loft insulation with 2.9% having no loft insulation at all and that many properties in Skelmersdale which were built using structural pre-cast concrete units with solid external walls are thermally inefficient and difficult to improve, in terms of thermal efficiency.

The Government is also committed to tackling the issue of vulnerable people being unable to afford to heat their homes. The national fuel poverty strategy aims to end fuel poverty by 2016.

With these Government objectives in mind and our own desire to improving the energy efficiency of the housing in West Lancashire, this has been set as a priority for the Council as defined within its sustainable energy strategy 2012 - 2020.

5.9 Other relevant themes and housing market challenges

We have highlighted above some of the issues that we aim to address in this housing strategy. They relate mainly to our housing market and the issue of housing supply, making the best use of existing stock, the impact of population growth and changes in age profile in the years to come.

However housing strategies also consider other issues. These are introduced in the next chapter, all of which make up the housing strategy objectives that we have chosen to focus upon during the life of this Housing Strategy. Our housing market issues are summarised below:

- We have an ageing population and this will mean we will have to deliver an increasing range of tailored housing solutions for this client group, and where appropriate promote the use of our own Home Care Link monitoring service and assistive technology to help households remain independent in their own homes;
- Research suggests that younger households are leaving West Lancashire to move to adjacent Borough's, often in search of more housing choice at a price they can afford. Our housing need survey 2010 indicates a need for smaller (2 bed) starter homes for first time buyers;
- The housing market is polarised with affordable housing being geographically concentrated in Skelmersdale, reducing the choice of location for people who want to access affordable housing. Whilst in house price terms, there is a good supply of affordable housing in Skelmersdale it does not meet with prospective purchaser house type aspirations. There is also a shortage of accommodation that meets the housing aspirations of older people, with some Council sheltered property not proving

popular by virtue of size and design. Similarly there is a shortage of smaller affordable housing units for young families to suit their housing aspirations;

- There is a need to increase supply of affordable housing in rural areas and Ormskirk, Burscough and Aughton;
- It is important that we develop a housing offer for the excluded middle market to either access home ownership using Low Cost Home Ownership products such as shared ownership and shared equity or to facilitate the private rented sector to provide a good quality alternative;
- There are increasing demands for private rented sector. This is a growing sector and we need to facilitate and encourage an increased supply of good quality, well managed properties;
- There is a need to continue to support the green agenda and improve the energy efficiency of the housing in West Lancashire. This will assist households with their energy housing costs, help to alleviate fuel poverty and contribute to CO2 reductions;
- We need to ensure that our placement and relationships within the Lancashire, Liverpool and Manchester geographical context enables us to actively support our strategic housing priorities.

Chapter 6

Our housing strategy objectives

6.0 Introduction

In developing our housing strategy objectives we have examined housing data, reviewed our existing policies, and identified potential areas for priority for the Council. Based on these findings; the wider strategic housing agenda and following discussions with officers, we then consulted with residents of the Borough and relevant partners to identify the housing strategy priorities for the Council over the next five years.

Throughout the consultation process we made clear that the Council had finite resources. It was acknowledged that the Council, as it worked on delivering this housing strategy, would therefore have to:

- ⇒ **Manage housing demand** by having mature and honest conversations with our customers so that they have realistic expectations by virtue of the provision of quality advice, so that they understand the housing options available to them. From that point they can exercise choice, perhaps amend their housing expectations which may enable them to find their own solutions to their housing circumstance.

We have chosen six housing strategy delivery objectives which are discussed further in this section.

6.1 Objective 1 - Achieve the right supply of new homes including maximising affordable housing

For this objective we want to encourage a choice of homes that meets the needs of our existing residents, [including a housing offer for those households wishing to downsize](#) and provides a suitable housing offer for those households wishing to invest and make their home in West Lancashire. We want to develop high quality new homes in locations where people want to live and that support economic growth and we want to ensure that there is a choice of different tenures available.

This has been difficult given the economic conditions in recent years which made it necessary for housing developers to display caution when they have looked to develop housing sites. However, there has been consistent interest by developers in delivering new homes in our Borough, although now, we are noticing that interest culminating in receipt of actual planning applications. This is positive and we would wish to work with developers and other housing providers to create a housing offer which is appropriate for West Lancashire.

The West Lancashire Local Plan 2012 – 2027 is central to increasing housing supply and it intends that the needs of all sectors of the community are intended to be catered for through the provision of lifetime homes where this is deemed to be appropriate. The Local Plan requires that in housing schemes of 15 dwellings or more, 20% of new residential units should be designed specifically as accommodation suitable for the elderly. This will assist in part, to providing a housing offer suitable for our ageing population, although further work will need to be undertaken to ensure that there is range of tenure options suitable for this household group. [As part of our approach we will be mindful of Lancashire County Councils planned Extra Care Strategy for Lancashire which is due to be published during 2014. – West Lancashire does have a successful 111 unit Extra Care Scheme in Ormskirk and so we know that such schemes are popular and provide another housing option for older people.](#) Additionally we will ensure that smaller homes are provided for First Time Buyers with a range of purchase options such as shared equity and shared ownership.

The plan allows for the delivery of 4,860 net new dwellings with 2000 of the homes being in Skelmersdale.

Over the plan period this breaks down to:

- 302 per year 2012-2017
- 335 per year 2017-2027

We aim to create sustainable communities and promote sustainable development and we will seek out new ways of delivering housing supply in the future. We will explore and consider a number of options which are likely to include developing new delivery vehicles where the public sector takes on risk (and profit) alongside other public and private sector partners; these will make best use of public sector assets, particularly land,

and we are aiming to maximise new investment sources such as the New Homes Bonus, and think more innovatively about how we can use funding sources to bring new housing supply forward.

We will also explore any pilot opportunities to try out different delivery approaches. Most recently the Council became just one of three Councils in the Country to work with the Homes and Communities agency to undertake a Land Auctions pilot. The pilot project tests the land disposal elements of a proposed national community Land Auction model, which could potentially replace the current planning system for the provision of new homes. [We seized the opportunity to participate in the pilot as it has the potential to stimulate housing growth and diversification of the housing offer in Skelmersdale by providing up to 650 new homes across sites in Whalleys.](#) The pilot began in 2012 and will last for two years, during which time development sites will be brought forward which meet the objectives of the Local Plan. It is anticipated that the sale of at least part of the land will take place during the early part of this housing strategy. Dependent upon which site(s) are selected, there is the potential for a significant sum of money to be raised which can then be used, through the Capital Programme, to invest in the priorities of the Council.

[In the case of affordable housing development provided through our partnership working with Registered Providers, we will work with them to consider the benefits of using different construction approaches where it will assist in the increasing supply of affordable housing whilst meeting or surpassing existing construction standards.](#)

6.2 Objective 2 - Regenerate and remodel areas of Skelmersdale

Skelmersdale was designated in 1961 and was the first new town in the North West. The town has a population of 35,000 (Census 2011), has a good central location, near main transport routes such as the M58 and M6 and has excellent links with the wider region. The town was initially intended to accommodate population overspill from Liverpool with the former New Town being established as part of an overall masterplan, which included provision for a new town centre comprising new retail, leisure, services and commercial facilities.

Work started on the new town centre in the late 1960s and was initially seen as a great success. Over the course of the last 20 years the town has struggled to compete with larger and more successful centres and as a consequence its influence and popularity has declined.

For many years West Lancashire Borough Council has recognised the need to regenerate the town by improving existing facilities and attracting new retail and leisure elements. In addition the housing offer in Skelmersdale is such that it has led to an imbalance in the local housing market with there being evidence of:

- Some areas of low demand, in both social housing and owner occupied stock, associated with poor design and/or neighbourhood reputation;
- High housing densities and poor estate layout can contribute to feelings of insecurity;
- Relatively low house prices, and a lack of variety in housing types, leading to more affluent households moving out of the area;
- Some evidence of properties being bought up by absentee private landlords, with unstable private tenancies undermining the sustainability of some neighbourhoods;
- Relatively high concentrations of deprivation in some areas.

This is not unusual in former New Towns as reported in the DTLR Report (2002) 'The New Towns: Their Problems & Future' which highlights some of the problems faced by former new towns, including Skelmersdale.

The town is known to have a higher percentage of people affected by a long-term illness, or a physical health problem, than elsewhere in the Borough and this means there is a continuing and long-term demand for specialist and adapted accommodation.

There has been, in the last decades or so, building of new private housing estates on the outskirts of the town. These estates have proved popular and some of the houses are in the top income-purchasing band, however there is still a need to diversify the style and range of residential accommodation available and for this work to be complemented by the Town Centre Regeneration.

In order to address the issues mentioned above a Supplementary Planning Document and masterplan was developed and adopted in 2008, with housing as a significant driver in the area's redevelopment. The masterplan includes the development of high quality market housing, for sale and to rent, low cost market housing and affordable housing.

[We see the regeneration activity linked to this objective as being a catalyst and driver of growth, exploiting Skelmersdale's location advantages and aligned to this activity will be the strategic fit with the West Lancashire Transport and Highways Masterplan which aims to remodel the public realm and highway infrastructure. Being aware of the importance of transport connectivity in such regeneration and remodelling work will assist in terms of long term sustainable development.](#)

6.3 Objective 3 - Make the best use of all existing homes

Making the best use of the existing housing we have whether in the private sector or that social housing owned by the Council and Registered Providers will play a central role in meeting housing need and demand as well as enabling housing choice.

It is important to use existing housing stock effectively, including reducing long term empty properties. We wish to make the best use of all existing homes available across the Borough, to connect people to an improved housing offer whether that be a larger or smaller home or a home with an adaptation.

6.4 Objective 4 - Encourage well managed and maintained homes across all tenures

Many households aspire to homeownership yet are unable to buy their own property. This often means that they will seek to obtain housing by renting from either a private landlord, the Council or other Registered Providers. Some households are happy to rent and find that it suits their lifestyles. Irrespective of their tenure preference though, households who rent, will expect their home to be well managed and well maintained.

This Council seeks to encourage, professional housing management across West Lancashire. We are also mindful that we are the largest landlord in the Borough and that our own approach needs to reflect the high standards that we expect by other landlords within the private rented sector and social housing owned by the Registered Providers.

There are enforcement tools available to the Council to ensure that property is maintained and managed in line with legislation. The Council would prefer to inform and educate any offending landlords to allow them opportunity to respond in a manner that would mean enforcement is not required. Sometimes this approach is all that is required as the landlord has not been fully aware of what is required from them. We will though, continue to use enforcement powers when necessary.

6.5 Objective 5 - Encourage investment to meet specialist housing requirements

We are keen to encourage investment in [all parts of the Borough, including our rural communities](#) to help assist in meeting specialist housing requirements. Vulnerable client groups such as those with a learning disability, physical disability, those subject to domestic abuse, sensory impairment, including those with mental health issues sometimes require both accommodation and appropriate support to help sustain independent living. Dependant on the circumstances then such support may also be required for young people who are affected by homelessness, are estranged from home or in need of appropriate support for some other reason. Older people's health or social circumstances can also mean that on a case by case basis, older members of the population may need access to specialist housing and/ or support.

This is a diverse area of development that not only requires use of capital assets but also revenue funding to support the provision of the required support services. Encouraging investment and achieving delivery will be challenging in the current environment as budgets continue to be squeezed. The Council, along with statutory agency colleagues across the social care and health spectrum will need to work together and explore the availability of funding streams and delivery models to support investment. This will include exploring funding availability from the recently established Clinical Commissioning Groups (CCGs) who replaced Primary Care Trusts (PCTs) from March 2012.

6.6 Objective 6 – Deliver the Council's sustainable energy strategy 2012- 2020 Residential and Domestic Sector objectives.

West Lancashire Borough Council has produced and published a sustainable energy strategy 2012-2020. It covers a number of themes which recognise that climate change is an internationally important problem and that we can play a significant part in tackling the issue locally. It refers to housing sector issues under a theme described as the Residential and Domestic Sector. It has two delivery objectives identified as follows:

- To improve the energy efficiency of West Lancashire housing;
- Tackle hard to treat properties, reduce fuel poverty, and ensure affordable warmth for all

It is important to recognise the importance of this work, hence reference being made to it in this strategy as housing has a significant role to play in terms of reducing fuel poverty, improving the energy efficiency of existing housing stock and ensuring that all new housing built is sustainable.

6.7 Summary of our housing strategy objectives.

We show in the next few pages the high level actions which we consider will make the greatest impact to achieving the following six objectives:

- ✚ Achieve the right supply of new homes including maximising affordable housing;
- ✚ Regenerate and remodel areas of Skelmersdale;
- ✚ Make the best use of all existing homes;
- ✚ Encourage well managed and maintained homes across all tenures;
- ✚ Encourage investment to meet specialist housing requirements;
- ✚ Deliver the Council's Sustainable Energy Strategy 2012- 2020 Residential and Domestic Sector objectives.

Objective 1 - Achieve the right supply of new homes including maximising affordable housing

Delivery Action - Implementation of the West Lancashire Local Plan 2012-2027.

The plan sets out a clear objective for housing, 'to provide a range of new housing types in appropriate locations to meet the needs of West Lancashire's population'.

Implementation of the plan will result in acceptable land sites delivering new homes, jobs and training opportunities for residents of the borough and additional affordable housing through use of planning policy.

Policy RS2 of the West Lancashire Local Plan 2012-2027 requires that at least 25% of units in residential schemes of 8 dwellings and above be affordable.

Delivery Action - Secure HCA Affordable Housing Grant investment .

We will ensure that, through joint working with Registered Providers, we secure inward investment from the Homes and Community Agency to develop affordable housing.

Delivery Action - Use Council assets to support the delivery of affordable housing.

We will use Council land and / or other assets, where appropriate, to support the delivery of affordable housing. This will encourage investment in the Borough while also meeting affordable housing need. This includes using our existing partnership arrangement with Regenda Housing Group.

Delivery Action - Develop 500 new affordable homes.

We wish to encourage and enable the delivery of no less than 500 affordable homes during the life of this housing strategy which shall consist of a range of affordable housing tenures including, where appropriate, tenure suitable for First Time Buyers. This will be achieved by using planning policy requirements, development of 100% affordable housing schemes and a modest council new build programme where it is affordable and contributes to Objective 2.

Objective 2 - Regenerate and remodel areas of Skelmersdale

Delivery Action - Complete £65 million capital investment programme.

The majority of the Council housing stock is in Skelmersdale. We have embarked upon a five year £65 million capital investment programme which will significantly improve all our housing to the benefit of our tenants. The works include new bathrooms, kitchens, windows, energy efficiency improvements and other measures.

We aim to deliver the programme on time and in budget.

Delivery Action - Complete Firbeck revival and continue an estate based revival programme.

A Birch Green estate, known locally as Firbeck is benefitting from significant investment from the programme mentioned above. It involves a £5.5 million capital investment programme.

This comprehensive scheme will see existing homes improved along with some small scale demolition and regeneration provided by new homes being built. There will also be improvement to the street scene.

A second revival scheme will be identified and completed during the life of this housing strategy.

Delivery Action - Complete land auctions pilot.

The Council is one of just three in the Country to pilot a land auctions pilot. We have seized the opportunity to participate as it has the potential to stimulate housing growth and diversification of the housing offer in Skelmersdale by providing up to 650 new homes across sites in Whalleys. It may also generate capital receipts to assist further with this work.

Delivery Action - Enable the development of specific land sites.

We intend to support the housing element of our Town Centre Masterplan and diversification of the housing offer through disposal and development of land at Findon, Delph Clough and former Skelmersdale Sports Centre. There is the potential for around 270 new homes to be provided across the three sites.

Delivery Action - Seek funding for environmental work.

In contrast to our current capital investment in our Council housing stock, our ability to invest in the environment is significantly limited, yet we are aware of the benefits of doing so. We will seek to secure any suitable funding opportunities to lever in investment to enable wider scale environmental improvements to our housing estates.

Objective 3 - Making the best use of all existing homes.

Delivery Action - Provide housing advice.

In the context of high house prices and rents, pressures on the supply of new affordable housing and welfare reform, we may well see an increase in the number of people approaching the Council because they are experiencing problems with their housing – we currently experience around 1700 enquiries a year for housing but we cannot help everyone.

People need to be able to make informed decisions and understand what broader housing options are available to them to help them with their housing issue. We will provide appropriate support and quality advice so that our customers have realistic expectations, and we will help people exercise choice and find their own solutions to housing problems. Providing easy access to good quality housing advice for those experiencing problems with their housing is important. People want us to be honest about their chances of being rehoused.

Delivery Action - Bring private sector empty homes back in to use.

In September 2013, 1300 privately-owned homes in West Lancashire were empty. Of these 600 had been empty for six months or more. We are committed to bringing empty homes back into use and have found that charging Council Tax at 150% for properties empty for 2 years or more has had a positive impact on the number of empty properties. We will however, explore other approaches that could assist further in reducing the number of empty homes in West Lancashire.

Delivery Action - Produce a new private sector housing strategy.

Our previous private sector housing strategy covered the period 2006-2009. A new strategy will take account of the current policy and delivery context and will shape strategic direction related to empty homes, fuel poverty, house condition, other relevant private sector themes and funding availability.

Delivery Action - Be innovative about Council owned housing stock without a future.

We know, that a very small proportion of our properties have come to the end of their natural life and their future use needs to be reviewed. This may be because they don't meet modern day family living or because they cannot support the changing needs of older people. Where this is the case, we will undertake an options appraisal to consider alternative uses for the building or the land

Objective 4 - Encourage well managed and maintained homes across all tenures

Delivery Action - Promote the private landlord accreditation scheme.

West Lancashire's Landlord Accreditation Scheme (WLLAS) was established in February 2012. The scheme is administered by the Residential Landlords Association (RLA) and has accredited four landlords to date. The aim of the scheme is to improve property and management standards in the private rented sector. Accredited landlords will have access to RLA's training resources and legal support and a host of other benefits. The scheme is open to all landlords and has been particularly supported by Edge Hill University and Edge Hill Students Union. The scheme will continue to be promoted to raise awareness and encourage take up amongst non student landlords.

Delivery Action - Maximise use of enforcement powers to deal with problem landlords and target resources to address disrepair, unsafe properties and management issues within the private rented sector.

A large proportion of private landlords do provide good quality accommodation and fulfil their legal obligations. However where this is not the case we will maximise use of the enforcement powers available. This approach mirrors the expectation of Government in line with the Department Communities and Local Government guidance issued to local authorities about dealing with problem landlords in August 2012. We do often find that where there are problems, they can be remedied with the Council providing advice and support. In some instances the landlord may be inexperienced and so we provide them with guidance so that they can comply with their legal obligations.

Delivery Action - Ensure that Council housing is well maintained, managed and involves our tenants in the shaping of our housing service.

The Council owns and manages 6,200 homes and we aim to be a top performing landlord. That aspiration from a Council housing function perspective consists of a number of important components as follows:

Make our customers our number one priority; Be in the top 25% of performers nationally; Give our tenants the best possible value for their money; Support local people to be more independent; Tackle any incidents of anti-social behaviour in partnership with our community safety partners; Provide jobs that are rewarding and help people develop; use our spending power to help local businesses and provide local jobs and so help West Lancashire grow.

Objective 5 - Encourage investment to meet specialist housing requirements

Delivery Action - Enable the development of a Foyer for young people.

Many young people become homeless after leaving care or following parental disputes or for other reasons. The Birchwood Centre, based in Skelmersdale provide a service for young people (16-25 years old) to help prevent homelessness. They approached the Council to seek support for the development of a Foyer, a place where young people can live and receive integrated support to help them to achieve their goals and move onto independent accommodation. The Council supports the principle of the development of a Foyer and is satisfied that there is a need for such provision and have agreed to use our enabling role to try and bring the statutory and voluntary sector together to develop a Foyer in West Lancashire.

Delivery Action - Identify sites suitable for Gypsy and Traveller pitch provision.

Apart from one pitch with planning permission, there are no authorised sites for Gypsies and Travellers in the Borough, although there is an authorised site for Travelling Showpeople, located in Burscough. The Council is currently preparing a planning document to allocate two types of sites, those which may be used for Travellers to base themselves throughout most of the year, or for Travelling Showpeople to live and store their equipment outside their touring season, and sites to meet the short term transit needs of Travellers who are passing through West Lancashire.

The authority is required by national planning policy to ensure that enough sites in West Lancashire are made available to meet the needs of the travelling community. If the Council does not comply with this obligation, it will be more vulnerable to the establishment of illegal encampments and sites in the Borough. The lack of allocated sites weakens the ability of the Council to take quick and effective action to secure the removal of such encampments and sites.

Delivery Action - Ensure that the Supporting People (SP) Programme meet local need.

SP is the government programme which provides housing related support services for vulnerable people to maintain their tenancy and independent living. It is administered locally by Lancashire County Council with Borough Councils input about service provision in their locality. The SP Programme faces budget reductions and so it is important to influence positively and try different delivery models to ensure that services continue to meet local needs.

Delivery Action - Support a range of needs.

We are aware of a lack of specialist accommodation options to support a range of needs including those with physical disabilities and sensory impairment, those subject to domestic abuse, mental health problems and learning disabilities. We will work with specialist partners to ensure that we can assist with suitable accommodation options. The Council will be reliant on solid partnership arrangements being formed, supported with funding and a clear understanding of the accommodation models proposed.

Objective 6 - Deliver the Council's sustainable energy strategy 2012- 2020 Residential and Domestic Sector objectives.

To improve the energy efficiency of West Lancashire Housing

The Delivery Actions are:

- Sign up to "Climate Local";
- Increase the number of properties with the recommended level of loft and cavity wall insulation;
- Provide an easily accessible and helpful advice service for households across all tenures;
- Continue to progress the energy efficiency work programme on Council owned properties;
- Secure maximum funding from all available sources for energy efficiency projects;
- Work with landlords to improve energy standards in the private rented sector;
- Aid succesfull role out of the Governments Green Deal so that it is promoted locally to householders Produce a HECA progress report on an annual basis.

Tackle hard to treat properties, reduce fuel poverty, and ensure affordable warmth for all

The Delivery Actions are:

- Identify opportunities to retrofit hard to treat homes in the private sector;
- Lead by example by continuing to tackle fuel poverty in Council housing;
 - Explore opportunities for fuel switching;
 - Aid the implementation for fuel poverty referral system;
- Consider projects specifically focussed on the vulnerable groups within our communities.

The delivery actions shown above are taken from the Council's sustainable energy strategy 2012-2020. They can be found in the Residential and Domestic Sector theme of that strategy along with further information about other planned activity to help support the Council's sustainable energy aspirations.

Chapter 7

Resourcing and monitoring the housing strategy

7.0 Introduction

We are mindful that we are aiming to deliver this housing strategy at a time when nationally, lowering the national deficit is central to the Governments national policy agenda. Integral to this is the expectation that the private sector and local communities will deliver services in place of the public sector. Public spending has been reduced and this has meant that the Council has needed to achieve revenue savings of around 30% over the period 2011-2015. To balance the Council's budget in this context means constant, managed change and is reflected and underpinned by our Corporate Business Plan 2011 – 2015. Since the implementation of our Corporate Business Plan significant inroads have been made with £4.9 million identified of permanent revenue savings towards the £5.7 million we anticipate is required.

Delivering a housing strategy in such circumstances where funding in the public sector is reduced will mean that partnership working to deliver this strategy may become more challenging as resources become more stretched. The Action Plan that accompanies this housing strategy is therefore presented in a manner that looks at tackling our housing strategy challenges over the short, medium and longer term. This allows for flexibility to respond to funding opportunities and / or funding issues.

It is also important to note the distinction between funding of housing between that of Council housing and the rest of the housing stock (private sector) in the Borough.

- ❖ Council housing and improvements to Council housing stock is funded through receipt of rents paid by Council tenants. Council housing operates a Housing Revenue Account and is not subsidised by any Council Tax revenue. Council housing, although operated and administered by the Council, has its own income stream, through the rent it receives, in which to operate, manage and maintain its service and housing stock. Rental income received from Council tenants cannot be used to improve private sector housing. Registered Providers operate in a similar manner. The Council housing service, since 2012, operates under a self-financing model. Through that model the service has been able to borrow money to enable for £65 million of capital investment to take place in the Council housing stock. This is in stark contrast to the funds available to assist in improving private sector housing.
- ❖ Income received by the Council through collection of Council Tax is used to achieve the Corporate Priorities of the Council. As mentioned above public spending nationally has been reduced and this means the Councils financial ability to support housing initiatives that help to improve private sector housing is limited.

7.1 Resources

There are significant resources required in order to deliver the objectives set out in this housing strategy. Staffing resources are key to this and span across many teams both internal and external to the Council. In addition to this, the Council owns land and property assets which are considered possible for housing use (considered on a site by site basis) on an on-going basis through the work of our SAMP – Strategic Asset Management Plan.

Any funds made available to support this housing strategy will need to satisfy the following five principles that underpin all of our financial decisions:

- financial planning based upon realistic and prudent assumptions about the resources available to the Council and its partners
- capital and revenue resources used in such a manner as to extend and enhance finances under our direct control
- priorities aligned to local, regional and national funding streams to maximise capital income
- service users, residents and partners influence and participate in financial decision-making processes
- pro-active approaches to new funding opportunities

In addition to the above principles, the Council assesses its capital requirements using a system to rank proposed capital schemes against a range of criteria that are set out in our capital strategy and asset management plan. These criteria cover a wide range of factors including corporate and service objectives and priorities, external funding levered in, partnership working, revenue implications, and the results of stakeholder consultation. This formalised system of assessment ensures compliance with agreed priorities and is administered in line with the Councils budgeting cycle.

There are sources of funding to help support some aspects of delivery, however we will also have to try and maximise external funding opportunities as they present themselves, work with partners and think creatively about the use of any of our own funds and assets to support our housing strategy objectives. Paragraphs 8.1 to 8.7 refer to existing funding types / routes / opportunities.

7.2 Housing Revenue Account

Council housing - As a stock retained landlord the council produces a Housing Business Plan. The plan considers the capital investment needs of our housing stock to ensure that we keep our properties to a high standard. The plan also considers if there are any particular investment needs to assist in regenerating parts of our Council housing estates and takes account of the need to have appropriate staffing levels to manage the Council house service. Our Housing Business Plan can be viewed on our Council web pages at www.westlancs.gov.uk

7.3 Right to Buy Receipts

Legislation allows for most Council Tenants to exercise their right to buy their Council home. Under existing rules, when a Council home is sold, the Council is able to keep a proportion of the sales receipt which can then be used to fund new affordable housing units.

It is not possible to forecast how many homes will be sold in any financial year, however receipts from such sales can be used to support affordable housing development or regeneration.

7.4 National Affordable Housing Programme

Affordable housing – The Homes and Community agency (HCA) is a Government agency that aims to meet Government aspirations to develop affordable homes across the Country. The HCA provide affordable housing grant to Registered Providers of Social Housing to develop affordable housing. Grant is awarded via a bidding cycle where bid applications are considered against specific criteria. The amount of grant provided does not cover the full build cost and so the Registered Provider will have to fund the gap between the development cost and the amount of grant received. West Lancashire Borough Council is able to bid for HCA Affordable Grant Programme funding and may explore this route if viable.

The Council will, however, continue to work hard to maximise the amount of HCA grant provided to this authority.

7.5 Affordable Housing Capital Fund

The Council has also committed capital resources of £650k to help achieve its affordable housing delivery aspirations. This resource has been committed to a partnership arrangement with Regenda Housing Group who have ensured that their Development Teams capacity has been enhanced to deliver success through this arrangement. The partnership was originally intended to achieve delivery of up to 32 affordable housing units, however by using this fund and working with the HCA we will exceed this original delivery target with current live schemes leading to the development of up to 65 affordable units. Start on sites are planned for 2014/15 and scheme completions anticipated in 2015/16. Further affordable housing units will be delivered through this arrangement.

7.6 Supporting People Programme

The Supporting People Programme, administered by Lancashire County Council, funds housing related support services for specific vulnerable client groups across the County. The Council will need to work closely with the Supporting People Team to ensure that appropriate housing related support services are funded in West Lancashire.

7.7 CCG's Commissioning

Clinical Commissioning Groups (CCGs) replaced Primary Care Trusts (PCTs) from March 2012 when the 2010 White Paper "Equity and Excellence: Liberating the NHS" became law under the Health and Social Care Act 2012. This was part of the Government's wider desire to create a clinically driven commissioning system that is more sensitive to the needs of patients. This new arrangement does not particularly bring with it any significant additional funds, however its new operational focus may afford funding opportunities across mental health and learning disability. This will be particularly explored when aiming to deliver positive outcomes for Objective 5 - Encourage investment to meet specialist housing requirements.

7.8 Monitoring

The Council produces a number of strategies and plans directed at achieving our vision and priorities. These plans and strategies contain numerous tasks and targets which, when completed successfully, are the building blocks of our success.

To keep track of our progress we use a performance monitoring framework. This helps us monitor progress and take any remedial action to make sure that what is supposed to be done gets done. Each of our service areas produce Service Action Plans which reflect the key delivery actions we are working on as contained in our strategies and plans. These are monitored regularly through our monitoring framework with performance updates being provided to relevant service managers and service heads. Performance and achievement is also reported to our Elected Members in line with our constitution so that progress is fully understood.

The housing strategy action plan will be monitored as part of the process outlined above.



AGENDA ITEM: 5(i)

CABINET: 18 March 2014

**EXECUTIVE OVERVIEW &
SCRUTINY COMMITTEE:
03 April 2014**

Report of: Borough Treasurer

Relevant Managing Director: Managing Director (People and Places)

**Relevant Portfolio Holders: Councillor D Westley
Councillor A Owens**

**Contact for further information: Mrs K Samosa (Ext. 5038)
(E-mail: karen.samosa@westlancs.gov.uk)**

SUBJECT: CAPITAL PROGRAMME MONITORING

Wards affected: Borough wide

1.0 PURPOSE OF REPORT

1.1 To update Members on the current position in respect of the 2013/2014 Capital Programme.

2.0 RECOMMENDATIONS TO CABINET

- 2.1 That the current position in respect of the 2013/2014 Capital Programme be noted.
- 2.2 That Call In is not appropriate for this item as the report is being submitted to the next meeting of the Executive Overview and Scrutiny Committee on 3rd April 2014.

3.0 RECOMMENDATION TO EXECUTIVE OVERVIEW AND SCRUTINY COMMITTEE

3.1 That Members note the current position in respect of the 2013/2014 Capital Programme.

4.0 BACKGROUND

4.1 The Capital Programme is set on a three-year rolling basis that is updated regularly when Members are advised of progress against it. The revised programme of £19.503m for 2013/2014 was agreed by Members in December 2013. Council subsequently approved the new Medium Term Programme for 2014/2015 to

2016/2017 on 26th February 2014, but due to the timing of this budget, any changes have not been incorporated into this report.

5.0 CAPITAL EXPENDITURE

- 5.1 Generally, capital schemes are profiled with relatively low spending compared to budget in the early part of the financial year with increased spending as the year progresses. This reflects the fact that many new schemes have considerable lead in times, for example, because of the need to undertake a tendering process and award contracts at the start of the scheme. Some schemes are dependent on external partner funding and schemes can only begin once their funding details have been finalised. Other schemes include contract retentions or contingencies that will only be spent some time after completion of the contract. Most schemes then progress and spend in line with their approval by the year-end.
- 5.2 This pattern has been repeated in the current year with £9.243m (47%) of expenditure having been incurred by the end of January. The actual spend on capital investment is higher than the same point last year although the percentage spend to budget is lower. This is due to the budget being significantly more than in previous years. However, the spend compares favourably to recent programmes as indicated in Table 1:

Year	Expenditure £m	Budget £m	% Spend against Budget
2013/2014	9.243	19.503	47%
2012/2013	8.078	13.362	60%
2011/2012	5.823	12.341	47%
2010/2011	5.084	11.013	46%

- 5.3 Appendix A shows a breakdown by Service of expenditure and approvals whilst Appendix B provides comments from Heads of Service on the progress of schemes against the Programme. Housing Public Sector schemes represent 77% of the overall programme and consequently progress in these areas will largely determine the overall spending position at the year end.

6.0 CAPITAL RESOURCES

- 6.1 Sufficient resources have been identified to fund the Capital Programme as shown in Appendix A.
- 6.2 A proportion of the resources to fund capital expenditure are based on government allocations that have been confirmed. Other resources come from external funding and schemes that are heavily dependent on this source are not able to start until after the funding has been confirmed. A further source of funding is capital receipts.
- 6.3 Capital receipts are the main area of the capital resources budget that is subject to variation. They are the useable proceeds from the sale of Council assets (mainly houses under Right to Buy (RTB) legislation) that are available to fund capital

expenditure. They can vary significantly depending on the number and value of assets sold.

- 6.4 The Mid Year Review report identified that 25 RTB sales had been achieved against the target of 12 for the year and 2 plots of land sold. At the end of the third Quarter a further 9 RTB sales had been achieved with no further land sales. The useable receipts generated are analysed in Table 2:

Year	Estimate £'000	Actual £'000	% Received against Budget
Right to Buy Sales	120	210	175%
Land Sales	50	22	44%
Total	170	232	136%

- 6.5 The estimate for the year was based on historical averages as the actual pattern of sales is volatile. However, following a change to the rules relating to Right to Buy sales, although the average receipt from each sale has reduced, it has led to an increase in the number of sales. Officers are also progressing land sales in line with the Asset Management Strategy with further sales in the offing.
- 6.6 Council have been advised that changes in capital receipt regulations meant that the Council retain a greater share of the proceeds generated by Council House sales. This funding is split between general usable capital receipts (detailed above), One for One Replacement Funding, and Debt Funding. At the end of the third Quarter, £0.16m had been generated for One for One Replacement Funding and there will be an estimated total Debt Funding of £0.652m at the end of the financial year.

7.0 SUSTAINABILITY AND COMMUNITY STRATEGY LINKS

- 7.1 The Capital Programme includes schemes that the Council plans to implement to enhance service delivery and assets. The Capital Programme also achieves the objectives of the Prudential Code for Capital Finance in Local Authorities by ensuring capital investment plans are affordable, prudent, and sustainable. This report provides an updated position and progress against project plans.

8.0 RISK ASSESSMENT

- 8.1 Capital assets shape the way services are delivered for the long term and, as a result, create financial commitments. The formal reporting of performance against the Capital Programme is part of the overall budgetary management and control framework that is designed to minimise the financial risks facing the Council. Schemes within the Programme that are reliant on external contributions or decisions are not started until funding is secured and other resources that are subject to fluctuation are monitored closely to ensure availability. The capital receipts position is scrutinized on a regular basis and managed over the medium term to mitigate the risk of unfunded capital expenditure.

Background Documents:

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

The decision does not have any direct impact on members of the public, employees, elected members and/or stakeholders. Therefore, no Equality impact assessment is required.

Appendices:

A Capital Programme Expenditure and Resources Budget

B Heads of Service Comment

C. Minute of Cabinet 18 March 2014 (Executive Overview and Scrutiny Committee only)

2013/2014 CAPITAL PROGRAMME
EXPENDITURE AND RESOURCES BUDGET
as at JANUARY 2014

Service	Budget Approval	Actual		Variance	
	£'000	£'000	%	£'000	%
EXPENDITURE					
Housing and Regeneration					
Public Sector Housing	15,082	7,116	47%	7,966	53%
Housing Strategy	657	0	0%	657	100%
Property Management	272	187	69%	85	31%
Regeneration	184	30	16%	154	84%
Community Services					
Private Sector Housing	692	661	95%	31	5%
Other Community Services	1,378	786	57%	592	43%
Planning	82	12	15%	70	85%
Street Scene	758	339	45%	419	55%
Corporate Services					
Financial Services	60	37	61%	23	39%
Transformation	338	74	22%	264	78%
	19,503	9,243	47%	10,260	53%
RESOURCES					
Capital Grants	858				
HRA	11,104				
HRA Borrowing	3,569				
GRA	1,374				
GRA Borrowing	150				
Capital Receipts	2,448				
	19,503				

CAPITAL PROGRAMME 2013/2014
HEADS OF SERVICE COMMENTS
AS AT JANUARY 2014

Public Sector Housing

This is the most ambitious programme of investment that the Council has undertaken and this year's Budget for Public Sector Housing is £15.1m.

It is anticipated, however, that there will be some slippage into next year for the following schemes: Disabled Adaptations, Environmental Improvements, Void Capital Contingency, Communal Areas, Lifts, General Sheltered Upgrades, Drainage, and Elmstead Affordable Housing. The main reasons for this slippage are planning and design issues along with retentions.

There is likely to be an overspend due to excess need on the Communal Door and Community Heating Programmes. This overspend, however, will be more than offset by tender savings achieved in the following work streams: Heating, Energy Efficiency, Kitchen and Bathroom Replacements, Replacement Windows and Doors, General Contingency, and corresponding Professional Fees.

All of the remaining schemes, including Firbeck Revival Project, are progressing with budgets fully committed. Most will be substantially completed by the end of the financial year allowing for retentions and minor slippage.

This is a satisfactory position bearing in mind the level of investment and the resources available.

Housing Strategy

The proposed Affordable Housing scheme at Furnival/Pickles Drive has been delayed but is still progressing. Budget has been earmarked for a contribution to three further sites that have attracted HCA funding. The remaining Affordable Housing Budget will be used for further sites that have been identified where our registered provider partner has also committed resources.

Each site is different and delivery and timing can be affected by various issues. However, the first development using this budget will commence construction later in the year meaning that budgets will slip into the next financial year.

CAPITAL PROGRAMME 2013/2014
HEADS OF SERVICE COMMENTS
AS AT JANUARY 2014

<p>Regeneration and Estates</p>
<p>Demolition works at Gorse Place are complete and the timeline for the Greenshoots project has been finalised. Plans are being put into place for procurement and appointment of consultants for the Greenshoots project and expenditure is likely to be in the next financial year.</p> <p>Although the scoping work for the Culvert Debris Screens is scheduled to start by the end of the financial year, it is anticipated that this budget will need to slip into next year when the scheme should be completed.</p>
<p>Property Management</p>
<p>The Corporate Property Programme comprises a number of projects within Property Services. As the responsibility for resurfacing of the car park at the Robert Hodge Centre is with Technical Services, this budget (£40,000) has been transferred from Property Services. The remaining schemes are progressing and, although some are dependent upon the weather, the Programme will be delivered by 31st March.</p>
<p>Planning</p>
<p>An order has been placed for new PC's for the Planning ICT System and phase 2 is likely to commence in April. The budget for this phase will, therefore, need to be slipped into the new financial year.</p> <p>The remaining Planning schemes are demand led. The Free Tree Scheme has been hugely popular and is complete for the year. However, demand for both Conservation Area Enhancement Grants and Buildings at Risk has been lower than anticipated and unused budgets will be slipped into the next financial year.</p>

CAPITAL PROGRAMME 2013/2014
HEADS OF SERVICE COMMENTS
AS AT JANUARY 2014

Community Services - Private Sector Housing

Both Renovation Grants and Disabled Facility Grants are demand led but expenditure should be in line with current budgets. Any unspent budgets will be slipped into the new financial year to meet anticipated demand.

The Clearance Programme is completed.

Other Community Services

The Leisure Trust funding is part of an on-going agreement and the budget will be fully spent. Playground Improvement Schemes are completed for the year as is the extension to Sandy Lane Car Park and the resurfacing of the car park at the Robert Hodge Centre.

The CCTV schemes are progressing and will be mostly completed this financial year although there could be an element of slippage for the Parish area allocation.

Expenditure on additional works on the Flood Alleviation schemes at both Calico and Dock Brooks will be funded by additional grant. Works at Abbey Brook have commenced and will continue into the new year.

Survey works on Playing Pitch Improvements are due to commence towards the end of the financial year and may slip into next year. This is also the case for Moor Street.

Approvals for using section 106 monies have been made for the refurbishment of the fountain at St Helen's Road Park, the development of a Bowling Green adjacent to Ormskirk Cricket Ground, and improvements to the park at Ruff Wood. Although preliminary works on these schemes is due to commence, the approvals have not been included in the programme as the timing of the expenditure is uncertain. The phasing of the approvals will be included in the next monitoring report.

Street Scene

Replacement Blue Bins have been purchased and distributed to households and the scheme is expected to be completed on schedule by the end of April.

CAPITAL PROGRAMME 2013/2014
HEADS OF SERVICE COMMENTS
AS AT JANUARY 2014

Corporate Services

Progress made on delivering Parish Capital Schemes rests with individual Parishes and is not within the direct control of the Borough Council. Part of this budget has been reprofiled into the new financial year and part has been given back to the Capital Pot.

A new ICT strategy is being drawn up to ensure that risk is effectively controlled. Expenditure to date in this area has been limited but will increase significantly once the strategy has been put in place. Work on the new Website Content Management System has also commenced and a number of purchase orders have been raised for this project.



AGENDA ITEM: 5(j)

CABINET: 18 March 2014

Report of: Borough Treasurer

Relevant Managing Director: Managing Director (People and Places)

Relevant Portfolio Holder: Councillor D Westley

**Contact for further information: Mrs Natasha Bryan (Extn. 5098)
(E-mail: natasha.bryan@westlancs.gov.uk)**

SUBJECT: RISK MANAGEMENT

Borough Wide Interest

1.0 PURPOSE OF THE REPORT

1.1 To set out details on the Key Risks facing the Council and how they are being managed.

2.0 RECOMMENDATIONS

2.1 That the progress made in relation to the management of the risks shown in the Key Risks Register (Appendix A) be noted and endorsed.

3.0 BACKGROUND

3.1 Risk management is not about being 'risk averse' – it is about being 'risk aware'. Risk is ever present and some amount of risk taking is inevitable if the Council is to achieve its objectives. Risk Management is about effectively managing risks that could affect the Council and the community. It is also about making the most of opportunities and achieving objectives. By being 'risk aware' the Council is in a better position to avoid threats and take advantage of opportunities.

- 3.2 It is a best practice requirement that the Risk Management Policy and Strategy and the Key Risks Register are reviewed and reported to Members on a regular basis. Consequently it is our standard practice to report on Risk Management issues to Cabinet every 6 months.
- 3.3 Risk Management covers the whole spectrum of risks and not just those associated with finance, business continuity, insurance and health and safety. It also considers risks associated with service provision, compliance with legislation, public image (reputation) and environment. Key Risks are defined as the highest priority risks that may prevent the Council from achieving its objectives or may result in the failure of a service, or the failure to comply with legislation. The Key Risks Register gives a summary of these risks and the work that is being undertaken to mitigate them, although many of these risks will have already been the subject of separate committee reports. In addition each Service maintains its own Service risk register of the specific risks that they face.

4.0 KEY RISK REGISTER

- 4.1 The Key Risk Register attached (Appendix A) shows the current Key Risks and the measures in place to manage those risks. The regular reporting of the Register provides Members with an opportunity to scrutinize key risks and provides assurance that these risks are being effectively controlled.
- 4.2 Some of the key risks and changes in the register are as follows:
- Achieving a balanced budget position for 2015/16 – Council agreed a balanced budget for the 2014/15 financial year at its meeting in February. However ongoing reductions in Government funding mean that there is a significant medium term financial risk facing the Council. These challenges will be addressed through the Business Plan for 2015-18 that is currently being developed
 - Business Continuity - The Council currently has 13 services (or parts of services) that are classed as "Critical Services" and each of those services has a Business Continuity Plan that looks at reducing the risks of issues occurring (where possible) and how to respond if they do. They are intended to be a document that can be used to try to ensure an appropriate level of service is maintained for residents, in the event of a disruption. A review of this area is currently being undertaken and more information will be provided to Members in due course in the form of a Members Update
 - The risk relating to the implementation of the Localism Act has been removed from the Key Risk Register as the issues arising have been dealt with sufficiently so that it is no longer regarded as a key risk. However certain aspects of the Localism Act will continue to be managed and controlled through service risk registers
- 4.3 There are no risks that have been assessed in the "very concerned" category that would require urgent action at the highest level to reduce the risk to an acceptable position. There are a number of risks in the "concerned" or "uneasy"

category but this is largely due to external factors that are not within the direct control of the Council.

5.0 RISK MANAGEMENT POLICY

5.1 The Risk Management Framework and Policy have recently been reviewed to assess whether any amendments or modifications are required. This review identified that, as the policy had been reviewed and updated in January 2013 that it was up to date and that no further changes are required at this time. Details on this review were reported to the January meeting of the Audit and Governance Committee, as this Committee has the responsibility for ensuring that the Risk Management Framework operates effectively. It is intended that the policy will be reviewed once again in 12 months time to ensure it remains fit for purpose.

6.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

6.1 There are no significant sustainability impacts associated with this report and, in particular, no significant impact on crime and disorder. The report has no significant links with the Sustainable Community Strategy.

7.0 FINANCIAL AND RESOURCE IMPLICATIONS

7.1 The successful management of the key risks facing the Council will ensure that resources are used effectively and efficiently.

8.0 RISK ASSESSMENT

8.1 The continued identification and review of key risks is essential to ensure the management and mitigation of those risks, the successful achievement of the Authority's objectives, and the maximisation of opportunities. By continually monitoring and reviewing the Risks and the Risk Management Framework we will ensure that it continues to improve, develop and meet external assessment criteria and best practice requirements.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

The decision does not have any direct impact on members of the public, employees, elected members and / or stakeholders. Therefore no Equality Impact Assessment is required.

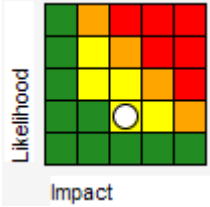
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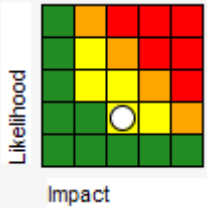
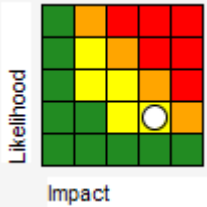
Appendix A – Key Risks Register

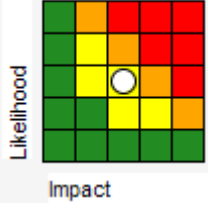
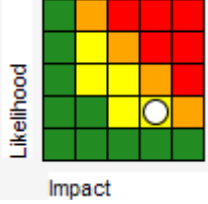
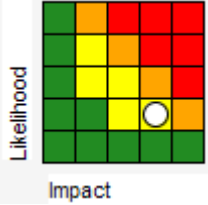
Appendix A - Key Risk Register - Cabinet March 2014



Service Area	Title	Potential Effect	Internal Controls	Responsible Officer	Latest Note	Current Risk Matrix	Current Risk Assessment and Score
Corporate Services: Borough Treasurer	Treasury Management Investments are riskier given current market conditions	The volatility in financial markets has meant that investments are now less secure than previously. There is the potential that significant sums of money could be lost.	There is a treasury management policy and strategy in place. Well trained staff make investments with the guidance of brokers and Sector. Investments can only be made in top rated UK based institutions or other local Authorities and for a maximum of three months.	Borough Treasurer	An updated Treasury Management Policy and Strategy will be submitted to Council for approval in April 2014.		5 Content
Corporate Services: Borough Treasurer	Achieving a balanced budget position for 2015/16	The latest spending review has announced further cuts in Government funding for 2015/16 which will need to be addressed to meet the statutory requirement to set a balanced budget.	The medium term financial forecasting process and business plan will set out how this financial challenge will be met.	Borough Treasurer	Council set its budget for 2014/15 in February 2014. A new Business Plan covering the period 2015/18 is currently being drawn up to address the Council's medium term financial challenges.		10 Concerned
Community Services	Business Continuity - Potential for disruption	Lack of Business Continuity planning could have a severe impact on service provision across critical Service Areas.	Key Service areas have been identified and individual plans put in place. These plans are tested on a regular basis and updated accordingly.	Emergency Planning Officer	A review of this area is currently being undertaken and more information will be provided to Members in due course in the form of a Member's update.		4 Content

<p>Housing & Regeneration : Housing</p>	<p>Failure to deliver Affordable Housing Strategy</p>	<p>The Affordable Housing Strategy will deliver a series of plans that will outline our future affordable housing interventions programme, will establish Housing Needs data that will help in negotiation for affordable housing provision on mixed development sites and will identify plots of land that may be suitable for affordable housing development.</p>	<p>The established Affordable Housing Panel will shape appropriate policy responses. A Borough wide Housing Needs survey, Framework Formulation and an Affordable Housing Viability Study will need to be considered by the Affordable Housing Panel.</p>	<p>Housing Strategy and Development Programme Manager</p>	<p>a) Work is on-going to optimise the amount of affordable housing achieved from market housing sites through the use of planning obligations and the Section 106 arrangements. b) The Housing Strategy Section continues to work with Registered Providers to identify land sites suitable for the development of 100% affordable housing schemes. We are currently exploring 7 sites that have the potential to provide up to 80 units. c) In December 2013, 30 affordable dwellings were completed by Regenda Housing Group in the rural village of Banks. The build was carried out by Melfords, a local building company. In January 2014 the allocation process started, giving priority to households with a local connection to Banks. The development has proved popular and 29 of the 30 dwellings have been allocated to date. d) Through our partnership arrangement with Regenda Housing Group a development of 12 affordable homes in Burscough on land at Pickles / Furnival Drive is being progressed. e) The HCA have announced a new affordable homes grant bid round for the period 2015 - 2018. The Housing Strategy Section is working with Registered Providers to submit funding bids. f) Through our partnership arrangement mentioned above, Regenda Housing Group, supported by the Council submitted three funding bids to the HCA in the last bid round. The bid was successful. In terms of HCA investment in the Borough it works out at around £1.6 million provided all units are built. The final number to be achieved out of the 64 units possible, will be dependent upon the outcome of the respective planning applications. Work continues to shape the respective planning applications and agree land acquisition / land option arrangements where necessary.</p>		<p>6 Uneasy</p>
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Council Wide	Loss of personal data	The Information Commissioner can take a range of actions against the Council for breaches of the Data Protection legislation including issuing undertakings to commit the Council to a particular course of action to improve its compliance with DPA, audit, serve enforcement notices and Stop Now Orders and, in the case of a serious breach, can serve a Monetary Penalty Notice up to £500,000. A loss of personal data would result in negative press coverage, damage to the Council's reputation, officer time and resources in addressing the breach and potentially action against the Council by the data subject.	The Council has had Data Protection policies in place for some years. Corporate policies have been updated and service specific policies are being updated. New roles of Senior Information Risk Owner (SIRO) and Information Asset Owners (IAO) have been introduced in an updated DP Policy. Initial refresher training has been completed and further training is planned for March 2013. An action plan is in place to assist compliance.	Managing Directors and Heads of Service	The original Action Plan has now been completed and a revised version created to carry forward continuing obligations and new requirements.		6 Uneasy
Planning Services	Failure to deliver a new Local Plan	The future housing, economic and infrastructure needs of the Borough would not be fully met. Also a greater risk of development occurring in unsustainable locations.	A Local Development Scheme (LDS) has been produced setting key targets and milestones relating to delivery of the LDF. These are replicated in the Council's Business Plan and in the Service Action Plan	Assistant Director Planning	The Local plan has been adopted but is subject to a legal challenge. A Court date is yet to be set but this risk will need to be reviewed once the legal decision has been made.		8 Uneasy

<p>Planning Services</p>	<p>Failure to deliver Skelmersdale Town Centre Regeneration</p>	<p>Opportunity - The project will provide a mix of residential, commercial, leisure and education accommodation opportunities. Threat - We could fail to address the economic issues, not address residents' requirements and have an impact on the Council's reputation.</p>	<p>1. Continue to consult with public where relevant. 2. Collaboration agreement in place. 3. Continue to engage with the "other" landowners to encourage their participation in the scheme. 4. This risk is reviewed regularly as part of the on-going project management. 5. Maintaining regular contact with developer and potential retail/commercial/leisure occupiers. 6. Project Board meets regularly to review progress.</p>	<p>Assistant Director Planning</p>	<p>Currently working with St Modwen to bring forward three housing sites within the Town Centre. Discussions also on-going in relation to town centre scheme. Firbeck Revival scheme and new Youth Zone development are both underway.</p>		<p>9 Uneasy</p>
<p>Corporate Services: Transformation</p>	<p>ICT Infrastructure (Q)</p>	<p>Several ICT systems/software applications coming to end of life in future years</p>	<p>The ICT Strategy has prioritised the refresh of ICT infrastructure for 2014.</p>	<p>Transformation Manager</p>	<p>Addressed through the ICT Strategy</p>		<p>8 Uneasy</p>
<p>Corporate Services: Transformation</p>	<p>Failure to manage the impact of the Government's Benefit Reforms</p>	<p>The government has reduced its financial support for Council Tax benefit by 10% from April 2013, which creates a financial risk for both the Council and local benefit claimants. There are further risks from the proposed changes on universal credits.</p>	<p>A working group has been established with membership from WLBC, LCC/OCL, together with the DWP to oversee and manage the changes and introduction of the various emerging changes regarding Welfare Reform</p>	<p>Transformation Manager</p>	<p>A Member Update report on Welfare Reform will be provided within the first quarter of 2014/15</p>		<p>8 Uneasy</p>



AGENDA ITEM: 5(k)

CABINET: 18th March 2014

**EXECUTIVE OVERVIEW AND
SCRUTINY: 3rd April 2014**

Report of: Borough Treasurer

Relevant Managing Director: Managing Director (People and Places)

**Relevant Portfolio Holders: Councillor D. Westley
Councillor A. Owens**

**Contact for further information: Marc Taylor (Extn. 5092)
(E-mail: Marc.Taylor@westlancs.gov.uk)**

SUBJECT: REVENUE BUDGET MONITORING

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To provide a projection of the financial position on the General and Housing Revenue Accounts to the end of the financial year.

2.0 RECOMMENDATIONS TO CABINET

2.1 That the financial position of the Revenue Accounts be noted including the position on reserves and balances.

2.2 That call in is not appropriate for this item as the report is being submitted to the next meeting of the Executive Overview and Scrutiny Committee on 3rd April 2014.

3.0 RECOMMENDATION TO EXECUTIVE OVERVIEW AND SCRUTINY COMMITTEE

3.1 That the financial position of the Revenue Accounts be noted.

4.0 BACKGROUND

4.1 In February 2013 the Council approved budgets for the Housing and General Revenue Accounts for the 2013-2014 financial year. It is good practice that monitoring reports are produced on a regular basis to ensure that Members are kept informed of the financial position of these accounts. This is the third monitoring report for the year and is based on information available in January 2014.

5.0 GENERAL REVENUE ACCOUNT

5.1 The Council has set a revenue budget of £13.972m for the financial year. The mid-year monitoring report projected an overall favourable variance of £435,000 or 3.1% on the budget. At its meeting in December, Council then agreed to use £261,500 of this favourable variance to provide funding:

- To ensure that all Council staff are paid the Living Wage
- To support the new Economic Development Strategy that is being developed
- For 2 new capital schemes on Vehicle Fleet in Cab Communications and Payment Card Industry Data Security Standards Compliance
- To enable the Ormskirk MotorFest to be held for the next 3 years

5.2 After allowing for these allocations, the balance of the projected favourable budget variance remaining was then £173,500. The latest third quarter monitoring figures now show an improvement of £141,500, and forecast an updated favourable variance of £315,000 or 2.3% of the budget. The Appendix to this report provides further details on the performance of individual service areas.

5.3 The projections have been calculated on a prudent basis, and consequently it can be confidently expected that the Council will achieve a surplus by the year end. This will continue our strong track record of managing our financial performance to ensure that the outturn position is in line with the budget.

5.4 Council considered the potential uses of this favourable budget variance at its meeting in February as part of the Budget Requirement Report. It was then decided that this delivery of a managed underspend against budget in the current year should be used to support the GRA budget position for 2014-15. Consequently the full amount of the projected favourable variance has now been allocated.

5.5 The Council's Business Plan sets out a four-year process to save money and protect frontline services within a very challenging financial environment. As part of this process, the Budget that was approved for this year included a significant value of savings to be achieved, particularly through initiatives that had been agreed through the Major Service Review process. The majority of these initiatives have delivered the expected level of savings either on time or ahead of schedule, and as a consequence the overall savings target will be exceeded.

- 5.6 Employee costs form a significant proportion of the Council's total budget and consequently are very important from a budget management perspective. The budget contains a corporate target for staff efficiency savings of £280,000, and the active management of staffing levels will mean that this target should be achieved by the year end.
- 5.7 The external income that the Council generates can be one of the most volatile areas of the budget, with income going up and down due to factors outside our direct control. However at the current time, while there is some variation in certain areas, income levels are generally in line with budget targets.
- 5.8 There are a number of services where income is currently performing below the budget target including Car Parks and Treasury Management. However these variances are not significant in the context of the Council's overall financial position. There are also a number of areas where income is performing well above the budget target in particular in relation to Planning application fees. Consequently in overall terms external income levels are currently satisfactory.
- 5.9 A number of spending and income pressures have been identified in the current year that are expected to persist into the next financial year. These areas have been reviewed during the budget process for 2014-15, and budget targets adjusted to reflect anticipated future cost and income levels where appropriate.

6.0 HOUSING REVENUE ACCOUNT (HRA)

- 6.1 The Council approved an external income budget for the HRA of £25.141m for this financial year. Right to Buy sales and void rates heavily influence the amount of income generated and these have caused a number of significant adverse impacts to date.
- 6.2 There were 20 Right to buy Sales allowed for when the budget was set, which was in line with recent trends. However due to government changes on the maximum discount allowable and the increased availability of mortgages, the number of sales is expected to be around 50 for the year. While this has the effect of reducing HRA income it does however increase the available receipts for capital investment.
- 6.3 It was previously reported that a number of issues had impacted on void levels and turnaround in the first half of the year which were caused by a backlog of voids, fitting new kitchens to voids, and capacity issues due to an increase in void numbers. Implementation of an action plan has improved void turnaround and re-let costs, resulting in those properties put on hold due to budgetary pressures in 2012-13 being re-let. The current void level of 1.5% compares favourably against the 2.7% encountered earlier in the financial year, and this has improved the HRA income stream.
- 6.4 On the positive side, the active management of staffing levels combined with the higher level of professional fees being charged through to the much increased capital programme will ensure a significant favourable budget variance this year.

Expenditure in other areas is being effectively controlled, although there are a range of both favourable and adverse variances across different budget areas.

- 6.5 When all of these factors are put together, current projections show that the HRA should achieve a small surplus against its bottom line budget target for the year.

7.0 RESERVES AND BALANCES

- 7.1 The Council agreed an updated Reserves Policy at its meeting in February. This Policy has taken various factors into account including the difficult medium term financial position facing the Council as a result of an ongoing series of reductions in its grant funding. Consequently the GRA will continue to have an adequate level of reserves in place that should enable it to deal with its financial challenges effectively.

8.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

- 8.1 There are no significant sustainability impacts associated with this report and, in particular, no significant impact on crime and disorder. The report has no significant links with the Sustainable Community Strategy.

9.0 RISK ASSESSMENT

- 9.1 The formal reporting of performance on the General and Housing Revenue Accounts is part of the overall budgetary management and control framework that is designed to minimise the financial risks facing the Council.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

The decision does not have any direct impact on members of the public, employees, elected members and / or stakeholders. Therefore no Equality Impact Assessment is required.

Appendices

Appendix 1 – General Revenue Account Projected Outturn Position

Appendix 2 – Minute of Cabinet 18 March 2014 (Executive Overview and Scrutiny Committee only)

**APPENDIX 1
GENERAL REVENUE ACCOUNT PROJECTED OUTTURN POSITION**

Budget area	Net Budget £000	Variance from Budget £000	Variance %
Community Services	4,644	-100	-2.2%
Corporate Services			
- Borough Solicitor	1,194	-40	-3.4%
- Borough Treasurer	1,103	-65	-5.9%
- Transformation Manager	1,746	-35	-2.0%
Housing and Regeneration	300	-160	See note
Planning Services	1,520	-220	-14.5%
Street Scene	5,045	-100	-2.0%
Central Budget Items	87	185	See note
Non Service Items	-1,667	-42	2.5%
Allocations agreed by Council in December		262	Para 5.1
TOTAL BUDGET REQUIREMENT	13,972	-315	-2.3%

Table Notes

The budget figures for each Service have been updated to include capital accounting adjustments and the allocation of central budget items to services. These are technical accounting adjustments that do not affect the bottom line budget requirement, which has remained unchanged during the year at £13.972m.

Housing and Regeneration has a relatively small net budget requirement because it contains Property Services which is a support service that recharges most of its costs to other services, and also the Community Related Assets portfolio, which generates a significant amount of external income.

General

It should be recognised that some areas of the budget are within the Council's control, for example the filling of vacant posts to achieve salary savings. However other areas such as external income can be volatile where we are exposed to market forces. In addition some service areas are demand led where it can be difficult to directly control expenditure.

Community Services – Favourable variance £100,000

The financial performance of the Service continues to do well, with the largest single contributory factor being managed savings on staffing, supported by a number of smaller savings on non staffing areas. The bottom line projection for the Service reported at the mid year stage was a favourable budget variance of £70,000. This projection has now increased to £100,000 taking into account the latest available information.

Income performance has generally been good but with a number of variances. Car Park Pay and Display income has been performing below budget and this position has been exacerbated by the termination of the agreement at Two Saints Car Park. This adverse variance will be mitigated by additional income from penalty charge notices, but overall the car park income stream will be significantly down on budget. These factors have been taken into account when setting the car park budgets for 2014-15.

Home Care Link (previously reported as Lifeline), is anticipated to outturn ahead of its budget target with a surplus on the account at the year end. The surplus on the account will be transferred to the Home Care Link Reserve, for future use in line with the Reserves Policy.

Borough Solicitor – Favourable variance £40,000

Income from Local Searches is currently performing above the budget target to date, and there has also been a substantial amount of Legal Costs recovered. Expenditure is being effectively controlled and there are savings in a range of areas including Civic Admin and Supplies and Services. When all of these factors are combined it should ensure that the service has an overall favourable variance.

Borough Treasurer – Favourable variance £65,000

The new insurance contract will deliver a 12% reduction in cost while maintaining the same level of cover, and Council have previously agreed that this saving should be used to help finance the new Blue Wheelie Bin scheme.

Staffing and other costs are being effectively managed and controlled, and this should result in an overall favourable variance being delivered over the course of the year.

Transformation Manager – Favourable variance £35,000

There is a small favourable budget variance on salary costs across the Service, as well as a range of minor savings on other budget headings that have contributed to the overall positive financial performance. The level of Benefits payments will be kept under review as this is a demand led area that is not under the direct control of the Council.

Housing and Regeneration – Favourable variance £160,000

The restructuring of the Housing and Regeneration service has enabled a £60,000 saving to be made this year as previously reported in the MSR report to Council in July.

Regeneration and Estates is projected to achieve a significant favourable variance mainly due to staff savings. The Investment Centre is trading far better than its budget targets, although a loss is still projected for this financial year, as discussed elsewhere on the agenda. The Industrial Portfolio income position is bucking the national trend and is better than previous years. In general, income from the Commercial Assets Portfolio is holding up, although due to the economic climate there is an issue with bad debts that will have to be considered in more details through the closure of accounts process.

The overall Property Services forecast is for expenditure to match budget for the year. Utilities expenditure for water, gas and electricity are all projected to have an adverse variance, which has been taken into account in preparing next year's budgets. However tight control of other expenditure headings, and in particular repairs and maintenance, has mitigated these cost pressures in order to achieve a budget neutral position.

Planning Services – Favourable variance £220,000

Planning Application Fees and Pre-Application Advice charges are continuing to perform significantly above their targets for the year. Building Control income is also performing in line with its target and there are additional payments due for the Housing survey works that were negotiated towards the end of the last financial year. Whilst this increase in income has been a significant contributor to the projected favourable variance, it should be borne in mind that this income is demand led and volatile and not necessarily sustainable for the long term.

Savings have also been achieved through the strict management of staffing and supplies and services ahead of the implementation of the Organisational Reengineering of Planning Services and the continuing Major Services Review.

Street Scene – Favourable variance £100,000

The budget that was set for this year included £200,000 of budget streamlining savings and these are being achieved. The new vehicles that have been introduced have also facilitated service improvements. Progress is being made on the deployment of recycling bins and work is progressing in line with timescales. The service area is expected to outturn with a £100,000 favourable budget variance, mostly as a result of non-staff savings including some vehicle hire costs.

Central Budget and Non Service Items

This heading covers a range of corporate budgets including savings targets, treasury management, and capital charges. Central savings targets for staff and other efficiency improvements are all held in this area. The actual savings that are made in relation to these items are contained within Services. Consequently savings made elsewhere will help to offset the adverse variances on these budget items.



AGENDA ITEM: 5(I)

CABINET:
18 March 2014

PLANNING COMMITTEE:
10 April 2014

Report of: Assistant Director Planning

Relevant Managing Director: Managing Director (Transformation)

Relevant Portfolio Holder: Councillor M Forshaw

Contact for further information: Mr S Benge (Extn. 5274)
(Email: stephen.benge@westlancs.gov.uk)

**SUBJECT: PROVISION FOR TRAVELLER SITES DEVELOPMENT PLAN
DOCUMENT: OPTIONS AND PREFERRED OPTIONS**

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To recommend the Provision for Traveller Sites Development Plan Document ('Traveller Sites DPD'): Options and Preferred Options, and its supporting documentation, for public consultation in April - May 2014.

2.0 RECOMMENDATIONS TO CABINET

2.1 That Cabinet have regard to the three documents provided in Appendices B-D in their decision on the recommendation at 2.2, which will be publicly available for comment as part of the consultation on the Traveller Sites DPD: Options and Preferred Options.

2.2 That the Provision for Traveller Sites DPD: Options and Preferred Options (Appendix A to this report) be approved for public consultation from 17 April to 30 May 2014, subject to any authorised minor amendments made by the Assistant Director Planning, following agreed comments from Planning Committee, as per recommendation 2.3 below.

2.3 That the Assistant Director Planning, be authorised, in consultation with the Portfolio Holder, to make any necessary minor amendments to the Provision for Traveller Sites DPD: Options and Preferred Options, in the light of agreed

comments from Planning Committee, before the document is published for consultation.

3.0 RECOMMENDATION TO PLANNING COMMITTEE

- 3.1 That the content of this report be considered and that agreed comments be referred to the Assistant Director Planning, in order that any necessary minor amendments can be made to the DPD and its accompanying documents, in consultation with the Portfolio Holder, before the start of the public consultation period.

4.0 BACKGROUND

The need for a Traveller site DPD

- 4.1 The West Lancashire Local Plan 2012-2027 was adopted by Council on 16 October 2013. Earlier versions of this Local Plan (i.e. Preferred Options, January 2012, and Publication, August 2012) contained a policy on Gypsies and Travellers and Travelling Showpeople (referred to hereafter as 'Travellers'). This policy, Policy RS4, was a criteria-based policy whose purpose was to direct Traveller development to the most appropriate places in the Borough, and to provide a means by which planning applications or enforcement cases relating to Traveller development could be judged.
- 4.2 During the Local Plan Examination in early 2013, the Local Plan Inspector advised that he could not find Policy RS4 sound, as it did not allocate specific deliverable sites to provide a five year supply of land to meet Traveller accommodation needs as required by national policy (as set out in the Department for Communities and Local Government's Planning Policy for Traveller Sites document, published March 2012). In order for the West Lancashire Local Plan as a whole to be found sound, the Inspector recommended that Policy RS4 be deleted in its entirety from the Local Plan, and that the Council commit to preparing a separate Development Plan Document (DPD) to allocate sufficient deliverable sites to meet Traveller accommodation needs over the Local Plan period.
- 4.3 The Council is acting upon the Local Plan Inspector's recommendation, and has set out a timetable in its Local Development Scheme for preparing a Provision for Traveller Sites DPD. The target milestones for the document's preparation are as follows:

Regulation 18 Scoping Consultation	September – October 2013
Preferred Options Consultation	March – April 2014
Publication	August - September 2014
Submission to Secretary of State	September 2014
Examination	September 2014 – February 2015
Adoption by WLBC	March 2015

- 4.4 The Provision for Traveller Sites DPD is to comprise the following elements:
- A statement of Traveller accommodation needs;
 - A criteria-based policy against which planning applications for Traveller sites can be assessed (these criteria would also be relied upon in enforcement and appeal cases);
 - Site-specific allocations for Gypsies and Travellers, and for Travelling Showpeople, both permanent and transit sites.
- 4.5 Until the Provision for Traveller Sites DPD is adopted, the saved Policy DE4 of the West Lancashire Replacement Local Plan 2006 remains extant. However, the weight to be attributed to WLRLP Policy DE4 in development management is likely to be low, as this policy is no longer consistent with national policy.

Traveller accommodation needs

- 4.6 The now-abandoned Policy RS4 of the West Lancashire Local Plan 2012-2027 relied upon a Gypsy and Traveller Accommodation Assessment (GTAA) undertaken in conjunction with the North West Regional Strategy. Based on this GTAA and locally-agreed targets that were considered to represent the Borough's Traveller accommodation needs, Policy RS4 sought to provide 21 permanent pitches for Gypsies and Travellers, 14 transit pitches and 7 permanent plots for Travelling Showpeople by 2027.
- 4.7 The Borough Council has recently participated in a more up-to-date GTAA with the five Merseyside local authorities. This GTAA has been carried out on the authorities' behalf by consultants, who were appointed in March 2013. The report is in draft form at present, with completion expected in spring 2014.
- 4.8 The draft Merseyside and West Lancashire GTAA concludes that the need for new Traveller accommodation in West Lancashire, additional to that which already has permission, is as follows:
- 14 pitches on permanent Gypsy and Traveller sites by 2018, rising to 20 pitches by 2028;
 - 4 transit pitches; and
 - One yard for Travelling Showpeople with at least one residential plot.
- 4.9 The general term "pitch" refers to an area of land which would accommodate a Traveller household. Government guidance advises that, in general, a pitch should have space for a touring and static caravan, as well as for parking and an ablutions block. Typically, therefore, one would expect two caravans per pitch.
- 4.10 Given the GTAA is currently in draft form, the above figures may be subject to minor variation when the final report is published. Any changes can be taken into account in the preparation of the Publication version of the DPD, which is expected to be produced later in 2014.

Work to date on Provision for Traveller Sites DPD

- 4.11 Work on the Provision for Traveller Sites DPD started in spring 2013, following the Local Plan Examination Hearings. One of the initial tasks has been to compile a list of sites for consideration as potential Traveller sites, using the following sources:
- Sites known to the Council on account of previous or current planning applications, appeals, and / or enforcement action;
 - Sites submitted to the Council during a 'Call for Sites' exercise undertaken during September 2013;
 - Sites submitted to the Council in conjunction with its ongoing Strategic Housing Land Availability Assessment, where the owner (or agent acting for the owner), in response to a letter sent from the Council in September 2013, has expressed a willingness for the site to be considered as a possible Traveller site;
 - Sites identified by, or brought to the attention of, Council officers on account of their potentially suitable location and / or size.
- 4.12 In order to assess the suitability, availability and achievability of the potential candidate sites, a list of site assessment criteria has been drawn up. These criteria have been prepared using the Department for Communities and Local Government's National Planning Policy Framework (March 2012), Planning Policy for Traveller Sites (PPTS, March 2012), and the Designing Gypsy and Traveller Sites Good Practice Guide (May 2008), as well as the criteria set out in the now-deleted Local Plan Policy RS4. The resulting site assessment criteria, whilst based upon national policy, have been tailored to local circumstances where appropriate, and have been categorised into sustainability, suitability, availability and achievability criteria.
- 4.13 The criteria for site assessment have two purposes. Firstly, they have been used to 'sift' the original list of potential candidate Traveller sites resulting from the Council's site assembly work as described in paragraph 4.11 above. Secondly, the criteria have formed the basis of a policy within the Provision for Traveller Sites DPD, against which planning applications for Traveller sites can be assessed, and which can be taken into consideration in appeals and enforcement cases.
- 4.14 The Town and Country Planning (Local Planning) (England) Regulations 2012 ('the Regulations') set out the process by which a DPD must be prepared. The first step in a DPD's preparation is covered by Regulation 18, under which the local planning authority must notify certain specified bodies (for example, the Highways Agency) that the DPD is being prepared, and invite representations from them about what the document should contain.
- 4.15 Accordingly, in September 2013, the Council wrote to the specified bodies, as per Regulation 18, as well as a number of other organisations who were considered to have a particular interest in the DPD. Twelve responses were received. The Consultation Report and Duty to Co-operate Statement appended to this report (Appendix D) summarises the responses made to the Council's letter, and the Council's proposed action in the light of the responses.

- 4.16 In preparing DPDs, the Council is bound by the 'Duty to Co-operate', set out in the Localism Act and the NPPF. It is intended that the Council will co-operate fully with neighbouring local authorities and other relevant organisations throughout the preparation of the Traveller Sites DPD. So far, at this early stage in the document's preparation, the Council has written to the 'prescribed bodies' (as listed in Regulation 4), setting out what it considers to be the cross-boundary issues relating to Travellers, and inviting comments on / additions to this list of issues. Once again, the Consultation Report and Duty to Co-operate Statement appended to this report (Appendix D) summarises the responses that the Council has received to its letter, and any other relevant dialogue that has taken place so far under the Duty to Co-operate.
- 4.17 The Provision for Traveller Sites DPD: Options and Preferred Options has been subject to an initial Sustainability Appraisal (SA) and Habitats Regulations Assessment (HRA). The SA has covered both the criteria-based policy for assessing sites, plus the sites considered as having potential for Traveller accommodation, as well as a number of reasonable alternatives. The SA and HRA reports are appended to this report (Appendices B and C).

5.0 CURRENT POSITION

- 5.1 A Provision for Traveller Sites DPD: Options and Preferred Options has been prepared, drawing on the work outlined in Section 4 above, and is appended to this report as Appendix A. Consistent with paragraph 4.4 above, the document comprises:
- A statement of Traveller accommodation needs;
 - A criteria-based policy against which planning applications for Traveller sites can be assessed (these criteria would also be relied upon in enforcement and appeal cases);
 - Proposed criteria for site selection;
 - A list of potential candidate Traveller sites resulting from the Council's site assembly process undertaken in autumn 2013;
 - An assessment of the potential candidate Traveller sites against the site selection criteria;
 - In the light of the site assessment, proposed site-specific allocations for Gypsies and Travellers and Travelling Showpeople, both permanent and transit sites; and
 - Alternative options for providing Traveller sites in West Lancashire.
- 5.2 The site assembly process has yielded 20 potential candidate Traveller sites across West Lancashire, the sites being located in Aughton, Banks, Bickerstaffe, Burscough, Mere Brow, Ormskirk, Scarisbrick and Skelmersdale. Of these 20 sites, 3 have been proposed as 'Preferred Options' to meet the identified need of 20 permanent pitches for Gypsies and Travellers, as follows:
1. Sugar Stubbs Lane, Banks; permanent Gypsy site, 3 pitches.

This is a site currently owned and occupied by Travellers, and has an extant permission for one mobile home, granted in 2003. There is a planning application for a certificate of lawfulness for five caravans on the site

currently pending a decision. If allocated for three pitches, this site would have an expected maximum of six caravans on site (assuming two caravans per pitch), one more caravan than the five currently on site. It is considered possible to accommodate 3 pitches on the site without any expansion of the site beyond its present boundaries. The site is reasonably well screened from its surroundings. Access to the primary road network involves a short journey of 115m along the unclassified Sugar Stubbs Lane. There are few residential properties in close proximity to the site, although the site is within easy reach of Banks village and bus stops on the A565. There are no records of any issues with, or complaints against, the resident travellers since they have occupied the site.

2. Pool Hey Caravan Park, Scarisbrick; permanent Gypsy site, 6 pitches.

This is an existing Traveller site that has been occupied since the mid-1990s. Data from aerial photographs and the twice-yearly count of Gypsy and Traveller caravans indicates that between four and eleven caravans have been situated on the site over the past 10 years. A temporary 'personal' permission for one park home on the site existed from 1999-2005; this has now lapsed. The occupants of the site have indicated that 6 pitches (12 caravans) could be satisfactorily accommodated on the site without any expansion of the site beyond its current boundaries. The site is well screened from the surrounding area, the occupants have forged ties with the nearby settled community, and there are no records of any issues with, or complaints against, the residents during the two decades they have occupied the site, other than the fact that they do not possess planning permission for the use of the site as a Traveller site.

3. White Moss Road South "B", Skelmersdale; permanent Gypsy site, 11 pitches.

Skelmersdale is an established area of Traveller accommodation needs. The site is in the ownership of Travellers. Permission for stables, a sand paddock and hardstanding area was granted in December 2013. The site has access to Junction 4 of the M58 along White Moss Road South, and is within easy reach of Skelmersdale and its facilities. However, it is physically separated from the town by the M58 motorway, meaning that the site should not dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community.

5.3 In terms of meeting the needs for transit pitches, the options are very limited, given the identified area of need for transit pitches (i.e. the M58 corridor), and the nature and distribution of the potential candidate sites. The preferred location is the White Moss Road South "B" site (i.e. the same site as 5.2(3) above); this would require transit and permanent pitches being located on the same piece of land.

5.4 Whilst the co-location of both permanent and transit pitches on the same site can lead to potential difficulties (for example the possibility of disputes between the two groups of site occupants), such a combination is not out of the question.

- 5.5 In terms of sites for Travelling Showpeople and their equipment, a need has been identified in the Burscough area, given links between Travelling Showpeople and the local community, such as children attending local schools. There is a longstanding authorised Travelling Showpeople site west of The Quays, possessing an extant permission for 10 Travelling Showpeople plots, 4 of them permanent and 6 seasonal. The inclusion of the site as a preferred site reflects the current status of the site. It does not thus represent a new or additional site allocation, neither does it contribute towards the GTAA-identified need figure for Travelling Showpeople accommodation.
- 5.6 To meet the GTAA-identified need of one site for Travelling Showpeople in the Burscough area, incorporating space for storage of equipment and at least one residential plot, the site assembly process described above yielded just two potential candidate sites, both adjacent to Burscough Industrial Estate:
- a) Land at Ringtail Road / Plantation Road;
 - b) Land west of Tollgate Road.
- 5.7 Following assessment of the above two sites, both sites have attributes that are conducive to the accommodation of Travelling Showpeople and their equipment. The Ringtail Road / Plantation Road site is well screened from its surroundings, and its owner submitted the site during the September 2013 Call for Sites exercise as a Travelling Showpeople site. The Tollgate Road site has direct access onto the “spine road” through the Employment Area and there are no residential properties in close proximity. Both sites are in an established area of Travelling Showpeople accommodation need, are of a suitable size to provide the necessary accommodation to meet Travelling Showpeople needs in West Lancashire, and are adjacent to the Burscough Employment Area, where the storage of lorry trailers would be a compatible use.
- 5.8 Overall, in planning policy terms the Tollgate Road site is considered the more suitable site. However, it has not been possible to make contact with the owner of this site (the land is unregistered), and thus there is, at present, uncertainty over its deliverability. In contrast, the Ringtail Road / Plantation Road site owner has expressed willingness for the site to be considered as a Travelling Showpeople site. As a result, it is proposed that neither site be treated as a ‘preferred’ site at present, but that stakeholder and public comments be invited on both sites.
- 5.9 The locations of the sites referred to above are shown on maps contained within the Provision for Traveller Sites Development Plan Document: Options and Preferred Options (Appendix A to this report).
- 5.10 Regulation 18 of the 2012 Regulations contains a requirement that the local planning authority carry out a formal public consultation exercise on a draft DPD and the Council’s Statement of Community Involvement states that the Council will undertake a six week public consultation exercise at Preferred Options stage when preparing DPDs. Therefore, in order to satisfy these requirements, and to ascertain the public’s views on the important matter of Traveller sites provision, it is proposed that the Provision for Traveller Sites DPD: Options and Preferred Options be consulted upon publicly for six weeks.

6.0 NEXT STEPS

- 6.1 Assuming that Cabinet approve the DPD for consultation, the consultation will take place for six weeks, from Thursday 17 April to Friday 30 May 2014.
- 6.2 Following the consultation period, all comments submitted to the Council will be processed, responses will be made where necessary, and a Publication version of the DPD will be prepared. It is anticipated that the Publication version of the DPD will be brought to Cabinet and Council later in 2014, with authorisation sought to consult upon the Provision for Traveller Sites DPD: Publication Version, and thereafter to submit the DPD to the Secretary of State for examination.

7.0 SUSTAINABILITY IMPLICATIONS / COMMUNITY STRATEGY

- 7.1 Sustainability criteria have formed a significant part of the process whereby potential Traveller sites have been assessed. Sustainability Appraisal (SA) and Habitat Regulations Assessment (HRA) have been undertaken on the proposed site assessment policy and set of potential Traveller sites to assess their possible impacts. The SA and HRA did not identify any significantly increased impacts on sustainability or international sites of habitat importance. The SA and HRA reports are appended to this document (Appendices B and C).
- 7.2 Providing suitable sites for the travelling community will, directly or indirectly, help to meet two of the key objectives of the Sustainable Community Strategy, namely "Improved health for all" (to improve health outcomes, promote social wellbeing for communities and improve health for everyone) and "Affordable housing" (to provide more appropriate ... housing to meet the needs of local people). It is important that the provision of Traveller sites be undertaken in such a way as to minimise the fear of crime amongst local people.

8.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 8.1 The preparation of the Provision for Traveller Sites DPD (and consultation on it) can be resourced through the Strategic Planning & Implementation Team's revenue budgets. However, in the longer term, the examination of the DPD will incur more significant costs which it is proposed will be resourced through a Budget Growth Bid for 2014/15.

9.0 RISK ASSESSMENT

- 9.1 The authority is required by national planning policy to ensure that enough sites in West Lancashire are made available to meet the objectively assessed needs of the travelling community. If the Council does not comply with this obligation, it will be more vulnerable to the establishment of illegal encampments and sites in the Borough. The lack of allocated sites weakens the ability of the Council to

take quick and effective action to secure the removal of such encampments and sites. It also weakens the ability of the Council to defend refusals of planning permission for Traveller sites at appeal if the Council cannot demonstrate a five-year supply of Traveller sites.

- 9.2 Failure to address this matter could create adverse comments in relation to the Council's Equality and Diversity work and could lead to future adverse external assessments for the Council.
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Background Documents

- Planning Policy for Traveller Sites (CLG, March 2012)
- Designing Gypsy and Traveller Sites – Good Practice Guide (May 2008)

Equality Impact Assessment

There is a direct impact on members of the public, and on the Travelling community. Therefore an Equality Impact Assessment is required. A formal equality impact assessment is attached as an Appendix to this report, the results of which have been taken into account in the Recommendations contained within this report. An Equality Impact Assessment of the Provision for Traveller Sites DPD itself is required under legislation and such an assessment will be carried out as the preparation of the DPD progresses.

Appendices

- A. Provision for Travellers Sites Development Plan Document: Options and Preferred Options
- B. Sustainability Appraisal Report
- C. Habitats Regulations Assessment
- D. Consultation Report and Duty to Co-operate Statement
- E. Equality Impact Assessment
- F. Minute of Cabinet 18 March 2014 (Planning Committee only)

Provision for Traveller Sites Development Plan Document Options and Preferred Options

March 2014

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West Lancashire Borough Council**



Draft

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Preface

This Provision for Traveller Sites (Options and Preferred Options) Development Plan Document is the first draft of what will eventually become a site allocations document for Gypsy and Traveller and Travelling Showpeople sites in West Lancashire. It explains why and how the Council is identifying possible sites to accommodate the travelling community, the criteria used to assess potential sites, and sets out the Council's initial views on which are the preferred sites to allocate to accommodate the needs of Travellers.

The Council is seeking people's views on the following matters:

- The proposed policy to assess planning applications for Traveller accommodation;
- The proposed criteria to assess potential sites for allocation as Traveller sites;
- The list of potential Traveller sites in West Lancashire;
- The Council's assessment of potential sites;
- The Council's preferred sites for allocation;
- Alternative options to meet Traveller accommodation needs.

Chapter 7 of this document describes in further detail how comments can be made on this document.

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1 Introduction

The Need for a Traveller Sites DPD

1.1 The West Lancashire Local Plan 2012-2027 was adopted by West Lancashire Borough Council on 16 October 2013. Earlier versions of this Local Plan (i.e. Preferred Options, January 2012, and Publication, August 2012) contained a policy on Gypsies and Travellers and Travelling Showpeople (referred to hereafter in the general sense as 'Travellers'). This policy, Policy RS4, was a criteria-based policy whose purpose was to direct Traveller development to the most appropriate places in the Borough, and to provide a means by which planning applications or enforcement cases relating to Traveller development could be judged.

1.2 At the Local Plan Examination in early 2013, the Local Plan Inspector advised that he could not find Policy RS4 sound, as it did not meet the national policy requirement, as set out in the government's Planning Policy for Traveller Sites (PPTS, published March 2012), to allocate specific deliverable sites to provide a five year supply of land to meet Traveller accommodation needs. In order that the West Lancashire Local Plan as a whole could be found sound, the Inspector recommended that Policy RS4 be deleted in its entirety from the Local Plan, and that the Council commit to preparing a separate Development Plan Document (DPD) to allocate sufficient deliverable sites to meet Traveller accommodation needs over the Local Plan period.

1.3 West Lancashire Borough Council ('the Council') is acting upon the Local Plan Inspector's recommendation by preparing this Provision for Traveller Sites DPD. The Council's Local Development Scheme sets out a timetable for preparing the Provision for Traveller Sites DPD. The target milestones for the document's preparation are as follows:

Preferred Options Consultation	Early 2014
Publication	July 2014
Submission to Secretary of State	October 2014
Examination	October 2014 – February 2015
Adoption by WLBC	March 2015

1.4 This document comprises the 'Options and Preferred Options' version of the West Lancashire Provision for Traveller Sites DPD. It contains the following elements:

- A statement of Traveller accommodation needs;
- A proposed criteria-based policy against which planning applications for Traveller sites can be assessed (these criteria would also be applicable in enforcement and appeal cases);
- Proposed criteria for assessment of potential Traveller site allocations;
- Options and preferred options for site-specific allocations for Gypsies and Travellers, and for Travelling Showpeople, including both permanent and transit sites.

1.5 Until the Provision for Traveller Sites DPD is adopted, the saved Policy DE4 of the West Lancashire Replacement Local Plan 2006 (WLRLP) remains extant. However, the weight to be attributed to WLRLP Policy DE4 in the development management process is unlikely to be significant, as Policy DE4 is generally inconsistent with current national policy on Traveller site provision.

Terminology

1.6 This Provision for Traveller Sites (Options and Preferred Options) DPD uses various terms to describe the travelling community, as set out below. The term “Gypsies and Travellers” is defined in the government’s PPTS document as follows:

Persons of nomadic habit of life whatever their race or origin, including such persons who on grounds only of their own or their family’s or dependants’ educational or health needs or old age have ceased to travel temporarily or permanently, but excluding members of an organised group of Travelling Showpeople or circus people travelling together as such.

1.7 Similarly, PPTS defines Travelling Showpeople as:

Members of a group organised for the purposes of holding fairs, circuses or shows (whether or not travelling together as such). This includes such persons who on the grounds of their own or their family’s or dependants’ more localised pattern of trading, educational or health needs or old age have ceased to travel temporarily or permanently, but excludes Gypsies and Travellers as defined above.

1.8 For the purposes of this DPD, the general term “Travellers” refers to all groups of Gypsies and Travellers, and Travelling Showpeople.

1.9 The term “pitch” is used to denote a pitch on a Gypsy and Traveller site, whilst “plot” means a pitch on a Travelling Showpeople site (also often called a “yard”). This terminology differentiates between residential pitches for Gypsies and Travellers and mixed-use plots for Travelling Showpeople. Gypsy and Traveller pitches tend to be of a suitable size to accommodate both a static and a touring caravan, plus any associated vehicle(s), and a small amenity building. Travelling Showpeople plots tend to be larger, requiring extra space to allow for the storage of fairground equipment.

Site Assembly Process

1.10 In preparing this Traveller sites DPD, the Borough Council has endeavoured to compile as comprehensive a list of potential ‘candidate’ Traveller sites as possible, from which to select preferred sites. The starting point was those sites already known to the Council’s Planning Service by virtue of their Traveller-related planning history, namely sites which have been subject to planning applications, planning appeals, and / or enforcement action over the past five years or longer. This category of site yielded nine sites, located in Banks, Scarisbrick and Skelmersdale.

1.11 The Council undertook a “Call for Traveller Sites” exercise in September 2013, inviting members of the public, the travelling community, agents with links to the travelling community, and any other interested individuals or organisations to send the Council details of any sites they considered might be suitable for putting forward as potential Traveller sites. The Council received seven site suggestions, three of these sites ‘duplicating’ those in the first category of sites, i.e. already known to the Council.

1.12 In addition, the Council wrote to all known owners, and / or agents representing owners, of sites in the Council’s Strategic Housing Land Availability Assessment

(SHLAA)¹, asking whether the owner would be willing for the sites in question to be considered as possible Traveller sites. The Council received responses relating to 52 different sites. Of these 52 replies, the owners of just four sites expressed a willingness for the sites to be considered as possible Traveller sites, whilst the owners or agents for the other 48 sites did not want the sites to be considered as potential Traveller sites. No responses were received for the other SHLAA sites.

1.13 The Council received the draft findings of the Merseyside and West Lancashire Gypsy and Traveller Accommodation Assessment (GTAA) in November 2013, which gave an indication of the general locations in West Lancashire where Traveller accommodation needs exist. Following initial assessment of potential Traveller sites from the sources referred to in paragraphs 1.10 – 1.12 above, and in the light of the GTAA findings, the Council also undertook area-based site searches to identify four further potential sites in areas of known Traveller accommodation need, bringing the total number of candidate Traveller sites to 20. The GTAA and the area-based site search approach are described in more detail in Chapters 2 and 5 respectively.

Legal Compliance in the Preparation of the Provision for Traveller Sites DPD

1.14 In order that the preparation of this Traveller sites DPD be legally compliant, regard must be had to national planning policy, the Town and Country Planning (Local Planning) (England) Regulations 2012, the West Lancashire Sustainable Community Strategy, and the Council's Local Development Scheme and Statement of Community Involvement. These are addressed in turn below.

National Planning Policy

1.15 National planning policy is set out in the government's National Planning Policy Framework (NPPF), published March 2012. Sustainable development is to be seen as a 'golden thread' running through the NPPF, with paragraph 14 setting out a presumption in favour of sustainable development. National policy with specific regard to provision for Traveller accommodation is set out in the document Planning Policy for Traveller Sites (PPTS), published in March 2012 alongside the NPPF.

1.16 The preparation of local plans is covered by Policies B-G (paragraphs 7-19) of PPTS. The key requirements of these policies, in relation to the circumstances of West Lancashire Borough Council, are as follows:

- (i) Local planning authorities (LPAs) should work collaboratively with neighbouring LPAs to set pitch and plot targets for Travellers which address the likely permanent and transit site accommodation needs of Travellers in their area.
- (ii) LPAs should identify and update annually, a supply of deliverable² sites sufficient to provide five years' worth of sites against their own set targets, and a supply of

¹ The Strategic Housing Land Availability Assessment (SHLAA) is essentially a compilation of sites that the Council and / or the site owners consider might have potential for residential development at some point in the future. The sites are grouped according to their anticipated timescale for delivery. Some SHLAA sites have been identified by the Council; others have been suggested by, or on behalf of, their owners. Not all SHLAA sites will necessarily be judged suitable for housing.

² PPTS paragraph 9 footnote 7 defines "deliverable" as available now, offering a suitable location for development now, and achievable with a realistic prospect that development will be delivered on the site within five years, and that development is viable.

- specific, developable³ sites or broad locations for growth, for six to ten years time, and, if possible, for eleven to fifteen years time.
- (iii) LPAs should relate the number of pitches or plots to the circumstances of the specific size of the Traveller site in question and to the size and density of the surrounding population, and should protect local amenity and environment.
 - (iv) Criteria should be used to guide land allocations, and criteria-based policies prepared to provide a basis for decisions on Traveller site planning applications.
 - (v) PPTS paragraph 11 requires that LPAs ensure their policies:
 - (a) promote peaceful and integrated co-existence between the site and the local community;
 - (b) promote, in collaboration with commissioners of health services, access to appropriate health services;
 - (c) ensure that children can attend school on a regular basis;
 - (d) provide a settled base that reduces the need for long-distance travelling and possible environmental damage caused by unauthorised encampment;
 - (e) provide for proper consideration of the effect of local environmental quality on site occupants or others as a result of new development;
 - (f) avoid placing undue pressure on local infrastructure and services;
 - (g) do not locate sites in areas at high risk of flooding;
 - (h) reflect the extent to which traditional lifestyles (whereby some Travellers live and work in the same area) can contribute to sustainability.

1.17 With regard to points (i) – (v) above, the Council considers this document complies with national policy in the following respects:

- (i) The Borough Council is working collaboratively with neighbouring Merseyside Councils in a joint Gypsy and Traveller Accommodation Assessment (see Chapter 2 below). The Council has also met with neighbours in Wigan and Chorley with regard to cross-boundary issues, and is participating in a general Lancashire Gypsy Group. Early consultation undertaken under the ‘Duty to Co-operate’ (see section below) has indicated a general consensus that Traveller accommodation needs should be met in the area in which the needs arise, and thus West Lancashire’s targets can be based upon need figures for this Borough;
- (ii) It is considered that the proposed ‘Preferred’ sites set out in Chapter 6 of this document are deliverable or developable, and meet Traveller accommodation needs to 2028;
- (iii) The proposed ‘Preferred’ sites’ capacities have been estimated, taking into account site size, the local population, amenity and environment;
- (iv) Criteria for site allocations and planning applications are set out in Chapters 4 and 3 (respectively) of this document.
- (v) The criteria used in this DPD reflect the matters set out in PPTS paragraph 11.

1.18 Further to PPTS, a Government Ministerial Statement was issued on 3 July 2013, addressing the specific issue of how local planning authorities are to consider proposals for Traveller sites in the Green Belt. This Ministerial Statement reiterates that both temporary and permanent traveller sites are inappropriate development in the Green Belt and that inappropriate development in the Green Belt should not be approved except in very special circumstances. The Statement advises that the single issue of unmet demand, whether for Traveller sites or for conventional housing,

³ PPTS paragraph 9 footnote 8 defines “developable” as in a suitable location for traveller site development and having a reasonable prospect that the site is available and could viably be developed at the point envisaged.

is unlikely to outweigh harm to the Green Belt and other harm to constitute the 'very special circumstances' justifying inappropriate development in the Green Belt.

1.19 One further national document of relevance is the Designing Traveller Sites: Good Practice Guide, published by the government in May 2008. This document sets out how best to design Traveller sites, providing advice on site size, layout, and location. The Good Practice Guide has been taken into account in preparing the site assessment criteria in both the proposed Traveller sites policy (Chapter 3) and in the site selection process (Chapters 4 and 5).

Sustainable Community Strategy

1.20 The West Lancashire Local Strategic Partnership prepared the West Lancashire Sustainable Community Strategy (SCS) in 2007. Whilst Travellers are not referred to in the SCS, elements of the document's vision, objectives, and cross-cutting themes are considered to have relevance to the subject matter of this DPD.

1.21 The vision of the SCS is to 'improve the quality of life for all' and is to be achieved by the Local Strategic Partnership working with other bodies to be, amongst other things, 'a place where everyone is valued and has the opportunity to contribute'.

1.22 Of the nine key objectives of the SCS, the following three are relevant:

- To improve health outcomes, promote social wellbeing for communities and reduce health inequalities for everyone;
- To provide more appropriate and affordable housing to meet the needs of local people;
- To provide opportunities for young and older people to thrive.

1.23 Of the eight cross-cutting themes, the most relevant are:

- Reducing deprivation, with the aim to narrow the gap between the most and least disadvantaged people and communities;
- Social inclusion, equality and diversity, with the aim to improve community cohesion, including for people of all nationalities and ethnicities.

1.24 The Council considers that the Provision for Traveller sites DPD is consistent with, and may, to an extent, help to achieve the above vision and objectives of the SCS. Taking into account the fact that the Council is required by law to provide sites to meet Traveller needs, the DPD does not contravene the SCS.

Planning Regulations

1.25 The Town and Country Planning (Local Planning) (England) Regulations 2012 (referred to hereafter as 'the 2012 Planning Regulations') set out the process that must be followed when preparing a local plan⁴. The first statutory stage for preparing a document is covered by Regulation 18, which requires that the LPA notify certain specified bodies of the subject of the local plan and invite them to make representations about what a local plan with that subject ought to contain.

⁴ The definition of 'local plan', as set out in the 2012 Regulations (nos. 5 and 6), includes any document prepared by the local planning authority which allocates sites for a particular type of use and / or contains development management and site allocation policies intended to guide the determination of planning applications. The Provision for Traveller Sites DPD therefore is a 'local plan'.

1.26 The Council considers that it is in compliance with Regulation 18 in that it duly wrote to the bodies specified by the Regulation, as well as number of other bodies, inviting representations on the Provision for Traveller Sites DPD's content, and has taken into account the representations received in this Provision for Traveller Sites (Options and Preferred Options) DPD.

1.27 The number and nature of responses received to the above consultation, and the Council's responses, are set out in the separate "Consultation Statement" that accompanies this draft DPD. Please also refer to the Duty to Co-operate section below.

Statement of Community Involvement

1.28 The Statement of Community Involvement (SCI) is a document that sets out how the LPA intends to engage the public and other stakeholders when preparing its Local Plan and other local development documents. This includes details of the types of consultation methods the Council intends to use at the different preparation stages of different types of planning documents.

1.29 The SCI was first required as part of the 'Local Development Framework' system introduced under the 2004 Planning and Compulsory Purchase Act. West Lancashire Borough Council started preparing its SCI in 2006, the document eventually being adopted in July 2007, and updated with an Addendum in January 2009, reflecting amendments made to the government's Planning Regulations in 2008. The Council proposes to update the SCI in the near future. However, until this update is undertaken, the Council will continue to have regard to the content of the 2007 SCI and its Addendum.

1.30 In terms of preparing a development plan document such as this Traveller sites DPD, the Council's SCI refers to an "Options" stage and a "Preferred Options" stage. However, given the WLLP Inspector's requirement that the Traveller Sites DPD be prepared as a matter of urgency, and, if at all possible, more quickly than set out in the LDS⁵, it is considered expedient to combine the Options and Preferred Options stages of this DPD's preparation into a single stage, whereby options for providing Traveller sites are set out, an indication of the Council's preferred options is given, and people are invited to comment on both the options and preferred options, and to submit their own options and / or preferred options. This matter is set out more fully in Chapter 7 of this document.

⁵ See the Inspector's Report into the WLLP, paragraphs 192-193, p38, available on the Council's website at: http://www.westlancs.gov.uk/planning/planning_policy/the_local_plan/the_local_plan_2012-2027/local_plan_preparation_stages/stage_4_-_submission_and_exami.aspx

Paragraphs 192 and 193 state:

192. ...The timeline provided by the Council indicates that consultation on preferred options would take place early in 2014 and the *Provision for Traveller Sites* DPD would be published for consultation by July 2014. This is consistent with the information now contained in their revised *Local Development Scheme* [LDS].

193. It is, of course, very important that the Council adheres to – and, if at all possible, improves upon – this timescale in order to bring its policy on traveller sites into line with national guidance without delay.

Duty to Co-Operate

1.31 Despite the abolition of the regional tier of planning, the need for strategic planning remains, in particular the need to ensure coherent planning beyond local authority boundaries. To this end, the Localism Act 2011 has introduced the Duty to Co-operate which:

- requires local authorities and public bodies to engage constructively, actively and on an ongoing basis in relation to planning for sustainable development;
- requires local authorities to consider whether to enter into agreements on joint approaches or to prepare joint Local Plans; and
- applies to planning for strategic matters in relation to the preparation of local plans, and other activities that prepare the way for these activities.

1.32 The Localism Act and the NPPF require LPAs to fulfil the Duty to Co-operate on planning issues, including provision for Travellers, in order to ensure that their approaches are consistent, and that they address cross-border issues with neighbouring authorities. The 2012 Planning Regulations prescribe which bodies, as a minimum, should be contacted under the Duty to Co-operate.

1.33 West Lancashire Borough Council intends to fulfil the Duty to Co-operate by working with neighbouring local authorities and other relevant bodies throughout the preparation of this Traveller sites DPD. To this end, the Council wrote to all the 'prescribed bodies', as well as to a range of other organisations, in November 2013, setting out what it considered were the main cross-boundary issues with regard to the provision of Traveller sites in West Lancashire, and inviting comments on these issues.

1.34 West Lancashire Borough Council's understanding of cross-boundary issues at present is as follows:

- There is a need for the Council to co-operate with Merseyside authorities on the issue of transit site provision (transit sites are intended to meet the short term needs of Travellers who are passing through local authority areas on their way to other destinations or choose to occasionally visit the area for short periods), as Travellers who require such sites are almost certain to be moving between different boroughs.
- The Council is unaware of any significant cross-boundary issues between West Lancashire and Wigan / Central Lancashire in terms of transit site provision.
- If each LPA were to meet its own need for permanent Traveller sites (which may be used for Travellers to base themselves throughout the majority of the year, or for Travelling Showpeople to live and store their equipment outside their touring season), there should be no cross-boundary issues in terms of a need for sites. As far as this Council is aware, neighbouring authorities are intending to fully meet their needs for permanent Traveller sites within their own boundaries.
- Depending upon the location of any proposed Traveller site allocations, it may be the case that occupants of sites may seek to make use of facilities and services (education, health, etc.) in an adjacent Borough(s). Neighbouring authorities are not yet at the stage where sites have been formally proposed for allocation. Similarly, the locations of the sites in West Lancashire proposed for allocation as Traveller sites are not yet confirmed. Therefore, the likelihood of cross-boundary issues arising from specific proposed site allocations is not yet known.

- The government's Planning Policy for Traveller Sites document (Section 9(c)) requires that local planning authorities consider production of joint development plans that set targets on a cross-authority basis. Given the differing timescales for the different authorities surrounding West Lancashire, and the West Lancashire Local Plan Inspector's recommendation that the Council have this Traveller Sites DPD adopted as soon as possible, it is the Council's view that production of a joint development plan would not be a realistic prospect.

1.35 The Council received 18 written responses to its initial 'Duty to Co-operate letter', all of them either concurring with the Council's understanding of cross-boundary issues as set out above, or else having no specific comments to make at this stage of preparation of the Traveller sites DPD.

1.36 As set out in Chapter 2 below, the Council is working collaboratively with the five Merseyside authorities (including Sefton, Knowsley and St Helens, all of whom directly border West Lancashire) in a joint Gypsy and Traveller Accommodation Assessment (GTAA).

1.37 Chorley and South Ribble Borough Councils are also participating in a GTAA and have agreed that if any need for Traveller sites is demonstrated in their areas, they will fully meet such needs within their boundaries. Both these Councils have examination hearings early in 2014, dealing specifically with the issue of provision of Traveller sites.

1.38 Wigan MBC are participating in a Greater Manchester GTAA, which is currently at an early stage. Once again, it is expected that any Traveller accommodation needs in the Wigan area will be met within Wigan MBC boundaries.

Sustainability Appraisal

1.39 A Sustainability Appraisal (SA) of the content of this draft DPD has been undertaken by Council officers, and scrutinised by consultants URS. URS have also carried out a Habitats Regulations Assessment of the content of this document. The SA / HRA process will continue throughout the preparation of this DPD as it progresses through its various stages.

1.40 The SA concludes that the proposed Policy GT1: Assessment of Proposals for Gypsy and Traveller and Travelling Showpeople Sites (see Chapter 3 of this DPD) is likely to make a greater positive contribution towards the goal of achieving sustainable development, compared with the alternative approaches of having a less stringent policy in place, or no policy at all.

1.41 The SA further concludes that the allocation and occupation of the preferred sites would make a greater positive contribution towards the goal of achieving sustainable development, compared with the alternative approaches of allocating fewer sites, allocating additional sites, or allocating a different set of sites.

2. Traveller Accommodation Needs

Assessing Traveller Accommodation Needs

2.1 This chapter sets out the Council's current understanding of the need for Traveller accommodation, and how this has influenced the process whereby potential Traveller sites have been sought.

2.2 Since 2006, West Lancashire Borough has participated in three processes that have resulted in the derivation of Traveller accommodation needs figures for the Borough. These are a 2006-based Gypsy and Traveller Accommodation Assessment (GTAA), abortive work on the North West Regional Spatial Strategy Partial Review 2008-2010, and the Merseyside and West Lancashire GTAA 2013-14.

North West Regional GTAA 2006

2.3 In 2006, an assessment of Gypsy and Traveller accommodation needs was commissioned – *The North West Regional Gypsy and Traveller Accommodation and Related Services Assessment*. This report was undertaken by a team of academic researchers and consultants based in Salford, with research support from members of the travelling community.

2.4 The assessment identified that for the County of Lancashire there was a requirement for an additional 205-231 permanent Gypsy and Traveller pitches over the period 2006-2016 plus 7 plots for Travelling Showpeople. At the district level, the assessment calculated that there was a need for 17 permanent Gypsy and Traveller pitches and 3 plots for Travelling Showpeople across West Lancashire Borough over 2006-2016. There was also a need identified for transit pitches within the sub region, but this need figure was not split down by local authority.

North West RSS Partial Review

2.5 In January 2009, 4 North West (4NW), the former regional planning body, started a period of stakeholder engagement on an interim draft policy on the scale and distribution of Gypsy and Traveller pitches and Travelling Showpeople plots.

2.6 The proposed requirements for West Lancashire over 2007-2016 were 20 permanent pitches for Gypsies and Travellers and 5 transit pitches. These figures differ to those set out in the 2006 GTAA owing to an attempt to address the issue of 'hidden' overcrowding, which had been raised by the Gypsy and Traveller community during consultation, and a broadening of the geographical distribution of the pitch numbers, in order that greater choice may be available for Gypsies and Travellers in the future. (This contrasted with the GTAA approach, which tends to look at need as it arises, based upon "snapshot" counts of Gypsy caravans.)

2.7 The required number of Travelling Showpeople pitches to 2016 was raised from 3 to 5, based on more up-to-date information provided by the Lancashire and North Wales section of the Showman's Guild based upon survey work conducted in June 2007.

2.8 As part of the consultation process, 4NW sought support from the individual local authorities regarding pitch numbers. West Lancashire Borough Council suggested as an alternative a revised figure of 14 permanent pitches (based upon the number of unauthorised pitches based within the Borough at that time) and 10 transit pitches (in order to make it easier to direct Gypsies and Travellers to a transit site), whilst supporting the figure of 5 pitches for Travelling Showpeople.

2.9 Although it is very difficult to estimate the future level of demand for pitches and plots, household growth rates of 3% a year were suggested as appropriate, based on advice contained in the 2003 government document *Local Authority Gypsy / Traveller Sites in England*.

2.10 Following the Council's comments a submitted draft was published, setting out the following requirements for West Lancashire:

- 15 pitches on permanent Gypsy and Traveller Sites
- 10 transit pitches
- 5 Travelling Showpeople plots.
- An annual increase of 3% in the level of overall residential pitch provision.

West Lancashire Borough Council supported these figures, and they formed the basis of the now-abandoned Local Plan Policy RS4.

2.11 Work on the RSS Partial Review was halted in 2010 following the Secretary of State's announcement of his intention to abolish the regional tier of planning. The RSS was finally revoked early in 2013, and the RSS and the RSS Partial Review no longer have any legal status.

Merseyside and West Lancashire GTAA 2013-2014

2.12 West Lancashire Borough Council has recently participated in a more up-to-date GTAA with the five Merseyside local authorities. This GTAA has been carried out on the authorities' behalf by the consultants Arc⁴, who were appointed in March 2013. At the time of writing this document, the GTAA report is in draft form, with completion expected in early 2014. Given the need to progress with this Traveller sites DPD in accordance with the timescale submitted to the Local Plan Inspector and contained in the Council's Local Development Scheme, it has not been possible to await the publication of the final version of the GTAA before proceeding with this Options and Preferred Options paper.

2.13 The draft Merseyside and West Lancashire GTAA concludes that the need for new Traveller accommodation in West Lancashire, additional to that which already has permission, is as follows:

- 14 pitches on permanent Gypsy & Traveller sites by 2018, rising to 20 by 2028;
- 4 transit pitches;
- One site for Travelling Showpeople with a minimum of one residential plot.

2.13 The needs figures for Traveller accommodation set out in paragraphs 2.4, 2.10 and 2.13 above show a broad rolling consistency in terms of short-term, or "five year" need for Traveller accommodation in West Lancashire. This Traveller Sites DPD uses the requirements set out in the (currently draft) Merseyside and West Lancashire GTAA 2013-14, given its up-to-date status and the fact that it covers the DPD period.

3. Traveller Sites Policy

3.1 This draft Provision for Traveller Sites DPD sets out options and preferred options for the allocation of a number of specific sites (see Chapter 6 below). Policy GT1 provides a set of criteria against which planning applications for Traveller sites, either on allocated sites, or elsewhere, should be assessed. The policy will also be applicable in enforcement and planning appeal cases.

Policy GT1

Assessment of Proposals for Gypsy and Traveller and Travelling Showpeople Sites

Broad Locations

Proposals for permanent or transit Traveller sites or pitches should be located in areas where need exists, as demonstrated by robust evidence.

Site-Specific Criteria

In order to ensure that sites are fit for purpose and will provide adequate residential amenity, both to members of the travelling community and to members of the settled community, proposed sites for Travellers should meet the following criteria:

- (i) The site, on account of its scale and / or location, would not dominate the nearest settled community in such a way that the prospect of peaceful and integrated co-existence between the site and the local settled community would be undermined;
- (ii) The use of this site as a Traveller site would not place undue pressure on local infrastructure, services and roads;
- (iii) The site is within 1 kilometre (10 minutes walk) of a bus route or other public transport facility, and / or it is possible to access from the site by means other than private motor vehicle:
 - an appropriate health facility
 - education facilities, in particular a primary school
 - employment opportunities
 - shops
 - other necessary services;
- (iv) The site is sufficiently far from any refuse site, industrial process, electricity pylons, other hazardous place, or any other process, land use or environmental issue (e.g. flyover, motorway), for there to be no unacceptable impact on residents of the site;
- (v) The site is not subject to any contaminated land issues;
- (vi) The site is not subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development;
- (vii) The site is not within, adjacent to, or close to (such that it would adversely affect) any area of land subject to an historic environment, historic landscape, or nature conservation designation;
- (viii) It is possible to achieve visual and acoustic privacy on the site without any unacceptable visual impact on the site's surroundings;
- (ix) The site is accessible by a public highway of an appropriate standard;

- (x) Either the site has mains water, drainage and electricity, or else these services could readily be provided and satisfactory drainage achieved;
- (xi) The site is not within the Green Belt;
- (xii) The site is not within an area at risk of flooding;
- (xiii) The site is stable and is not sloping to any great extent.
- (xiv) The site can accommodate between 3 and 15 pitches.

In the case of transit sites, these should be accessible to the M58, or to the strategic highway network.

Justification

Broad Locations

3.2 Policy GT1 is intended to direct Traveller development to areas where there is a need for such accommodation, as demonstrated by robust evidence. As a first recourse, the Council will rely on the findings of the most up-to-date Gypsy and Traveller Accommodation Assessment (GTAA) covering West Lancashire⁶. Any planning application that departs from the findings of the most up-to-date GTAA will require to be backed up by robust evidence justifying this departure, either an unequivocal demonstration of need in a different area, or a clear demonstration that no sites are realistically available within the GTAA-identified areas of Traveller need.

3.3 In the light of the findings of the 2014 Merseyside and West Lancashire GTAA⁷:

- Permanent sites should be located in, or as close as reasonably possible to the settlements of Skelmersdale, Scarisbrick or Banks;
- Transit sites should be located along the M58 corridor;
- Land for Travelling Showpeople should be located within the Burscough area.

3.4 For the purposes of this policy, the M58 corridor is defined as land within 2.4km (equivalent to three minutes drive time at 30mph) of any M58 junction via a classified road (i.e. A or B road).

Criteria

3.5 The criteria in Policy GT1 above are based on national policy, as set out in the government's National Planning Policy Framework (NPPF; March 2012), and Planning Policy for Traveller Sites (PPTS; March 2012)⁸ documents, and on the advice contained in the government's Designing Gypsy and Traveller Sites Good Practice Guide (May 2008), tailored to the individual circumstances of West Lancashire.

3.6 Policy GT1 is intended to ensure that if a site is granted permission for Traveller development, its development maintains a suitable quality of life, both for residents of the site in question, and for those living or working in the vicinity of the

⁶ The most up-to-date GTAA covering West Lancashire is the Merseyside and West Lancashire GTAA 2014 (currently at final draft stage, and thus in theory could be subject to minor amendments; it is expected to be finalised by the time of the Options / Preferred Options consultation period). It is expected that GTAAs will be updated approximately every five years.

⁷ At the time of writing this policy, the GTAA is currently in draft form, and thus may be subject to change. Any necessary changes relating to need will be made in subsequent versions of Policy GT1 as the preparation of this DPD progresses.

⁸ PPTS requires *inter alia* that a criteria based policy should be set out within Local Plans.

site. These sites should have reasonable access to facilities and services, and should not cause an adverse impact on neighbouring residents or land uses.

3.7 The criteria set out in Policy GT1 are similar to the criteria used in the assessment of potential Traveller sites as set out in Chapter 4 of this DPD. Chapter 4 provides more specific detail as to the source of each site assessment criterion, and much of the material in that chapter is applicable to Policy GT1.

3.8 Criteria (i), (ii), (vi), (vii) and (viii) seek to ensure that Traveller sites integrate as far as is reasonably possible with the local settled community, and with the surrounding natural and built environment.

3.9 In terms of criterion (iii), whilst it is recognised that Travellers, by definition, are most likely to have ready access to motor vehicles, it is preferable, in terms of sustainable development, that Travellers also have the opportunity to access local services by sustainable modes of transport, such as walking, cycling, and public transport.

3.10 Criteria (iv), (v), (vi), (viii), (ix), (xii) and (xiii) are intended to protect the occupants of sites from unacceptable adverse living conditions, and to protect those living near to sites from possible adverse impacts of Traveller site development. These criteria do not necessarily rule out development if a site is subject to the particular issues specified in the criteria, especially if existing residential development or other authorised Traveller development is located equally close to any such uses, or is subject to similar topographical constraints. Furthermore, there may in cases be scope for mitigation measures, in order to ensure that the impact from any such uses is minimised to an acceptable level, in which case proposals may be judged as being in line with the relevant criterion / criteria.

3.11 With regard to the screening of sites (criterion (viii)), careful attention should be paid to the nature of screening and how it relates to the character of the surrounding area. Close board and other fencing, or evergreen landscape planting may be appropriate in some areas, but not in others. Sites on elevated or sloping ground are likely to be more difficult to screen appropriately. For sites adjacent to developed areas, an acceptable balance needs to be struck taking into account the privacy of occupants and neighbours, the visual impact of screening (if it needs to be greater in height than on a more isolated site), and the general urban design principle of natural surveillance.

3.12 Ensuring adequate highways access to Traveller sites is important. Whilst on a day-to-day basis, the sites are likely to be used by cars, vans and small lorries, there are also likely to be regular movements of touring caravans, and occasional movements of larger static caravans. For Travelling Showpeople, sites are likely to be regularly accessed by articulated lorries and / or heavy goods vehicles carrying fairground rides. The 2008 Good Practice Guide advises that access onto Traveller sites should be readily achievable by regular or potential visitors to the site, including the emergency services. Similarly, easy movement through, or manoeuvres within, the site should be possible for typical Traveller vehicles, and the safety of [pedestrian] site occupants, including children, is an important consideration.

3.13 Traveller site development is by definition inappropriate in the Green Belt, and PPTS (paragraph 14) requires that very special circumstances be demonstrated in order for Traveller sites in the Green Belt to be judged acceptable. The Ministerial

Statement adds that unmet need for Traveller accommodation does not on its own constitute very special circumstances.

3.14 With regard to criterion (xii), caravans are defined in the NPPF Technical Guidance, published alongside the NPPF in March 2012 (Table 2, page 6), as highly vulnerable development. Table 3 (page 8) states that highly vulnerable development should not be permitted on sites within Flood Zone 3. If a site is in Flood Zone 2, the site must be demonstrated to meet the “Exceptions Test”. Furthermore, Policy GN5 of the West Lancashire Local Plan 2012-2027 requires that a sequential test be satisfied where development is proposed in flood risk areas.

3.15 The Good Practice Guide states that sites should consist of a maximum of 15 pitches unless there is clear evidence that a larger site is preferred by the Gypsy and Traveller Community.

Options and Preferred Options Consultation Question 1

Policy GT1

Is Policy GT1 sufficiently consistent with national policy, whilst reflecting local circumstances?

What amendments, if any, should be made to the criteria in Policy GT1?

(Please provide a reasoned justification for any proposed amendments to the policy.)

Do you have any other comments on Policy GT1?

4. Criteria for Site Assessment

4.1 The following 19 criteria have been used in assessing the candidate Traveller sites. These criteria are based on national policy, as set out in the National Planning Policy Framework, and Planning Policy for Traveller Sites documents, and also on the advice contained in the government's Designing Gypsy and Traveller Sites Good Practice Guide (May 2008). Where appropriate, the criteria have been tailored to the particular circumstances of West Lancashire. Minor additions have been made to the criteria following feedback from Natural England in the initial Regulation 18 "Scoping" consultation carried out in September / October 2013 (see paragraphs 1.25-1.27 above). The criteria are broadly similar to those used in Policy GT1 (see Chapter 3 above), and are as follows:

1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?
2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?
3. Accessibility:
Is the site within 1km of a bus route or other public transport facility?
Is it possible to easily access:
 - an appropriate health facility
 - education
 - employment
 - shops
 - other necessary services?
4. Is the site near to a refuse site (within 200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process or environmental issue? Is the site adjacent to (i.e. within 25m of) the carriageway of any flyover or motorway, or any operational railway line? Could satisfactory mitigation realistically be achieved?
5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?
6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?
7. Is the site in, adjacent to (i.e. within 25m of), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?

Suitability

8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?

10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?
11. Is the site in the Green Belt?
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?
13. Can the site accommodate between 3 and 15 pitches / yards?

Availability

14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?

Achievability

16. Are there any significant physical constraints to the site's development as a Traveller site?
17. Are there any land stability issues?
18. Is the site sloping to any great extent?
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?

Derivation of Site Assessment Criteria

- 4.2 The process by which the 19 criteria were arrived at is outlined below. Firstly, the specific policy requirements of PPTS and the site design / layout recommendations in the Good Practice Guide were listed individually, then grouped into the following topic areas:
 - a) Sustainability (i.e. economic, social and environmental sustainability⁹) – for example, how easy it is to access education or health services from the site;
 - b) Suitability – for example, whether highway access to the site is adequate;
 - c) Availability;
 - d) Achievability – for example, whether there are any significant physical constraints to the site's possible development.
- 4.3 Where necessary, minor adjustments were made to the national criteria (e.g. to specify the Council's understanding of the word "near"). A small number of additional criteria were added, based primarily on the site assessments used in the Council's Strategic Housing Land Availability Assessment (SHLAA). One amendment to criterion (vii) was added following comments made on the "scope" of the Traveller sites DPD received from Natural England as part of the Regulation 18 consultation.

⁹ Paragraph 7 of the National Planning Policy Framework states that there are three dimensions to sustainable development: economic, social and environmental.

4.4 For the reasons set out in the table below, a small number of the requirements / recommendations from the national documents were not used directly as site assessment criteria, primarily because they were too ‘generic’.

Table 4.1 Analysis of site assessment criteria from national policy

Criterion	Source	Comments	Final criterion number
Suitability			
Is the site economically / socially / environmentally sustainable?	PPTS* para. 11	On its own, this criterion is not specific enough to use as a site selection criterion – instead it should be used as a general heading for a set of more specific criteria.	(Not used in this format)
Can this site provide a settled base that reduces the need for: (i) long-distance travelling, and (ii) possible environmental damage caused by unauthorised encampment?	PPTS 11(d)	PPTS 11(d) is generic. The whole point of delivering any permanent or transit site is “to provide a settled base that reduces the need for long distance travelling and possible environmental damage caused by unauthorised encampment”. Rather than using this criterion, more specific sub-criteria should be used to make an informed judgement on this question.	(Not used in this format)
Social sustainability criteria			
Is this site situated such that it can promote peaceful and integrated co-existence between the site and the local community?	PPTS 11(a)	Subjective question; this criterion (as with others) requires a comments box for elaboration.	1
Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site’s surroundings?	GPG** para. 3.5	This needs careful judgment – most sites can be adequately screened by landscaping given enough time; one needs to consider how to screen sites appropriately in the short term.	8
Would the use of this site as a Traveller site place undue pressure on local infrastructure and services?	PPTS 11(f)	It will be necessary to provide a comments box to explain how “undue pressure” is understood. Note that separate criteria below relate to water supply and drainage, so the “local infrastructure” referred to by this criterion will relate primarily to social infrastructure, roads and services.	2
Would this site, on account of its scale, dominate the nearest settled community?	PPTS 12	This is a subjective question and will need to be applied consistently between sites.	1
Environmental / economic sustainability criteria			
Can adequate access onto and from the site be achieved?	GPG §4	Also an achievability criterion. Travelling Showpeople yards are likely to need a higher standard of access than Gypsy and Traveller sites.	9

Criterion	Source	Comments	Final criterion number
Is it possible for emergency vehicles to access the site?	GPG 4.24-29	Possibly also a social sustainability question, but worth combining with other access criteria.	9
Is the site near to a bus route, shops and school?	GPG 3.4 (C01/06)	This is based on Circular 01/2006, quoted in the GPG. Circular 01/2006 also refers to means of access, availability of transport modes and distances from services. “Near” needs to be quantified using a specific distance / walking time. Railway stations and other public transport facilities should also be taken into account.	3
Is it possible to easily access appropriate health services from the site?	PPTS 11(b) / GPG 3.1	This is vague; either it needs some measure of distance, or else should be linked to the above “proximity to public transport facilities” criterion.	3
Is it possible to easily access education facilities / employment / other services and facilities?	PPTS 11(c) / GPG 3.1	As above, either this needs a measure, or should be linked to the proximity to public transport criterion. In terms of education, priority should be given to primary schools (journeys to secondary schools generally tend to be longer for the settled community).	3
Does the site have mains water and electricity, or could these services be provided?	GPG 3.13		10
Does the site have mains drainage and sanitation, or could satisfactory drainage be readily achieved?	GPG 3.13		10
Is the site adjacent or near to a refuse site, industrial process, electricity pylons or other hazardous place?	GPG 3.3 / 3.17	It is necessary to define “near”. The negative impacts from refuse sites arise primarily from noise (vehicle movements), odours and potential leaching; a distance of 200m has been chosen as a ‘threshold’ (there is no specific national policy on such distances). From industrial processes, the primary impacts are likely to be noise (machinery / vehicles), emissions, and visual intrusion. A similar threshold of 200m has been chosen for Traveller site assessment. The primary impacts of electricity pylons comprise magnetic fields; a lesser, secondary, impact is visual intrusion. A lower threshold of 100m is considered appropriate for pylons. For “other hazardous place”, as the particular hazards are not specified, a similar threshold to refuse sites and industrial processes is proposed. The possibility of mitigation needs to be taken into account, and also whether other residential uses (recent, or long-established) in the vicinity are subject to	4

Criterion	Source	Comments	Final criterion number
		the same issues.	
Is the site on contaminated land?	GPG 3.16	The possibility of mitigation needs to be taken into account.	5
Is the site adjacent to a main road, flyover, or railway line?	GPG 3.18	The possibility of mitigation needs to be taken into account, and also whether other residential uses in the vicinity are subject to the same issues. However, one must also take into account the lessened capacity of caravans to be insulated against noise.	4
Is the site subject to any other environmental issues that would impact on residents of the site?	PPTS 11(e)	This is a generic criterion – can be added after the above specific considerations from GPG 3.13 / 3.16-18. The possibility of mitigation needs to be taken into account.	4
Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development?	PPTS 11(e)	PPTS does not define what these might be.	6
Is the site in the Green Belt?	PPTS 14	PPTS paragraph 15 allows for Green Belt boundaries to be altered in exceptional circumstances, through the development plan process.	11
Is the site in Flood Zone 2 or 3?	PPTS 11(g)	Further guidance on the implications of being in these Flood Zones is provided in the NPPF Technical Guidance.	12
If the site is in Flood Zone 2, can the site be demonstrated to meet the "Exceptions Test", and can satisfactory mitigation be achieved?	GPG 3.21-3.23	This criterion "qualifies" the above – being in Flood Zone 2 does not necessarily rule out development.	12
Is the site in an area of land subject to any historic environment or landscape designation?	WLBC***	e.g. Area of Landscape History Importance, Conservation Area, potential to affect the setting of a Listed Building.	7
Is the site subject to, or near to land subject to, a nature conservation designation?	Natural England	This criterion was added following comments from Natural England in the Regulation 18 "Scoping" consultation.	7
Can the site accommodate between 3 and 15 pitches / yards?	GPG 4.7-8		13
Availability			
Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	WLBC (based on the process used in SHLAA site assessment)		14
Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	PPTS 9 (footnote 7/8)		15
Achievability			
Are there any significant	WLBC	The SHLAA "Call for Sites" form cited a	16

Criterion	Source	Comments	Final criterion number
physical constraints to the site's development as a Traveller site?	(based on SHLAA work)	number of constraints; all but one of these (access to telecommunications - which is not considered vital given mobile phone prevalence) are covered by other criteria in this table.	
Are there any land stability issues?	WLBC	Ground conditions are mentioned in GPG paragraph 3.4 (a quote from Circular 01/2006).	17
Is the site sloping to any great extent?	GPG 3.19		18
Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	WLBC (based on SHLAA work)		19

* Planning Policy for Traveller Sites (CLG, March 2012)

** Designing Gypsy and Traveller Sites Good Practice Guide (May 2008)

*** West Lancashire Borough Council

Options and Preferred Options Consultation Question 2

Criteria for Site Selection

Are the criteria for site selection sufficiently consistent with national policy, whilst reflecting local circumstances?

What amendments, if any, should be made to the criteria?

(Please provide a reasoned justification for any proposed amendments to the criteria.)

Do you have any other comments on the criteria for site selection?

5. Potential Traveller Sites

Site Assembly Process

5.1 Chapter 1 above sets out the general process whereby the Council has sought to collate a set of potential sites to meet Traveller accommodation needs in the Borough to 2027, namely through consideration of sites with recent Traveller-related planning history, a Call for Sites, letters to owners of SHLAA sites, and more locationally-specific searches for sites in areas where the GTAA has highlighted a specific need. The following paragraphs set out in more detail the procedures used to identify additional potential Traveller sites in specific areas, in order to meet locally-arising needs. The full list of sites assessed, and site location maps, are provided in Chapter 5 and Appendix 1 respectively.

5.2 Given patterns of Traveller encampments in West Lancashire over recent years (both authorised and unauthorised), and the various local connections of Travellers currently residing in West Lancashire, the general locations of need in West Lancashire are concluded to be as follows:

- The Banks, Scarisbrick and Skelmersdale areas for permanent Gypsy and Traveller sites;
- The M58 corridor and Skelmersdale area for transit sites;
- The Burscough area for Travelling Showpeople sites.

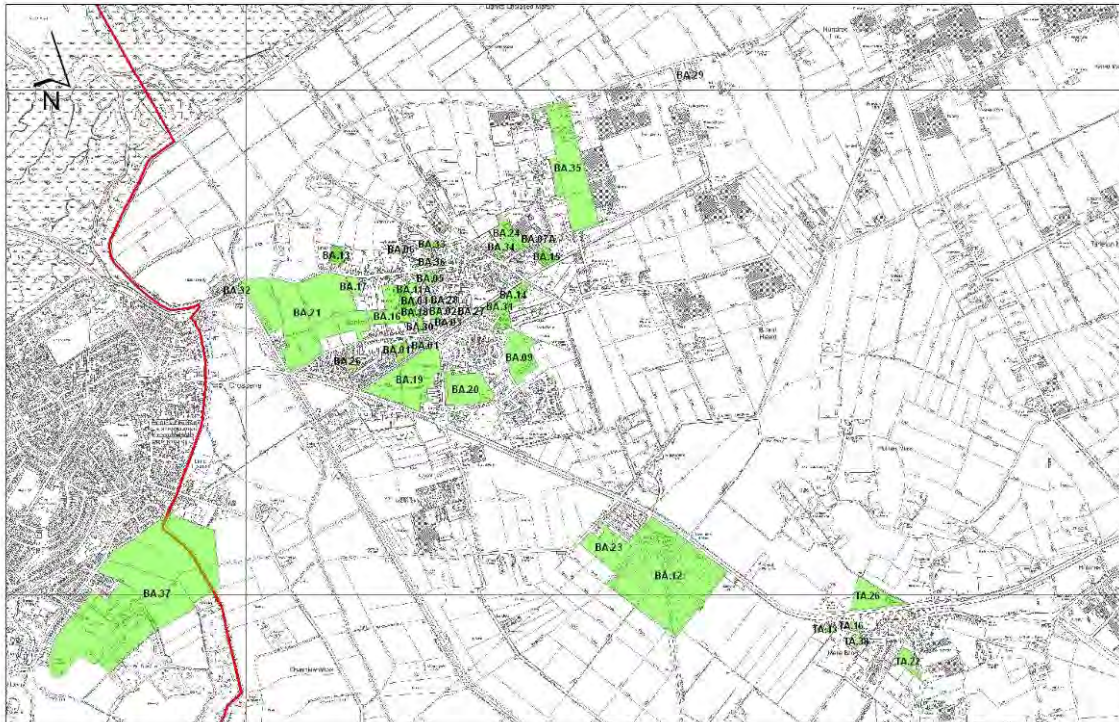
The Banks area

5.3 The initial site search process yielded four sites in Banks, three of the sites known to the Council's Planning Division by virtue of recent planning applications and / or enforcement action (two sites at Aveling Drive, one site at Sugar Stubbs Lane), and one site contained in the SHLAA (Hoole Lane), whose owner expressed a willingness for the site to be considered as a potential Traveller site.

5.4 Much of the land in the Banks area is in Flood Zone 3; national policy states that caravans should not be permitted in such locations. Of the four Banks sites, only one is not in Flood Zone 3, and this site was not considered sufficiently large to meet all accommodation needs in Banks. It was thus considered necessary to extend the site search further to identify any other potential sites. The starting point for this search was SHLAA sites in non-flood risk areas whose owners had not expressly informed the Council that they were unwilling for the site to be considered as potential Traveller sites¹⁰, initially in, or within 1km of Banks village, and subsequently further afield. Figure 5.1 below shows the location of SHLAA sites in the Banks area.

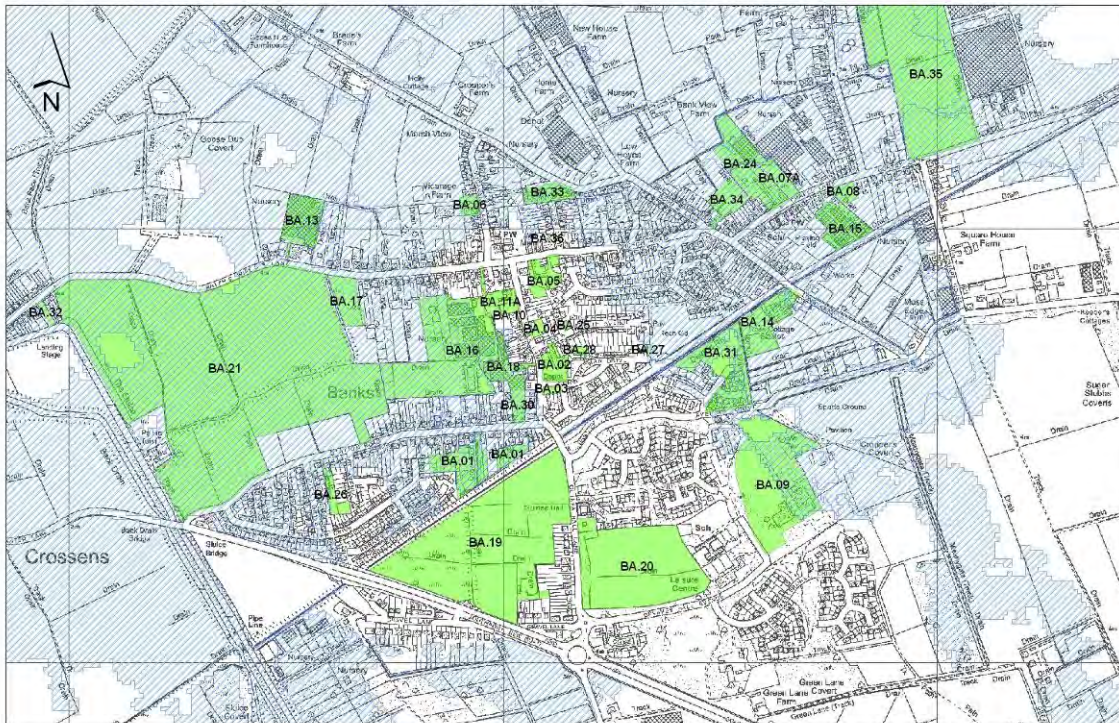
¹⁰ As highlighted in Chapter 1, letters were sent to all known owners of SHLAA sites, asking whether they were willing to consider the possibility of their site being allocated as a Traveller site. Some owners replied, confirming whether or not they were willing for their sites to be considered as potential Traveller sites. For those sites where no response was received, the Council is currently unsure of the owners' intentions. It is these sites that have been considered as a 'first port of call' in area-based searches for additional sites to those identified in the initial site assembly process.

Figure 5.1 SHLAA sites in the Banks area



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Figure 5.2 SHLAA sites and Flood Zone 3 in Banks



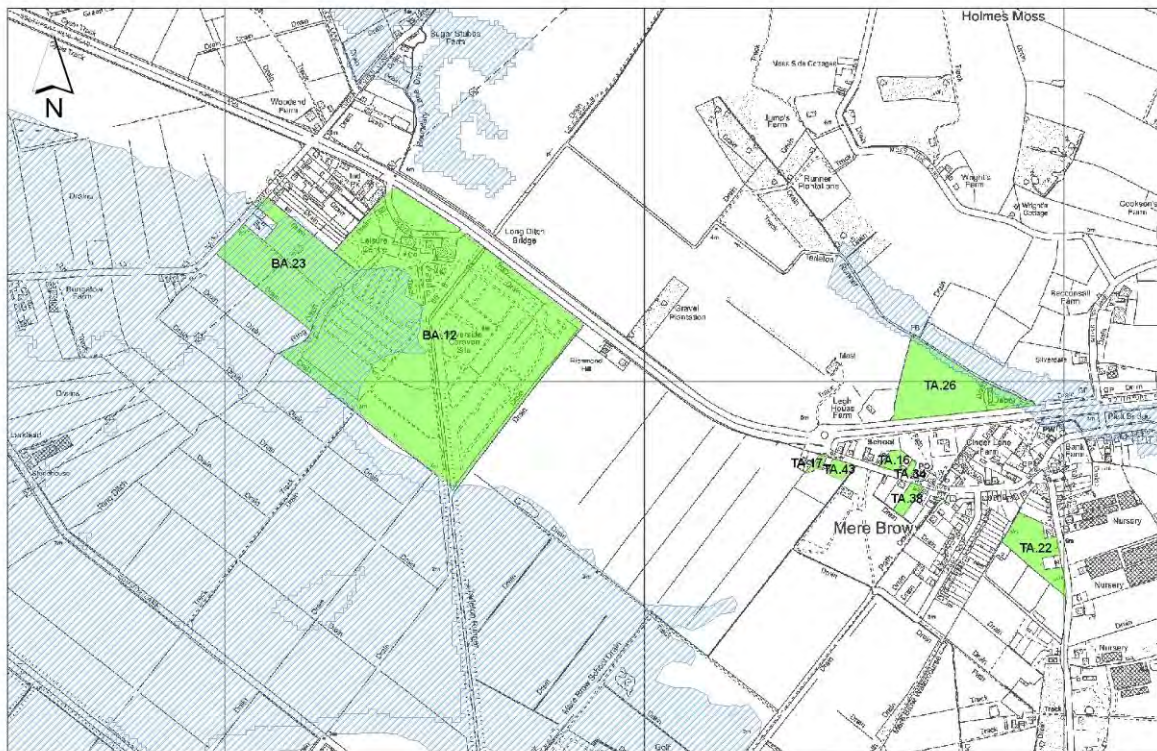
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5.5 Figure 5.1 shows that the three most substantial pieces of undeveloped land not in Flood Zone 3 are sites BA.19, BA.20 and part of BA.09. However, sites BA.09 and BA.20 have planning permission for residential development (subject to a Section 106 Agreement in the case of site BA.09), and the owners of site BA.19 have informed

the Council that they are not willing for the site to be considered as a Traveller site. The smaller sites within the built-up area of Banks were not considered suitable locations for potential Traveller sites for a number of reasons including existing buildings and uses on site, site size, access, and / or neighbouring land uses.

5.6 In the light of a lack of suitable sites within, or within 1km of Banks, the area of search was expanded eastwards and southwards (west of Banks is Sefton Borough; north of Banks is the River Ribble Estuary), looking for SHLAA sites with easy access to the A565 road. Figure 5.2 below shows SHLAA sites and areas within Flood Zone 3 to the south east of Banks.

Figure 2 SHLAA sites and Flood Zone 3 areas south / east of Banks



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5.7 Of the sites in Figure 2 above, site BA.23 is in Flood Zone 3, site BA.12 is an existing permanent caravan park (Riverside), and the owner of site TA.22 has not expressed support for the site being considered as a Traveller site. However, site TA.26, part of which was a former depot, and which is adjacent to the A565, was considered a possible ‘candidate’ Traveller site, and was consequently added to the list of potential sites. TA.26 is in two ownerships; the owners of the larger western part of the site have indicated that they are not willing for the land to be a Traveller site, and thus only the eastern triangle of land is the area under consideration as a potential site, with a correspondingly reduced capacity.

Scarisbrick

5.8 Within Scarisbrick, the site search process yielded four sites. Three sites are known to the Council by virtue of their history. Two of these (High Brow Farm, Pool Hey Lane, and land at 1-3 Southport Road, Kew) have been subject to unauthorised Traveller encampments in the past; the other (Pool Hey Caravan Park) is a longstanding unauthorised site. In addition, one site (land rear of 281 Smithy Lane)

was submitted to the Council in the September 2013 call for sites exercise. Unlike Banks, none of the Scarisbrick sites are within Flood Zone 3, and thus an area-based search for additional sites was not considered necessary.

Skelmersdale area

5.9 Within the Skelmersdale area, the initial site search process yielded two sites. One site (White Moss Road South (B)) is known to the Council as it has been subject to a planning application made by Travellers; the other site (White Moss Road South (A)) was brought to the Council's attention during the call for sites exercise as a possible Travelling Showpeople site. In addition, the site at the former Bickerstaffe Colliery was discussed at the West Lancashire Local Plan examination hearings as a potential site¹¹.

5.10 Whilst none of the above sites were in areas of flood risk, given the historic need for Traveller accommodation in the Skelmersdale area, a search was made for additional potential sites. However, despite the size of the settlement of Skelmersdale, there are a number of topographical and other constraints in and around the settlement that limit the area of search for further development sites, for example nature conservation sites, Beacon Country Park, areas of landscape history of regional importance, an ethylene pipeline, a railway cutting, and areas of Green Belt that form a narrow "strategic gap" between Skelmersdale / Up Holland and Orrell / Tontine.

5.11 In terms of transit sites, whilst there have been a number of unauthorised roadside encampments over recent years in Skelmersdale, primarily on the Pimbo and Gillibrands Industrial Estates, it was not considered appropriate to include the locations of these unauthorised encampments as potential sites, given their inherent unsuitability for Traveller accommodation.

5.12 In the light of the above constraints, the area of search was narrowed down to the M58 corridor, defined in paragraph 3.4 above as land within 2.4km (equivalent to three minutes drive time at 30mph) of any M58 junction via a classified road (i.e. A or B road). One further potential site was identified (White Moss Road South (C)), located adjacent to the White Moss Road South (B) site, south of the M58.

Burscough

5.13 The need for a site for Travelling Showpeople exists in Burscough, given the connections of local Showpeople to this village, and thus the area of search for a Travelling Showpeople site was limited to land within or adjoining the settlement of Burscough. The Call for Sites exercise yielded one site, and a second site was brought to the attention of the Council during the Call for Sites period, neither of these sites being subject to flood risk issues.

¹¹ See document Ref EX.238 on the Council's website at http://www.westlancs.gov.uk/planning/planning_policy/the_local_plan/the_local_plan_2012-2027/local_plan_preparation_stages/stage_4_-_submission_and_exami/documents_submitted_during_t-1.aspx

Candidate Traveller Sites

5.14 A total of 20 sites were identified as potential candidate Traveller sites, following the site assembly process set out in of this document. The 20 sites, and the sources of their identification, are set out in Table 5.1.

Table 5.1 Candidate Traveller Sites.

Site	Source
1. Mosslands Stables, Aveling Drive ('Aveling Drive A'), Banks	Site with planning application pending consideration.
2. Land west of Mosslands, Aveling Drive ('Aveling Drive B'), Banks	Site with planning appeal pending decision (in the hands of the Secretary of State).
3. Land rear of 'The Poppys' (<i>sic</i>), Sugar Stubbs Lane, Banks	Site with planning permission for one caravan; more recent planning application pending consideration.
4. Land west of Hoole Lane, Banks	SHLAA site; owner indicated a willingness for the site to be considered as a Traveller site.
5. Land west of Ringtail Road, Burscough	Site submitted in the September 2013 Call for Sites exercise.
6. Land west of The Quays, Burscough	Established Travelling Showpeople site with planning permission.
7. Land west of Tollgate Road, Burscough	Site suggested by a member of the travelling community.
8. Pool Hey Lane 'Caravan Park', Scarisbrick	Site with longstanding planning history, also submitted in the Call for Sites exercise.
9. High Brow Farm, Pool Hey Lane, Scarisbrick	Site with previous enforcement action relating to unauthorised occupation by Travellers.
10. Land at 1-3 Southport Road, Kew, Southport	Site with previous issues relating to unauthorised occupation by Travellers.
11. Land to the rear of 281 Smithy Lane, Scarisbrick	Site submitted in the Call for Sites exercise.
12. Former depot, Mere Brow	Site identified as a possible candidate site by WLBC officers undertaking an area-based site search (Banks area).
13. White Moss Road South (A), Skelmersdale	Site brought to the Council's attention by a member of the travelling community.
14. White Moss Road South (B), Skelmersdale	Site with planning permission recently granted (December 2013) for Traveller-related development (stables).
15. White Moss Road South (C), Skelmersdale	Site identified by WLBC officers, adjacent to above site.
16. Blackacre Lane, Ormskirk	Site submitted in Call for Sites.
17. Land south of Butcher's Lane, Aughton	SHLAA site; owner indicated a willingness for the site to be considered as a Traveller site.
18. Land east of Brookfield Lane, Aughton	SHLAA site; owner indicated a willingness for the site to be considered as a Traveller site.
19. Land east of Middlewood Drive, Aughton	SHLAA site; owner indicated a willingness for the site to be considered as a Traveller site.
20. Bickerstaffe Colliery, Bickerstaffe	Site previously identified by WLBC officers on account of its proximity to M58 Junction 3.

5.15 The full site assessment tables for the 20 candidate sites are set out in Appendix 1. Maps showing the locations of the 20 sites are provided in Figures 6.1-6.6 below, and in Appendix 1.

Potential Site Uses and Capacities

5.16 Table 5.2 below shows what types of Traveller accommodation the 20 sites have been considered for, and their indicative capacities. Please note that these are indicative figures, based on an initial assessment of each site (using *inter alia* aerial photographs, information gleaned from site visits, consideration of the potential of site accesses to cope with vehicle numbers, and possible site constraints, e.g. flood risk areas, neighbouring uses), rather than a detailed study of different potential site layouts, plot sizes, and vehicle turning distances, etc.

5.17 The potential type of Traveller uses for each site have come from site submission forms (SHLAA / Call for Sites), or from current uses of the sites. For other sites, where this information is not available, potential uses have been determined from Council officers' judgement of sites' suitability for different uses. For example, transit or Travelling Showpeople sites are not being considered in areas where the GTAA does not indicate that there is a need for such accommodation.

5.18 The maximum indicative number of pitches per site has been limited to 15, based on advice in the government's Designing Gypsy and Traveller Sites: Good Practice Guide (May 2008).

Table 5.2 Potential site uses and capacities

Site	Potential accommodation* (GT / TS / Tr / All)	Indicative capacity
1. Mosslands Stables, Aveling Drive ('Aveling Drive A'), Banks	GT only	Planning application for 8 caravans; assuming 2 caravans per pitch, this equates to 4 pitches
2. Land west of Mosslands, Aveling Drive ('Aveling Drive B'), Banks	GT only	Current appeal over one pitch; in theory, capacity may exist for one further pitch on site.
3. Land rear of 'The Poppys' (<i>sic</i>), Sugar Stubbs Lane, Banks	GT only	Existing authorised caravan on site; 3 pitches maximum within current site boundary.
4. Land west of Hoole Lane, Banks	All	7-8 pitches
5. Land west of Ringtail Road, Burscough	TS only	Sufficiently large to store Travelling Showpeople equipment to meet stated GTAA need (i.e. one yard; one residential plot).
6. Land west of The Quays, Burscough	TS only	10 plots (current permission)
7. Land west of Tollgate Road, Burscough	TS only	Sufficiently large to store Travelling Showpeople equipment to meet stated GTAA need (i.e. one yard; one residential plot).
8. Pool Hey Lane 'Caravan Park',	GT only	Maximum 6 pitches within

Site	Potential accommodation* (GT / TS / Tr / All)	Indicative capacity
Scarisbrick		current site boundary.
9. High Brow Farm, Pool Hey Lane, Scarisbrick	GT only	5-6 pitches
10. Land at 1-3 Southport Road, Kew, Southport	GT only	4 pitches
11. Land to the rear of 281 Smithy Lane, Scarisbrick	All	6 pitches
12. Former depot, Mere Brow	GT only	1-2 pitches
13. White Moss Road South (A), Skelmersdale	Tr only	15 transit pitches
14. White Moss Road South (B), Skelmersdale	GT / Tr	15 pitches
15. White Moss Road South (C), Skelmersdale	GT / Tr	15 pitches
16. Blackacre Lane, Ormskirk	All	15 pitches
17. Land south of Butcher's Lane, Aughton	GT only	3-4 pitches
18. Land east of Brookfield Lane, Aughton	GT only	8 pitches
19. Land east of Middlewood Drive, Aughton	GT only	15 pitches
20. Bickerstaffe Colliery, Bickerstaffe	GT / Tr	15 pitches

* GT = Permanent Gypsy / Traveller site
 TS = Travelling Showpeople site
 Tr = Transit site

Options and Preferred Options Consultation Question 3

Proposed Candidate Traveller Sites

Do you have any comments about the list of proposed candidate Traveller sites?

Are there any other sites that should be added to this list?

(Please provide a reasoned justification for any proposed additions to the list of candidate sites. Where possible, please provide details of ownership, availability, physical constraints, and any other relevant information that would help the site assessment process.)

Draft

6. Preferred Options to Meet Traveller Accommodation Needs

Assessment of Candidate Traveller Sites

6.1 The 20 sites set out in Tables 5.1 and 5.2 above constitute West Lancashire Borough Council’s “Options” for meeting the need for Traveller accommodation in this Borough. Appendix 1 contains the full assessment of each site against the criteria set out in Chapter 4 above.

Options and Preferred Options Consultation Question 4

Assessment of Candidate Traveller Sites

Is the assessment of the candidate Traveller sites correct?

Are there any factual errors that need to be corrected, or are there any other amendments that should be made to the site assessments in Appendix 1?

(Where possible, please provide clear evidence to back up any suggested changes to site assessments.)

Preferred Options

6.2 In the light of the site assessments set out in Appendix 1, the locations and scale of Traveller accommodation need across West Lancashire, and the proposed uses and indicative capacities of the different candidate sites (Table 5.2), the Council’s Preferred Options to meet Traveller accommodation needs are set out below. In arriving at the Preferred Options, the Council has considered the merits of six alternative approaches, of which five have been discounted for the reasons set out in the Alternative Options section (paragraph 6.4 onwards). However, at this Options / Preferred Options stage of the preparation of this DPD, the Council is open to further evidence as to the suitability and / or deliverability of the sites considered, and open to suggestions of alternative sites not included in the list above. If alternative sites are suggested, the Council will expect evidence to be submitted concerning the ownership, capacity and deliverability of the given sites.

Preferred Options to Meet Traveller Accommodation Needs

(a) Permanent Gypsy and Traveller Accommodation

The draft GTAA states a need of 14 pitches to 2018, and 20 pitches in total to 2028, in the Banks / Scarisbrick / Skelmersdale area.

The preferred sites are:

- | | | |
|-------|--|------------|
| (i) | Site 3: Sugar Stubbs Lane, Banks | 3 pitches |
| (ii) | Site 8: Pool Hey Caravan Park, Scarisbrick | 6 pitches |
| (iii) | Site 14: White Moss Road South (B), Skelmersdale | 11 pitches |

The reasoning for the choice of the above three sites as Preferred Option sites is as follows:

(i) Site 3: Sugar Stubbs Lane, Banks

This site is within an area of identified need (Banks); it is not in Flood Zone 3; it is considered to have adequate highways access; it is within walking distance of bus stops; it is not considered to have an unacceptable impact on neighbouring properties; it is reasonably well-screened, and is in the ownership of Travellers.

(ii) Site 8: Pool Hey Caravan Park, Scarisbrick

This site is within an area of identified need (Scarisbrick); it is in the possession of Travellers; whilst unauthorised, it has been in place almost 20 years and the Council is not aware of any significant issues between the site occupants and the local community; it is reasonably well-screened and its impact is not considered unacceptable.

(iii) Site 14: White Moss Road South (B), Skelmersdale

This site is within an area of identified need (Skelmersdale); it is in the possession of Travellers; it is close to a major settlement (but also detached from it, physically separated by the M58 motorway).

(b) Transit Site

The draft GTAA states a need of 4 pitches on one site in the Skelmersdale area or M58 corridor.

The preferred site is:

Site 14: White Moss Road South (B), Skelmersdale

This site is within an area of identified need (Skelmersdale); it is in the possession of Travellers; it has reasonably good access to the M58 motorway along White Moss Road South. The site is considered to have adequate capacity for 11 permanent pitches and 4 transit pitches.

(c) Travelling Showpeople Site

To meet the GTAA-identified need of one site for Travelling Showpeople in the Burscough area, incorporating space for storage of equipment and at least one residential plot, the site assembly process described above yielded just two potential candidate sites, both adjacent to Burscough Industrial Estate:

- i) Land at Ringtail Road / Plantation Road;
- ii) Land west of Tollgate Road.

Following assessment of the above two sites, in planning policy terms the Tollgate Road site is considered the more suitable site. However, it has not been possible to make contact with the owner of this site (the land is unregistered), and thus there is at present no certainty over its deliverability. In contrast, the owner of the land at Ringtail Road / Plantation Road submitted the site during the September 2013 Call for Sites exercise, and has expressed a willingness for the site to be considered as a Travelling Showpeople site. As a result, neither site is being treated as a 'preferred' site at present, but comments are invited on both sites.

In addition, Site 6 (Land west of The Quays, Burscough) is currently authorised for 10 plots. These 10 plots do not contribute towards the outstanding need for Travelling Showpeople accommodation in Burscough. The labelling of Site 6 as a preferred site does not thus represent a potential new site allocation, but reflects the position “on the ground”.

Whilst it is accepted that there are issues with all of the above sites, the issues overall are considered less significant than other candidate sites. In terms of the sites’ location within the Green Belt, whilst this is less desirable than non-Green Belt locations in policy terms, the fact is only two of the 20 candidate sites are wholly outside the Green Belt. Of these two sites, one is a current Travelling Showpeople site and the other is in Flood Zone 3, upon which caravans are not permissible under national policy.

6.3 Figures 6.1 – 6.6 below show the locations of all sites considered as potential Traveller sites, including the Preferred Options for Traveller sites (outlined in red).

Figure 6.1 Candidate Traveller sites in Banks village

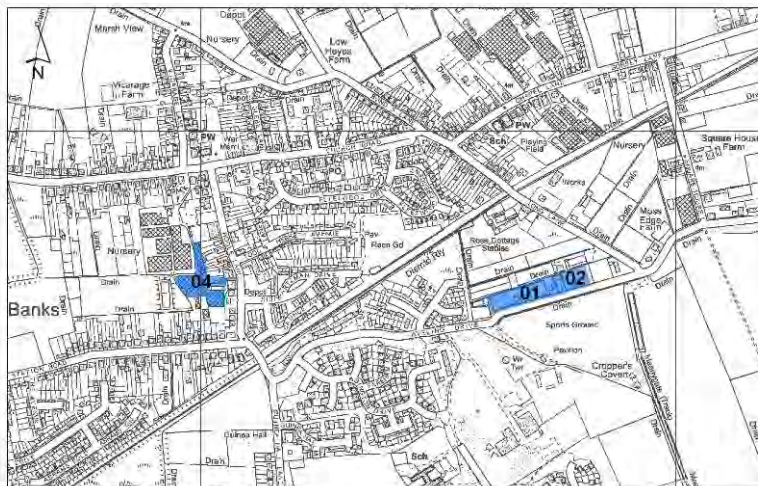


Figure 6.2 Candidate and Preferred Traveller Sites East of Banks Village

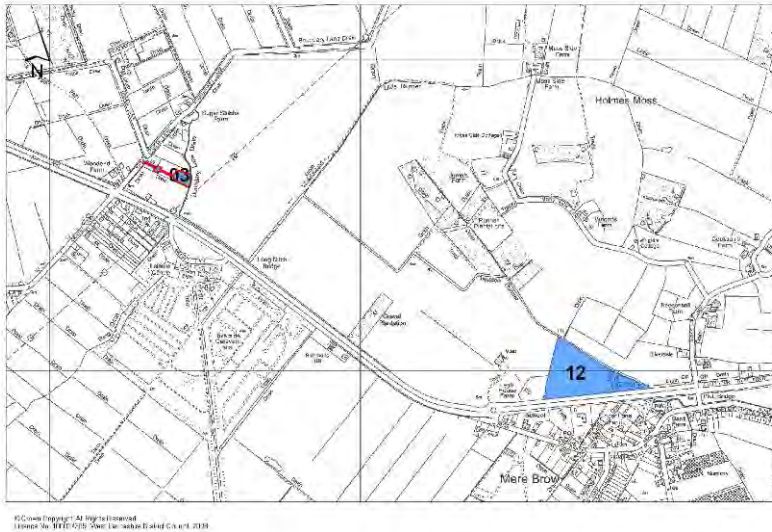


Figure 6.3 Candidate and Preferred Traveller Sites in West Scarisbrick

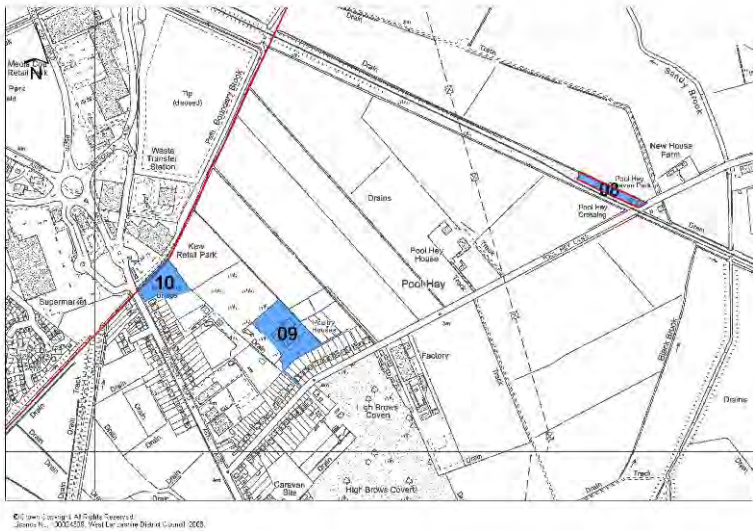


Figure 6.4 Candidate and Preferred Traveller Sites in East Scarisbrick / West Burscough

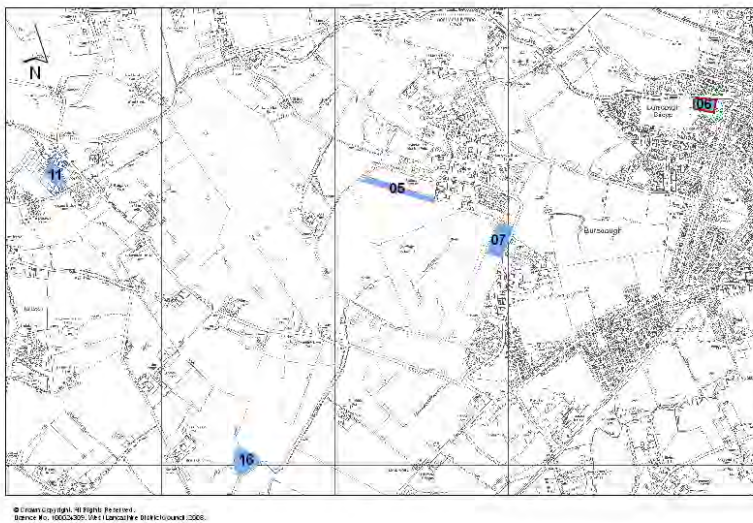
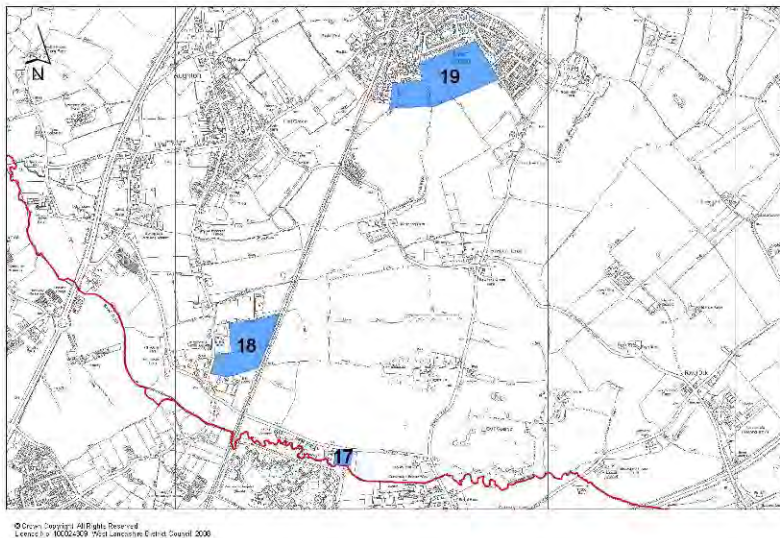


Figure 6.5 Candidate and Preferred Sites in Skelmersdale / Bickerstaffe



Figure 6.6 Candidate Sites in Aughton



Key to Sites

1. Mosslands Stables, Aveling Drive ('Aveling Drive A'), Banks
2. Land west of Mosslands, Aveling Drive ('Aveling Drive B'), Banks
3. Land rear of 'The Poppys' (*sic*), Sugar Stubbs Lane, Banks
4. Land west of Hoole Lane, Banks
5. Land west of Ringtail Road, Burscough
6. Land west of The Quays, Burscough
7. Land west of Tollgate Road, Burscough
8. Pool Hey Lane 'Caravan Park', Scarisbrick
9. High Brow Farm, Pool Hey Lane, Scarisbrick
10. Land at 1-3 Southport Road, Kew, Southport
11. Land to the rear of 281 Smithy Lane, Scarisbrick
12. Former depot, Mere Brow
13. White Moss Road South (A), Skelmersdale

14. White Moss Road South (B), Skelmersdale
15. White Moss Road South (C), Skelmersdale
16. Blackacre Lane, Ormskirk
17. Land south of Butcher's Lane, Aughton
18. Land east of Brookfield Lane, Aughton
19. Land east of Middlewood Drive, Aughton
20. Bickerstaffe Colliery, Bickerstaffe

Options and Preferred Options Consultation Question 5

Preferred Options for Traveller Sites

What amendments, if any, should be made to the list of 'Preferred' sites for providing Traveller accommodation?

Do you have any other comments on the list of 'Preferred' sites?

(Please provide a reasoned justification for any proposed amendments to the list of 'Preferred' sites. In particular, if a site is to be removed from the list, please show how the corresponding shortfall in provision should be made up. Where alternative sites are suggested, please provide a reasoned justification of why, in terms of planning policy and deliverability, the alternative site should be allocated as a Traveller site.)

Alternative Options

6.4 Five alternative options in terms of meeting Traveller accommodation needs are set out below, with comments on each alternative:

Alternative Option 1

Increase planned provision for Traveller accommodation, in order to offer choice to Travellers seeking accommodation.

Comment: Whilst this approach would be laudable in terms of giving Travellers choice regarding where they could seek accommodation, and would comply with national policy by providing *at least* a five year supply of deliverable sites, it is considered an unrealistic objective, due to the difficulty in identifying sufficient sites that are available, suitable (including sustainably located), and achievable.

Alternative Option 2

Increase planned provision for Traveller accommodation, in order to offer help meet neighbouring authorities' needs for Traveller accommodation.

Comment: Whilst this approach would be laudable in terms of this Council co-operating with neighbouring authorities to help meet needs on a cross-boundary basis, it has two main drawbacks. Firstly, as with Alternative Option 1, it is considered an unrealistic objective due to the difficulty in identifying sufficient sites that are available, suitable (including sustainably located), and achievable. Secondly, initial discussions with neighbouring authorities under the Duty to Co-operate have not resulted in any neighbouring authorities requesting that all or part of their needs be met in West Lancashire. Rather, the general consensus is that Traveller accommodation needs should be met where they arise, i.e. within the boundaries of the local planning authority where a particular need exists. (Cross-boundary dialogue will, however, continue throughout the preparation of this DPD, and as the Merseyside and West Lancashire GTAA is completed, and as the Greater Manchester and Central Lancashire GTAs and the Chorley and South Ribble Site Allocations Local Plans progress.)

Alternative Option 3

Reduce planned provision for Traveller accommodation below the levels set out in the draft GTAA, in anticipation of neighbouring local authorities offering to meet needs in West Lancashire.

Comment: As with Alternative Option 2, the general consensus is that Traveller accommodation needs should be met where they arise, i.e. within the boundaries of the local planning authority where a particular need exists. No neighbouring local authority has expressed any desire to meet any of West Lancashire's Traveller accommodation needs.

Alternative Option 4

Decrease provision for Traveller accommodation below the levels set out in the draft GTAA, regardless of neighbouring local authorities not offering to help meet West Lancashire's Traveller accommodation needs.

Comment: Not meeting Traveller accommodation needs would be contrary to national policy, as set out in paragraphs 8 and 9 of PPTS, and with the Duty to Co-operate (Paragraph 8 requires that local planning authorities work collaboratively with their neighbours in setting Traveller accommodation targets). This would lead to the Traveller Sites DPD being found unsound. Failure to provide Traveller sites would mean the Council would be more vulnerable to the establishment of illegal encampments and sites in the Borough. A lack of allocated sites would weaken the ability of the Council to take quick and effective action to secure the removal of such encampments and sites.

Alternative Option 5

Set out a different distribution of proposed Traveller sites, either different sites in the same general locations, or sites in different locations.

Comment: The Council's assessment of potential sites is set out in Appendix 1, and has been used in making the choice of which sites are categorised as Preferred Options. To suggest sites in different geographical areas may not be consistent with the findings of the draft GTAA, which indicates the general areas of Traveller accommodation needs. To suggest other sites in similar geographical areas may result in a less suitable or less deliverable site being proposed. Sustainability Appraisal work to date indicates that the five Preferred sites score well in sustainability terms, relative to the other potential candidate sites.

Options and Preferred Options Consultation Question 6

Alternative Options for Traveller Sites

What amendments, if any, should be made to the alternative options for providing Traveller accommodation, and their being discounted?

Do you have any other comments on the alternative options?

(Please provide a reasoned justification for any proposed amendments to the alternative options and the analysis of them. If it is being proposed that one of the alternative options should become the Preferred Option, please indicate how this alternative option can be delivered and how it will comply with national policy.)

7. How to comment

Comments are invited on this document, on the site assessments set out in Appendix 1, and on the Sustainability Appraisal. Six questions on different aspects of this document and Appendix 1 are set out in Chapters 3 (Question 1), 4 (Question 2), 5 (Question 3) and 6 (Questions 4-6) above.

The consultation period on this document runs from 17 April – 30 May 2014. Comments must be received by the Council by 5pm on Friday 30 May.

Comments may be made in the following ways:

Online: Please visit the Council's website at: www.westlancs.gov.uk/Travellers and fill in the online form.

Email: Comments forms can be downloaded from the Council's website (as above) and emailed to Localplan@westlancs.gov.uk

By post: Please post comments forms to:

Strategic Planning and Implementation
West Lancashire Borough Council
52 Derby Street
Ormskirk
Lancashire
L39 2DF

Any queries on the consultation process should be made to the above email or postal addresses, or can be made by telephone to 01695 585171.

Equality Act 2010

Under the Equality Act 2010 the Council is under a duty to:

- Eliminate conduct that is prohibited by the Equality Act;
- Advance equality of opportunity between those who share a protected characteristic and those who do not share it;
- Foster good relations between those who share a protected characteristic and those who do not share it.

Race is one of nine "protected characteristics" covered by the Equality Act 2010; Romany Gypsies and Irish Travellers are recognised as having a protected characteristic. The Council reserves the right not to accept responses received that are considered to contain offensive or derogatory comments about Gypsies and Travellers.

Appendix 1

Assessment of Potential Traveller Sites

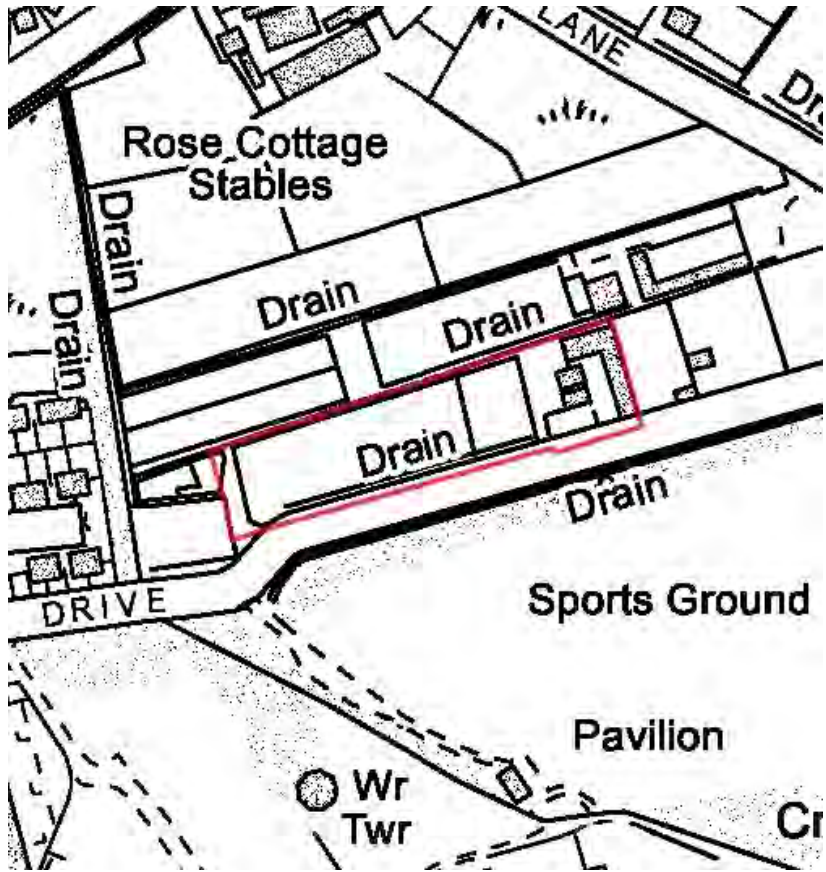
The 20 potential Traveller sites that have been assessed are as follows:

1. Aveling Drive (A), Banks
2. Aveling Drive (B), Banks
3. Sugar Stubbs Lane, Banks
4. Land west of Hoole Lane, Banks
5. Land west of Ringtail Road, Burscough
6. Land west of The Quays, Burscough
7. Land west of Tollgate Road, Burscough
8. Pool Hey Lane Caravan Park' Scarisbrick
9. High Brow Farm, Pool Hey Lane, Scarisbrick
10. Land at 1-3 Southport Road, Kew, Southport
11. Land to the rear of 281 Smithy Lane, Scarisbrick
12. Former Mere Brow depot, Mere Brow
13. White Moss Road South (A), Skelmersdale
14. White Moss Road South (B), Skelmersdale
15. White Moss Road South (C), Skelmersdale
16. Blackacre Lane, Ormskirk
17. Land south of Butchers Lane, Aughton
18. Land east of Brookfield Lane, Aughton
19. Land east of Middlewood Drive, Aughton
20. Bickerstaffe Colliery, Bickerstaffe

Each of the sites has been assessed against 19 criteria. Possible responses are Yes ("Y"), No ("No"), Maybe ("M") or Unknown ("?").

Site 1. Aveling Drive A, Banks

Site with planning application pending decision for accommodation for 4 families of Irish Travellers and enforcement action in abeyance (awaiting outcome of appeal for Aveling Drive B site)



Criterion	Y/N/M/?	Comments
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	N	The western edge of the site is close to housing at the edge of the Banks settlement (Aveling Drive), although a strip of open land up to 100m and a line of poplar trees separates the two. Planning permission for housing has been secured at Greaves Hall, south of Aveling Drive. If site is kept relatively small, it should not dominate the settled community.
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	M	See comment on (9) below; use of site may place undue pressure on roads. Given the size of the site, there should not be undue pressure on services such as health / education, nor on other infrastructure.
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	Y	Site is approximately 650m from bus stops on Guinea Hall Lane. GP, primary school and some shops are located in Banks; secondary school and further shops at Tarleton; employment facilities are not prevalent in locality.
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	N	No significant issues known. Some commercial uses have taken place at Greaves Hall nearby, but this site is expected to be redeveloped principally as housing.
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	N	No contamination issues known about.
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	N	No issues known about.
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	N	No historic environment, landscape or nature conservation designation in vicinity of site.

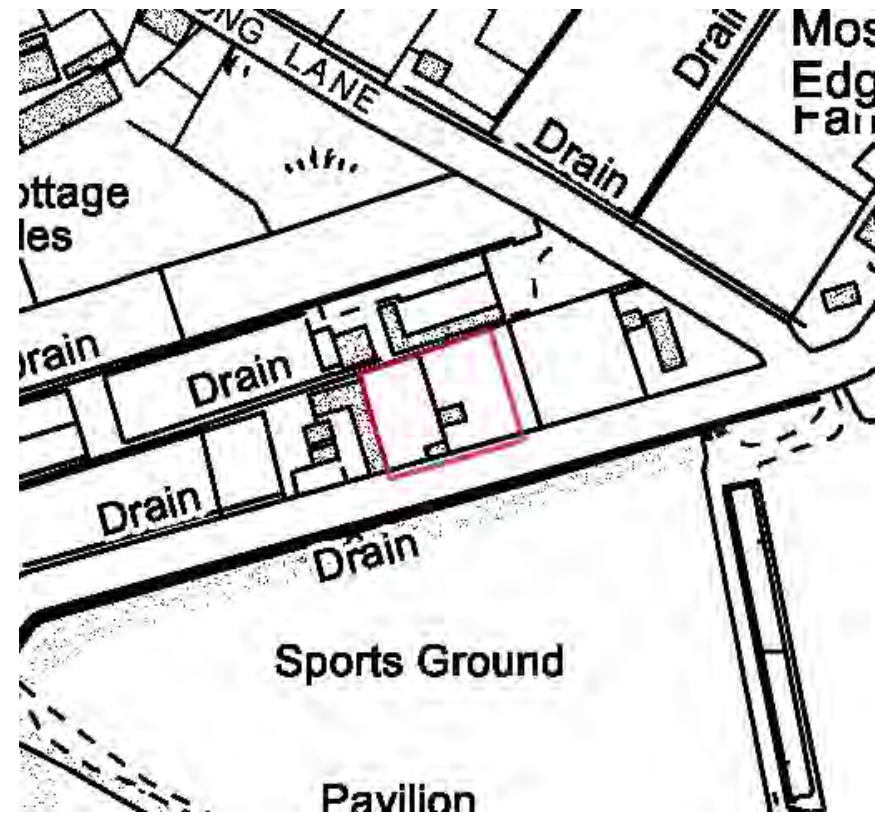
Criterion	Y/N/M/?	Comments
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	?	The existing caravans are screened by close board wooden fencing. Given the generally open nature of the surrounding area and the predominance of trees / hedging or open fencing, this close board fencing is considered a negative impact. Visual / acoustic privacy should be achieved via planting rather than fencing.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	N	Aveling Drive in the vicinity of the site is a single track road with a drainage ditch at one side, and is reached by first passing through a residential area. The narrow lane to the site is not designed for the types of large vehicles typically associated with Travellers, and it is not the easiest site for, say, a fire engine to access.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	Given the proximity of other houses, it is expected that these services are available or could readily be made available.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Green Belt site, but less than 100m from Banks settlement boundary
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	Y	Site is within Flood Zone 3.
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Planning application for 8 caravans; assuming 2 caravans per pitch, this equates to 4 pitches. In theory, more pitches could be accommodated within the site boundary, up to a maximum of 6 pitches.
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Site currently occupied by Travellers.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	Availability may be limited to a particular group or family.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	M	Unsuitable highway access mentioned above
17. Are there any land stability issues?	N	None known of
18. Is the site sloping to any great extent?	N	

Criterion	Y/N/M/?	Comments
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of
Main constraints or negative issues Most advantageous features		Flood Zone 3 and poor access In hands of Travellers and in use as Traveller site

Site

2. Aveling Drive B, Banks

Site awaiting outcome of appeal (with Secretary of State); one pitch, two caravans at present.

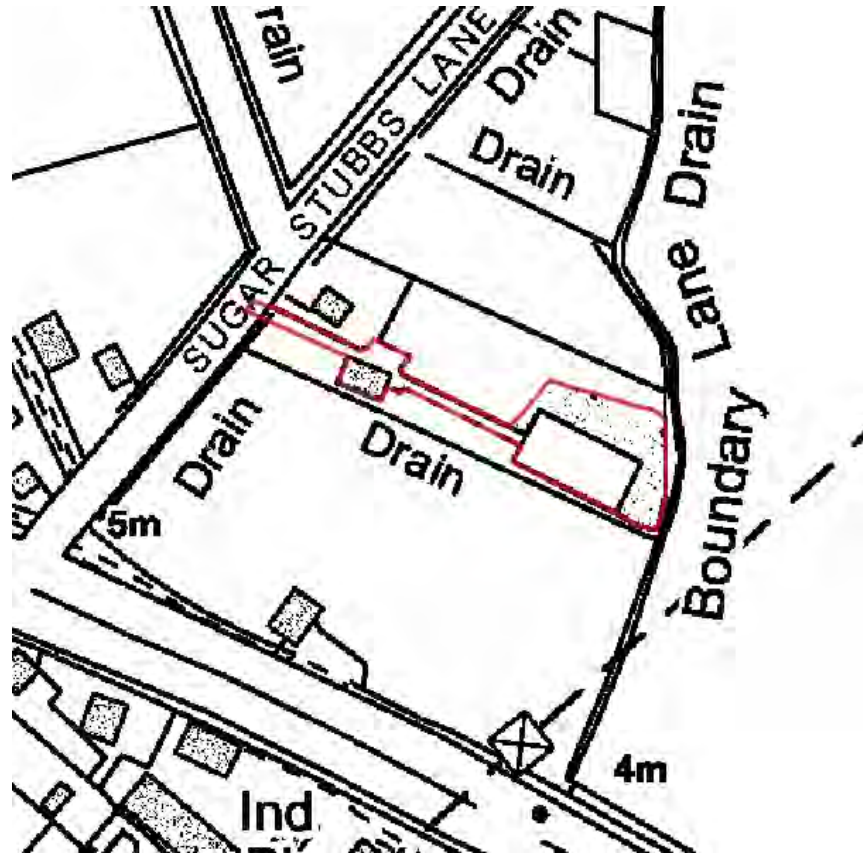


Criterion	Y/N/M/?	Comments
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	N	The western edge of the site is close to housing at the edge of the Banks settlement (Aveling Drive), although a line of poplar trees, a strip of open land and the Aveling Drive A site separates the two. Planning permission has been secured for housing at Greaves Hall, south of Aveling Drive. Small site, so unlikely to dominate the settled community.
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	M	See comment on (9) below; use of site may place undue pressure on roads. Given the size of the site, there should not be undue pressure on services such as health / education, nor on other infrastructure.
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	Y	Site is approximately 700m from bus stops on Guinea Hall Lane. GP, primary school and some shops are located in Banks; secondary school and further shops at Tarleton; employment facilities not prevalent in locality.
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	N	No significant issues known. Some commercial uses have taken place at Greaves Hall nearby, but this site is expected to be redeveloped principally as housing.
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	N	No contamination issues known about.
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	N	No issues known about.
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	N	No historic environment, landscape or nature conservation designation in vicinity of site.
<p>Suitability</p>		

Criterion	Y/N/M/?	Comments
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	?	Given the generally open nature of the surrounding area and the predominance of trees / hedging or open fencing, visual / acoustic privacy should be achieved via planting rather than fencing.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	N	Aveling Drive in the vicinity of the site is a single track road with a drainage ditch at one side, and is reached by first passing through a residential area. The narrow lane to the site is not designed for the types of large vehicles typically associated with Travellers, and it is not the easiest site for, say, a fire engine to access.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	Given the proximity of other houses, it is expected that these services are available or could readily be made available.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Green Belt site; approximately 100m from Banks settlement boundary
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	Y	Site is within Flood Zone 3.
13. Can the site accommodate between 3 and 15 pitches / plots?	N	Current appeal over one pitch; in theory capacity may exist for one further pitch on site.
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Two caravans on site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	Availability may be limited to a particular group or family.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	M	Less than ideal highway access mentioned above
17. Are there any land stability issues?	N	None known of
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of
Main constraints or negative issues Most advantageous features Any other comments	Flood Zone 3 and poor access; small site In hands of Travellers and in use as Traveller site Site subject to planning appeal, currently with Secretary of State	

Site 3. Sugar Stubbs Lane, Banks

Site with permission for one caravan. Static caravan and other caravans on site.



Site from Sugar Stubbs Lane



Site from A565



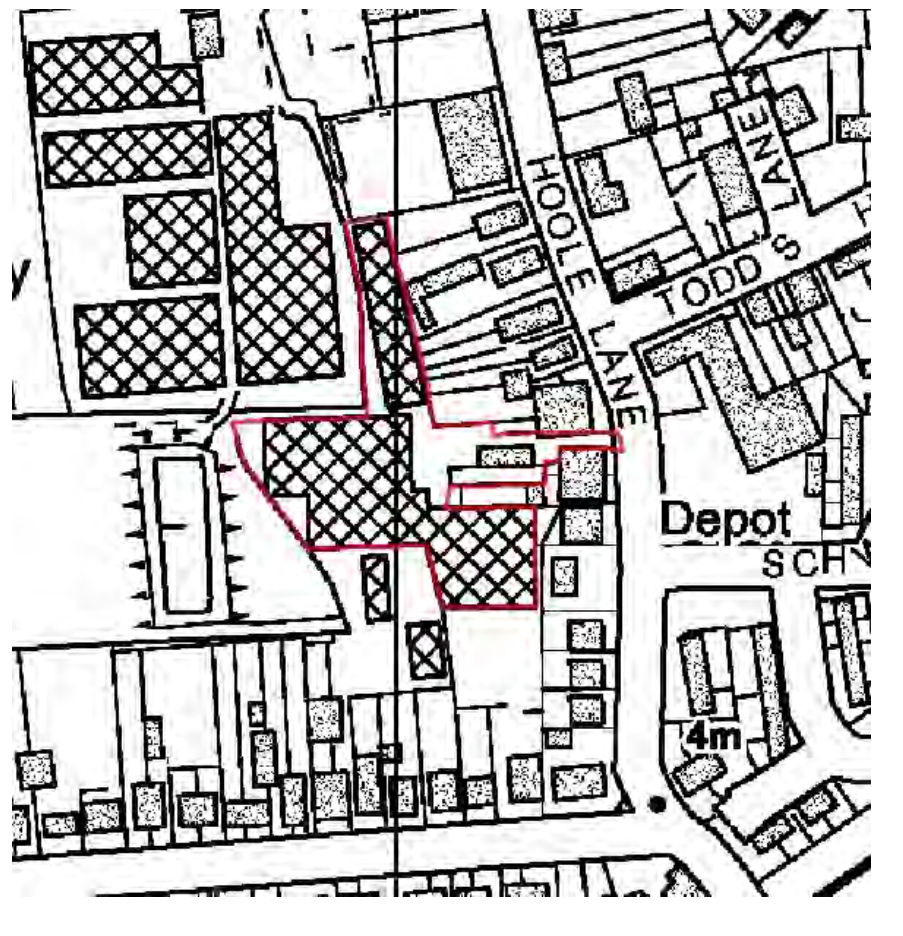
Criterion	Y/N/M? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>N This is a small site sufficiently far from any settled community to avoid issues of the site dominating the community. It is possible to access the main road network passing only two other properties.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N Due to the relatively small size of the site, its use as a Traveller site should not place undue pressure on local infrastructure; see comment at (9) below on roads.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	<p>Y/N Site is approximately 500m / 700m from nearest bus stop (depending on bus direction). Access on foot to facilities mentioned is not a realistic prospect due to location of site away from Banks village. However, the site is close to the A565, so services are easily accessible by private motor vehicle.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>Y Overhead electricity cables less than 100m from back of site; main road within 150m of site. However, neither are considered to imply an unacceptable impact on site residents (holiday caravans and residential properties nearby are closer to the A565 / pylons).</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>N No issues known about.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>N No historic environment, landscape or nature conservation designation applies to site; historic landscape of local importance starts 100m to east of site.</p>
<p>Suitability</p>	

Criterion	Y/N/M/?	Comment
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y	Much of the site is already screened to an extent by existing trees / bushes / buildings. Screening at the south-eastern (back) edge of the site is necessary, as the site is highly visible from the westbound A565 east of Banks.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	M	Sugar Stubbs Lane is unclassified and narrow, although it appears wide enough for two vehicles to pass. It is necessary to use approximately 120m of Sugar Stubbs Lane to access the site from the A565. Site has separate gated access from adjacent dwelling. Access for emergency vehicles appears possible (given the site entrance is set back up to 10m from Sugar Stubbs Lane), although not ideal.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	Given the proximity of other houses, it is expected that these services are available or could readily be made available.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Green Belt site, approximately 600m from Banks settlement boundary.
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	Y	Site is within Flood Zone 2, so must be shown to meet Exceptions Test. Within 100m of Flood Zone 3.
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Current planning application for five caravans; existing static caravan also on site; 3 pitches at 2 caravans per pitch.
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	M	Static caravan and a number of other vehicles, including touring caravans on site (Nov 2013); site is in the hands of Travellers.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	Availability may be limited to a particular group or family.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	No significant physical constraints known, although highway access is not ideal
17. Are there any land stability issues?	N	None known of
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of

Criterion	Y/N/M/?	Comment
Main constraints or negative issues		Flood Zone 2; small site
Most advantageous features		Site is well screened, should not impact significantly on the settled community, and appears to be in the hands of Travellers.

Site 4. Land west of Hoole Lane, Banks

Site close to the centre of Banks village. SHLAA site whose owner has indicated a willingness for the site to be considered as a Traveller site.

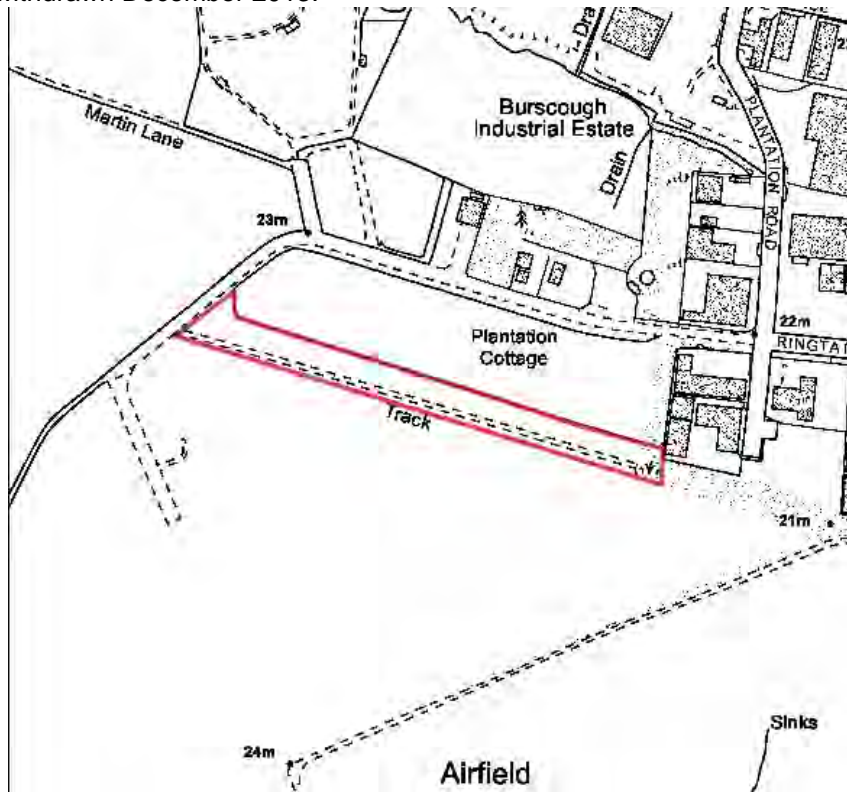


Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>Y The site is likely to cause issues with settled community due to its abutting several residential and other properties on Hoole Lane.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N The site is within the settlement of Banks, with generally adequate roads, infrastructure and services (drainage has been raised as a local issue). Provided the site were not too large, it should not place undue pressure on local services.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	<p>Y Site is within 50m of bus stops on Hoole Lane. Access on foot possible to a number of services / facilities in Banks.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>N Any "bad neighbour" uses would equally affect existing residential properties adjacent to the site.</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>N No issues known about. (Existing derelict glasshouses would need to be removed in an appropriate manner if the site were to be allocated as a Traveller site.)</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>N No historic environment, landscape or nature conservation designation in vicinity of site.</p>

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y/N	Site overlooked by neighbouring residential properties, although close board fencing already exists to screen some of the site. Western edge of the site leads to open land outside the settlement - planted screening may be more appropriate here.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y/N	Site is on Hoole Lane which is of suitable standard, although it is not clear as to how access to site would be achieved, given existing properties fronting Hoole Lane.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	Given the site's location within a settlement, it is expected that appropriate services could be provided.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	N	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	Y	Site is within Flood Zone 3.
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Indicative capacity 7-8 pitches
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Owner has expressed a willingness that the site be considered as a potential Traveller site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	?	Access arrangements unclear.
17. Are there any land stability issues?	N	None known of
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of
Main constraints or negative issues		Flood Zone 3 rules out this site.
Most advantageous features		Reasonably sustainable location with access to services and facilities.

Site 5. Land west of Ringtail Road, Burscough

Green Belt site subject to unauthorised development, including storage of fairground equipment. Planning application for park homes to accommodate Travelling Showpeople withdrawn December 2013.



Eastern end of site from Plantation Road (unadopted)



Unadopted Plantation Road

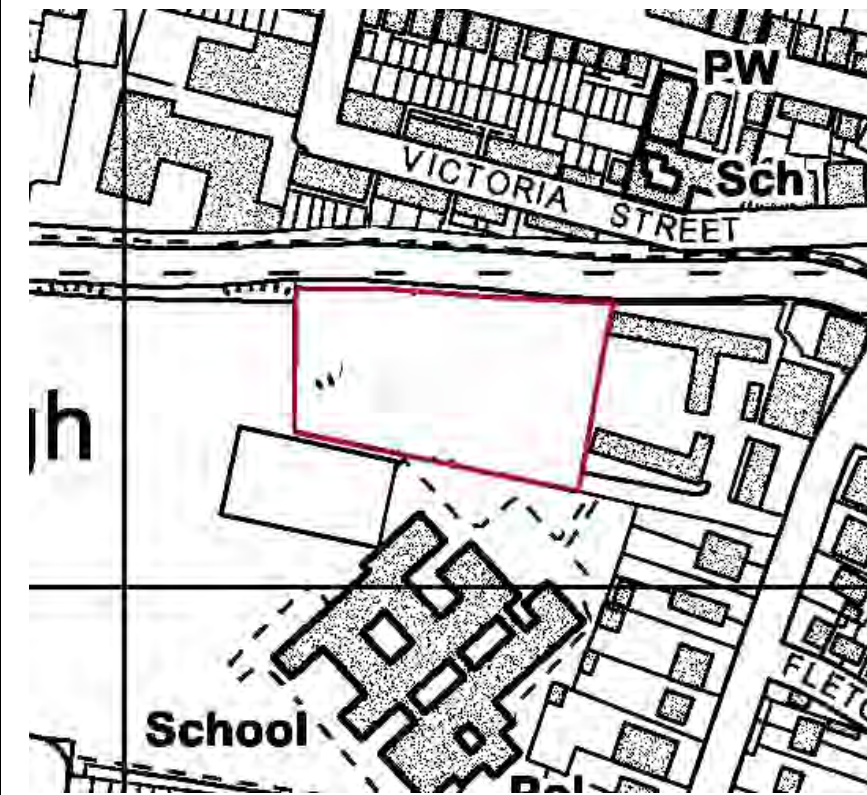


Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>N The site is physically separated from predominantly residential areas, although there is one residential property approximately 100m from the site.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N/M This site has been put forward as a Travelling Showpeople site. Whilst its occupation as such should not place undue pressure on 'social' / 'utilities'-type infrastructure, the type of large vehicles associated with this site may cause issues on the unadopted road leading to the most recent proposed site access.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	<p>N Site is approximately 2km by road to bus stops on A59 from the most recent proposed access to this site. Access to facilities would thus normally require private motorised transport. There is ready access to employment, however, on the adjacent industrial estate. Development of Yew Tree Farm nearby may result in certain services being more closely located.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>Y Site abuts industrial area; mitigation in relation to visual impact may be possible by screening, but mitigation in relation to noise issues more difficult.</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>N/M Neighbouring residents / occupiers of industrial units have raised concern regarding the timing of moving Travelling Showpeople equipment. If site were to be allocated, it may be possible to mitigate some of these issues e.g. via conditions re. timing of moving / storage of equipment.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>N No historic environment, landscape or nature conservation designation in vicinity of site.</p>

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y/M	Site already well screened existing trees / bushes / buildings, many of them evergreen, although storage of significant amounts of fairground equipment may require more extensive screening.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	N	Proposed site access (from planning application 2013/0629) involves travelling along 500m of unadopted road currently of poor quality, then 300m along the site access track.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	N/Y	Site does not currently have any formal connection to mains water / drainage / electricity. Given the neighbouring employment uses, it should be possible to obtain connections.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Site is in the Green Belt, but adjacent to the non-Green Belt Burscough Industrial Estate.
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Sufficiently large to store Travelling Showpeople equipment to meet stated [draft] GTAA need (i.e. one plot; one yard).
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Owner has submitted a planning application for park homes to accommodate Travelling Showpeople (2013/0629).
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	No significant physical constraints known, although highway access is unsatisfactory.
17. Are there any land stability issues?	N	None known of
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N/?	Site requires access down an unadopted road; site not at present in the ownership of Travelling Showpeople, although this should not jeopardise the site's development.
Main constraints or negative issues		Highways access
Most advantageous features		Relatively screened site in area of Travelling Showpeople need.

Site 6. Land west of The Quays, Burscough

Authorised Travelling Showpeople site; 10 plots: 4 permanent, 6 seasonal.

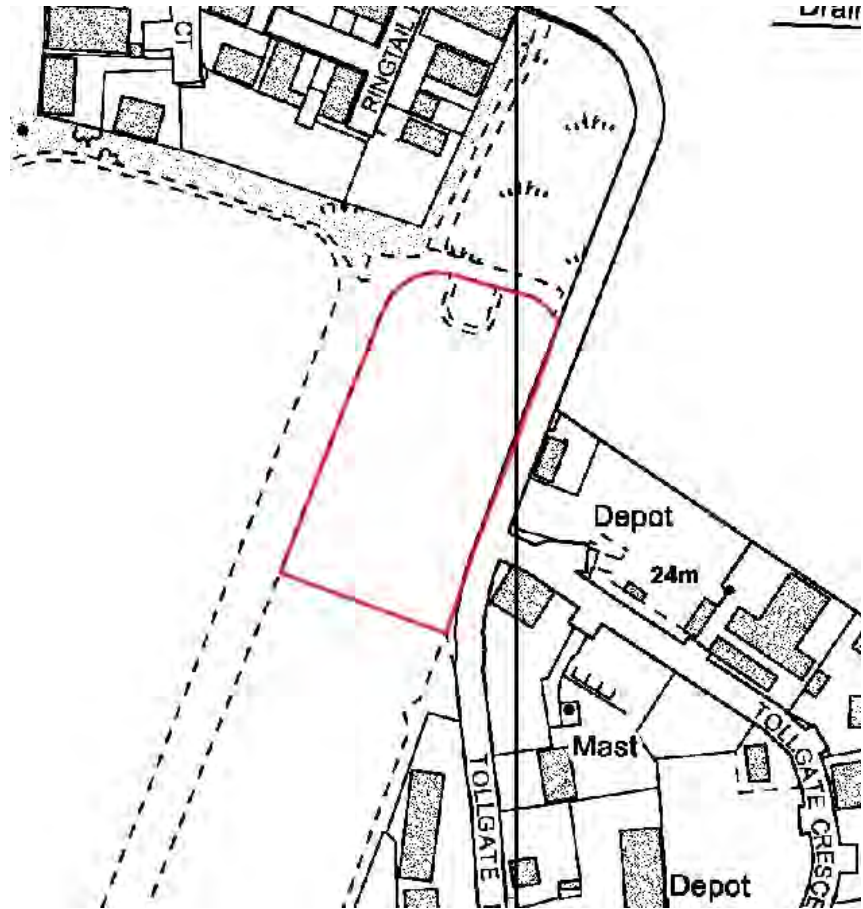


Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>N Longstanding site, already used and authorised as a Travelling Showpeople site. WLBC is unaware of any issues between the site occupants and the local settled community.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N WLBC is unaware of any evidence that the existing site is placing undue pressure on local infrastructure, services and roads.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	<p>Y Site is less than 100m from Burscough Centre and its facilities, approx. 200m from bus stops and 500m from Burscough Bridge Station. Site is within walking distance of most services and facilities.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>N</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>M Site involves storage and manoeuvring of large vehicles, although it has operated adjacent to flatted development for a number of years.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>Y Site is subject to an open space designation and is adjacent to the Leeds Liverpool Canal (wildlife corridor designation), but site is already authorised as a Travelling Showpeople site.</p>

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y	Unfortunately, the evergreen hedge / trees screening the site were removed in 2012/13, greatly increasing the site's visual impact. Replacement planting / fencing would help screen the site.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y	Site is close to A59 but accessed via a narrow road between the site and the A59. Nevertheless, the site has functioned as a Travelling Showpeople site for several years using the existing access.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	N	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Site is limited in size, and the number of Travelling Showpeople plots possible would be unlikely to exceed 10. (Current permission is for 10 plots.)
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Site owned by Travelling Showpeople.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	Availability limited to a particular group or family.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of
17. Are there any land stability issues?	N	None known of
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of
Main constraints or negative issues		Site recently unsightly
Most advantageous features		Authorised site in the hands of Travelling Showpeople.

Site 7. Land west of Tollgate Road, Burscough

Green Belt site suggested (by Travelling Showpeople) as a possible Travelling Showpeople site.



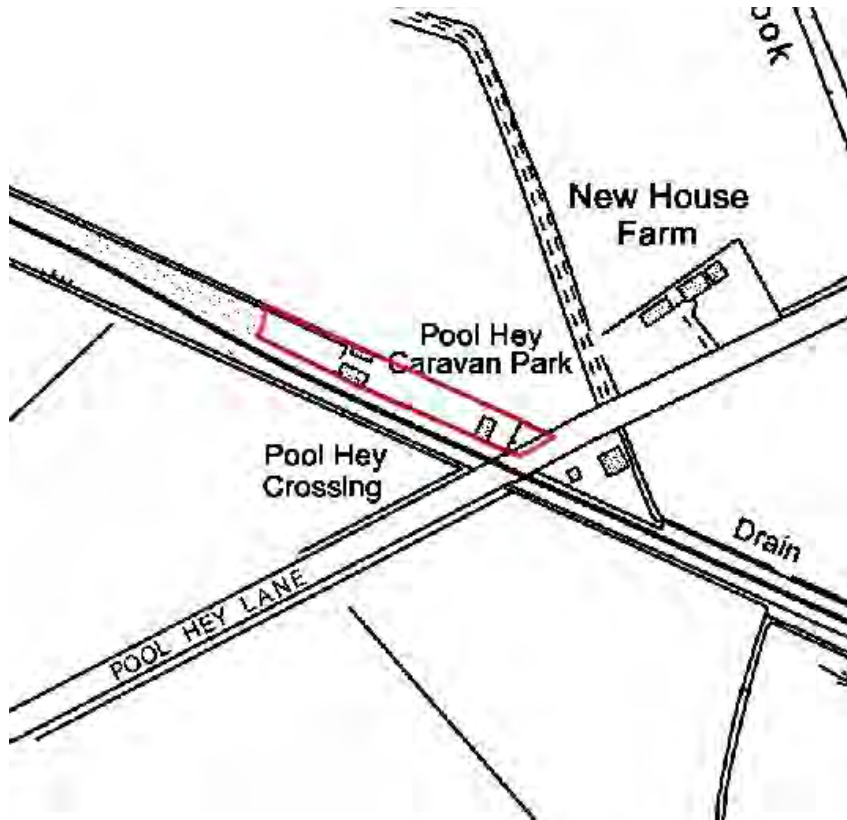
Criterion	Y/N/M/?	Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	N	The site is separated from the settled community by (currently) undeveloped countryside and / or industrial development. The site is close to the edge of the Yew Tree Farm Strategic Development Site, but it is expected that the western part of the Yew Tree Farm site will be employment uses, rather than residential.
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	N	The use of this site as a Travelling Showpeople yard should not place undue [extra] pressure on local roads or services.
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access:</p> <ul style="list-style-type: none"> - an appropriate health facility - education - employment - shops - other necessary services? 	Y/M	The site is 850m walk from the nearest bus stops on A59. The site is within walking distance of employment; retail development is planned less than 1km from site, but other services tend to be more than 1km from site.
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	Y/N	The site is adjacent to an industrial area, although this tends to be light industrial uses. Some existing properties on Lordsgate Lane nearby are less than 50m from similar industrial uses.
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	N	No contamination issues known about.
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	N	Site involves storage and manoeuvring of large vehicles. The site is adjacent to industrial uses and close to the edge of the Yew Tree Farm Strategic Development Site, where it is expected that employment uses will be located, and thus the movement and maintenance of vehicles and equipment should not impact unacceptably on neighbours.
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	N	No historic environment, landscape or nature conservation designation in vicinity of site.

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	?	The site is currently open, with just a low hedge on the road boundary. Allocating the site as a Travelling Showpeople site would mean an incursion into a "new" area of Green Belt, and particularly good and robust boundary treatment would be necessary. Given the green, open nature of the site, landscaping rather than fencing would be more appropriate, but this obviously takes longer to be established.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y	Site lies on the "spine road" through the Burscough Industrial Estate.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	N/Y	Site is currently undeveloped, but provision of services should be straightforward given neighbouring industrial areas.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Site is within the Green Belt, but adjacent to the non-Green Belt area of Burscough Industrial Estate and the Yew Tree Farm Strategic Development Site.
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Sufficiently large to store Travelling Showpeople equipment to meet stated [draft] GTAA need (i.e. one plot; one yard).
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	?	Land is unregistered, thus unable to ascertain owner's views.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	?	Delivery of site depends on owner being willing to sell. Site is currently used for car boot sales.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of.
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of, but see above comments regarding ownership.

Criterion	Y/N/M/?	Comment
Main constraints or negative issues		Owner's views currently not confirmed. Open Green Belt location.
Most advantageous features		Access to road network and compatible neighbouring uses.

Site 8. Pool Hey Caravan Park, Pool Hey Lane, Scarisbrick

Site has in use as a Traveller site for almost 20 years. Permission for one 'park home' tied to an individual; this permission has now expired. Current use unlawful but long-established.

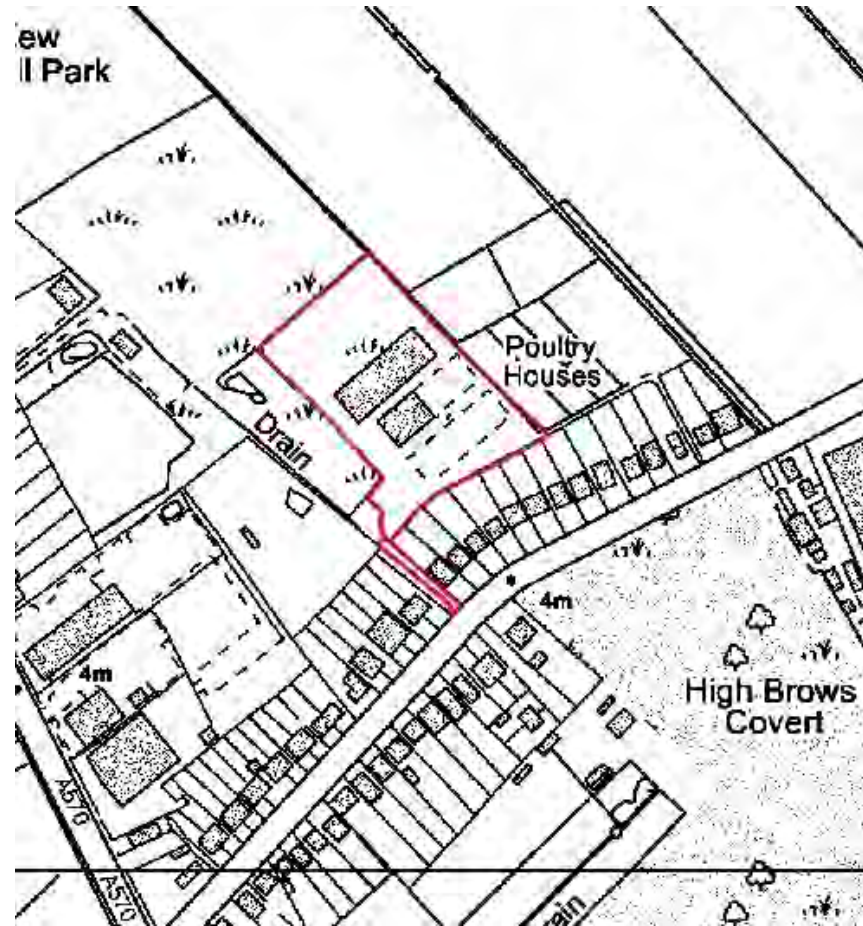


Criterion	Y/N/M/?	Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	N	Narrow linear site over 700m from the nearest residential area (although there are two properties close to the site). Site has been occupied by Travellers since the 1990s and the Council has no evidence of issues between the occupants of the site and the local settled community.
2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?	N	The Council is unaware of this site's occupation over recent years placing undue pressure on local infrastructure, services and roads.
<p>3. Accessibility:</p> <p>Is the site within 1km of a bus route or other public transport facility?</p> <p>Is it possible to easily access:</p> <ul style="list-style-type: none"> - an appropriate health facility - education - employment - shops - other necessary services? 	N	The site is approximately 1.2km from the nearest bus stop. Access to health services, education, employment, shops, etc. would probably thus need to be by private motor vehicle.
4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?	N/Y	Site is adjacent to Southport - Manchester railway line, and beside a level crossing. These should not have any greater impact on residents of the site than on other existing residential uses in the locality close to the railway line.
5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?	N	No contamination issues known about.
6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?	N	WLBC is unaware of any significant issues arising from the site's continuing use as a Traveller site. The site is physically separate (field / road) from the nearest residential properties.
7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?	Y	Site lies within an Area of Landscape History of County Importance, and is directly adjacent to the Martin Mere Mosslands Biological Heritage Site.
<p>Suitability</p>		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y	The site is largely screened on the south western side by the railway, and on the north eastern side by hedging; the front is screened by substantial wooden gates.

Criterion	Y/N/M/?	Comment
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	N/Y	This lane has accommodated typical Traveller traffic for a number of years, but Pool Hey Lane includes a narrow stretch of road with a passing place and is not an ideal access road to a Traveller site, plus is close to a level crossing.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	Land the other side of the railway is in Flood Zone 2, but the site itself is not in Flood Zone 2 or 3.
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Indicative capacity 6 pitches.
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.
Main constraints or negative issues		Highway access is not ideal.
Most advantageous features		Site is a long-established (although illegal) Traveller site with no evidence of significant problems arising from its use as such over recent years.

Site 9. High Brow Farm, Pool Hey Lane, Scarisbrick

Former poultry farm site subject to enforcement action in the past, due to occupation by Travellers.



Site access from Pool Hey Lane



Southern portion of site



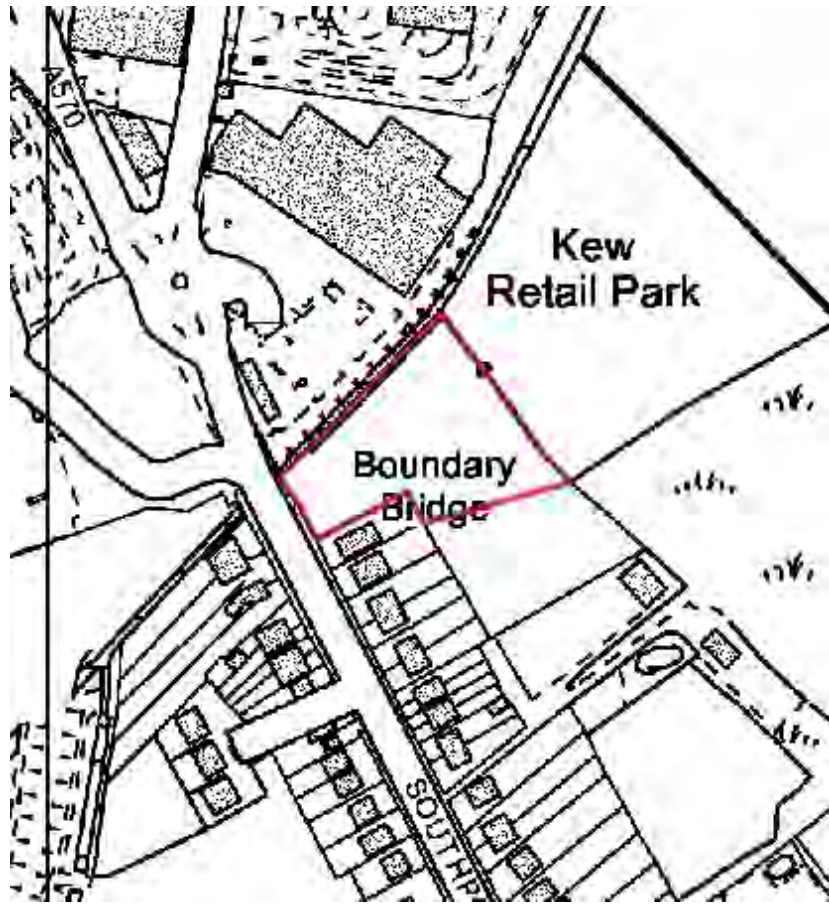
Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>Y The site is directly adjacent to a row of bungalows, but is subject to no other "natural surveillance". It is unlikely that peaceful and integrated co-existence could be achieved between the two uses.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N Given residential uses (and, by implication, services and infrastructure) in the proximity of this site, it is expected that its use for Travellers should not place undue pressure on local services or infrastructure, provided the site were not too large.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	<p>Y The site is approximately 350m from bus stops on the A570; access to general facilities is on the whole beyond typical walking distances.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>N No such processes, etc. are situated adjacent or close to the site. The closest part of Southport landfill site is approximately 500m from the site, but other residential properties are closer to the landfill site than this site is.</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>M The site is adjacent to a former agricultural building (poultry shed) that, judging by appearance, may have roofing that contains asbestos. If the site were to be proposed for allocation, this would need to be subject to further careful investigation.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>Y The site is directly adjacent to an Area of Landscape History of County Importance.</p>

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	M/N	Screening between the site and neighbouring residential properties (presumably close board fencing) would result in these properties losing their current open outlook, although the current view is somewhat interrupted by derelict poultry sheds. Fencing or screening between the site and the currently open countryside to the north east would have a visual impact and could affect an area of landscape history importance.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y	The site is close to the A570. Access would involve using a 250m stretch of Pool Hey Lane which is an unclassified residential road. However, commercial vehicles associated with the Kershaws Foods business, as well as farm traffic, use this part of Pool Hey Lane.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	Given the proximity to residential and commercial properties on Pool Hey Lane, it is assumed that provision of utilities and drainage should be achievable.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Site abuts the Brown Edge settlement area.
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	Y	Site is wholly within Flood Zone 2; parts of the site are less than 50m from Flood Zone 3.
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	?	Site is currently being marketed. Whether or not the owner would sell as a Traveller site is not known.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	?	Site is currently being marketed. Whether or not the owner would sell as a Traveller site is not known.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N/?	See above comment regarding environmental issues.
17. Are there any land stability issues?	N	Whilst there appear to have been some land stability issues on Scarisbrick New Road nearby, these are not considered to be sufficiently severe to prevent the use of this site as a Traveller site.
18. Is the site sloping to any great extent?	N	

Criterion	Y/N/M/?	Comment
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.
Main constraints or negative issues		Site's proximity to residential properties is likely to lead to difficulties in ensuring peaceful co-existence between the settled and travelling community.
Most advantageous features		Proximity to bus route

Site 10. Land at 1-3 Southport Road, Kew

Site suggested as a potential location for a Traveller site, although not by owners.



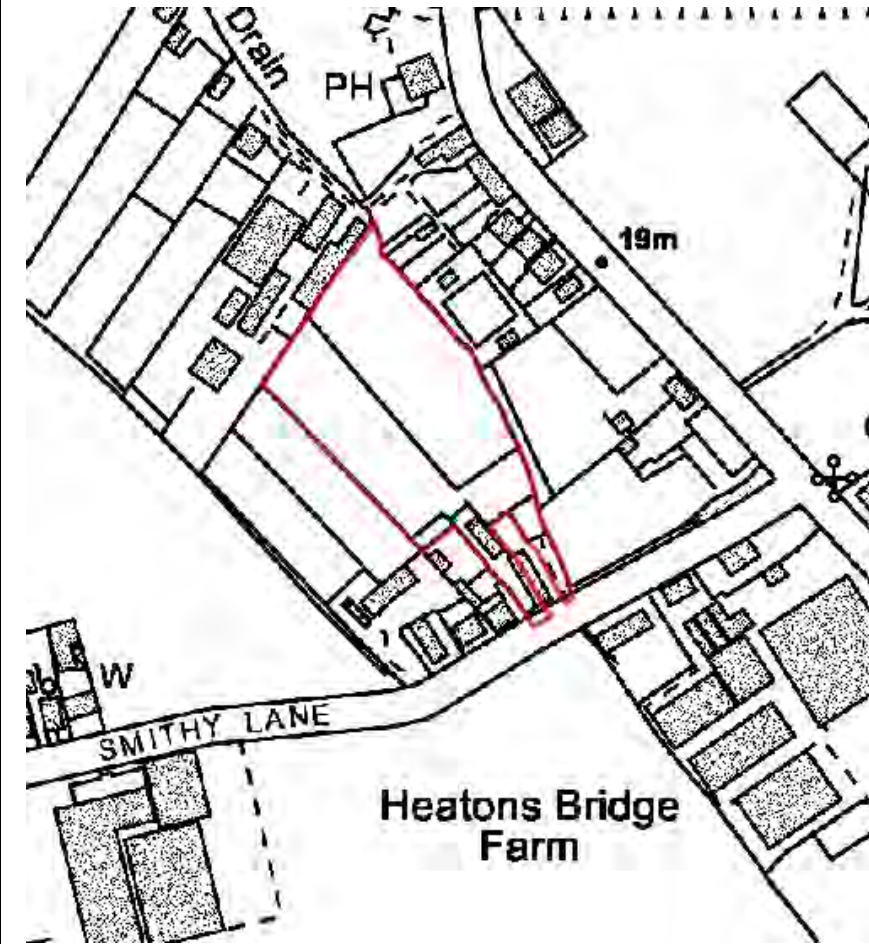
Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>N/M The site is directly adjacent to one residential property, but given its location on a main road and neighbouring uses (including commercial), the overall impact of this site on neighbouring properties should be less than the overall impact of the High Brow Farm site nearby.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N The site is located close to the edge of a sizeable settlement with associated levels of infrastructure and services. The site's development should not place undue pressure on these services.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access:</p> <ul style="list-style-type: none"> - an appropriate health facility - education - employment - shops - other necessary services? 	<p>Y Site is adjacent to A570 with its bus services direct to Southport and Ormskirk centres. Site is within easy walking distance of supermarket and other shops. Other services are easy to access via public transport.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>Y Site is very 200m (as the crow flies) to waste disposal centre, with a landfill site beyond, although it is separated by a watercourse and retail units. Mitigation by way of appropriate screening should be possible. The site has been considered as a housing site, and these issues have not precluded the principle of housing on the site.</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>N No such issues known about.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>N Site is just over 100m from the edge of an area designated as Area of Landscape History of County Importance.</p>
<p>Suitability</p>	

Criterion	Y/N/M/?	Comment
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y	The dwelling adjacent to the site has a close board fence in place at the side and rear of the property. The north western boundary has trees / bushes. Land at the back of the site is overgrown / scrubland. Introduction of visual screening at the back of the site should not lead to an unacceptable visual impact on the site's surroundings. More careful attention would need to be paid to the front of the site, and to the boundary between the site and the adjacent residential property.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y	Site has direct access onto the A570.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	Site does not currently appear to have these services, but given its location, these services should be straightforward to provide.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	N/Y	Front part of the site is within Brown Edge settlement area; rear of site is within Green Belt.
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	The part of the site fronting the A570 is not in Flood Zone 2; south-eastern part of the site is in Flood Zone 2.
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Capacity of the site would be expected to be at the lower end of the scale, given adjacent residential use and proximity of Green Belt and Flood Zone 2.
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	N	Site has recently been sold; it is unclear whether the new owners would be willing to sell on the site as a Traveller site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	?	Site has recently been sold; it is unclear whether the new owners would be willing to sell on the site as a Traveller site.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	?	Site appears to consist of concrete hardstanding, some of which may need to be removed to accommodate Travellers. This may not be a "significant" constraint.
17. Are there any land stability issues?	M	There is evidence of land stability issues in the immediate area. Site is directly adjacent to a watercourse.
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.

Criterion	Y/N/M/?	Comment
Main constraints or negative issues		Willingness of owner to sell as a Traveller site is unclear.
Most advantageous features		Reasonably sustainable location.

Site 11. Land rear of 281 Smithy Lane, Scarisbrick

Site submitted as a potential Traveller site in the September 2013 Call for Sites exercise.



Rear of site viewed from further west along Smithy Lane



Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>Y Site is directly adjacent to a number of residential properties.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>? The site is within a semi-rural area with several residential and a small number of commercial properties nearby, and thus it is expected that there is adequate infrastructure provision in the area to 'absorb' the use of the site for Travellers. There are few local services, however.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	<p>Y Site is within 150m of bus stops on Heaton's Bridge Road with hourly services in each direction to Ormskirk and Southport. The services listed in the criterion are generally beyond typical walking distance, and would need to be accessed by public transport or private motor vehicle.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>N The only nearby use that could be considered to have negative impacts is a mushroom farm (150m away), but there are several residential properties as close, or closer, to this use.</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>N No such issues known about.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>Y Site is within an Area of Landscape History of Local Importance.</p>

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	M	Achieving visual and acoustic privacy would probably entail close board fencing which may be in keeping with boundary fences for neighbouring residential uses, but not with the more open land to the south west of the site, which would be likely to require planting.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y/N	Site is close to the B-classified Heaton's Bridge Road, although has less than ideal access onto Smithy Lane, especially for larger vehicles associated with Travellers. Access to the site would be directly beside a residential property (283 Heaton's Bridge Road)
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	The site is within an area with several residential and a small number of commercial properties, and thus it is expected that there is adequate utility infrastructure provision in the area to also serve this site.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Given the size of the site, it would be expected to accommodate closer to 3 rather than 15 pitches.
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Site submitted in "Call for Sites" as a potential Traveller site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of, but see comments on access above.
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None specified in Call For Sites form.

Criterion	Y/N/M/? Comment
Main constraints or negative issues	Proximity to residential properties; access not ideal.
Most advantageous features	Site is available.

Site 12. Former Depot, A565, Mere Brow

Site considered as a potential Traveller site on account of its proximity to Banks and limited availability of sites in Banks not subject to flood risk. Site is triangular in shape, with the 'eastern apex' of the triangle a former depot, with a number of derelict buildings and a row of trees forming a roust 'inner western boundary'. Beyond this 'inner western boundary' is an open area in agricultural use, in separate ownership.



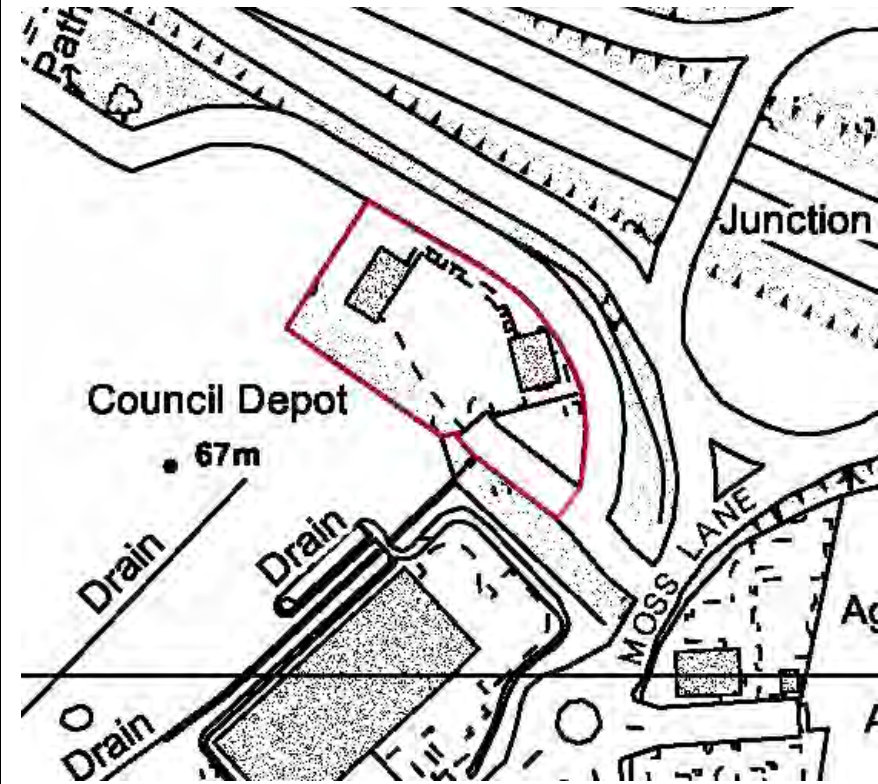
Criterion	Y/N/M/?	Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	N/M	Site is adjacent to the small settlement of Mere Brow, but is separated from residential properties by the A565 dual carriageway. This physical barrier may increase the possibility of peaceful co-existence, but not integrated co-existence.
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	N	The site should not place undue pressure on local infrastructure, services and roads. As local services are limited, it is likely the site's occupants will travel to access services elsewhere (e.g. Banks, if this site is to meet Traveller accommodation needs arising in Banks).
<p>3. Accessibility:</p> <p>Is the site within 1km of a bus route or other public transport facility?</p> <p>Is it possible to easily access:</p> <ul style="list-style-type: none"> - an appropriate health facility - education - employment - shops - other necessary services? 	Y	Site is within 550m of bus stops on A565 (and within 300m of bus stop on Mere Brow Lane). Limited facilities within walking distance at Mere Brow; access to the majority of facilities would be likely to require public transport or private motorised transport.
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	N	With the exception of power cables (although not high tension (>100kV) power lines) over the site, none of the stated uses are next or near to the site. Site is adjacent to the A565 dual carriageway, but a number of other residential properties in the area are equally close to the same road.
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	N	No contamination known of, although minor contamination may be present on account of site's previous use as a County Council depot.
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	N	No such issues known about.
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	N	

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	M	The site is mostly screened from the adjacent A565 by hedging. Vegetation along the Tarleton Runner watercourse screens the majority of the site from the east, and vegetation along the 'inner western boundary' screens the site from the west. Full acoustic privacy unlikely to be achievable from the adjacent A565 without more significant impact on the surroundings.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y/N	Site lies directly on the A565. Although it has previously been used as a highways depot, direct access onto this 50mph speed limit section of the A565 dual carriageway may be problematic, given vehicles accessing the site may be slowing to almost a standstill.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	M	Presumably the previous depot had mains water and electricity; given the proximity to Mere Brow village, connection to these services should be feasible in future.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Site is within the Green Belt, but adjacent to the Mere Brow settlement.
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	Y	Land beside Tarleton Runner is in Flood Zones 2 (typically 20-25m from the watercourse) and 3 (typically 15-20m from the watercourse). This would not preclude the use of the site as a Traveller site, but would require caravans to be located away from the Flood Risk area, significantly decreasing the net developable area and the site capacity.
13. Can the site accommodate between 3 and 15 pitches / plots?	N	See comments on ownership below. Only the eastern part of the site is considered a deliverable Traveller site, but given the area at risk of flooding, this site would only be able to accommodate a small number of pitches (possibly no more than 2).
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	N?	The willingness of the owner of the eastern section of the site to sell as a Traveller site is unknown. The owner of the open, western section of the site has stated that they are not willing for this part of the site to be considered as a Traveller site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	N?	Availability of the eastern part of the site unknown. Western part not available.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of.
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	

Criterion	Y/N/M/?	Comment
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.
Main constraints or negative issues		Owner's views unknown. Direct access onto A565 dual carriageway likely to be problematic. Flood risk areas reduce the site's capacity.
Most advantageous features		Brownfield site able to accommodate a small number of pitches to help meet unmet needs arising in the Banks area.

Site 13. Land at White Moss Road South, Skelmersdale (A)

Site brought to the attention of the Council by the travelling community; being considered only as a transit site / authorised stopping-off site.

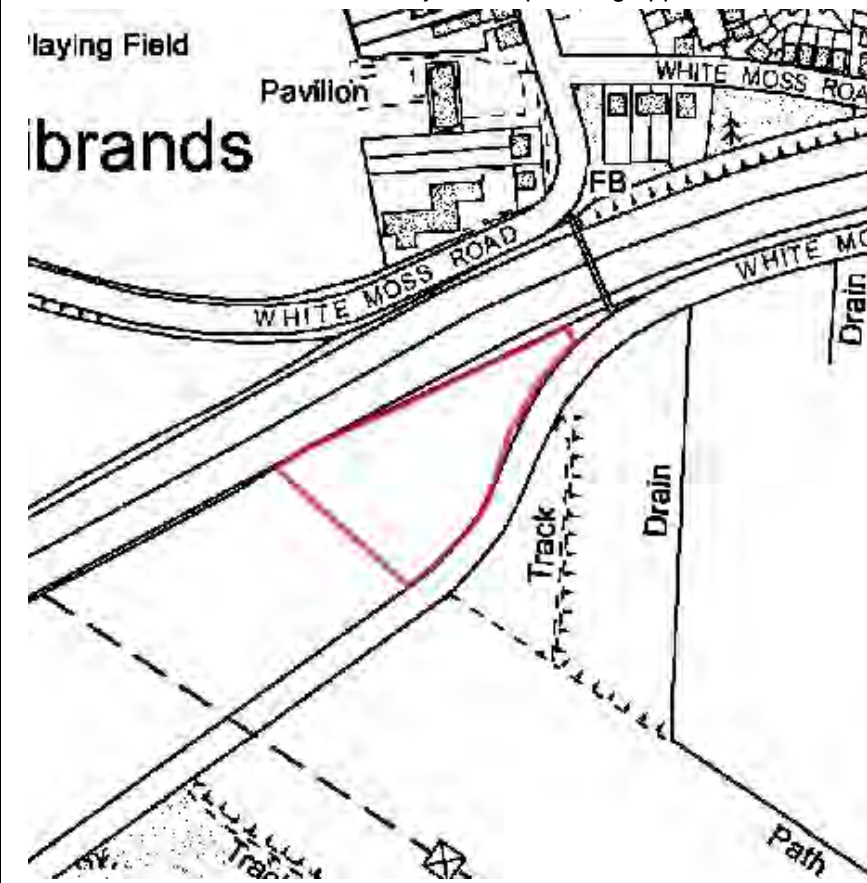


Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>N Site is physically separate from nearest settled community.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N? Site is away from "typical residential" infrastructure and services; its proposed use as a Transit site should result in the site only being occupied occasionally. Being close to a business area, it is expected that its use would not place undue pressure on local infrastructure.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	<p>N Site is just over 1km on foot from bus stops on Railway Road; this involves crossing a motorway junction. Access to facilities is thus likely to require private motorised transport.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>Y Site is less than 100m from the M58 motorway and within 500m of a waste facility.</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination known of, although minor contamination may be possible on account of site's previous use as a Highways Agency depot.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>N Use of this site as a transit site should have no greater visual impact than the site's previous highways-related use. Site is screened by trees from neighbouring business park and motorway junction.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>N No historic environment, landscape or nature conservation designation in vicinity of site, apart from M58 (designated as a major wildlife corridor - but this site's use as a Traveller site should not impact upon any nature conservation attributes of the M58).</p>

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y	Site is surrounded by an existing security fence and is screened by a belt of (deciduous) trees from the neighbouring business park and motorway junction uses.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y	Site has direct access to Junction 4 of the M58.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	It is expected that these services exist as a result of the site's previous use, or if not, they should be readily achievable given the business park nearby.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Site abuts the non-Green Belt White Moss Business Park.
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Site appears to have the capacity to accommodate 15 transit pitches.
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	N	Site owner has indicated that. although vacant, the site is not currently for sale.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	N	See above.
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of.
17. Are there any land stability issues?	N	There do not appear to be any land stability issues.
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.
Main constraints or negative issues		Owner not currently willing to sell. Site is close to an office-based business park. Relatively unsustainable location (although this may not be such a significant issue for a transit site).
Most advantageous features		Good location for a transit site, close to M58, fenced off and with hardstanding.

Site 14. Land at White Moss Road South, Skelmersdale (B)

Site in the hands of Travellers, subject to a planning application for stables in 2013.



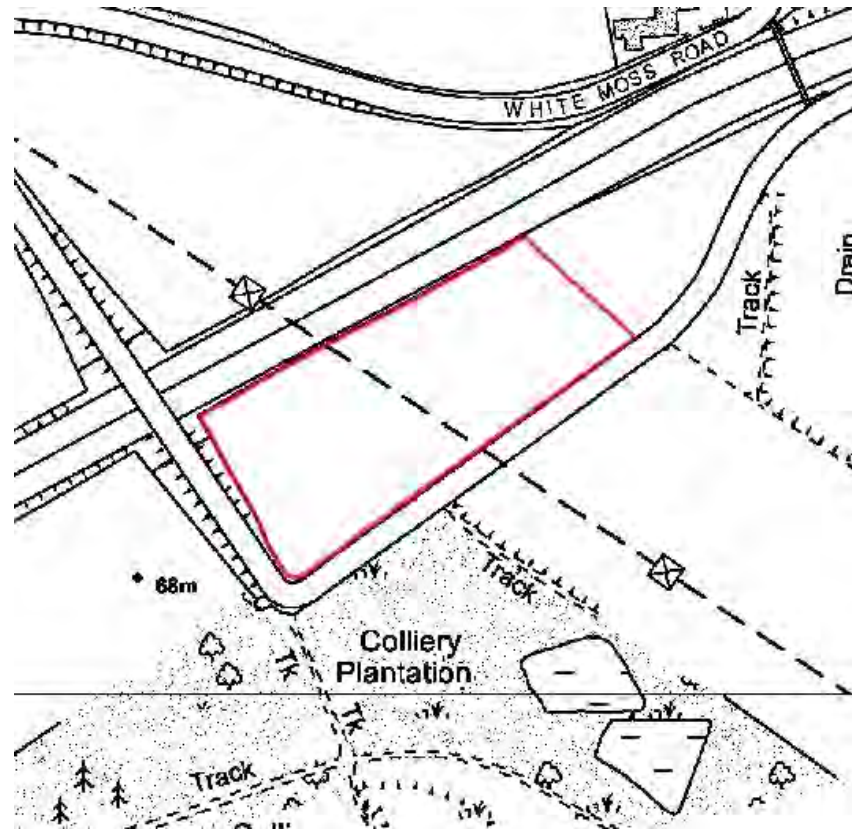
Criterion	Y/N/M/?	Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	N	Site is physically separate from nearest settled community. There is just one residential property approximately 300m along White Moss Road South; residential properties on White Moss Road are closer as the crow flies, and whilst separated by the M58, there is a footbridge close to the site.
2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?	N/A	There is very little local infrastructure / services.
<p>3. Accessibility:</p> <p>Is the site within 1km of a bus route or other public transport facility?</p> <p>Is it possible to easily access:</p> <ul style="list-style-type: none"> - an appropriate health facility - education - employment - shops - other necessary services? 	Y/N	Site is 650m / 750m from bus stops on Liverpool Road (using the footbridge over the M58). However, given the generally "detached" location of this site, it is probably that access to services and facilities would be reliant on private motorised transport.
4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?	Y	Site is adjacent to M58 motorway and within 200m of a waste facility.
5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?	N	No contamination issues known about.
6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?	N	Site has no immediate neighbours. Site is reasonably screened (provided existing trees, etc. are retained), and the adjacent motorway already has significant visual and acoustic impact, so the impact of the site should be limited and can be mitigated.
7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?	N	No historic environment, landscape or nature conservation designation in vicinity of site, apart from M58 (designated as a major wildlife corridor - but this site's use as a Traveller site should not impact upon any nature conservation attributes of the M58).
<p>Suitability</p>		

Criterion	Y/N/M/?	Comment
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y/N	Site is reasonably well screened by existing vegetation; this should be retained and added to in order to provide visual privacy. Given the location adjacent to the M58, acoustic privacy would be difficult to obtain without substantial close board fencing, which would look incongruous at this location, even against the backdrop of the motorway.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	?	White Moss Road South is narrow and of sub-optimal quality. However, a significant stretch of the road is used by landfill HGVs. Other than these, the road is relatively quiet; it should thus be able to accommodate typical Traveller vehicles, although being narrow, it is not ideal.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	N/?	The site does not currently have these utilities / drainage given its separation from other built development. It is unclear how easy it would be to provide mains water / electricity / drainage.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Site has been subject to a planning application for stables by an agent on behalf of Travellers.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	Y	No obvious constraints, but see comments above regarding nearby landfill use.
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.

Criterion	Y/N/M/?	Comment
Main constraints or negative issues		Proximity to M58.
Most advantageous features		Site is in the hands of Travellers.

Site 15. Land at White Moss Road South, Skelmersdale (C)

Site identified by Council officers.



View over site from M58 bridge



Site from White Moss Road South



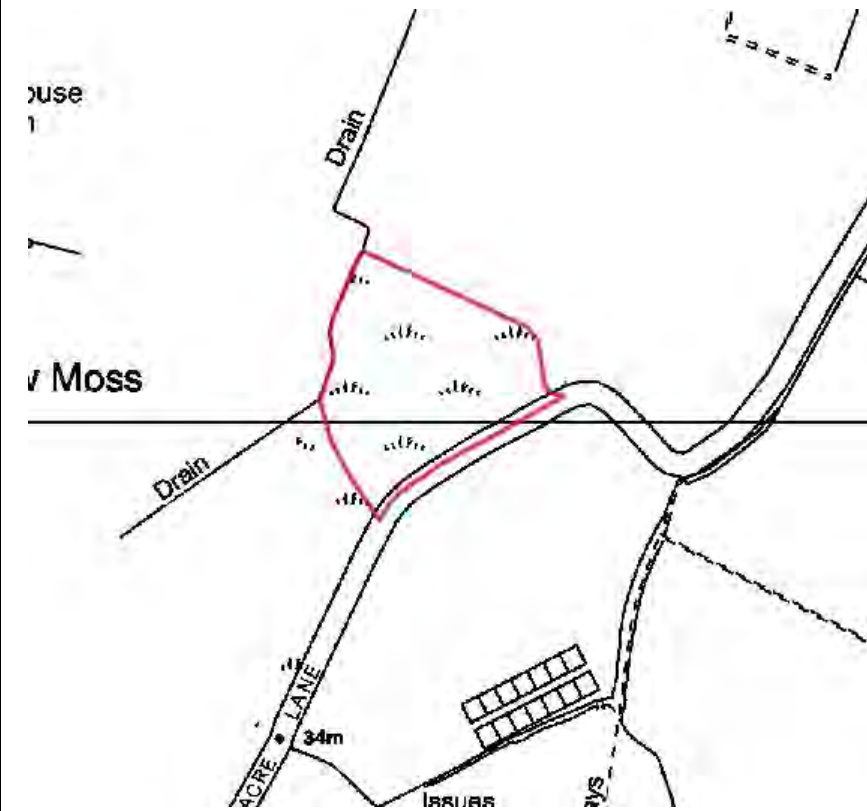
Criterion	Y/N/M/?	Comment
Sustainability 1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?	N	Site is physically separate from nearest settled community. There is just one residential property approximately 400m along White Moss Road South; residential properties on White Moss Road are closer as the crow flies, and whilst separated by the M58, there is a footbridge close to the site.
2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?	N/A	There is very little local infrastructure / services.
3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?	Y/N	Site is 700m / 800m from bus stops on Liverpool Road (using the footbridge over the M58). However, given the generally "detached" location of this site, it is probably that access to services and facilities would be reliant on private motorised transport.
4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?	Y	Site is adjacent to M58 motorway and within 300m of a waste facility.
5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?	N	Contamination unlikely given current agricultural use and classification as prime agricultural land.
6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?	Y	Site is open and in agricultural use; its use as a Traveller site would have visual impact and lead to loss of Grade 1 agricultural land. Screening by appropriate planting possible in theory, but would take several years to become established.
7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?	N	No historic environment, landscape or nature conservation designation in vicinity of site, apart from M58 (designated as a major wildlife corridor - but this site's use as a Traveller site should not impact upon any nature conservation attributes of the M58).
Suitability		

Criterion	Y/N/M/?	Comment
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	N	This rectangular site is currently open on its "long sides". Achieving visual and acoustic privacy in the short term would require close board fencing (or more significant measures, given proximity to M58) which would look incongruous at this location. Planting would take several years to become sufficiently established to screen the site / fencing.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y/?	White Moss Road South is narrow and of sub-optimal quality. However, a significant stretch of the road is used by landfill HGVs. Other than these, the road is relatively quiet; it should thus be able to accommodate typical Traveller vehicles, although is not ideal.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	N/?	The site does not currently have these utilities / drainage given its separation from other built development. It is unclear how easy it would be to provide mains water / electricity / drainage.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	N	Site in agricultural use. Owner's views not known.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	?	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	Y	No obvious constraints, but see comments above regarding nearby landfill use.
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.

Criterion	Y/N/M/?	Comment
Main constraints or negative issues		Proximity to M58, pylons cross site; current agricultural use.
Most advantageous features		Within M58 corridor and reasonably separate from residential uses.

Site 16. Land at Blackacre Lane, Ormskirk

Site brought to the Council's attention by the travelling community.



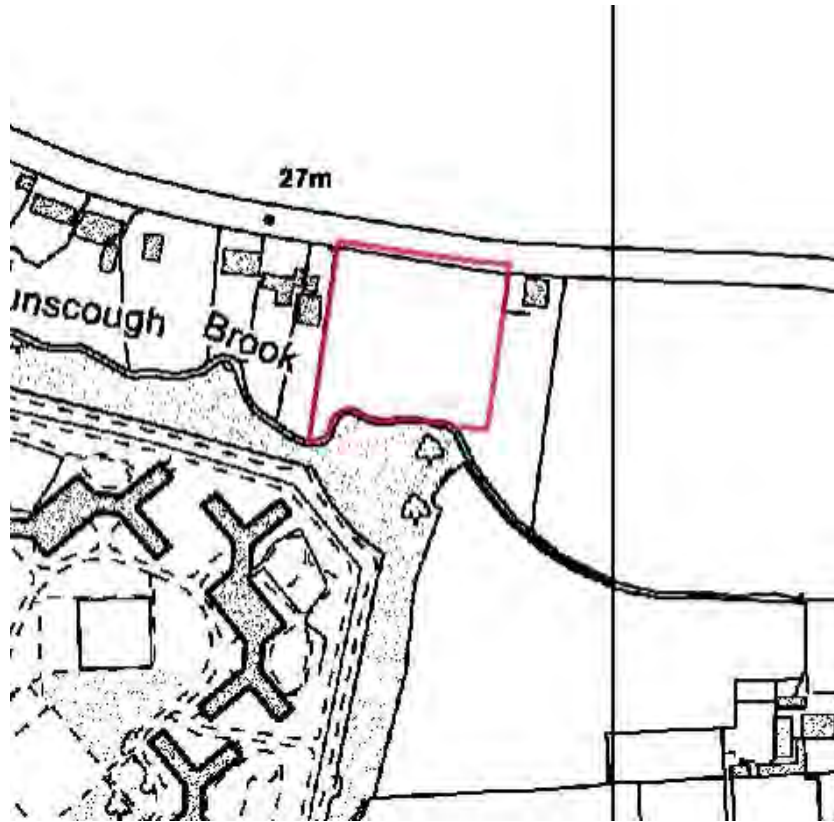
Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>N Site is physically separate from the built-up area of Ormskirk, although relatively close by (350m to the nearest housing). Provided the site were not large-scale, it should not dominate the settled community.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N Given proximity to Ormskirk and all its services / infrastructure, it is unlikely that the use of this site for Travellers would place undue pressure. However, see comment below on road access.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access:</p> <ul style="list-style-type: none"> - an appropriate health facility - education - employment - shops - other necessary services? 	<p>Y Site is 600-650m from nearest bus stops. Ormskirk has a full range of facilities; site is within walking distance of education and local shops; other services accessible via public transport.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>N Former sewage works nearby, but this use ceased several years ago and not considered to have any significant impact on the site.</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>N No environmental issues known of that would impact unacceptably on neighbours, but see comments on visual impact below.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>N No historic environment, landscape or nature conservation designation in vicinity of site.</p>

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	N?	Site is a metre or so higher than Blackacre Lane, so to provide visual and acoustic privacy would result in greater visual impact on the site's generally flat surroundings than a site level with the road. There is no natural screening between the site and Blackacre Lane at present.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	?	Blackacre Lane is a narrow lane (not much wider than single track) and not likely to be suitable for the larger vehicles typically associated with Travellers. Access from Ormskirk (A570 via Heskin Lane, or A59 via Grimshaw Lane) would be easier than access from Burscough (A59 / B5242 Pippin Street) as this would entail less distance travelled along Blackacre Lane, but would mean Traveller traffic passing through residential areas of Ormskirk. Site lies on a bend on the lane, but at present has two gated accesses.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	N/Y?	Site does not currently have these services. It is unclear whether they could easily be provided, but it is noted that the site is within 400m of the urban area of Ormskirk with its services / utilities.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Site is owned by Travellers; currently used for grazing horses.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of.
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	Site is generally flat, although the edge of the site gently slopes down approximately a meter in height towards Blackacre Lane.

Criterion	Y/N/M/?	Comment
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	Y	Site is on the line of the proposed Ormskirk Bypass. Site subject to a financial "clawback" clause which could impact upon deliverability.
Main constraints or negative issues		Site not in a recognised area of historic Traveller need; access road is narrow.
Most advantageous features		In the hands of Travellers; reasonably sustainable location, but separate from residential properties.

Site 17. Land at Butchers Lane, Aughton

SHLAA site whose owner has indicated a willingness for the site to be considered as a potential Traveller site.

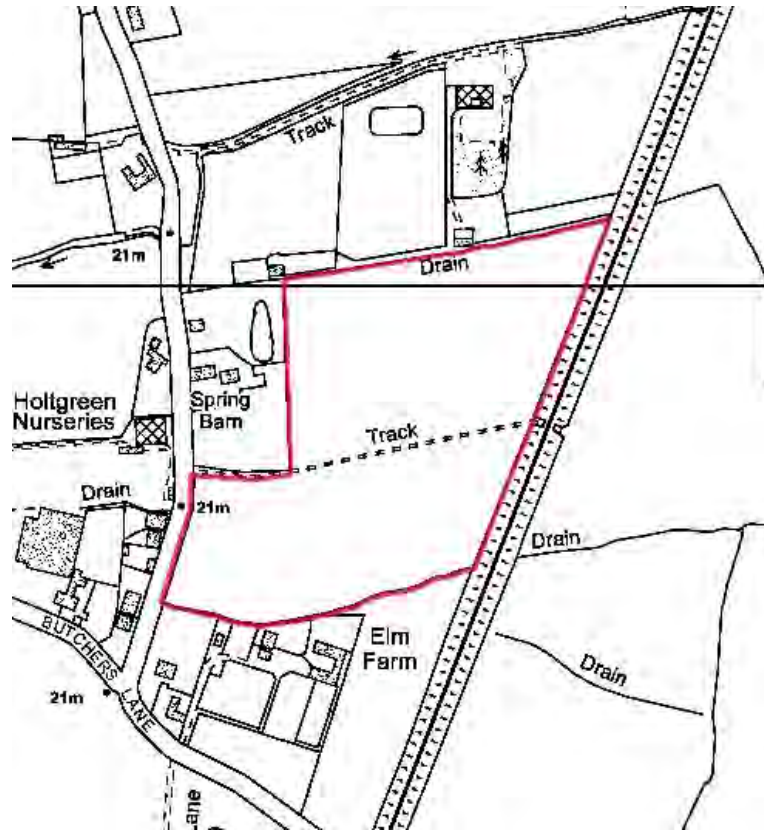


Criterion	Y/N/M/? Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	<p>M Site is in a rural area, but lies between residential properties.</p>
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	<p>N/A There is little local infrastructure / services.</p>
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	<p>N Site is 1.8km (Springfield Road) from the 311 bus service connecting to Ormskirk. Very few local accessible services.</p>
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	<p>N No such process / land use known of, although site is within 100m of Ashworth Hospital.</p>
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	<p>N No contamination issues known about.</p>
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	<p>N No environmental issues known about.</p>
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	<p>N No historic environment, landscape or nature conservation designation in vicinity of site.</p>

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	N	Site is located in a gap between residential properties. Any fencing to achieve visual / acoustic privacy would be likely to have a negative visual impact upon neighbours, who currently have predominantly open views to the side / front.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	M	Whilst Butchers Lane is unclassified, it is wide enough to accommodate typical Traveller vehicles. The site is large enough for adequate access to be achieved.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	Y	Site does not currently have these services, but it is assumed that they can be provided given residential properties either side of the site.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N/Y	Rear of site (about 15% of site) is within Flood Zone 2, by virtue of the adjacent watercourse.
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	Small site; closer to 3 than to 15 pitches.
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Site is not in the hands of Travellers but the owner has expressed willingness for the site to be considered as a Traveller site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of.
17. Are there any land stability issues?	N	Stability issues unlikely at road frontage of site, but rear of site slopes towards a watercourse.
18. Is the site sloping to any great extent?	N	Rear of site slopes gently towards a watercourse.
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of
Main constraints or negative issues		Unsustainable Green Belt location away from regular public transport and from recognised areas of Traveller need.
Most advantageous features		Owner willing to consider site as a Traveller site

Site 18. Land east of Brookfield Lane, Aughton

SHLAA site whose owner has indicated a willingness for the site to be considered as a potential Traveller site.



Criterion	Y/N/M/? Comment
Sustainability 1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?	M Site is in a rural area, close to a small number of residential properties.
2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?	N/A There is little local infrastructure / services.
3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?	N Site is just over 1km from bus stop on Springfield Road. Few local accessible services.
4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?	N Site is within 100m of railway embankment, but this is not considered a constraint in terms of impact upon the residents of the site.
5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?	N No contamination issues known about.
6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?	N No environmental issues known about.
7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?	N No historic environment, landscape or nature conservation designation in vicinity of site.

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	N	Site is within open countryside. Whilst it is screened to an extent by existing trees / hedging, to achieve visual and acoustic privacy for the whole site would mean visual impact on this Green Belt area. The visual impact of the site from the adjacent railway embankment would be very difficult to mitigate in the short-medium term.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	N	Brookfield Lane is narrow and unlikely to be suitable for typical Traveller vehicles.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	N/M	Site does not currently have these services; there are some residential properties nearby, so it is assumed that services can be provided, although it is unclear how easy it would be to provide them.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Site is not in the hands of Travellers but the owner has expressed willingness for the site to be considered as a Traveller site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of.
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.
Main constraints or negative issues		Unsustainable Green Belt location; not in recognised area of Traveller need.
Most advantageous features		Owner willing to consider site as a Traveller site

Site 19. Land east of Middlewood Drive, Aughton

SHLAA site whose owner has indicated a willingness for the site to be considered as a potential Traveller site.



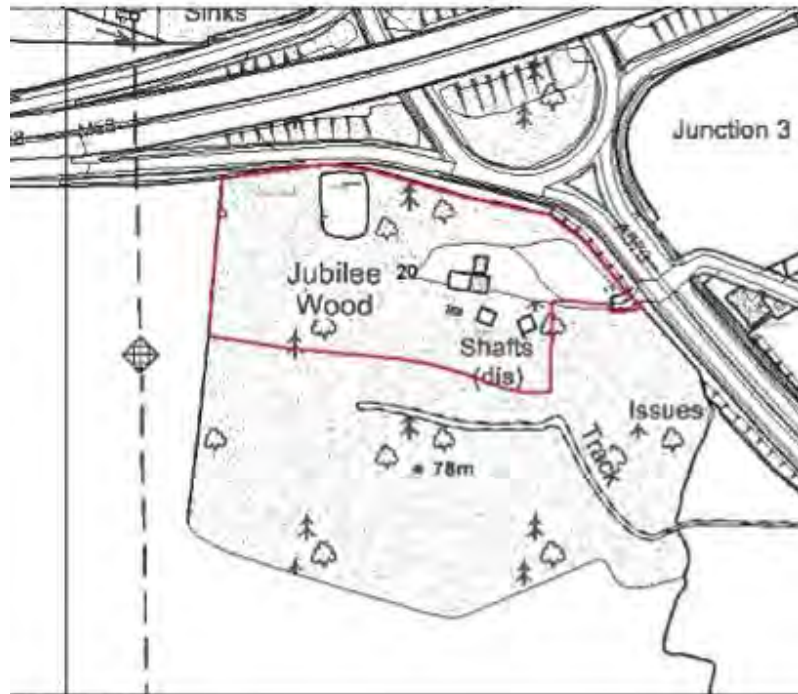
View over site from western edge



Criterion	Y/N/M/?	Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	Y	Site is adjacent to a significant number of residential properties; access to the site would be such that wherever it was taken from (all options involve using quiet residential streets), it would be likely to not promote peaceful and integrated co-existence.
<p>2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?</p>	N	Given its location on the edge of an urban area, it is likely that local services can accommodate a small additional Traveller population.
<p>3. Accessibility: Is the site within 1km of a bus route or other public transport facility? Is it possible to easily access: - an appropriate health facility - education - employment - shops - other necessary services?</p>	Y	Site is close to Town Green Station (distance depends on access point) and a limited number of local services at Town Green.
<p>4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?</p>	N	
<p>5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?</p>	N	No contamination issues known about.
<p>6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?</p>	N	No environmental issues known about.
<p>7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?</p>	N	No historic environment, landscape or nature conservation designation in vicinity of site.

Criterion	Y/N/M/?	Comment
Suitability		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	N	Site comprises open countryside on the edge of an urban area. To provide visual and acoustic privacy to the site's occupants would be likely to cause unacceptable visual impact as a result of close board fencing, etc.
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	N	Likely access would be Middlewood Road or Middlewood Drive, both narrow cul-de-sacs with significant on-street parking. Access by emergency vehicles would be likely to be difficult.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	N/Y	Site has no services, but it is probable these could readily be provided given the proximity to an urban area.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	Green Belt site adjacent to settlement area.
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	Y	Site is not in the hands of Travellers but the owner has expressed willingness for the site to be considered as a Traveller site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	Y	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	N	None known of.
17. Are there any land stability issues?	N	None known of.
18. Is the site sloping to any great extent?	N	Site slopes gently in parts.
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	N	None known of.
Main constraints or negative issues		Green Belt location with poor access and adjacent to a significant number of residential properties; not in a recognised area of Traveller need.
Most advantageous features		Owner willing to consider site as a Traveller site

Site 20. Former Bickerstaffe Colliery, Jubilee Wood, Bickerstaffe



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Criterion	Y/N/M/?	Comment
<p>Sustainability</p> <p>1. Would this site, on account of its scale and / or location, dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community?</p>	N	Site is predominantly separate from settled community, and is screened by trees.
2. Would the use of this site as a Traveller site place undue pressure on local infrastructure, services and roads?	N/A	There is little local infrastructure / services.
<p>3. Accessibility:</p> <p>Is the site within 1km of a bus route or other public transport facility?</p> <p>Is it possible to easily access:</p> <ul style="list-style-type: none"> - an appropriate health facility - education - employment - shops - other necessary services? 	Y	Site is 450m from bus stops on the A570, although walking to these bus stops entails crossing Junction 3 of the M58 (roundabout / under a flyover). Few local services, so most services would need to be accessed via bus or by private motor vehicle.
4. Is the site adjacent (within 25m) to, or near to a refuse site (200m), industrial process (200m), electricity pylons (100m), other hazardous place (200m), or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that these would impact unacceptably on residents of the site? If so, could satisfactory mitigation realistically be achieved?	Y	Site is within 100m of M58 motorway, although screened by woodland.
5. Is the site on contaminated land? If so, would it be possible to achieve satisfactory mitigation?	N/M	No precise detail of contamination are known, although site has been used as a colliery in the past and thus contamination may be an issue in certain areas.
6. Is the site subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development? Could any such impacts realistically be mitigated?	Y	Much of site is wooded; development / use of the site (or part of the site) as a Traveller site may impact upon the woodland, although this could be mitigated through appropriate fencing / planning conditions.
7. Is the site in, adjacent to (within 25m), or close to (such that it would materially affect) any area of land subject to any historic environment, landscape, or nature conservation designation?	N	Site is not subject to any historic environment, landscape or nature conservation designation.
<p>Suitability</p>		
8. Is it possible to achieve visual and acoustic privacy on the site without unacceptable visual impact on the site's surroundings?	Y/N	Site is surrounded by woodland, which provides natural screening. Acoustic privacy would be more difficult to achieve, given the nearby M58 motorway.

Criterion	Y/N/M/?	Comment
9. Is the site accessible by a public highway of an appropriate standard? Can adequate access onto and from the site be achieved, both by the occupants, and by visitors (including emergency services)?	Y/?	Site is accessible from A570 Rainford Bypass and close to M58, although access is not ideal (direct access onto a dual carriageway, less than 100m from motorway junction roundabout). Access point also used by LCC for woodland operations.
10. Does the site have mains water, drainage and electricity, or could these services be provided or satisfactory drainage achieved?	N/M	It is unclear how easy it would be to provide services, although it is noted that there are commercial and residential buildings within 100m of the site, so it is assumed that services exist in the vicinity of the site.
11. Is the site in the Green Belt? (i.e. would the site require removal from the Green Belt to be allocated as a Traveller site?)	Y	
12. Is the site in Flood Zone 2 (in which case the site must be shown to meet the Exceptions Test) or Zone 3 (in which case caravans should not be permitted)?	N	
13. Can the site accommodate between 3 and 15 pitches / plots?	Y	
Availability		
14. Is the site in the hands of Travellers, or an owner willing to sell to Travellers?	N	Owner has indicated in early 2014 an unwillingness to sell the site as a Traveller site.
15. Is the site available now (or within a timescale that allows for the site's allocation to meet a need within the DPD period)?	N	
Achievability		
16. Are there any significant physical constraints to the site's development as a Traveller site?	Y	Surrounding woodland is likely to be a constraint in terms of minimising impact on the woodland, although there is in theory potential for part of the site to be used.
17. Are there any land stability issues?	M	Site has disused mineshafts in places.
18. Is the site sloping to any great extent?	N	Site slopes gently at access point, but majority of site does not slope to any great extent.
19. Are there any ransom strips, leases, restrictive covenants, multiple ownerships or other issues that could delay or jeopardise the site's development?	M	If site were to be put forward for allocation, careful attention would need to be given to access to the site. Access is also needed to the wooded part of the site (for forestry operations / emergency vehicles) south of the area under consideration as a potential Traveller site. Whether a joint access is possible whilst maintaining security for the two potential uses would require investigation.
Main constraints or negative issues		Owner not willing to sell as a Traveller site; access may be problematic.
Most advantageous features		Proximity to M58 motorway; site is well screened.

**West Lancashire Borough Council
Provision for Traveller Sites DPD:
Options and Preferred Options
Sustainability Appraisal Report
January 2014**

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www.westlancs.gov.uk



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1. Introduction

This Sustainability Appraisal (SA) has been structured in order to meet the requirements of the European Directive 2001/42/EC “on the assessment of the effects of certain plans and programmes on the environment”, known as the Strategic Environmental Assessment (or SEA) Directive. The SA has been prepared by Council officers. The consultants URS have provided guidance as to the content of the report; this guidance is provided in Appendix 4.

The document that has been appraised is the Provision for Traveller Sites Development Plan Document – Options and Preferred Options (‘Traveller Sites DPD’), an early draft of a local plan document being prepared by West Lancashire Borough Council. The DPD’s purpose is twofold – firstly to set out a policy against which proposals for Gypsy and Traveller or Travelling Showpeople sites can be assessed, and secondly to allocate a number of specific pieces of land across the Borough to meet the objectively-assessed needs for Traveller accommodation.

Further details about West Lancashire Borough Council’s approach to Sustainability Appraisal can be found in the West Lancashire Local Plan 2012-2027 Sustainability Appraisal Scoping Report¹, available on the Council’s website at:

http://www.westlancs.gov.uk/planning/planning_policy/the_local_plan/the_local_plan_2012-2027/sustainability_appraisals.aspx

Table 1.1 below outlines how this initial Sustainability Appraisal report of the Traveller Sites DPD complies with the SEA Directive.

Table 1.1 Compliance of this Sustainability Appraisal with the SEA Directive

Information required by the SEA Directive	Existence of this information in the Traveller Sites DPD SA report
Contents, objectives and relationship with other plans and programmes.	Summarised in Appendix 1 of this report. Full details can be found within the Local Plan (LDF) Scoping Report.
Current state of the environment and implications without the supporting DPD.	Baseline data and Appendix 2.
Characteristics likely to be affected.	Baseline data and Appendix 2.
Existing environmental problems.	Baseline data and Appendix 2.
Environmental protection objectives that are relevant to the DPD.	Appendix 1 key policy documents
Likely significant effects on the environment	Options Appraisal, Section 9.
Measures to offset significant adverse effects on the environment	Appendix 3.
Reasons for selecting the alternatives, describing how the assessment was undertaken.	Section 8.
Measures envisaged concerning monitoring.	To be addresses in SA Report for Final SPD

¹ At the time of preparing the initial Sustainability Appraisal Scoping Report, the document being appraised was referred to as a “Core Strategy”, part of the “Local Development Framework” rather than a “Local Plan”.

2. Purpose of the Sustainability Appraisal

It is a requirement of law that Sustainability Appraisal (SA) be undertaken in line with the procedures prescribed by the Environmental Assessment of Plans and Programmes Regulations 2004 ('the Regulations'), which were prepared in order to transpose the European Union Strategic Environmental Assessment (SEA) Directive into UK law.

The Regulations require that a report be published for consultation alongside the Options / Preferred Options document that 'identifies, describes and evaluates' the likely significant effects of implementing the Provision for Traveller Sites DPD, 'and reasonable alternatives'. The report must then be taken into account, alongside consultation responses, when finalising the Plan.

In line with the Regulations, the report (which for the purposes of Sustainability Appraisal is known as the 'SA Report') must essentially answer **four questions**:

1. What is the scope of the SA?
2. What has plan-making / SA involved up to this point?
 - Preparation of the Plan must have been informed by at least one earlier plan-making / SA iteration at which point 'alternatives' are appraised.
3. What are the appraisal findings at this current stage?
 - i.e. in relation to the options / preferred options for the Provision for Traveller Sites DPD.
4. What happens next?

Sustainable development is central to the planning system. The purpose of an SA is to promote sustainable development, through the integration of social, environmental and economic considerations, into the preparation of new or revised Supplementary Planning Documents (SPDs) and Development Plan Documents (DPDs). This approach is reiterated within paragraph 165 of the National Planning Policy Framework (NPPF).

A Sustainability Appraisal seeks to ensure that sustainability and sustainable development is achieved within plans, policies and programmes. It provides a methodology for assessing strategy and policy (in this case the Provision for Traveller Sites DPD), investigating which documents are likely to promote a sustainable pattern of development, and where possible, avoid or mitigate any negative social, environmental and economic effects of plans, policies or programmes, by enhancing the integration of sustainability considerations throughout the preparation and adoption of the DPDs.

In order to establish the most important sustainability issues, this report draws upon the Sustainability Appraisal of the West Lancashire Local Plan 2012-2027 (which covers the whole Borough) and reviews evidence and baseline data to inform and support material in this subsequent document.

A range of alternative options for potential site allocations, and the principles for the Provision for Traveller Sites DPD has been considered and the potential environmental social and economic impacts assessed for each option.

In summary the Sustainability Appraisal Report does the following:

- Describes the purpose of the DPD, and the policy context within which it sits.
- Outlines the approach to sustainability methods.
- Provides signposts to the evidence supporting the DPD.
- Outlines and evaluates the Local Plan objectives directly relevant to the DPD.

- Outlines the environmental, economic and social impacts of the proposed policy for assessing planning applications for Traveller development (as well as alternative policies), the potential candidate Traveller sites, the preferred options for Traveller sites, and alternative options for providing Traveller sites.
- Explains how the Sustainability Appraisal has influenced the draft Traveller Sites DPD.

3. Planning Policy Context

The Localism Act 2011 and the introduction of the National Planning Policy Framework (NPPF) in March 2012 led to a substantial reform of the planning system. At the heart of the NPPF is the 'Presumption in Favour of Sustainable Development', which should be seen as 'a golden thread running through both plan making and decision taking' (NPPF paragraph 14).

National planning policy for Traveller-related development is set out in the government document Planning Policy for Traveller Sites (PPTS), published March 2012 alongside the NPPF. Paragraph 9 of PPTS places a requirement on local planning authorities to identify and update annually a five year supply of specific deliverable Traveller sites, and to identify a supply of specific developable sites, or broad locations for growth, for years 6-10 and, where possible, years 11-15 of their Plan period.

The West Lancashire Local Plan 2012-2027 was adopted by the Borough Council on 16 October 2013. Earlier versions of this Local Plan (i.e. Preferred Options, January 2012, and Publication, August 2012) contained a policy on Gypsies and Travellers and Travelling Showpeople (referred to hereafter as 'Travellers'). This policy, Policy RS4, was a criteria-based policy whose purpose was to direct Traveller development to the most appropriate places in the Borough, and to provide a means by which planning applications or enforcement cases relating to Traveller development could be judged.

At the Local Plan Examination in early 2013, the Local Plan Inspector advised that he could not find Policy RS4 sound, as it did not allocate specific deliverable sites to provide a five year supply of land to meet Traveller accommodation needs as required by PPTS. In order for the West Lancashire Local Plan as a whole to be found sound, the Inspector recommended that Policy RS4 be deleted in its entirety from the Local Plan, and that the Council commit to preparing a separate Development Plan Document (DPD) to allocate sufficient deliverable sites to meet Traveller accommodation needs over the Local Plan period.

To this end, the Council published an updated Local Development Scheme (LDS) in May 2013 which includes the commitment to prepare a Provision for Travellers' Sites DPD, and the anticipated timescales for the preparation of this DPD, which will provide the local planning policy for West Lancashire relating to provision for Gypsies & Travellers and Travelling Showpeople. This Sustainability Appraisal Report covers the said Provision for Traveller Sites DPD.

Provision for Traveller Sites Development Plan Document

The first version of the Traveller Sites DPD is labelled the "Options & Preferred Options" document. This draft DPD has been published for consultation in order to seek the views of the community, stakeholders and other interested parties. The Council is inviting comments on all aspects of the document and in particular the proposed policy for assessing planning applications for Traveller development, the proposed criteria for site selection, and the options, preferred options, and alternative options for Traveller site provision. Specific questions on these aspects of the document are set out in the draft DPD itself.

Following consultation, all representations made will be considered, and any necessary changes will be incorporated into the 'Publication' version of the DPD, which it is intended will be produced later in 2014. The Provision for Traveller Sites DPD: Publication Version will be subject to a further round of public consultation before being submitted to the Secretary of State for examination. If the DPD is found sound at examination, it will be submitted to West Lancashire Borough Council for adoption.

Figure 1 sets out the timescales for the preparation of the Provision for Traveller Sites DPD.

Figure 1 Preparation of the Provision for Traveller Sites DPD

Preparation Stage	Anticipated / Target Timescale
Evidence base: Preparation and publication of a Gypsy and Traveller Accommodation Assessment	March 2013 – spring 2014 (Draft figures available January 2014 and used in the Options / Preferred Options version of the DPD)
Regulation 18: 'Scoping' consultation	September 2013
Regulation 18: Options and Preferred Options	Spring 2014
Regulation 19: Publication	August – October 2014
Regulation 22: Submission to Secretary of State	October 2014
Regulation 24: Independent public examination	October 2014 – February 2015
Regulation 26: Adoption	March 2015

Note

References to "Regulations" above are to the Town and Country Planning (Local Planning) (England) Regulations 2012.

4. West Lancashire Borough Council's approach to the Sustainability Appraisal

There are five distinct stages to undertaking a Sustainability Appraisal, as outlined in Government guidance. Although this guidance is now out-of-date, it is still common practice to follow these stages, which are as follows:

Stages of the Sustainability Appraisal Process	
Stage A	Scoping Report
Stage B	Developing and refining options and assessing effects
Stage C	Preparing the Sustainability Report
Stage D	Consulting on the preferred options of the DPD and SA
Stage E	Monitoring the significant effects of implementing the DPD

This Sustainability Appraisal Report of the Provision for Traveller Sites DPD: Options and Preferred Options incorporates Stages A – C of the SA process.

Stage A

Stage A contains three principal elements:

A1: A review of update key documents and policy context

A2: Analysis of baseline information

A3: Identification of the main sustainability issues relating to the DPD

In terms of Stage A, this Sustainability Appraisal Report draws from the West Lancashire Local Plan 2012-2027 Sustainability Appraisal Scoping report, and from the evidence base that was compiled during the preparation of the Local Plan. Chapter 5 below and Appendices 2 and 3 provide a summary and analysis of the WLLP evidence base and SA Scoping Report.

Stage B

Stage B: Developing and refining options and assessing affects consists of the following elements:

B1: Testing the objectives of the DPD against the SA Framework.
This element is set out in Chapter 7 of this SA report below.

B2: Developing the options
The development of options and alternative options is set out in Chapter 8.

B3 / B4: Predicting and evaluating the effects of the DPD
The prediction and evaluation of the likely effects of the Traveller Sites Policy (and alternative policies) is set out in Chapter 9. The prediction and evaluation of the likely impacts of specific Traveller sites, including the preferred options for Traveller sites, as well as alternative approaches to providing Traveller sites, are set out in Chapter 10.

B5: Considering ways of mitigating adverse effects and maximising beneficial effects.
This element of Stage B is given some consideration in stages B3 / B4, but will be addressed in more detail in subsequent SA reports (i.e. for the Publication version of the DPD)

B6: Proposing measures to monitor the significant effects of implementing the DPD.

5. Evidence from the Local Plan Sustainability Appraisal Scoping Report

The first stage of the sustainability appraisal process involved reviewing the Local Plan (formerly “Core Strategy”) Scoping Report and considering objectives and key issues that relate specifically to the Traveller sites DPD. The opportunity was also taken to review some of the baseline data that was applicable to the background evidence of the DPD, in case any of these data were out of date.

In accordance with Task A1, a review of update key documents and the policy context was undertaken; this can be found in Appendix 1. A number of key issues and messages were identified as part of a ‘contextual review’ of key plans, strategies and other evidence. These have been taken into consideration when establishing the key suitability issues and the appraisal frameworks. Most important and useful was the Planning Policy for Travellers Sites document (2012), which highlights that fair and equal treatment for Travellers is paramount and should be delivered in a way that facilitates the traditional and nomadic way of life of Travellers, whilst respecting the interests of the settled community.

Task A2, Baseline Information, can be found in Appendix 2. Much of the original data from the original Local Plan Scoping report is still extant (i.e. it has not been superseded). However a review of some data, including census data and population statistics, has been updated to reflect the most recent information available. This updated information does not affect the issues or the framework as the trends remain the same; however, it provides an up-to-date picture for the current appraisal and DPD.

Task A3, Sustainability Issues, entailed identifying the primary sustainability issues facing the Traveller Sites DPD. This analysis has been carried out for this SA, specifically in relation to the Traveller Sites DPD, meaning that Traveller-related issues could be looked at in more detail than for the original Local Plan report. The issues relating to Travellers and their accommodation, as well as indication of how the issues can be addressed, are tabled below. A summary of the Baseline Evidence can be found in Appendix 2; the reasons for the identification of the issues in Table 5.1, and how they can be addressed, can be found in Appendix 3. The key issues identified below have been drawn out of the available evidence, and have highlighted a number of issues that must be considered as the Traveller sites DPD is prepared.

Table 5.1 Key Sustainability Issues relating to the Provision for Traveller Sites DPD

Topic area	Main issues
Access, Highways & Public Transport	One of the main issues facing the Borough is relates to the sustainability of transport; there is a need to improve access to sustainable methods of transport including bus services, rail links, cycle paths & footpaths. Car dependency levels are high and need reducing. There is the need to improve the diversity and availability of employment in West Lancashire in accessible locations or with improved public transport links to enable residents of the Borough to find employment within West Lancs, thereby reducing the need to commute.
Social Inclusion	The Borough is required to deliver a yearly requirement of homes over the plan period 2012-2027 to meet the needs of the population. There are issues regarding affordability of housing in several areas. There are no authorised Traveller sites in the Borough (the reason for preparing the Traveller Sites DPD). In addition to homes, there is a need to provide services, employment opportunities, and access to health related facilities for residents of the

Topic area	Main issues
	<p>newly developed accommodation.</p> <p>Social exclusion occurs from unemployment, low income, high crime rate, poor housing and poor health.</p>
<p>Access to services and amenities</p>	<p>Access to services and amenities in between settlements is poor in certain locations.</p> <p>There are various deficiencies in open space, and access to it, throughout the Borough.</p> <p>Development needs to maximise the role of open spaces to improve health and physical activity whilst improving the quality of amenity in open spaces.</p> <p>Play facilities need to be provided and the quality of existing grass pitches needs to be enhanced a. Development of new multi use pitch sites needs to be forthcoming to provide for the deficiencies.</p>
<p>Employment</p>	<p>Whilst unemployment levels and the number of benefit claimants is lower than the regional and national average, there are disparities and inequalities between skills, education, health & employment across the Borough.</p> <p>There are significant levels of out-commuting from the Borough, relatively low levels of in-commuting.</p>
<p>Education</p>	<p>There is a need to improve the lack of basic skills and barriers to work as well as linking workless people to vacancies.</p> <p>Education provision may need to be subsidised if additional resources are required, dependent upon the location of the site allocations.</p>
<p>Protection of ecology, biodiversity and soils</p>	<p>Agricultural & horticultural land needs to be protected, and businesses promoted within West Lancashire.</p> <p>Whilst there is not a major problem with vacant and derelict land, such land, in particular unused brownfield sites, would benefit from being remediated and brought back into use.</p> <p>The Borough comprises predominantly Green Belt land, which is required to be protected by national policy.</p> <p>The volume of waste going to landfill needs to be reduced.</p> <p>West Lancashire has roughly one third of the North West's best and most versatile agricultural land. In the light of impending climate change and fuel-related issues, this needs to be protected for crop production to respond to the changing needs of the food production industry and to aid food security.</p>
<p>Surface and Waste Water Treatment</p>	<p>West Lancashire has wetlands of international importance as well as other water bodies and watercourses with wildlife and amenity value.</p> <p>There are a number of deep aquifers that supply the horticultural industry. These water resources all require sustainable management and protection, including from foul (waste) water.</p> <p>There is a need for water and wastewater supply for existing and planned housing and employment development, as well as for agriculture and horticulture. More water efficient designs need to be incorporated into developments and new buildings and the use of Sustainable Drainage Systems (SuDS) promoted.</p> <p>West Lancashire has areas of flood risk, with implications for the location (or otherwise) of development.</p>

6. Consultation on the Local Plan Sustainability Appraisal Scoping Report

The initial Scoping Report for the (then) Local Development Framework Core Strategy (which later became the Local Plan) was consulted upon for a period of 6 weeks in 2009. The evidence behind the Scoping Report has been updated regularly throughout the preparation of the West Lancashire Local Plan 2012-2027 and, since the Local Plan's adoption, as part of the Council's ongoing monitoring work. The most recent analysis of the evidence base for this document has not indicated any changes to the baseline information that would require any change to the SA Framework and Objectives. Therefore further consultation on the scope is not considered necessary.

In line with planning Regulations, the Local Plan Sustainability Appraisal Scoping Report was sent to the Environment Agency, Natural England and English Heritage for comment. Comments were also invited from a wide range of community groups and other stakeholders, in order to ensure that the appraisal was transparent, comprehensive and addressed the relevant issues.

7. Task B1: Testing the Core Strategy objectives against the Sustainability Appraisal framework

Task B1: Testing the Core Strategy objectives against the Sustainability Appraisal framework, was undertaken in the Local Plan Sustainability Appraisal Scoping Report. Drawing on the [then] Core Strategy objectives, 18 Sustainability Objectives were established. These cover a full cross section of sustainability issues, including the three tenets of sustainability, namely environmental, social and economic factors, and are set out below:

Table 7.1 West Lancashire Local Plan Sustainability Appraisal Objectives

Sustainability Appraisal Objectives	Environmental	Social	Economic
1. To reduce the disparities in economic performance within the Borough		✓	✓
2. To secure economic inclusion		✓	✓
3. To develop and maintain a healthy labour market		✓	✓
4. To encourage sustainable economic growth	✓	✓	✓
5. To deliver urban renaissance	✓	✓	✓
6. To deliver rural renaissance	✓		✓
7. To develop and market the Borough's image	✓	✓	
8. To improve access to basic goods and services	✓		✓
9. To improve access to good quality affordable and resource efficient housing		✓	✓
10. To reduce crime and disorder and the fear of crime		✓	
11. To reduce the need to travel, improve the choice and use of sustainable transport modes		✓	
12. To improve physical and mental health and reduce health inequalities	✓	✓	
13. To protect places, landscapes and buildings of historical, cultural and archaeological value	✓		
14. To restore and protect land and soil quality	✓		
15. To protect and enhance biodiversity	✓		
16. To protect and improve the quality of both inland and coastal waters and protect against flood risk	✓		
17. To protect and improve noise air quality	✓		
18. To ensure the prudent use of natural resources, including the use of renewable energies and the sustainable management of existing resources	✓		

Each of these 18 objectives has been assigned a series of locally distinctive sub-criteria to allow for a more detailed evaluation of whether the objective will be achieved by the DPD being assessed. The sub-criteria are listed in Table 7.2 on the following pages.

Table 7.2 Locally distinctive sub-criteria for the 18 Sustainability Objectives

SA Objective (high level objective)	Locally Distinctive Sub Criteria
Objective 1: To reduce the disparities in economic performance within the Borough.	<ul style="list-style-type: none"> • Will the plan / policy provide job opportunities in areas with residents most at need? • Will the plan / policy reduce economic disparities within the Borough and at the Regional level? • Will the plan / policy maximise local benefit from investment? • Will the plan / policy meet local needs for employment? • Will the plan / policy improve the quality of employment opportunities within the Borough?
Objective 2: To secure economic inclusion	<ul style="list-style-type: none"> • Will the plan / policy meet the employment needs of all local people? • Will the plan / policy encourage business start-up, especially from under represented groups? • Will the plan / policy improve physical accessibility to jobs through the location of employment sites and / or public transport links being close to areas of high unemployment? • Will the plan / policy reduce poverty in those areas and communities most affected?
Objective 3: To develop and maintain a healthy labour market	<ul style="list-style-type: none"> • Will the plan / policy address the skills gap and enable skills progression? • Will the plan / policy provide higher skilled jobs? • Will the plan / policy increase the levels of participation and attainment in education? • Will the plan / policy provide a broad range of jobs and employment opportunities?
Objective 4: To encourage sustainable economic growth	<ul style="list-style-type: none"> • Will the plan / policy help to diversify the Borough's economy? • Will the plan / policy promote growth in the key sectors of the Borough's economy? • Will the plan / policy attract new businesses to the Borough? • Will the plan / policy help develop the Borough's knowledge base? • Will the plan / policy improve the range of sustainable employment sites?
Objective 5: To deliver urban renaissance	<ul style="list-style-type: none"> • Will the plan / policy improve economic, environmental and social conditions in deprived urban areas and for deprived groups? • Will the plan / policy improve the quality of the built and historic environment? • Will the plan / policy improve the quantity and quality of open space? • Will the plan / policy improve the vitality and viability of Town Centres? • Will the plan / policy deliver Sustainable Communities? • Will the plan / policy deliver regeneration to urban areas and Market Towns
Objective 6: To deliver rural renaissance	<ul style="list-style-type: none"> • Will the plan / policy support sustainable rural diversification? • Will the plan / policy to encourage and support the growth of sustainable rural businesses? • Will the plan / policy promote the economic growth of market towns? • Will the plan / policy retain or promote access to and provision of services?
Objective 7: To develop and market the Borough's image	<ul style="list-style-type: none"> • Will the plan / policy support the preservation and/or enhancement of high quality built, natural and historic environments within the Borough? • Will the plan / policy promote the Borough as a destination for short and long term visitors, for residents and investors? • Will the plan / policy promote the use of locally produced goods and materials? • Will the plan / policy increase the economic benefit derived from the Borough's natural environment?
Objective 8: To improve access to basic goods and services	<ul style="list-style-type: none"> • Will the plan / policy improve the access, range and quality of cultural, recreational and leisure facilities including natural green spaces? • Will the plan / policy improve the access, range and quality of essential services and amenities? • Will the plan / policy improve the access to basic goods, promoting the use of those which are locally sourced?
Objective 9: To improve access to good quality, affordable and resource efficient housing	<ul style="list-style-type: none"> • Will the plan / policy provide for an appropriate mix of housing to meet all needs including affordable? • Will the plan / policy reduce the number of unfit empty homes? • Will the plan / policy support the development and operation of resource efficient housing?

SA Objective (high level objective)	Locally Distinctive Sub Criteria
Objective 10: To reduce crime and disorder and the fear of crime	<ul style="list-style-type: none"> • Will the plan / policy support community development? • Will the plan / policy improve relations between all members of the community? • Will the plan / policy reduce levels of crime? • Will the plan / policy reduce the fear of crime? • Will the plan / policy identify and engage with hard to reach groups?
Objective 11: To reduce the need to travel, improve the choice and use of sustainable transport modes	<ul style="list-style-type: none"> • Will the plan / policy reduce vehicular traffic and congestion? • Will the plan / policy increase access to and opportunities for walking, cycling and use of public transport? • Will the plan / policy reduce freight movement? • Will the plan / policy improve access to and encourage the use of ICT? • Will the plan / policy improve the efficiency of the transport network?
Objective 12: To improve physical and mental health and reduce health inequalities	<ul style="list-style-type: none"> • Will the plan / policy improve physical and mental health? • Will the plan / policy reduce deaths in key vulnerable groups? • Will the plan / policy promote healthier lifestyles? • Will the plan / policy reduce health inequalities among different groups in the community? • Will the plan / policy reduce isolation for vulnerable groups in the community? • Will the plan / policy promote a better quality of life? • Will the plan / policy reduce poverty in those areas and communities most affected?
Objective 13: To protect places, landscapes and buildings of historical, cultural and archaeological value	<ul style="list-style-type: none"> • Will the plan / policy protect and enhance the character and appearance of the Borough's landscape strengthening local distinctiveness and sense of place? • Will the plan / policy improve access to buildings of historic and cultural value? • Will the plan / policy protect and enhance the accessibility of the landscape across the Borough? • Will the plan / policy protect Scheduled Ancient Monuments?
Objective 14: To restore and protect land and soil quality	<ul style="list-style-type: none"> • Will the plan / policy reduce the amount of derelict, contaminated, degraded and vacant / underused land? • Will the plan / policy encourage the development of brownfield land in preference to Greenfield? • Will the plan / policy reduce the loss of high quality Agricultural land to development? • Will the plan / policy maintain and enhance soil quality? • Will the plan / policy achieve the efficient use of land via appropriate density of development?
Objective 15: To protect and enhance biodiversity	<ul style="list-style-type: none"> • Will the plan / policy protect and enhance the biodiversity of the Borough? • Will the plan / policy protect and enhance habitats, species and damaged sites? • Will the plan / policy provide opportunities for new habitat creation? • Will the plan / policy protect and extend habitat connectivity and landscape permeability, suitable for species migration?
Objective 16: To protect and improve the quality of both inland and coastal waters and protect against flood risk	<ul style="list-style-type: none"> • Will the plan / policy reduce or manage flood risk? • Will the plan / policy maintain and enhance ground water quality? • Will the plan / policy improve the quality of coastal waters? • Will the plan / policy improve the quality of rivers and inland waters?
Objective 17: To protect and improve noise air quality	<ul style="list-style-type: none"> • Will the plan / policy maintain or, where possible, improve local air quality? • Will the plan / policy reduce noise and light pollution?
Objective 18: To ensure the prudent use of natural resources, including the use of renewable energies and the sustainable management of existing resources	<ul style="list-style-type: none"> • Will the plan / policy minimise demand for raw materials? • Will the plan / policy support the repair and re-use of existing buildings? • Will the plan / policy reduce the amount of waste generated by development? • Will the plan / policy promote the use of recycled, reclaimed and secondary materials? • Will the plan / policy promote the use of locally sourced materials? • Will the plan / policy minimise the need for energy? • Will the plan / policy maximise the production / proportion of renewable energy? • Will the plan / policy increase energy efficiency (e.g. energy efficiency in buildings, transport modes, etc) • Will the plan / policy minimise the use of fossil fuels?

8. Methodology - Developing and appraising options

The West Lancashire Local Plan Sustainability Appraisal Scoping Report and the analysis of the Local Plan's evidence base were used to assist in identifying the key issues specifically relating to this Traveller Sites DPD (Section 5 above).

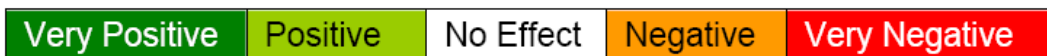
There are a number of ways in which the key issues could be addressed for the DPD; it would not be appropriate to simply choose a single approach that it is assumed would work best. Instead, in line with the requirements of national and European SEA guidance, a number of reasonable alternatives have been assessed and compared with one another, in order to justify which approaches are likely to be most suitable and to deliver the best overall outcome for stakeholders.

The formulation and testing of the reasonable alternatives is a key requirement of the SEA process, allowing for the consideration of options by various stakeholder groups and debate about the issues, ideas and ways of going forward.

There are two sets of "alternatives" in this SA of the first draft of the Traveller Sites DPD. Firstly, there are three alternative approaches towards a policy against which proposals for Traveller accommodation can be assessed. These are highlighted in Chapter 9. Secondly, four alternative approaches towards selecting specific sites for Traveller accommodation have been chosen; the reasons for selecting these approaches are set out in Chapter 10.

This SA report seeks to assess the effects that each alternative would be likely to have on the specific issues covered by each Sustainability Objective and on the existing baseline situation. It does not draw any specific conclusions as to which approach / option should be followed, but it has helped inform the choice of policy and preferred sites set out in the draft Traveller Sites DPD (i.e. the SA report has been taken into account in preparing the draft Traveller Sites DPD) by indicating which are the most sustainable options and alternatives.

The sustainability of each presented option has been appraised against social, economic and environmental objectives. The appraisal sought to highlight the positive and negative effects of each option on sustainability by assigning a "score". Remedial scores that could be achieved through mitigation were also assigned. Scores were recorded using the following colours:



The Sustainability Appraisal framework tests the economic, environmental and social 'performance' of each option and the significance of the effects.

At this early stage it is not possible to accurately and fully determine all of the impacts for each option, as they could differ depending upon the type of development and how it is implemented. Therefore when considering the criteria assessment including the type, location and quantity of development, the assessment has generally adopted the overall principles when determining the likely outcomes. The assessment of the preferred options and alternatives is displayed in Table 9.1 and Table 10.1.

9. Appraisal of the “Assessment of Proposals for Gypsy and Travellers and Travelling Showpeople Sites” Policy and Alternative Policies

Development of Alternatives

In terms of sustainability appraisal of policy for assessing planning applications for Traveller-related development, this report has assessed the implications of three alternative approaches, namely:

- (i) Policy GT1, as set out in Chapter 3 of the Traveller Sites DPD: Options and Preferred Options, and repeated below;
- (ii) An amended version of Policy GT1 (labelled “GT1a”) that places less emphasis on impact on the character of the area / landscape, and has less stringent locational criteria in terms of distance from public transport routes;
- (iii) Having no policy in place by which to assess planning applications for Traveller accommodation.

For obvious reasons, the proposed Policy GT1 as set out in the draft DPD is to be assessed. It was also considered necessary and most helpful (in terms of providing useful information to assist the appraisal process) to assess the implications on the baseline position of having no policy in place at all. It was considered prudent to add a third alternative policy approach. To this end, Policy GT1a was drawn up. This policy was similar to Policy GT1, but relaxed a number of Policy GT1’s criteria (e.g. using a distance of 3km, rather than 1km, from public transport facilities). This alternative is considered reasonable in the sense that Policy GT1a remains broadly (although not entirely) consistent with national policy.

(i) Policy GT1 is set out as follows, copied from the draft Traveller Sites DPD:

Policy GT1

Assessment of Proposals for Gypsy and Traveller and Travelling Showpeople Sites

Broad Locations

Proposals for permanent or transit Traveller sites or pitches should be located in areas where need exists, as demonstrated by robust evidence.

Site-Specific Criteria

In order to ensure that sites are fit for purpose and will provide adequate residential amenity, both to members of the travelling community and to members of the settled community, proposed sites for Travellers should meet the following criteria:

- (i) The site, on account of its scale and / or location, would not dominate the nearest settled community in such a way that the prospect of peaceful and integrated co-existence between the site and the local settled community would be undermined;
- (ii) The use of this site as a Traveller site would not place undue pressure on local infrastructure, services and roads;
- (iii) The site is within 1 kilometre (10 minutes walk) of a bus route or other public transport facility, and / or it is possible to access from the site by means other than private motor vehicle:
 - an appropriate health facility
 - education facilities, in particular a primary school
 - employment opportunities
 - shops
 - other necessary services;
- (iv) The site is sufficiently far from any refuse site, industrial process, electricity pylons, other hazardous place, or any other process, land use or environmental issue (e.g. flyover, motorway), for there to be no unacceptable impact on residents of the site;
- (v) The site is not subject to any contaminated land issues;
- (vi) The site is not subject to any environmental issues that would impact unacceptably on neighbours as a result of the site’s development;

- (vii) The site is not within, adjacent to, or close to (such that it would adversely affect) any area of land subject to an historic environment, historic landscape, or nature conservation designation;
 - (viii) It is possible to achieve visual and acoustic privacy on the site without any unacceptable visual impact on the site's surroundings;
 - (ix) The site is accessible by a public highway of an appropriate standard;
 - (x) Either the site has mains water, drainage and electricity, or else these services could readily be provided and satisfactory drainage achieved;
 - (xi) The site is not within the Green Belt;
 - (xii) The site is not within an area at risk of flooding;
 - (xiii) The site is stable and is not sloping to any great extent.
 - (xiv) The site can accommodate between 3 and 15 pitches.
- In the case of transit sites, these should be accessible to the M58, or to the strategic highway network.

(ii) Policy GT1(a) is set out as follows, with the differences from Policy GT1 shown as “tracked changes”:

Policy GT1(a)
Assessment of Proposals for Gypsy and Traveller and Travelling Showpeople Sites

In order to ensure that sites are fit for purpose and will provide adequate residential amenity, both to members of the travelling community and to members of the settled community, proposed sites for Travellers should meet the following criteria:

- (i) The site, on account of its scale and / or location, would not dominate the nearest settled community in such a way that it would not promote peaceful and integrated co-existence between the site and the local settled community
- (ii) The use of this site as a Traveller site would not place undue pressure on local infrastructure, services and roads;
- (iii) The site is within 31 kilometres (10-30 minutes walk) of a bus route or other public transport facility, ~~and / or it is possible to access from the site by means other than private motor vehicle:~~
 - ~~–an appropriate health facility~~
 - ~~–education facilities, in particular a primary school~~
 - ~~–employment opportunities~~
 - ~~–shops~~
 - ~~–other necessary services~~
- (iv) The site is sufficiently far from any refuse site, industrial process, electricity pylons, other hazardous place, or any other process, land use or environmental issue (e.g. flyover, motorway, railway line), such that there would be no unacceptable impact on residents of the site;
- (v) The site is not subject to any contaminated land issues;
- ~~(vi) The site is not subject to any environmental issues that would impact unacceptably on neighbours as a result of the site's development;~~
- (vi) The site is not in, adjacent to, or close to (such that it would adversely affect) any area of land subject to ~~an historic environment, historic landscape, or~~ nature conservation designation;
- ~~(viii) It is possible to achieve visual and acoustic privacy on the site without any unacceptable visual impact on the site's surroundings;~~
- (vii) The site is accessible by a public highway of an appropriate standard;
- (viii) Either the site has mains water, drainage and electricity, or else these services could readily be provided and / or satisfactory drainage achieved;
- ~~(x) The site is not within the Green Belt;~~
- (ix) The site is not within an area at risk of flooding;
- (x) The site is stable and is not sloping to any great extent.
- (xi) The site can accommodate between 3 and 15 pitches.

In the case of transit sites, these should be accessible to the M58, or to the strategic highway network.

Table 9.1, on the following pages, shows the likely impacts of Policy GT1, GT1(a) and the absence of any policy on the baseline position relating to the 18 Local Plan Sustainability Objectives.

Table 9.1 Assessment of the likely impacts of Policies GT1 and GT1(a), and no policy

Objective	Economic	Social	Environmental	Policy GT1	Alternative Policy GT1a	No policy
1. To reduce the disparities in economic performance within the Borough	Y	Y		No effect on the baseline data	No effect on the baseline data	No effect on the baseline data
2. To secure economic inclusion	Y	Y		No effect on the baseline data	No effect on the baseline data	No effect on the baseline data
3. To develop and maintain a healthy labour market	Y	Y		Sites are to be located within 1 km of a public transport facility and easy accessible to educational facilities particularly a primary school. This would have a positive effect on the baseline data with residents living/working/educated in the Borough.	Sites can be located as far as 3 km away from a public transport facility and do not need to be easily accessible to other facilities, meaning it may be difficult for Travellers to access education. This could have a negative impact on the baseline by affecting the population educated to GSCE standard.	If sites are not assessed against the distance from educational facilities there will be no measures in place to increase levels of education attainment. This could have a negative impact on the baseline by affecting the population educated to GSCE standard.
4. To encourage sustainable economic growth	Y	Y	Y	No effect on the baseline data	No effect on the baseline data	No effect on the baseline data
5. To deliver urban renaissance	Y	Y	Y	The policy seeks to address the needs of the Gypsy & Traveller and Travelling Showpeople community.	The policy seeks to address the needs of the Gypsy & Traveller and Travelling Showpeople community.	Without criteria based policy it would not be possible to address the needs of the Gypsy & Traveller and Travelling Showpeople community.
6. To deliver rural renaissance	Y		Y	No effect on the baseline data	No effect on the baseline data	No effect on the baseline data
7. To develop and market the Borough's image		Y	Y	No effect on the baseline data	No effect on the baseline data	No effect on the baseline data
8. To improve access to basic goods and services	Y		Y	The policy requires that sites be located within a sustainable area 10 min walking distance to public transport or a footpath	The policy requires that sites be located within a sustainable area 30 min walking distance to public transport or a footpath	If no policy was introduced there could be sites located in unsustainable locations with poor access to local facilities and

Objective	Economic	Social	Environmental	Policy GT1	Alternative Policy GT1a	No policy
				that is accessible to local facilities. This would continue to maintain the figures set out within the baseline data for applications within close proximity to sustainable facilities.	that is accessible to local facilities. This would be likely to be a negative impact compared with the figures set out within the baseline data for applications within close proximity to sustainable facilities.	services.
9. To improve access to good quality, affordable and resource efficient housing		Y		The policy criteria allow for sites to be allocated for Gypsy and Traveller and travelling Show People sites therefore meeting the local need identified within the evidence base.	The policy criteria allow for sites to be allocated for Gypsy and Traveller and travelling Show People sites therefore meeting the local need identified within the evidence base.	Absence of a site criteria based policy will not assist in provide an appropriate mix of accommodation to meet the needs of the Borough.
10. To reduce crime and disorder and the fear of crime		Y		The criteria for assessing sites seek to promote and integrate co-existence between the site and the local settled community. There would be no effect on the baseline data.	The criteria for assessing sites seek to promote and integrate co-existence between the site and the local settled community. There would be no effect on the baseline data.	Without a site criteria based policy there would be no promotion of integration and co-existence between the sites and the local settled community. However there is no evidence that this would increase actual crime levels just the perception of fear of crime.
11. To reduce the need to travel, improve the choice and use of sustainable transport modes		Y		The policy states that Traveller sites should not place undue pressure on local infrastructure services and roads, while sites are to be located within 1 km of a bus route or other transport facility. Sites must be accessible by a public highway and in the case of transit sites; these are to be accessible to the M58, or to the strategic highway network. Therefore this would have a likely positive impact upon the baseline figures for applications determined within sustainable locations.	The policy states that Traveller sites should not place undue pressure on local infrastructure services and roads. Sites only need to be located within 3 km of a bus route or other transport facility, which could result in greater private car use than for Policy GT1. Sites must be accessible by a public highway and in the case of transit sites; these are to be accessible to the M58, or to the strategic highway network. Therefore this would have a negative impact upon the figures in the baseline data for sustainable applications.	No policy could result in unsustainable sites with a reliance on travel by car. Therefore this would have a negative impact upon the figures in the baseline data for sustainable applications.
12. To improve physical and mental		Y	Y	Sites are to be located within 1 km of a public transport facility and easy accessible	As sites only need to be located within 3 km of a public transport facility and do not	With no policy in place sites could be located in unsustainable locations,

Objective	Economic	Social	Environmental	Policy GT1	Alternative Policy GT1a	No policy
health and reduce inequalities				to an appropriate health facility. This would have no impact on the overall evidence base however would have a likely positive impact on the travelling community whose mortality rate is higher than the average settled community.	need to be easy accessible to an appropriate health facility, this could lead to Traveller accommodation in locations with inadequate access to health provision.	reducing isolation for vulnerable groups in the community therefore having a likely negative impact upon the future baseline.
13. To protect places, landscapes and buildings of historical, cultural and archaeological value			Y	The policy states that the scale and location of development could not dominate the nearest settled community, nor be located in, adjacent to, or close to any areas of land subject to an historic environment, historic landscape or nature conservation designation. Therefore the policy adheres to protecting and enhancing the character and appearance of the Borough's landscape.	The policy states that the scale and location of development could not dominate the nearest settled community, nor should it be located in, adjacent or close to an area of land subject to a nature conservation designation.	If no criteria policy was in place to assess the sites there could be no protection and enhancement of the character and appearance of the District's landscape or maintaining a local distinctiveness and sense of place.
14. To restore and protect land and soil quality			Y	Policy GT1 discourages development within the Green Belt, and accommodates a variation in 3-15 pitches to take into consideration the most appropriate achievable density for the site.	The policy does not refer to protecting Green Belt land nor provide any reference towards promoting brownfield over greenfield.	If there were no policy, there could be minimal protection in place for Greenfield land which could potentially result in the loss of high quality agricultural land with inappropriate levels of development with regards to density.
15. To protect and enhance biodiversity			Y	The site criteria policy states that sites are not to be located in, close to or adjacent to nature conservation designations. Therefore no effect on the existing or future baseline.	The site criteria policy states that sites are not to be located in, close to or adjacent to nature conservation designations. Therefore no effect on the existing or future baseline.	If no criteria policy was in place there could be no protection or enhancement of biodiversity, therefore potentially harming natural habitats within the District. This could have a significant impact upon the future baseline.
16. To protect and improve the quality of both inland coastal waters and protect against flood risk			Y	Policy GT1 specifically requires that the allocated sites are not located within an area at risk of flooding and that satisfactory drainage be achievable.	Policy GT1 specifically requires that the allocated sites are not located within an area at risk of flooding and that satisfactory drainage be achievable.	Without criteria based policy referring to reducing and managing flood risk the allocation of sites could primarily fall on the NPPF for guidance.

Objective	Economic	Social	Environmental	Policy GT1	Alternative Policy GT1a	No policy
17. To protect and improve noise air quality			Y	GT1 sets criteria stating that the allocated sites must be able to achieve visual and acoustic privacy on the site without any unacceptable visual impact on the sites' surroundings. This can also be further enforced by policies within the Local Plan.	The GT1a policy makes no reference to noise and light pollution. This could solely rely on the Local Plan polices to provide mitigation measures.	No policy could potentially cause harm through an increase in light and noise pollution. Sites could thus be allocated in protected areas such as the Green Belt which would have a significant impact upon openness. The allocation of sites would allow for this to be assessed and the openness of the green belt to be protected no policy in place would rely solely on the NPPF. Without knowing the sites, it is not possible to assess the likelihood of the impact.
18. To ensure the prudent use of natural resources, including the use of renewable energies and the sustainable management of existing resources			Y	No effect on the baseline	No effect on the baseline	No effect on the baseline

10. Appraisal of Preferred and Alternative Traveller Sites

Table 10.1 below looks at the likely impact of the Preferred Options for Traveller sites, compared with three alternative courses of action.

Chapter 5 of the Provision for Traveller Sites DPD: Options and Preferred Options lists 20 potential candidate Traveller sites in West Lancashire, assembled from various sources, as follows:

Site	Source
1. Mosslands Stables, Aveling Drive ('Aveling Drive A'), Banks	Site with planning application pending consideration.
2. Land west of Mosslands, Aveling Drive ('Aveling Drive B'), Banks	Site with planning appeal pending decision (in the hands of the Secretary of State).
3. Land rear of 'The Poppys' (<i>sic</i>), Sugar Stubbs Lane, Banks	Site with planning permission for one caravan; more recent planning application pending consideration.
4. Land west of Hoole Lane, Banks	SHLAA site; owner indicated a willingness for the site to be considered as a Traveller site.
5. Land west of Ringtail Road, Burscough	Site submitted in the September 2013 Call for Sites exercise.
6. Land west of The Quays, Burscough	Established Travelling Showpeople site with planning permission.
7. Land west of Tollgate Road, Burscough	Site suggested by a member of the travelling community.
8. Pool Hey Lane 'Caravan Park', Scarisbrick	Site with longstanding planning history, also submitted in the Call for Sites exercise.
9. High Brow Farm, Pool Hey Lane, Scarisbrick	Site with previous enforcement action relating to unauthorised occupation by Travellers.
10. Land at 1-3 Southport Road, Kew, Southport	Site with previous issues relating to unauthorised occupation by Travellers.
11. Land to the rear of 281 Smithy Lane, Scarisbrick	Site submitted in the Call for Sites exercise.
12. Former depot, Mere Brow	Site identified as a possible candidate site by WLBC officers undertaking an area-based site search (Banks area).
13. White Moss Road South (A), Skelmersdale	Site brought to the Council's attention by a member of the travelling community.
14. White Moss Road South (B), Skelmersdale	Site with planning permission recently granted (December 2013) for Traveller-related development (stables).
15. White Moss Road South (C), Skelmersdale	Site identified by WLBC officers, adjacent to above site.
16. Blackacre Lane, Ormskirk	Site submitted in Call for Sites.
17. Land south of Butcher's Lane, Aughton	SHLAA site; owner indicated a willingness for the site to be considered as a Traveller site.
18. Land east of Brookfield Lane, Aughton	SHLAA site; owner indicated a willingness for the site to be considered as a Traveller site.
19. Land east of Middlewood Drive, Aughton	SHLAA site; owner indicated a willingness for the site to be considered as a Traveller site.
20. Bickerstaffe Colliery, Bickerstaffe	Site previously identified by WLBC officers on account of its proximity to M58 Junction 3.

The draft DPD sets out why particular sites have been chosen as preferred sites, as well as why other sites have been rejected. Each of the 20 sites has been assessed against a set of criteria (similar to the criteria set out in Policy GT1; the full assessment can be found in Appendix 1 to the draft Traveller Sites DPD), and this assessment has been used to inform the choice of preferred sites. A number of potential sites have been rejected; the main reasons for rejection of sites relate to:

- Ownership – the owner has expressed the view that they are not willing for the site to be considered as a potential Traveller site. It may thus be the case that a site scores well in sustainability terms, but is rejected on account of ownership, as, without a Compulsory Purchase Order, it is unlikely that the site could be delivered;
- Location – accommodation needs for Travellers exist in specific localities of the Borough, as informed by the Gypsy and Traveller Accommodation Assessments. Sites not in any identified area of need have been rejected.

In addition, an assessment of the 20 candidate sites against a comprehensive set of sustainability factors has been carried out for this SA report. (This overlaps with a separate assessment of the sites against a set of criteria carried out as part of the preparatory work for the draft DPD.) The assessment is provided at Appendix 5 to this report.

The draft Traveller Sites DPD sets out the preferred sites as follows:

Permanent Gypsy and Traveller Accommodation

The draft GTAA states a need of 14 pitches to 2018, and 20 pitches in total to 2028, in the Banks / Scarisbrick / Skelmersdale area.

(i) Site 3: Sugar Stubbs Lane, Banks; 3 pitches

This site is within an area of identified need (Banks); it is not in Flood Zone 3; it has adequate highways access; it is within walking distance of bus stops; it is not considered to have an unacceptable impact on neighbouring properties; it is in the hands of Travellers.

(ii) Site 8: Pool Hey Caravan Park, Scarisbrick; 6 pitches

This site is within an area of identified need (Scarisbrick); it is in the possession of Travellers; whilst unauthorised, it has been in place almost 20 years and the Council is not aware of any significant issues between the site occupants and the local community; it is reasonably well-screened and its impact is not considered significant.

(iii) Site 14: White Moss Road South (B), Skelmersdale; 11 pitches

This site is within an area of identified need (Skelmersdale); it is in the possession of Travellers; it is close to a major settlement (but also detached from it, physically separated by the M58 motorway).

Transit Site

The draft GTAA states a need of 4 pitches on one site in the Skelmersdale area or M58 corridor.

The preferred site is Site 14: White Moss Road South (B), Skelmersdale

This site is within an area of identified need (Skelmersdale); it is in the possession of Travellers; it has reasonably good access to the M58 motorway along White Moss Road South. The site is considered to have adequate capacity for 11 permanent pitches (see (iii) above) and 4 transit pitches.

Travelling Showpeople Site

In terms of sites for Travelling Showpeople and their equipment, a need has been identified in the Burscough area, given links between Travelling Showpeople and the local community, such as children attending local schools.

To meet the GTAA-identified need of one site for Travelling Showpeople in the Burscough area, incorporating space for storage of equipment and at least one residential plot, the site assembly process described above yielded just two potential candidate sites, both adjacent to Burscough Industrial Estate:

- a) Land at Ringtail Road / Plantation Road;
- b) Land west of Tollgate Road.

Following assessment of the above two sites, both sites have attributes that are conducive to the accommodation of Travelling Showpeople and their equipment. Overall, in planning policy terms the Tollgate Road site is considered the more suitable site. However, it has not been possible to make contact with the owner of this site (the land is unregistered), and thus there is, at present, uncertainty over its deliverability. In contrast, the Ringtail Road / Plantation Road site owner has expressed a willingness for the site to be considered as a Travelling Showpeople site. As a result, neither site is being treated as a 'preferred' site at present, but it is intended that stakeholder and public comments be invited on both sites.

In addition, Site 6 (Land west of The Quays, Burscough) is a longstanding authorised Travelling Showpeople site possessing an extant permission for 10 Travelling Showpeople plots, 4 of them permanent and 6 seasonal. The inclusion of the site as a preferred site reflects the current status of the site. It does not thus represent a new or additional site allocation, neither does it contribute towards the GTAA-identified need figure for Travelling Showpeople accommodation.

Development of Alternatives

In addition to the preferred sites, Chapter 6 of the Traveller Sites DPD sets out five alternative options for Traveller site provision. The reasons for the choice of the five alternative options are set out in the draft DPD itself; the alternatives are summarised as follows:

- Alternative 1: Increase planned provision for Travellers, in order to provide choice;
- Alternative 2: Increase planned provision for Travellers, in order to help meet neighbouring authorities' needs;
- Alternative 3: Reduce planned provision for Travellers and allow neighbouring authorities to help meet West Lancashire needs;
- Alternative 4: Reduce planned provision for Travellers, regardless of neighbouring authorities' intentions;
- Alternative 5: Set out a different distribution of Traveller sites from those in the preferred options.

In terms of this sustainability appraisal, rather than assessing the preferred sites against five different alternative approaches, the assessment has been carried out using Alternatives 1 and 2 above combined into a single alternative (as they both involve allocating a greater number of sites). In a similar manner, Alternatives 3 and 4 have been combined into a single alternative. The resulting combination of alternatives is considered reasonable as it encompasses most possible scenarios (more sites, fewer sites, the proposed sites, different sites).

Table 10.1 overleaf compares the likely impacts of the preferred options for Traveller sites, as set out in section 6.2 of the draft Traveller Sites DPD, with Alternatives 1 and 2 (provision of more sites), Alternatives 3 and 4 (provision of fewer sites) and Alternative 5 (a different, although unspecified, distribution of sites to provide the same levels of accommodation as the preferred option).

Table 10.1 Appraisal of the Effects of Preferred and Alternative Options on the 18 Sustainability Objectives

Objective	Econ	Soc	Env	Preferred Options for Traveller accommodation	Alternatives 1 and 2: Provision of more sites	Alternatives 3 and 4: Provision of fewer sites	Alternative 5: Different distribution of Traveller sites
1. To reduce the disparities in economic performance within the Borough	Y	Y		The Traveller sites DPD is concerned with providing accommodation for Travellers in the most appropriate locations. This Objective is concerned with providing job opportunities / investment, and thus the impact of allocating the preferred sites on this Objective should be minimal. There is no impact on the baseline data.	The allocation of more sites will have a minimal / neutral effect on meeting the employment needs of the Borough. Many Travellers are self employed and the transit site is not a permanent residence so would not assist in reducing economic disparities within the Borough. There is no impact on the baseline data.	Fewer site allocations would have a minimal / neutral impact on meeting the employment needs of local people, given many Travellers are self-employed. There is no impact on the baseline data.	A different geographical distribution of Traveller sites should have a negligible impact on reducing economic disparities. There is no impact on the baseline data.
2. To secure economic inclusion	Y	Y		The preferred sites have been selected with the intention of providing accommodation within easy reach of employment (subject to constraints such as flood risk). The preferred sites would have a small positive impact in terms of providing physical accessibility to jobs, although this is likely to be insignificant given many Travellers are self-employed.	The allocation of additional sites would not have any effect on improving the employment needs of the local community. The criteria of the Gypsy and Traveller Policy will seek to ensure that site allocations are in sustainable areas that are easily accessible by public transport and/or areas of employment. There is no impact on the baseline data.	The allocation of fewer sites would not have any impact on improving the employment needs of the local community. The criteria of the Gypsy and Traveller Policy will seek to ensure that site allocations are in sustainable areas that are easily accessible by public transport and/or areas of employment. There is no impact on the baseline data.	A different distribution of sites could result in Travellers having poorer access to employment areas compared with the preferred sites. However, many Travellers are self-employed and thus the overall impact is likely to be insignificant.
3. To develop and maintain a healthy labour market	Y	Y		One sub-criterion of this Objective relates to levels of participation in education. Criteria for selecting the preferred Traveller sites include ease	Provision of more sites, if occupied, should increase levels of participation in education, therefore having a likely impact	Provision of fewer sites will mean fewer opportunities for participation in education, lessening the	A different distribution of sites (if the different sites are further from education facilities than

Objective	Econ	Soc	Env	Preferred Options for Traveller accommodation	Alternatives 1 and 2: Provision of more sites	Alternatives 3 and 4: Provision of fewer sites	Alternative 5: Different distribution of Traveller sites
				of access to schools, and thus the allocation and use of the preferred sites should help increase participation in education, albeit for limited numbers of pupils. This should have a small positive impact on the baseline.	upon the baseline.	overall positive effect to insignificant levels.	the preferred sites) would mean that participation in education is likely to be less easy, hence a no effect on the baseline data compared with the preferred sites.
4. To encourage sustainable economic growth	Y	Y	Y	The sub-criteria relating to this objective are concerned with economic diversification and the attraction of new business. Self-employed Travellers carrying out “typical” Traveller business (e.g. paving) would not be expected to provide job opportunities for the settled community, and thus the overall impact on economic growth is likely to be positive but minimal.	The allocation and occupation of additional sites could lead to more Travellers residing in the Borough, and more business, but no more job opportunities for the settled community, hence no overall greater positive impact.	The allocation and occupation of fewer sites would result in fewer Travellers residing in the Borough, and lower business growth, compared with the preferred options for sites; however, the overall impact is likely to be negligible.	A different distribution of sites should result in no difference in impact compared with the preferred distribution of sites.
5. To deliver urban renaissance	Y	Y	Y	The sub-criteria for this Objective relate to the physical fabric of settlements, which has little relevance to provision of Traveller sites, hence no effect of any significance on the baseline.	No effect on the baseline data.	No effect on the baseline data	No effect (the only urban sites amongst the 20 candidate sites are subject to constraints and have unrealistic prospects of allocation).
6. To deliver rural renaissance	Y		Y	The sub-criteria for this Objective relate to rural diversification, growth of sustainable rural businesses and provision of services. Whilst Traveller sites may accommodate self-employed people and their	No effect on the baseline data	No effect on the baseline data	No effect on the baseline data

Objective	Econ	Soc	Env	Preferred Options for Traveller accommodation	Alternatives 1 and 2: Provision of more sites	Alternatives 3 and 4: Provision of fewer sites	Alternative 5: Different distribution of Traveller sites
				businesses, these business opportunities are not expected to be available to non-residents of the sites, so the overall impact on the baseline is negligible.			
7. To develop and market the Borough's image		Y	Y	Two sub-criteria are of relevance: preservation / enhancement of the built / natural environment in the Borough, and attraction of visitors, investors and residents. Traveller sites are unlikely to enhance the Borough's environment (although a well-planned and tidy site, complying with Local Plan policies on design, etc, need not have any negative impact). Whilst Travellers could be classed as "visitors" to the area, the sub-criteria are more likely to be concerned with tourists and business investors than Travellers. Overall, the effect is likely to be a combination of a minor negative and a minor positive impact, resulting in a neutral effect overall on the baseline.	The "balance" described in the assessment of the impact of the preferred options for sites would apply equally to an increased number of sites. There is no impact on the baseline data	The "balance" described in the assessment of the impact of the preferred options for sites would apply equally to a reduced number of sites. However, one consequence of under-providing sites would be an increased likelihood of unauthorised encampments, which tend to be unsightly, and thus likely to result in a negative impact.	A different distribution of sites should have no different impact on the Borough's image compared with the preferred sites and the baseline.
8. To improve access to basic goods and services	Y		Y	This objective is concerned with the range and quality of cultural and recreational facilities, essential services, and access to locally-sourced goods. As such it is of limited relevance to the topic of Traveller sites, hence no effect in the baseline data.	No effect on the baseline data.	No effect on the baseline data	No effect on the baseline data

Objective	Econ	Soc	Env	Preferred Options for Traveller accommodation	Alternatives 1 and 2: Provision of more sites	Alternatives 3 and 4: Provision of fewer sites	Alternative 5: Different distribution of Traveller sites
9. To improve access to good quality, affordable and resource efficient housing		Y		The most pertinent sub-criterion for this Objective refers to an appropriate mix of housing to meet all needs. Assuming Traveller accommodation can be included in this category, the provision of suitable accommodation to meet Traveller needs will have a positive impact on this group of people and on the baseline position.	The allocation of a greater number of Traveller sites will further assist in meeting the accommodation needs of this group of people.	The allocation of fewer sites will have a less positive impact in comparison to alternatives 1 and 2 on providing accommodation for this group of people than the preferred option.	Providing the same amount of accommodation, albeit in different locations, should have a similar impact to the preferred option.
10. To reduce crime and disorder and the fear of crime		Y		Sub-criteria relate to community development, relations between sections of the community, crime and fear of crime. These issues are emotive and are likely to be a hindrance in securing the allocation of sites in the first place. However, the allocation of appropriate, good quality sites, and community cohesion should help ensure positive impacts in terms of this Objective. As these outcomes are not guaranteed, this category has been assigned a “no effect score rather than “likely positive” score compared with the baseline.	A greater number of site allocations is likely to have a similar impact to the preferred option, subject to the same conditions / caveats. There is no effect on the baseline data	Fewer site allocations could result in needs not being met, leading to a greater likelihood of unauthorised encampments, which tend to reinforce negative public perceptions of Travellers, and provide little motivation on the part of Travellers to integrate with the local settled community.	Providing enough sites to meet Traveller needs should have a similar impact to the preferred option, although it is likely to be less positive in comparison to preferred option and alternatives 1 and 2, if sites are in less appropriate locations.
11. To reduce the need to travel, improve the choice and use of sustainable transport		Y		The most relevant sub-criteria relate to increased walking, cycling and public transport use. The preferred sites have been chosen taking into account, <i>inter alia</i> , their proximity to services and public transport, but in practice it is recognised that	More site allocations could have both a negative and positive impact on the use of sustainable transport modes. If more sites were located in sustainable areas this would have a positive impact. However, if more rural	Fewer site allocations could have both a negative and positive impact on the use of sustainable transport modes. If fewer sites were located in sustainable areas this	A different distribution of proposed Traveller sites is likely to be less sustainable than those set out in the preferred options, but the overall impact / change in

Objective	Econ	Soc	Env	Preferred Options for Traveller accommodation	Alternatives 1 and 2: Provision of more sites	Alternatives 3 and 4: Provision of fewer sites	Alternative 5: Different distribution of Traveller sites
modes				Travellers tend to have and use private motorised transport. The overall impact, therefore, is likely to be positive but small compared with the baseline.	unsustainable sites were allocated this would have a negative impact. Overall, it is assumed no net effect on the baseline position.	would have a positive impact. However, if these site were located in a more rural unsustainable location the impact would be negative. Overall, assumed no net effect.	impact is likely to be insignificant.
12. To improve physical and mental health and reduce inequalities		Y	Y	Sub-criteria refer to improve physical and mental health, vulnerable groups, health inequalities and isolation. By providing suitable sites for Traveller accommodation, the preferred options can contribute towards a positive impact on these issues for Travellers. Ease of access to health facilities is one of the criteria used in site assessment. Overall, it is anticipated there would be a positive effect compared with the baseline position.	Additional site allocations should result in a similar, or greater positive impact compared with the preferred options for sites.	Fewer site allocations could result in the accommodation needs of some Travellers not being met, which could lead to unauthorised encampments and constant “moving on”, allowing less access to health facilities and a lower quality of life for some. (Moving on refers to unauthorised transit sites, that are closed down through enforcement action)	Providing enough sites to meet Traveller accommodation needs should help address the issues set out in this Objective’s sub-criteria. However, a different distribution of sites is likely to result in health facilities being more difficult to access in comparison to preferred options and alternatives 1 and 2; hence a less positive impact. (If health facilities are easily accessible, this impact could be the same as for the preferred option and Alternative Options 1 & 2.)
13. To protect places, landscapes and buildings of			Y	The preferred Traveller sites are generally in rural locations, and thus there is a high possibility that the landscape in these locations will be	Providing further sites could lead to further impact on landscapes and / or countryside. However screening mitigation measures	Whilst provision of fewer sites will lead to less cumulative impact on the landscape, this could result	A different distribution of Traveller sites is likely to have a similar or slightly more negative

Objective	Econ	Soc	Env	Preferred Options for Traveller accommodation	Alternatives 1 and 2: Provision of more sites	Alternatives 3 and 4: Provision of fewer sites	Alternative 5: Different distribution of Traveller sites
historical, cultural and archaeological value				adversely affected. However, with appropriate screening and mitigation, any negative impact could be mitigated as outlined in GT1 avoiding any unacceptable impacts on the site and its surroundings. Overall, it is anticipated there would be a minor negative impact compared with the baseline.	can be implemented to ensure the impact is not severe. There is unlikely to be an impact upon heritage with the selection of these sites.	in overall accommodation needs not being met, and an increased likelihood of unauthorised encampments. Such encampments may have a much more negative impact on the countryside as there is less incentive for the site occupants to screen their site. Conversely, occupants of longer-term unauthorised sites may sometimes screen their sites, in which case the impact could be “negative” rather than “very negative”.	impact on the landscape, although once again, these sites can be appropriately screened to mitigate their impact.
14. To restore and protect land and soil quality			Y	The preferred sites will result in the loss of a small amount of greenfield land and some low grade agricultural land, although the majority of sites are already in Traveller use, or are brownfield land, thus the overall impact is unlikely to be severe – a minor negative impact compared with the baseline position.	An increase in allocated sites is likely to result in a greater loss of greenfield land, and could potentially lead to loss of more significant amounts of agricultural land.	Whilst provision of fewer sites will lead to less cumulative impact on land and soil resources, it could also result in overall accommodation needs not being met, and an increased likelihood of unauthorised encampments in more “harmful” locations, with an overall “net” negative impact greater than for the preferred option. Whether	A different distribution of sites is likely to have a slightly more negative impact than the preferred options, although, depending on which sites are chosen, could have a more significant negative impact.

Objective	Econ	Soc	Env	Preferred Options for Traveller accommodation	Alternatives 1 and 2: Provision of more sites	Alternatives 3 and 4: Provision of fewer sites	Alternative 5: Different distribution of Traveller sites
						this is “negative” or “very negative” depends on the locations of any unauthorised encampments.	
15. To protect and enhance biodiversity			Y	The preferred sites have been selected using, <i>inter alia</i> , a criterion seeking to avoid impact on nature conservation sites. The sites chosen will not enhance biodiversity, but should not have any significant negative impact on biodiversity in the baseline evidence. A number of the preferred sites are already in Traveller use at present. No overall effect upon the baseline position.	An increase in allocated sites would potentially increase the likelihood of some impact upon habitats and species, through a cumulative effect, mitigation measures would need to be implemented to deal with any loss. Overall it is likely there would be a minor negative impact on the baseline position.	Fewer allocated sites would reduce the impact upon habitat and species within the borough, but could result in unauthorised developments in locations affecting nature conservation sites.	A different distribution of sites to meet the same accommodation needs is unlikely to have any significantly worse impact on biodiversity in the baseline evidence than the preferred sites (if the alternative locations are from the 20 ‘candidate’ sites).
16. To protect and improve the quality of both inland costal waters and protect against flood risk			Y	The preferred sites avoid Flood Zone 3, in accordance with national policy. Any allocated sites will need to satisfy the Exceptions Test, where applicable. Allocating the preferred sites will not have a positive impact on flood risk, but neither should it have any significant negative impact. Thus overall, no net effect on the baseline.	Providing more sites could result in an increase in flood risk, depending on the location of the sites chosen. The extent of any negative impacts depends on the sites chosen.	Providing fewer sites could result in unauthorised encampments, which may be in flood risk areas. Two current unauthorised sites are in Flood Zone 3. The extent of negative impacts depends on the occurrence and location of any unauthorised encampments.	A different distribution of sites to meet the same accommodation needs is unlikely to have any significantly worse impact on flood risk, provided sites in Flood Zone 3 are avoided. Whether or not the impact is negative and significant depends on the location of the alternative sites. Thus overall, no net effect on the baseline position.
17. To protect			Y	The preferred sites should have no	An increase in sites would	Fewer allocated sites	A different distribution

Objective	Econ	Soc	Env	Preferred Options for Traveller accommodation	Alternatives 1 and 2: Provision of more sites	Alternatives 3 and 4: Provision of fewer sites	Alternative 5: Different distribution of Traveller sites
and improve noise air quality.				significant impact on air quality and noise / light pollution, taking into account the legal requirement to meet Traveller accommodation needs in this Borough, and provided suitable measures be put in place on allocated sites to provide suitable acoustic and visual screening. There is no evidence of likely impact upon the baseline.	potentially mean an increase in car usage, thus decreasing air quality. However this would be dependent upon the location of sites and if they were in sustainable locations. There is no evidence of likely impact upon the baseline.	would potentially have a lesser impact upon noise and air quality. However the impact would be dependent upon the location of sites the sustainability of their locations. There is no evidence of likely impact upon the baseline.	of sites should have no significant impact on air quality and noise / light pollution, taking into account the legal requirement to meet Traveller accommodation needs in this Borough, and provided suitable measures be put in place on allocated sites to provide suitable acoustic and visual screening. There is no evidence of likely impact upon the baseline.
18. To ensure the prudent use of natural resources, including the use of renewable energies and the sustainable management of existing resources			Y	Providing accommodation to meet Traveller needs will have implications for use of resources, but these impacts are not likely to be significant given the relatively small Traveller accommodation requirements in West Lancashire, compared with, say bricks and mortar housing requirements. There is no evidence of likely impact upon the baseline.	More sites will inevitably produce a higher demand on the use of resources; however policies within the Local Plan ensure that renewable energies and sustainable design/ construction will be implemented. There is no evidence of likely impact upon the baseline.	Fewer sites will in theory produce a lesser demand on the use of resources. However policies within the Local Plan ensure that renewable energies and sustainable design/ construction will be implemented. There is no evidence of likely impact upon the baseline.	A different distribution of sites should have no noticeable different effect on the use of resources compared with the preferred options for sites. There is no evidence of likely impact upon the baseline.

11. Conclusions

This Sustainability Appraisal report represents a fulfilment of the Stages A – C of the Sustainability Appraisal process for the Provision for Traveller Sites Development Plan Document: Options and Preferred Options (“the DPD”).

An assessment has been made of the DPD’s proposed policy to assess planning applications for Traveller sites against the baseline position with regard to the 18 Sustainability Objectives of the West Lancashire Local Plan insofar as they relate to the Traveller Sites DPD. For comparison purposes, assessment was also made against two reasonable alternatives: an alternative, less stringent policy, and against a scenario where there would be no policy in place. The relative effects of these three scenarios are summarised in the Table 11.1 below:

Table 11.1
Impacts on Sustainability Objectives of Proposed & Alternative Policies for Traveller Sites

Scenario	Number of incidences of each type of impact				
	Very negative	Negative	Neutral	Positive	Very positive
Policy GT1	0	0	11	6	1
Policy GT1a	4	1	9	4	0
No policy in place	9	2	7	0	0

This table indicates that the proposed policy for assessing planning applications for Traveller sites, as set out in the DPD, is likely to have the most positive overall impacts in terms of sustainability. A less stringent policy (allowing development further away from facilities, and / or in the Green Belt, and / or in areas of landscape value) would be likely to have a slight net negative impact overall in terms of sustainability, whilst the absence of any policy would be likely to have a significant negative impact in terms of sustainability. These findings are being taken into account in formulating the draft Traveller Sites DPD.

In the same way, an assessment was made of the preferred options for Traveller site allocation (as set out in Chapter 6 of the DPD) against the 18 Sustainability Objectives, and this was compared with three reasonable alternative scenarios of providing additional sites, providing fewer sites, and providing sites in different geographical locations from the preferred sites.

The results are summarised in Table 11.2 below.

Table 11.2
Impacts on Sustainability Objectives of Preferred & Alternative Traveller site distributions

Scenario	Number of incidences of each type of impact				
	Very negative	Negative	Neutral	Positive	Very positive
Preferred sites	0	2	12	3	1
Provide additional sites	1	3	11	2	1
Provide fewer sites	2	5	10	1	0
Provide sites in different locations	0	2	14	2	0

Table 11.2 indicates that the preferred sites are likely to have the most positive overall impact in terms of sustainability, whilst the provision of additional sites or the provision of sites in different areas will have a lesser positive impact. Conversely, providing fewer sites would have a more significant negative impact. All four scenarios include elements of negative impact; this is because the allocation of sites for Travellers will inevitably result in impacts such as the loss of land, and the use of private motorised transport. The likely negative impacts linked to the allocation of fewer sites are due to the need for Traveller accommodation not being met in full, leading to the likelihood of unauthorised encampments in the Borough.

The above analysis demonstrates that the proposed policy for assessment of Traveller sites, and the proposed locations of the preferred sites are the most sustainable when assessed against the 18 Sustainability Objectives of the West Lancashire Local Plan.

Next Steps

The results of this Sustainability Appraisal have fed into the Traveller Sites DPD: Options and Preferred Options document. This report will be consulted upon, alongside the draft DPD. Comments received through the consultation process will be taken into account when preparing the next stage of the DPD (Publication version, in which specific sites will be proposed for allocation), at which point a further Sustainability Appraisal will be undertaken. The subsequent SA will also deal in more detail with the assessment of significant effects, and with monitoring arrangements.

APPENDIX 1: REVIEW OF RELEVANT PLANS AND PROGRAMMES

Strategy/Plan/Programme	Key Objectives relevant to Provision for Traveller Sites DPD	Key targets and indicators relevant to Provision for Traveller Sites DPD	Implications for Provision for Traveller Sites DPD	Implications for Sustainability Appraisal
INTERNATIONAL				
Johannesburg Declaration on Sustainable Development	<ul style="list-style-type: none"> • Commitment to building a humane equitable global community for all. • Renewable energy and efficiency • Sustainable construction. • Reducing impacts on biodiversity. 	<ul style="list-style-type: none"> • Greater resource energy efficiency. • Renewable energy. • Increase energy efficiency. 	<ul style="list-style-type: none"> • The Gypsy and Travellers Policy and allocated sites should encourage the use of energy efficiency resource and the use of renewables where possible. 	<ul style="list-style-type: none"> • The SA will be required to provide objectives relating to the environment and the use of natural resources and renewable energy.
Kyoto Protocol (1997)	<ul style="list-style-type: none"> • To prevent greenhouses gases and climate change. 	<ul style="list-style-type: none"> • Reduce emission levels 	<ul style="list-style-type: none"> • Encourage renewable energy 	<ul style="list-style-type: none"> • The SA will be required to provide objectives relating to the environment and the use of natural resources and renewable energy.
European Spatial Development Perspective	<ul style="list-style-type: none"> • Economic/Social cohesion. • Conservation of natural and cultural heritage. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Consider the Directive within the SA.
Directive 2001/42/EC on the assessment of the affects of certain plans on the environment	<ul style="list-style-type: none"> • Protection of the environment. 	<ul style="list-style-type: none"> • Must apply to plans after 21/07/2006. 	<ul style="list-style-type: none"> • Develop a Policy and ensure allocated sites take account of Directives requirements 	<ul style="list-style-type: none"> • Requirements of the Directive must be met within the SA.
EU Air Quality Framework Directive 1996/62/EC and 1999/30/EC, 2000/3/EC	<ul style="list-style-type: none"> • Maintain good air quality and improve where possible. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Develop a Policy and ensure allocated sites take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • Should include objectives to consider air quality.
EU Water Framework Directive 2000/60/EC	<ul style="list-style-type: none"> • Prevent deterioration of aquatic water systems. • Promote sustainable water use. • Reduce underground pollution • Mitigate effects of flooding and droughts. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Develop a Policy and ensure allocated sites take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • Should include objectives to consider water quality.
Drinking Water Directive	<ul style="list-style-type: none"> • Quality of drinking water 	<ul style="list-style-type: none"> • Standards are legally binding 	<ul style="list-style-type: none"> • Develop a Policy and ensure allocated sites take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • The SA should consider water quality.

Strategy/Plan/Programme	Key Objectives relevant to Provision for Traveller Sites DPD	Key targets and indicators relevant to Provision for Traveller Sites DPD	Implications for Provision for Traveller Sites DPD	Implications for Sustainability Appraisal
Bern Convention on the Conservation of European Wildlife and Natural Habitats (1979)	<ul style="list-style-type: none"> To ensure conservation of wild flora and fauna species and habitats. Special attention should be given to endangered and vulnerable species, included endangered and vulnerable migratory species. <p>There are three main aims:</p> <ol style="list-style-type: none"> 1. Conserve wild flora, fauna and Natural Habitats. 2. To promote co-operation between states. 3. To give particular attention to vulnerable/endangered species. 	<ul style="list-style-type: none"> No targets identified 	<ul style="list-style-type: none"> Develop a Policy and ensure that allocated sites take account of the requirements of the Directive. 	<ul style="list-style-type: none"> The SA should consider the natural environment and biodiversity issues.
EU Directive on the Conservation of Wild Birds 79/409/EEC	<ul style="list-style-type: none"> Identification of endangered species for which Member States are required to designate Special Protection Areas. 	<ul style="list-style-type: none"> Creation of protected areas; Upkeep and Management; Re-establishment of destroyed biotopes. 	<ul style="list-style-type: none"> Develop a Policy and ensure allocated sites take account of the requirements of the Directive. 	<ul style="list-style-type: none"> The SA should consider biodiversity issues.
EU Directive on the Conservation of Natural Habitats and Wild Flora and Fauna 92/43/EEC	<ul style="list-style-type: none"> To conserve natural habitats; Identification of areas of conservation and maintain landscape features; Protection of Species. The consideration of Appropriate Assessments. 	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Develop a Policy and ensure allocated sites take account of the requirements of the Directive. 	<ul style="list-style-type: none"> The SA should consider the protection of landscape benefit for ecological issues.
RAMSAR Convention on Wetlands of International Importance (1971)	<ul style="list-style-type: none"> The conventions mission statement is 'the conservation and wise use of all wetlands through local, regional and national actions and international co-operation, as a contribution to sustainable development throughout the world'. 	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Develop a Policy and ensure allocated sites take account of the requirements of the Directive. 	<ul style="list-style-type: none"> The SA should consider the protection of the environment.

Strategy/Plan/Programme	Key Objectives relevant to Provision for Traveller Sites DPD	Key targets and indicators relevant to Provision for Traveller Sites DPD	Implications for Provision for Traveller Sites DPD	Implications for Sustainability Appraisal
EU Framework Waste Directive 75/442/EEC (as amended)	<ul style="list-style-type: none"> Seeks to prevent and reduce the production of waste and its impacts; Where necessary waste should be disposed of with creating environmental problems. 	<ul style="list-style-type: none"> Promoting of the development of clean technologies to process waste; Promote re-cycling and re-use 	To develop policies and programmes which take account of the Directive’s requirements and consider recycling and treatment of waste?	<ul style="list-style-type: none"> The SA should include the minimisation of waste.
Aarhus Convention (1998)	<ul style="list-style-type: none"> Contribute to the protection of the right of every person and future generations to live in an environment adequate to his / her health and well being by: <ol style="list-style-type: none"> Access to Information; Public Participation in Decision Making; Access to Justice. 	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Ensure public are consulted at relevant stages. 	<ul style="list-style-type: none"> Ensure the public are consulted at the relevant stages.
NATIONAL				
NPPF	<ul style="list-style-type: none"> An economic role – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure; A social role – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality built environment, with accessible local services that reflect the 	<ul style="list-style-type: none"> Making it easier for jobs to be created in cities, towns and villages; Moving from a net loss of bio-diversity to achieving net gains for nature;6 Replacing poor design with better design; Improving the conditions in which people live, work, travel and take leisure; and Widening the choice of high quality homes. 	<ul style="list-style-type: none"> To develop the Policy ensuring that allocates sites take account of the NPPF. 	<ul style="list-style-type: none"> Ensure that the Policy and site allocations are economically, socially and environmentally sustainable.

Strategy/Plan/Programme	Key Objectives relevant to Provision for Traveller Sites DPD	Key targets and indicators relevant to Provision for Traveller Sites DPD	Implications for Provision for Traveller Sites DPD	Implications for Sustainability Appraisal
	<p>community's needs and support its health, social and cultural well-being; and</p> <ul style="list-style-type: none"> • An environmental role – contributing to protecting and enhancing our natural, built and historic environment; and, as part of this, helping to improve biodiversity, use natural resources prudently, minimise waste and pollution, and mitigate and adapt to climate change including moving to a low carbon economy. 			
NPPF – Planning policy for Traveller Sites	<ul style="list-style-type: none"> • Fair and equal treatment for travellers, in a way that facilitates the traditional and nomadic way of life of travellers while respecting the interests of the settled community. 	<ul style="list-style-type: none"> • LPA's make their own assessment of need for the purpose of planning • LPA's work collaboratively, develop fair and effective strategies to meet need through the identification of land for sites • Protect Green Belt land from inappropriate development • Reduce the number of unauthorised developments and encampments 	<ul style="list-style-type: none"> • The Policy and site allocations should take into account the key objectives of the Planning Policy for Traveller Site document. 	<ul style="list-style-type: none"> • The SA should consider, where appropriate, the need for objectives relating to traveller sites.
SUB REGIONAL				
Lancashire Minerals and Waste Local Plan	<ul style="list-style-type: none"> • To resist minerals or waste developments where they could cause unacceptable impact on people and the environment; • To minimise the adverse impact of minerals or waste 	<ul style="list-style-type: none"> • A variety of targets and indicators are referred to relating to a minerals production, waste minimisation and recycling relates. 	<ul style="list-style-type: none"> • The Policy and site allocations should take into account the key objectives of the Minerals and Waste Local Plan where relevant. 	<ul style="list-style-type: none"> • The SA should consider, where appropriate, the need for objectives relating to minerals and waste.

Strategy/Plan/Programme	Key Objectives relevant to Provision for Traveller Sites DPD	Key targets and indicators relevant to Provision for Traveller Sites DPD	Implications for Provision for Traveller Sites DPD	Implications for Sustainability Appraisal
	<p>developments and seek where appropriate environmental and social benefits;</p> <ul style="list-style-type: none"> • To identify the requirements for, and ensure a supply of land to meet necessary local, regional and national supplies of minerals; • To safeguard minerals resources for the future; • Increased emphasis on waste minimisation, re-use and recycling whilst ensuring that adequate provision is made for the treatment and disposal of waste; • To ensure that minerals and waste development are reclaimed to a high standard, to enable an acceptable after the use to be implemented; • To encourage the use of secondary materials; • To minimise the adverse impacts from the transport of minerals and waste; and • To facilitate the establishment of installations and sites needed to minimise waste requiring final disposal. 			
<p>A landscape strategy for Lancashire – Landscape Character Assessment (2000)</p>	<ul style="list-style-type: none"> • To outline how the landscape of Lancashire has evolved in terms of physical forces and human influences; • To classify the landscapes in 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • To incorporate landscape enhancement into the Policy and site allocations. 	<ul style="list-style-type: none"> • To include protection of landscapes in the Policy and site allocations.

Strategy/Plan/Programme	Key Objectives relevant to Provision for Traveller Sites DPD	Key targets and indicators relevant to Provision for Traveller Sites DPD	Implications for Provision for Traveller Sites DPD	Implications for Sustainability Appraisal
	<p>district landscape types identifying key characteristics and sensitivities and providing principles to guide landscape change;</p> <ul style="list-style-type: none"> • To describe the current appearance of the landscape, classifying it into district zones of homogenous character, summarising the key features of each landscape character area; • To describe the principal urban landscape types across the County, highlighting their historical development. 			
Lancashire County Council Local Transport Plan	<ul style="list-style-type: none"> • Reduce road casualties; • Improve access to jobs and services; • Improve air quality; • Improve the condition of transport infrastructure; • Reduce delays on journeys; • Increase journeys by bus and rail; and • Increase active travel. 	<ul style="list-style-type: none"> • The Plan includes a wide range of targets and indicators relating to areas such as traffic growth, air quality and public transport use, cycling and walking rates, congestion and accessibility. 	<ul style="list-style-type: none"> • Develop the Policy and site allocations in relation to improving the accessibility to services, encouraging the provision and use of public transport and cycling and walking. 	<ul style="list-style-type: none"> • Include sustainability objectives in relation to improving traffic issues.
LOCAL				
West Lancs Local Plan 2012-2027	<ul style="list-style-type: none"> • Stronger and safer communities • Education, training and the economy • Health • Natural Environment • Housing • Services and Accessibility 	<ul style="list-style-type: none"> • The Plan includes a wide range of targets and indicators. 	<ul style="list-style-type: none"> • Develop the Policy and identification of the site allocations in relation to the objectives of the Local Plan. 	<ul style="list-style-type: none"> • To include objectives in the Policy and site allocations.

Strategy/Plan/Programme	Key Objectives relevant to Provision for Traveller Sites DPD	Key targets and indicators relevant to Provision for Traveller Sites DPD	Implications for Provision for Traveller Sites DPD	Implications for Sustainability Appraisal
	<ul style="list-style-type: none"> • Location of development and built environment • Climate Change • Provision of Gypsy and Traveller sites (Policy RS4) 			
West Lancashire District Council Statement of Community Involvement	<ul style="list-style-type: none"> • Describes the various stages in document preparation when the Council will involve the community, the different groups to be contacted at each stage and for each type of document, and the different ways in which groups will be involved at each stage. • Explains how the Council will provide feedback on any comments received. • Provides a list of organisations and community groups that the Council will consult, both formally and informally. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • The consultation must comply with the SCI. 	<ul style="list-style-type: none"> • Ensure the consultation on the SA in undertaken in accordance with the SCI.
Housing Needs Survey	<ul style="list-style-type: none"> • Provide accurate and robust information about the housing need requirements • Help support the Council's strategic housing role; • Help inform the Housing Strategy for the Masterplan; • Identify key priorities to creating a balanced housing market in the District, particularly addressing issues of affordability; • Provide an assessment of housing markets in the District; • Assess the specific housing 	<ul style="list-style-type: none"> • 20% elderly provision and 35% affordable housing provision. 	<ul style="list-style-type: none"> • The DPD must address the issues of the Housing Needs Survey. 	<ul style="list-style-type: none"> • SA Framework should include for the development of affordable and elderly housing.

Strategy/Plan/Programme	Key Objectives relevant to Provision for Traveller Sites DPD	Key targets and indicators relevant to Provision for Traveller Sites DPD	Implications for Provision for Traveller Sites DPD	Implications for Sustainability Appraisal
	<p>needs of ethnic minorities, older people and key workers in the District;</p> <ul style="list-style-type: none"> • Provide projections on future housing need. 			
West Lancashire Open Space Strategy	<ul style="list-style-type: none"> • To prioritise strategic sites for enhancement and development of open space and non-sports pitch facilities. • Provide quality targets and management targets for general open space and individual typologies. • Provide information that can be used within the LDF process and supplementary planning documents. • Protect sites, which increase nature conservation and biodiversity, from over use. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • The DPD must consider open space. 	<ul style="list-style-type: none"> • SA should take account of open space in the DPD.
West Lancashire Playing Pitch Assessment	<ul style="list-style-type: none"> • Analyse the current level of pitch provision in the District • Review the quantity and quality of pitches in the District • Identify how facilities can be improved • Identify the levels of demand • Set a local standard for playing pitches within the District. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • The DPD must consider open space 	<ul style="list-style-type: none"> • SA should take account of open space in the DPD.

APPENDIX 2: COLLECTION OF RELEVANT ECONOMIC, SOCIAL AND ENVIRONMENTAL BASELINE DATA

The indicators are West Lancashire Performance indicators

Indicator - 1. Encourage sustainable economic growth and performance.

Indicator	Data Source	Data recent at	West Lancs	North West	England	Comments	Expected baseline without the plan
All Economically Active	NOMIS	Jul 2012-Jun 2013	53,700 (77%)	3,426,000 (75%)	32,474,000 (78%)		No effect
% claiming JSA	NOMIS	Nov 2013	2.5%	3.4%	GB 2.9%		No effect

Indicator – 2. Secure Economic Inclusion

Indicator	Data Source	Data recent	West Lancs	North West	England	Comments	Expected baseline without the plan
All Economically Active	2011 Census	2011	81,601	5,184,216	3,881,374		Unknown
% Claiming JSA	2010 Nomis	2010	4.1%	4.5%	4.1%		Unknown
Higher Occupation workers	2009 Economic Study	2009	38.6	N/A	N/A		Unknown
Intermediate Occupation Workers	2009 Economic Study	2009	38.3	N/A	N/A		Unknown
Lower Occupation Workers	2009 Economic Study	2009	22.4	N/A	N/A		Unknown

Indicator – 3. To deliver Urban Renaissance

Indicator	Data Source	Data recent	West Lancs	North West	England	Comments	Expected baseline without the plan
Number of dwellings.	2001 census	2001	43586	2812789	20451427	Awaiting 2011 census update	No effect
Deficiency of public open space	Playing pitch strategy	2004	Football: minor oversupply of adult pitches; significant shortfall of junior			Needs reviewing as may have	No effect

Indicator	Data Source	Data recent	West Lancs	North West	England	Comments	Expected baseline without the plan
			pitches; undersupply of mini pitches. Large undersupply of junior rugby union pitches. Small undersupply of adult rugby league pitches.			changed over time.	

Indicator – 4. To deliver Rural Renaissance

Indicator	Data Source	Data recent	West Lancs	North West	England	Comment	Expected baseline without the plan
% of population within 5km of 5 basic services	LCC	2005	55.93%				Unknown exact level but if no plan in place the Travelling community would possibly decrease this figure
Proportion of new housing granted consent and completed within 400m of an existing / proposed bus stop	LCC	2013	99% completions				Unknown exact level but if no plan in place the Travelling community would possibly decrease this figure

Indicator - 5. To protect and improve the quality of inland and costal waters, and manage flood risk

Indicator	Data Source	Data recent	West Lancs	North West	England	Comment	Expected baseline without the plan
Number of Planning Permissions permitted against Environment Agency Advice	2013 AMR Environment Agency	2013	0				No effect

Indicator – 6. To reduce the need to travel and improve the choice and use of sustainable transport modes.

Indicator	Data Source	Data recent	West Lancs	North West	England	Comment	Expected baseline without the plan
Proportion of new housing granted consent and completed within 400m of an existing / proposed bus stop	WLDC Housing Land Database	2012/2013	99% completions				Unknown however without the plan unauthorised development and encampments may not meet this requirement
Average distance (km) travelled to a fixed place of work.						Question not asked in 2011 census.	Unknown
Length of Public Footpaths within the District	LCC GIS	2007	144km				No change
Length of cycle ways within the District	LCC GIS	2007	6km				No change
Number of people travelling to work within the borough	West Lancs AMR	2011	63%				This figure would possible increase although it is unknown by how much

Indicator – 7. To minimise the requirement for energy, promote efficient energy use and increase the proportion of energy from renewable sources

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Daily domestic use of the water supply.	Audit commission	2004	148 Litres		154.14 Litres		No change
Average annual consumption of gas in Kwh.	Audit commission	2004	22971	20828	20496 (GB)		No change
Average Annual Consumption of electricity in Kwh.	Audit commission	2004	4919	4393	4628 (GB)		No change

Indicator – 8. To protect, enhance and manage West Lancashire’s rich and diverse culture and built environment and archaeological assets.

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Number of Conservation Areas	Council Heritage List	2013	28			(Junction Lane CA)	No effect
Listed Buildings	English Heritage	2013	600				No effect
Building of Local Importance	Council Heritage List	2013	120				No effect

Indicator – 9. To protect and restore land and soil

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Proportion of land stock that is neglected, underused or derelict.	AMR 2012	2012	29	680	4080		If no plan is in place loss of prime agricultural land could be compromised through unauthorised development/encampments
Proportion of land stock that is classified as contaminated land						No data	No effect
Amount of Contaminated land that has been remediated.	West Lancs		0				No effect

Indicator – 10. To protect and enhance biodiversity and sites of geological importance

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Number of RAMSAR sites within the District.	West Lancs AMR	2012	2				No change
Number of SSSIs within the District.	West Lancs AMR	2012	6				No change
Number of TPOs	West Lancs AMR	2012	557				No change
Green Flag Awards	West Lancs AMR	2012	3				No change
Biological Heritage sites			5,111				No change

Indicator – 11. To improve health and well-being and reduce health inequalities.

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Life expectancy males	West Lancs	2005-2007	77.7	78.8	77.7		This would remain unchanged for the overall population; however it could increase life expectancy of the ethnic group
Life expectancy Female	West Lancs	2005-2007	80.6	84.4	81.8		As above

Indicator – 12. To protect and improve air, light and noise quality

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Numbers of Air Quality Management Zones	West Lancs	2009	1			Moor Street Ormskirk	No effect
% of moderate / higher pollutant days	West Lancs					Not recorded by WLBC	No effect

Indicator – 13. To improve access to and the provision of basic goods, services and amenities.

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Amount of new residential development (completions) within 30 minutes public transport time of essential basic services (GP, Hospital, Primary, Secondary, Retail, Employment)	West Lancs		65%				Unknown, however it would be expected that the figure would decrease if the plan was not implemented as there would be no control over where development was located

Indicator – 14. To develop strong and vibrant communities and reduce the fear of crime.

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Recorded Crime	Lancashire Profile – West Lancs	2008	38.3	58.4	53.7	Descriptions of each crime type often change.	No effect
Violence Against the Person	Lancashire Profile – West Lancs	2008	1423				No effect
Robbery	Lancashire Profile – West Lancs	2013	27				No effect
Burglary Dwelling	Lancashire Profile – West Lancs	2013	262				No effect
Theft of a Motor Vehicle	Lancashire Profile – West Lancs	2008	276				No effect
Theft from a Motor Vehicle	Lancashire Profile – West Lancs	2008	497				No effect

Indicator – 15. To improve access to a range of good quality affordable and resource efficient homes.

Indicator	Data Source	Data relevant	West Lancs	North West	England	Comments	Expected baseline without the plan
Number of affordable housing units granted permission	West Lancs AMR	2013	95				No effect
Brownfield conversions sites			233				Unknown this could increase or decrease depending upon location of applications
Greenfield agricultural conversion sites			17				Unknown this could increase or decrease depending upon location of applications

APPENDIX 3: IDENTIFYING SUSTAINABILITY ISSUES

Issue	Description of the Issue	Discussion on the relationship with other issues/plans and the reliance of action from other bodies	How can the issue be addressed?
Access, Highways & Public Transport	<p>One of the main issues facing the Borough is improving access to sustainable methods of transport including bus, rail links and cycle & footpaths. This also extends to improving the availability and frequency of bus and rail services.</p> <p>Although sites are assessed against this criteria it is important to reduce car dependency levels.</p> <p>There is the need to improve the diversity and availability of employment in West Lancashire in accessible locations or with improved public transport links to enable residents of the Borough to find employment within West Lancs, thereby reducing the necessity to commute.</p>	<p>The Council and Lancashire County Council must work in partnership, ensuring that the issue of congestion is addressed through assessing problem junctions and ensuring a sustainable public transport network functions to its full potential.</p>	<p>Assessing the sites against criteria and liaising with public transport infrastructure providers regarding the transport network.</p>
Social Inclusion	<p>The Borough is required to deliver a yearly requirement of homes over the plan period 2012-2027 to meet the needs of the population which also includes services, employment opportunities as well as provision of and access to health related facilities.</p> <p>Social exclusion occurs from unemployment, low income, high crime rate, poor housing and poor health. Social inclusion is used to assist in addressing these issues.</p>	<p>Engagement with the Health providers will establish what requirements are needed.</p>	<p>Liaise with providers to establish the required need and either provide a facilities onsite or within the town centre, through planning obligations.</p>
Access to services and amenities	<p>Access to services and amenities needs to be improved in-between settlements; this is expected to be delivered through establishing a network of green corridors.</p> <p>There are various deficiencies in open space</p>	<p>Identify areas for linear parks, play areas and footpaths/cycle paths.</p>	<p>Liaise with the green infrastructure providers to establish what provision, if any is required and provide through planning obligations.</p>

	<p>throughout the borough. Development needs to maximise the role of open spaces to improve health and physical activity whilst improving the quality of amenity in open spaces. Provide play facilities needs to be provided and the quality of existing grass pitches needs to be enhanced and development of new multi use pitch sites needs to be forthcoming to provide for the deficiencies.</p>		
Employment	<p>There are levels of disparities and inequalities between skills, education, health & employment across the Borough that need to be reduced. Work is required to reduce unemployment levels and the number of benefit claimants although this is already lower than the regional and national average. Reduce travelling out of the borough for work and increasing the number of those travelling inwards for work will assist in increasing West Lancashire's economy.</p>	<p>Links with improving education and developing skills. It is key to establish any educational and training needs derived from the allocation of sites.</p>	<p>Liaise with the Local Education Authority to establish if an additional education provision is required to link, whilst establishing any local training needs.</p>
Education	<p>There is a need to improve the lack of basic skills and barriers to work as well as the barriers to work through linking workless people to vacancies. Education provision will need to be subsidised if additional recourses are required dependent upon the location of the site allocations.</p>	<p>The Council will have to liaise with Lancashire county Council in order to establish if a need for additional primary /secondary school places is required.</p>	<p>Liaise with providers to establish the required need and provide a facility within the town centre, through a planning obligation.</p>
Protection of ecology, biodiversity and soils	<p>Protect and promote agricultural land & horticultural land and businesses within West Lancashire. Reduce the amount of vacant land and Brownfield sites unused by promoting their regeneration.</p>	<p>Liaison with Lancashire County Council and RSPB/Natural England will identify areas to be protected; these could be doubled up as areas of public open space.</p>	<p>Habitat Regulations Assessment (HRA) to identify species on the site and any mitigation/provision for ecology on the site.</p>

	<p>Simultaneously review and protect green belt land.</p> <p>Continue to reduce the volume of waste going to landfill.</p> <p>Respond to climate change through protecting the most fertile agricultural land for crop production to respond to the changing needs of the food production industry.</p>		
<p>Surface and Waste Water Treatment</p>	<p>Sustainably manage and use water resources. Ensure all households, businesses, agriculture and environments have enough water available.</p> <p>Support and protect as many watercourses, wetlands and groundwater & surface water sources as financially viable.</p> <p>Ensure more water efficient designs are incorporated into developments and new buildings.</p> <p>Promote the use of Sustainable Drainage Systems (SuDS).</p> <p>Reduce flood risk through location management of development into areas of the lowest risk and supporting flood defences</p> <p>Respond to the impacts of climate change on water resources such as water quantity and quality, changes to water tables and demands from the public.</p>	<p>Careful consideration is needed in protecting areas from surface water flooding.</p> <p>The Council, along with Lancashire County Council and the Environment Agency will be required to work together to ensure new development and the existing area is protected.</p>	<p>Liaise with United utilities to establish what additional infrastructure will be required to assist in the delivery of the sites, and whether or not there is existing capacity within the existing network.</p>



Sustainability Appraisal Review

Provision for Traveller Sites Development Plan Document Options and Preferred Options

(Interim SA Report)

Prepared for:
West Lancashire Borough
Council

UNITED
KINGDOM &
IRELAND



Rev	Date	Details	Prepared by	Approved by
1	January 2014	SA Review	Sam Rosillo <i>Planner</i>	Ian McCluskey <i>Senior Sustainability Consultant</i> Alan Houghton <i>Associate</i>

Limitations

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The methodology adopted and the sources of information used by URS in providing its services are outlined in this Report. The work described in this Report was undertaken in January 2014 and is based on the conditions encountered and the information available during the said period of time. The scope of this Report and the services are accordingly factually limited by these circumstances.

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1. CRITICAL REVIEW OF THE SA REPORT FOR TRAVELLER SITES DPD

The following table sets out a review of the (interim) SA Report for the Provision for Traveller Sites Development Plan Document Options and Preferred Options undertaken by URS.

The review is structured by the requirements of Schedule 2 (regulation 12[3]) of the *Environmental Assessment of Plans and Programmes Regulations 2004*.

Review criteria	Requirements	Findings
What's the Plan seeking to achieve?	1. An outline of the contents and main objectives of the plan	Section 3 of the SA report outlines the background relating to the planning policy context. However, there is no specific section that sets out the content and objectives of the DPD. A short section should be included in the Final SA Report that outlines what the DPD will include and what its purpose is. <i>(This can be copied from the DPD itself).</i>
What's the sustainability 'context'?	2. The relationship of the plan with other relevant plans and programmes 3. The relevant environmental protection objectives, established at international or national level	Appendix 1 sets out a summary review of relevant plans, programmes and environmental protection objectives. The review should include reference to the Planning Policy for Traveller Sites. Section 5 of the SA report would be improved with a section outlining the key messages from the relevant plans, programmes and environmental protection objectives.
What's the sustainability 'baseline' at the current time?	4. The relevant aspects of the current state of the environment 5. The environmental characteristics of areas likely to be significantly affected	The baseline review provided in Appendix 2 covers a range of baseline data. Section 5 of the SA report would be improved if the key trends within the baseline review were set out.
What's the baseline projection?	6. The likely evolution of the current state of the environment without implementation of the plan.	The Baseline section in appendix 2 does not discuss how trends might be projected without the implementation of the DPD.

Review criteria	Requirements	Findings
<p>What are the key issues that should be a focus of SA?</p>	<p>7. Any existing environmental problems / issues which are relevant to the plan including, in particular, those relating to any areas of a particular environmental importance</p>	<p>The key sustainability issues are identified in Appendix 3. Section 5 incorporates a very brief summary of Appendix 3, which should be amended so that this table reads as a list of issues.</p>
<p>What has Plan-making / SA involved up to this point?</p>	<p>8. An outline of the reasons for selecting the alternatives dealt with (and thus an explanation of why the alternatives dealt with are 'reasonable')</p> <p>9. The likely significant effects on the environment associated with alternatives / an outline of the reasons for selecting preferred options / a description of how environmental objectives and considerations are reflected in the draft plan.</p>	<p>The reasons for selecting the alternatives have not been made clear in the SA Report. These need to be brought together in the SA to 'tell the story'.</p> <p>The reasons for selecting the preferred alternatives (including how the SA has influenced the Plan) have also not been made clear in the SA report.</p> <p>These aspects need to be completed to ensure the SA is not open to legal challenge.</p>
<p>What are the appraisal findings at this current stage?</p>	<p>10. The likely significant effects on the environment associated with the draft plan</p> <p>11. The measures envisaged to prevent, reduce and as fully as possible offset any significant adverse effects of implementing the draft plan</p>	<p>The methodology section ought to be made clearer about what constitutes 'significant' and how this relates to the baseline position.</p> <p>The impacts identified seem generally fine in terms of whether there are positive or negative implications. However, it would be better to refer to the baseline position and identify which impacts are 'significant'. It would also be useful to provide clear justifications where significant impacts have been identified. Cross-checking the appraisal findings for sites and policy alternatives would also be useful to ensure consistency.</p> <p>The spreadsheet outlining the SA of the 20 sites should be included</p>

Review criteria	Requirements	Findings
		<p>as an appendix. (Highlighting the parts that are relevant to the SA by linking to the SA Framework if possible). The SA report should also provide a brief discussion of the findings of the site specific SA including:</p> <ul style="list-style-type: none"> • What the preferred sites are? A map would be useful. • Reasons for selecting/rejecting specific sites for allocation. • Whether there are any particular sites that scored well but were not allocated? If so, why were they not allocated? <p>The SA report does not outline any measures relating to the preferred options. If there are any measures to reduce/prevent any significant adverse effects, then these should be included.</p>
<p>What happens next (including monitoring)?</p>	<p>12. A description of the measures envisaged concerning monitoring</p>	<p>There is no consideration of measures concerning monitoring. At this stage, it is only necessary to set out the measures 'envisaged'. Would suggest that a section is included in the SA Report outlining 'what happens next'. This could discuss consultation and set out measures envisaged for monitoring (these should link to any significant impacts that are identified and ideally draw upon existing monitoring measures such as in the AMR or other council performance management system to avoid effort and duplication.</p>

2. SUMMARY OF REVIEW AT THIS STAGE

The main issues that need to be addressed to ensure that the SA is not open to legal challenge are as follows:

- There is a need to set out an explanation of the different options and why they have been determined as 'reasonable alternatives'. This is a crucial aspect of SA following various legal challenges on these grounds.
- Once the preferred approach is selected (in the Plan), there is also a need to outline the reasons for choosing this approach.
- The methodology for determining the 'significance' of the impacts compared to the baseline position ought to be made clearer.
- The spreadsheet outlining the SA of the 20 sites should be included as an appendix. The SA report should provide a discussion of the findings of the site specific SA including:
 - Reasons for selecting/rejecting specific sites for allocation.
 - Whether there are any particular sites that scored well but were not allocated? If so, why were they not allocated?
- The impacts identified seem generally fine in terms of whether there are positive or negative implications. However, it would be better to refer to the baseline position and identify which impacts are 'significant'.
- The quantitative method of reaching the conclusions (Section 11) is not reflective of the more qualitative approach adopted throughout the rest of the SA report. It is acknowledged that this scoring system is only used as a tool to indicate which of the options has the most positive effects. However, to ensure consistency, it is suggested that a more qualitative approach to reaching conclusions is taken by setting out the key impacts relating to each option using text.
- Monitoring measures envisaged need to be outlined in the final SA Report.
- The SA Report ought to be structured so that it 'tells the story' of how the DPD has developed and how the issues and options were established and appraised.
- There are comments throughout the SA report that should be addressed.

At this stage, there is no requirement to produce an SA Report. Therefore, it is entirely possible to fill in the gaps before the final SA Report is published alongside the DPD.

Q	Site Name	1. Aveling Drive A, Banks	2. Aveling Drive B, Banks	3. Sugar Stubbs Lane, Banks	4. Land west of Hoole Lane, Banks
1	Other site references / SHLAA site reference?	No	No	No	SHLAA BA.18
2	Site Address	Land at Mossland Stables, Aveling Drive, Banks	Land west of Mosslands, Aveling Drive, Banks	Land at Sugar Stubbs Stables, Sugar Stubbs Lane, Banks	Land west of Hoole Lane, Banks
3	Post Code	PR9	PR9	PR9	PR9
4	OS Grid Ref - E	339687	339789	340405	339004
5	OS Grid Ref - North	420656	420688	419629	420680
6	Site Area (ha)	0.65	0.23	0.27	0.61
7	Description of Site	Site comprises former agricultural land, involving areas of hardstanding, some buildings, including stables, and storage of vehicles as well as fenced grassed areas.	Site comprises former agricultural land, involving areas of hardstanding, some buildings, including stables, and storage of vehicles as well as fenced grassed areas. .	Site is currently occupied by hardstanding, a few caravans, and storage of vehicles.	Site is currently occupied by horticultural glasshouses. The site is located to the rear of residential properties in the centre of Banks. Drains run along the western perimeter.
8	Description of Surrounding Area	Western edge of site is close to housing on Aveling Drive, although a strip of open land and a line of poplar trees separates the two. Immediate area appears to have been used for agricultural /equestrian use. Long Lane runs above the North-east of the site. The site is screened from the south by trees along the southern edge of Aveling Drive.	Western edge of site is close to housing on Aveling Drive, although the existing caravans at Aveling Drive A, a strip of open land and a line of poplar trees separates the two. Immediate area appears to have been used for agricultural /equestrian use. Long Lane runs above the north east of the site. The site is screened from the south by trees along the bottom edge of Aveling Drive.	Site is adjacent to residential property 'The Willows' (to the north of the site) and in proximity to other residential properties. The south and eastern parts of the site are farmed agricultural land.	The east and south of the site is bordered by residential properties, whilst the North is further glasshouses and the west is agricultural land.
9	Brief Site History	Site currently has p/p pending decision for accommodation for Irish Travellers. Enforcement action in abeyance. Site in use as Traveller site and owned by Travellers	Site in use as Traveller site and owned by Travellers. Previous application for stationing of caravans for Gypsy Traveller use was refused on grounds of flood risk, Green Belt and Policy DE4. Currently at appeal.	2013/1305/LDC pending decision - Cert of Lawfulness for stationing of 5 caravans and equestrian use.	No plan apps.
10	Relevant planning history	2012/0820/COU (pending), 2010/0885/COU (withdrawn)	2010/0998/cou (Refused)	2004/0880, 2013/1305/LDC	n/a
11	Land Ownership Details	Private	Private	Private	Private
12	Source of Site Suggestion	Existing site (illegal)	Existing site (illegal)	Existing site (illegal) / planning application	Owner submitted
13	Date of Appraisal	16/12/2013	16/12/2013	16/12/2013	17/12/2013
Deliverability Issues					
14	Are there any issues of land ownership that could prevent development on the site being delivered?	No. Land currently in hands of Travellers, and in use as Traveller site	No. Land currently in hands of Travellers, and in use as Traveller site	In the hands of Travellers.	None. Owner has expressed a willingness that the site be considered as a potential Traveller site.
15	Is the site potentially available for development?	Yes. Land currently in hands of Travellers, and in use as Traveller site	Yes. Land currently in hands of Travellers, and in use as Traveller site	Yes. Land currently in hands of Travellers, and in use as Traveller site	Yes.

Q	Site Name	1. Aveling Drive A, Banks	2. Aveling Drive B, Banks	3. Sugar Stubbs Lane, Banks	4. Land west of Hoole Lane, Banks
16	Does the planning history of the site caution against its allocation?	Site has history of 2 plan apps - 1 pending, 1 withdrawn. The outcome of a recovered appeal on the neighbouring site (2. Aveling Drive B, Banks) will have a bearing on this site.	Yes. Previous application for stationing of caravans for Gypsy Traveller use was refused on grounds of flood risk, Green Belt and 2006 Local Plan Policy DE4. Currently at appeal	Site has permission for one caravan. Current planning application on site pending consideration.	No relevant planning history. Much of current site is Protected Land.
17	Are there any potential land use conflicts with nearby sites that could prevent development on the site being delivered?	Residential use to the west of the site, although this should not on its own prevent the site being delivered.	Residential use to the west of the site, although this should not on its own prevent the site being delivered.	Overhead electricity cables less than 100m from back of site; main road within 150m of site. However, neither are considered to imply an unacceptable impact on site residents (holiday caravans and residential properties nearby are closer to the A565 / pylons).	Site is likely to cause issues with settled community due to its close proximity to existing residential area. Existing derelict glasshouses would need to be removed should the site be allocated. Unknown as to how access to site will be achieved given that existing properties front Hoole Lane.
18	Is the site directly accessible from the highway network or could it reasonably become so?	Aveling Drive is a single track road with a drainage ditch at one side, and reached by passing through a residential area. The narrow lane to the site is not designed for the types of large vehicles associated with Travellers and could not be accessed easily by emergency vehicles	Aveling Drive is a single track road with a drainage ditch at one side, and reached by passing through a residential area. The narrow lane to the site is not designed for the types of large vehicles associated with Travellers and could not be accessed easily by emergency vehicles	Sugar Stubbs Lane is unclassified and narrow, although it appears wide enough for two vehicles to pass. It is necessary to use approximately 120m of Sugar Stubbs Lane to access the site from the A565. Site has separate gated access from adjacent dwelling.	Site is on Hoole Lane, although it is not clear as to how access to site would be achieved, given existing properties fronting Hoole Lane.
19	Does the site have any known land contamination or remediation issues?	None known	None known	None known	None known.
20	Does the site have any known ground instability that would limit development?	None known	None known	None known	None known.
21	Can adequate provision be made to supply all major utilities to the site?	Given the proximity of other buildings, including houses, it is expected that utilities could readily be made available.	Given the proximity of other buildings, including houses, it is expected that utilities could readily be made available.	Given the proximity of other houses, it is expected that these services are available or could readily be made available.	Given the site's location within a settlement, it is expected that appropriate services could be provided.
22	Is the site within Functional Floodplain (Flood Zone 3b)?	Yes - Within Flood Zone 3.	Yes - Within Flood Zone 3.	No. Site is within Flood Zone 2, so must be shown to meet Exceptions Test. Within 100m of Flood Zone 3.	Flood Zone 3
23	Is the site within the Green Belt?	Yes - GB site, but less than 100m to the Banks settlement boundary	Yes - GB site, but less than 100m to the Banks settlement boundary	Yes. Green Belt site, approximately 600m from Banks settlement boundary.	No
24	Would development of the site affect any flight paths?	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site
25	Is there interest in site for development?	Site is in hands of Travellers and in use as a Traveller site.	Site is in hands of Travellers and in use as a Traveller site.	Site is in hands of Travellers and in use as a Traveller site.	Yes. Owner has expressed interest in the site being developed for Travellers.
Biodiversity					
26	Is the site within 5km of and / or likely to impact on internationally designated sites?	Site within 5km of Ribble Estuary, but would be deemed unlikely to impact on environmental sites.	Site within 5km of Ribble Estuary, but would be deemed unlikely to impact on environmental sites.	Site within 5km of Ribble Estuary, but would be deemed unlikely to impact on environmental sites.	No
27	Is the site within 1km of and / or likely to impact on a SSSI?	No.	No.	No.	No
28	Is the site in within 100m of areas designated to be of local nature conservation importance?	No.	No.	No.	No

Q	Site Name	1. Aveling Drive A, Banks	2. Aveling Drive B, Banks	3. Sugar Stubbs Lane, Banks	4. Land west of Hoole Lane, Banks
29	Is the site known to be home to protected species and / or habitats?	None known.	None known.	None known.	No
30	Is the site within 100m of woodlands, or trees with Tree Preservation Orders?	Yes	Yes	No	No
31	What could the effects of development on this site be on the sustainability of biodiversity, locally and wider over time? Will the effects be temporary or permanent?	Site would be unlikely to have an impact on local, or international, biodiversity.	Site would be unlikely to have an impact on local, or international, biodiversity.	Site would be unlikely to have an impact on local, or international, biodiversity.	Site would be unlikely to have an impact on local, or international, biodiversity.
Water and Land Resources					
32	Is the site subject to any known stability issues?	No	No	No	None known
33	Is the site identified for its geological or geomorphological importance?	No	No	No	No
34	Does the site have any adverse gradients on it?	No	No	No	No
35	Is the site located on the best and most versatile agricultural land (grades 1, 2 and 3a)?	Grade 1, although site is hardstanding, rather than farmed land.	Grade 1, although site is hardstanding, rather than farmed land.	Grade 1, although site is predominantly hardstanding, rather than farmed land.	Part urban / Part of site lies in Grade 2 land
36	Is the site an active mineral working site?	No	No	No	No
37	Is the site contaminated or derelict land?	No contaminated land known. Site currently in use, so not classed as derelict land.	No contaminated land known. Site currently in use, so not classed as derelict land.	No contaminated land known. Site currently in use, so not classed as derelict land.	Derelict glasshouses
38	Is the site previously developed land (brownfield)?	Some buildings and hardstanding exist on the site but it is likely they are as a result of agricultural (non-brownfield)	Some buildings and hardstanding exist on the site but it is likely they are as a result of agricultural (non-brownfield)	Some buildings and hardstanding exist on the site but it is likely they are classed as Non brownfield.	No (Horticulture classed as Non brownfield)
39	What could the effects of development on this site be on the sustainability of land resources locally / wider over time? Will the effects be temporary or permanent?	Site is on Grade 1 agricultural land although site is not in active use for farming, containing hardstanding and buildings. Site would therefore be unlikely to have a detrimental effect on land resources.	Site is on Grade 1 agricultural land although site is not in active use for farming, containing hardstanding and buildings. Site would therefore be unlikely to have a detrimental effect on land resources.	Site is on Grade 1 agricultural land although site is not in active use for farming, containing hardstanding and buildings. Site would be unlikely to have a detrimental effect on land resources.	Allocation of site would be unlikely to result in significant loss of land resources.
40	Is the site located within or adjacent to a Principal Aquifer or Source Protection Zone 1 or 2?	Unknown	Unknown	Unknown	Unknown
41	What could the effects of development on this site be on the sustainability of water quality and resources locally / wider over time? Will the effects be temporary or permanent?	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.
Climatic factors and flooding					
42	Is the site within Zones 2 or 3 of the floodplain?	Yes. Flood Zone 3.	Yes. Flood Zone 3.	Yes. Site is within Flood Zone 2, so must be shown to meet Exceptions Test. Within 100m of Flood Zone 3.	Flood Zone 3.

Q	Site Name	1. Aveling Drive A, Banks	2. Aveling Drive B, Banks	3. Sugar Stubbs Lane, Banks	4. Land west of Hoole Lane, Banks
43	What could the effects of development on this site be on the sustainability of climatic factors and flooding locally / wider over time? Will the effects be temporary or permanent?	Site would be located in an area of flood risk.	Site would be located in an area of flood risk.	Site would be located in an area of flood risk and would need to meet Exceptions Test.	Site would be located in an area of flood risk.
Heritage and Landscape					
44	Is the site located within or within 5km of and / or likely to impact on an AONB or Heritage Coast?	No	No	No	No
45	Is the site located within or within 1km of any area designated for its local landscape importance or is it likely to have adverse impacts on the landscape?	No historic environment, landscape or nature conservation designation in vicinity of site	No historic environment, landscape or nature conservation designation in vicinity of site	No historic environment, landscape or nature conservation designation applies to site; historic landscape of local importance starts 100m to east of site.	No historic environment, landscape or nature conservation designation in vicinity of site.
46	Is the site in the Green Belt? If so, would development on this site cause harm to the objectives of Green Belt designation?	Yes. Site is in GB, although 100m from settlement boundary.	Yes. Site is in GB, although 100m from settlement boundary.	Yes. Site use would fall outside the objectives of Green Belt designation.	No
47	Is the site within 250m of a site or building with a nationally recognized heritage designation?	No	No	No	No
48	What could the effects of development on this site be on the sustainability of heritage and landscape locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Site would be unlikely to have impacts on heritage and landscape. However, site may impact on the objectives of the Green Belt designation and would affect openness of Green Belt. Given the site is already partly developed, further impact should be minimal.	Site would be unlikely to have impacts on heritage and landscape. However, site may impact on the objectives of the Green Belt designation and would affect openness of Green Belt. Given the site is already partly developed, further impact should be minimal.	Site would be unlikely to have impacts on heritage but will impact on the openness of the Green Belt. Site can be seen from surrounding area.	Site would be unlikely to have impacts on heritage and landscape. The site is screened behind existing residential properties.
Social equality and community services					
49	Will development of the site harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses)?	Development of site for Traveller accommodation would likely be small scale and could be supported by community facilities. If the site is kept small, it should not dominate the settled community.	Development of site for Traveller accommodation would likely be small scale and could be supported by community facilities. If the site is kept small, it should not dominate the settled community.	Development of site for Traveller accommodation would likely be small scale and could be supported by community facilities. If the site is kept small, it should not dominate the settled community.	Development of site for Travellers should not harm community receptors, although may cause issues with the settled community.
50	How close [how many minutes walk at 5km/h average walking speed] is this site to a public transport facility (bus stop / station on regular route)? (Please note that this walking time is taken into account in the questions below referring to X minutes public transport journey from various facilities.)	650m (8 minutes walk) from bus stops on Guinea Hall Lane	700m (8 minutes walk) from bus stops on Guinea Hall Lane	500m / 700m (6 minutes / 8 minutes walk) from bus stops on A565 (depending on direction of travel)	Within 50m (within 1 minute walk) from bus stops on Hoole Lane.
51	Is the site within 30 minutes public transport journey of a Primary School?	Yes - at Banks	Yes - at Banks	Yes - at Banks	Yes (within walking distance)

Q	Site Name	1. Aveling Drive A, Banks	2. Aveling Drive B, Banks	3. Sugar Stubbs Lane, Banks	4. Land west of Hoole Lane, Banks
52	Is the site within 40 minutes public transport journey of a Secondary School?	Yes - at Southport / Tarleton	Yes - at Southport / Tarleton	Yes - at Southport / Tarleton	Yes - at Southport / Tarleton
53	Is the site within 60 minutes public transport journey of a Further Education Institution?	Yes - at Southport	Yes - at Southport	Yes - at Southport	Yes - at Southport
54	Is the site within 60 minutes public transport journey of a Hospital?	Yes - at Southport	Yes - at Southport	Yes - at Southport	Yes - at Southport
55	Is the site within 30 minutes public transport journey of a GP Practice?	Yes - at Banks	Yes - at Banks	Yes - at Banks	Yes - at Banks
56	Is the site within 30 minutes public transport journey of a Major Centre?	Yes - Southport	Yes - Southport	Yes - Southport	Yes - Southport
57	Is the site within 10 minutes walk (800m) of a district or local centre?	Yes	Yes	No	Yes
58	Is the site within 15 minutes walk (1200m) of a Public Open Space of at least 5ha in size?	Yes	Yes	Yes	Yes
59	Is the site within 10 minutes walk (800m) of a natural green space (e.g. Local Nature Reserve) of at least 2ha in size?	No	No	No	No
60	Is the site within 40 minutes public transport journey of a Leisure / Recreation / Sports Facility?	Yes - Leisure Centre, Banks	Yes - Leisure Centre, Banks	Yes - Leisure Centre, Banks	Yes - Leisure Centre, Banks
61	What could the effects of development on this site be on the sustainability of community health and equality, leisure and education locally and wider over time ; temporary / permanent effects?	Site is within reasonable accessible distance of existing services and facilities. Would be unlikely to put too much pressure on them.	Site is within reasonable accessible distance of existing services and facilities. Would be unlikely to put too much pressure on them.	Site is not easily accessible to local services and amenities. Would be unlikely to put too much pressure on them.	Site is within good accessible distance of services and facilities and should not place too much pressure on such amenities.
Local economy and employment					
62	Is the site within 250m of any sensitive commercial receptors, existing or proposed (e.g. sensitive business uses and tourist / visitor attractions)?	No	No	No	No
63	What could the effects of development on this site be on the sustainability of the local economy and employment locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)
Housing					
64	Is the site within 250m of residential dwellings (including individual houses)?	Yes. Residential area to west of site. Further development proposed for Greaves Hall site.	Yes. Residential area to west of site. Further development proposed for Greaves Hall site.	Yes. Some residential dwellings (individual houses) located within the rural area. not within an urban settlement.	Yes. Residential properties border the immediate east and south of the site.

Q	Site Name	1. Aveling Drive A, Banks	2. Aveling Drive B, Banks	3. Sugar Stubbs Lane, Banks	4. Land west of Hoole Lane, Banks
65	What could the effects of development on this site be on the sustainability of housing provision locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible
Transportation and air quality					
66	Is the site located with in or adjacent to an existing Air Quality Management Area?	No.	No.	No	No
67	Are there any sensitive receptors nearby (e.g. residential, community facilities) that may be impacted by dust, fumes and emissions caused by the development and end-use of the site?	No.	No.	No	No
68	What could the effects of development on this site be on the sustainability of air quality locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality
69	How suitable is the road network to accommodate expected levels of traffic to and from the site?	Site is accessed by a single track road with a drainage ditch at one site, reached by passing through a residential area. Narrow lane is not designed for types of large vehicles associated with Travellers and would not be easy for large emergency vehicles to access.	Site is accessed by a single track road with a drainage ditch at one site, reached by passing through a residential area. Narrow lane is not designed for types of large vehicles assoc by Travellers and would not be easy for large emergency vehicles to access.	Sugar Stubbs Lane is unclassified and narrow, although it appears wide enough for two vehicles to pass. It is necessary to use approximately 120m of Sugar Stubbs Lane to access the site from the A565. Site has separate gated access from adjacent dwelling. Access for emergency vehicles possible (given the site entrance is set back up to 10m from Sugar Stubbs Lane), although not ideal.	The site is within the settlement of Banks, with generally adequate roads, infrastructure and services (drainage has been raised as a local issue). Provided the site were not too large, it should not place undue pressure on local services. Site is on Hoole Lane, although it is not clear as to how access to site would be achieved, given existing properties fronting Hoole Lane.
70	Would the likely amount of traffic flowing from the site to the Primary Road Network cause adverse impacts on amenity of sensitive receptors on the route (residential, schools etc.)?	Traffic flow from the site onto the primary road network would likely be minor, compared to the volume of traffic accessing the network from the residential properties at the bottom of Aveling Drive. Traveller vehicles passing the residential properties on Aveling Drive would have some impact.	Traffic flow from the site onto the primary road network would likely be minor, compared to the volume of traffic accessing the network from the residential properties at the bottom of Aveling Drive. Traveller vehicles passing the residential properties on Aveling Drive would have some impact, although this is a small site.	Unlikely due to the location of the site away from such amenities; just two residential properties at the junction of Sugar Stubbs Lane and A565, but the impact of Traveller traffic on these properties will be minor compared with A565 traffic.	The site is within the settlement of Banks, with generally adequate roads. Provided the site were not too large, it should not place undue pressure on local road networks.
71	Is the site within 800m of an existing or proposed Cycle Route?	Yes	Yes	Yes	Yes
72	Is the site within 800m of a bus stop for a high frequency bus service?	Yes	Yes	Yes. Site is approximately 500m / 700m from nearest bus stop (depending on bus direction).	Yes. Site within 50m of bus stops on Hoole Lane.
73	Is the site within 1200m of a Rail Station?	No	No	No	No
74	Does the site have public footpaths, rights of way or any other type of footpath on it or near to it?	Yes	Yes	Yes	Yes
75	What could the effects of development on this site be on the sustainability of transportation locally / wider over time ; temporary / permanent effects?	Site would not be accessible to rail stations, but would be within walking distance of bus services. Narrow lane providing access to the site is less suitable for larger vehicles. Cycle routes and public footpaths can be accessed from the site. Site would be unlikely to cause an unacceptable impact on the local road network.	Site would not be accessible to rail stations, but would be within walking distance of bus services. Narrow lane providing access to the site is less suitable for larger vehicles. Cycle routes and public footpaths can be accessed from the site. Site would be unlikely to cause an impact on the local road network.	Site within walking distance of bus services but few other facilities. Small site should not generate significant traffic.	Providing the site were not too large, it should not place undue pressures on local road and bus services. However, access to the site needs to be considered.
Cumulative Impacts					

Q	Site Name	1. Aveling Drive A, Banks	2. Aveling Drive B, Banks	3. Sugar Stubbs Lane, Banks	4. Land west of Hoole Lane, Banks
76	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, have an adverse impact on the perceived environmental quality or character of the area?	Site may impact on the openness of the Green Belt. However, given the site is already partly developed, further impact on the character of the area should be minimal. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	Site may impact on the openness of the Green Belt. However, given the site is already partly developed, further impact on the character of the area should be minimal. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	Development of the site would have an impact on the openness of the Green Belt. As the site already exists, although unauthorised, this impact can already be seen. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	The site is currently occupied by derelict greenhouses and is 'hidden' from the main road by its location to the rear of surrounding residential properties. However, these properties would overlook such a potential Traveller site. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.
77	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote social cohesion or inclusion in nearby communities?	If site is kept relatively small, it should not dominate the settled community.	If site is kept relatively small, it should not dominate the settled community.	This is a small site sufficiently far from any settled community to avoid issues of the site dominating the community.	The site is likely to cause issues with settled community due to its abutting several residential and other properties on Hoole Lane.
78	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote the economic potential of the area?	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.

Q	Site Name	5. Land west of Ringtail Road, Burscough	6. Land west of the Quays, Burscough	7. Land west of Tollgate Road, Burscough	8. Pool Hey Caravan Park, Scarisbrick
1	Other site references / SHLAA site reference?	No	SHLAA BU.19	No	No
2	Site Address	Land west of Ringtail Road, Burscough	Land west of the Quays, Burscough	Land west of Tollgate Road, Burscough	Pool Hey Caravan Park, Pool Hey Lane, Scarisbrick
3	Post Code	L40	L40	L40	L40
4	OS Grid Ref - E	342361	344132	342947	337243
5	OS Grid Ref - North	411597	412084	411302	415623
6	Site Area (ha)	1.35	0.83	1.85	0.33
7	Description of Site	Site is Green Belt. A small access road runs along the southern edge of the site, with a storage area in the south-east part of the site. Site has been previously used to site polytunnels.	Site is adjacent the Leeds Liverpool Canal and located in the centre of Burscough, to the rear of residential properties. Site is opposite Priory High School. The site is currently an authorised Travelling Showpeople site. WLBC are unaware of any issues between the site occupants and the local settled community.	Site has a gated access with some hardstanding. Majority of site is Green Belt and belongs to the former airfield site. Site is currently open with just a low hedge on the road boundary.	Site is a narrow strip of land adjacent the railway line and beside a level crossing. The site contains hardstanding and some buildings, including a park home.
8	Description of Surrounding Area	The site is adjacent to an industrial estate (east). One residential property lies to the North of the site. Remaining area, and surrounding areas, are Green Belt land in agricultural use.	Site is located in the centre of Burscough, adjacent the Leeds Liverpool canal and to the rear of residential properties and opposite a high school.	Site lies between the two industrial estates at Tollgate and Ringtail. Eastern part of site is bordered by Tollgate Road. The site is close to the edge of the Yew Tree Farm Strategic Development Site, but it is expected that this part of the site will be employment uses, rather than residential. The site is adjacent to an industrial area, although this tends to be light industrial uses. Some existing properties on Lordsgate Lane nearby are less than 50m from similar industrial uses.	Site is adjacent to Southport - Manchester railway line, and beside a level crossing. These should not have any greater impact on residents of the site than on other existing residential uses in the locality close to the railway line. Surrounding areas on Green Belt, farmed agricultural land.
9	Brief Site History	Site is Green Belt, and currently subject to unauthorised development, including storage of fairground equipment. Planning application for park homes to accommodate Travelling Showpeople withdrawn Dec 2013.	Current, authorised use as Travelling Showpeople site.	-	Site has in use as a Traveller site for almost 20 years. Permission for one 'park home' tied to an individual; this permission has now expired. Current use unlawful but long-established.
10	Relevant planning history	2013/0629/FUL (withdrawn Dec 2013), 2004/0248, 2001/0763	1997/0536 - erection of Dutch barn for storage of fairground vans /equipment and layout of hardstanding.	1997/0345 - use of land for car boot sales (withdrawn)	1999/0106, 1993/0238, 1996/0596 - siting of 6 permanent caravans (Refused), 1999/0755, 2004/0551- siting of 5 residential caravans for 1 Gypsy family (refused)
11	Land Ownership Details	Private	Private	Private	Private
12	Source of Site Suggestion	Submitted in Call for Sites by agent	Authorised site, owned by Travelling Showpeople	Suggested by Travelling Showpeople	Call for Sites; existing site
13	Date of Appraisal	17/12/2013	17/12/2013	17/12/2013	17/12/2013
Deliverability Issues					
14	Are there any issues of land ownership that could prevent development on the site being delivered?	No. Owner submitted site in Call for Sites.	No. Site owned by Travelling Showpeople and in authorised use.	Ownership unknown (land unregistered). Delivery of site depends on owner being willing to sell, or develop. Site is currently used for car boot sales.	No.
15	Is the site potentially available for development?	Yes	Yes. Although availability limited to a particular group or family.	Dependent on owner.	Yes.

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16	Does the planning history of the site caution against its allocation?	Land is currently Green Belt, site has been subject to enforcement action (unauthorised storage).	Land has planning permission.	Site is within the Green Belt.	Site is within the Green Belt. Previous applications for siting of multiple Gypsy caravans have been refused.
17	Are there any potential land use conflicts with nearby sites that could prevent development on the site being delivered?	Site is on the western edge of the Ringtail Industrial Estate. Mitigation in relation to visual impact may be possible by screening, but mitigation in relation to Noise issues more difficult. However, remaining surrounding land is Green Belt, with one residential property to the North.	Site involves storage and manoeuvring of large vehicles, although it has operated adjacent to flatted development for a number of years. Site is subject to an open space designation and is adjacent to the Leeds Liverpool Canal (wildlife corridor designation), but site is already authorised as a Travelling Showpeople site.	Allocating the site as a Travelling Showpeople site would mean an incursion into a "new" area of Green Belt, and particularly good and robust boundary treatment would be necessary. Given the green, open nature of the site, landscaping rather than fencing would be more appropriate, but this obviously takes longer to be established.	Site is adjacent to railway line. These should not have any greater impact on site residents than on other existing residential uses close to the railway line. Officers unaware of any significant issues arising from the site's use as a Traveller site. Site is physically separate (field / road) from the nearest residential properties.
18	Is the site directly accessible from the highway network or could it reasonably become so?	Proposed site access (from planning application 2013/0629) involves travelling along 500m of unadopted road currently of poor quality, then 300m along the site access track.	Site is close to A59 but accessed via a narrow road between the site and the A59. Nevertheless, the site has functioned as a Travelling Showpeople site for several years using the existing access.	Site has direct access onto the "spine road" through the Burscough Industrial Estate.	This lane has accommodated typical Traveller traffic for 20 years, although access to the site along Pool Hey Lane requires using a narrow stretch of road and thus is not an ideal access road to a Traveller site, although it appears to have functioned as such without significant issues.
19	Does the site have any known land contamination or remediation issues?	None known	None known	None known	None known
20	Does the site have any known ground instability that would limit development?	None known	None known	None known	None known
21	Can adequate provision be made to supply all major utilities to the site?	Site does not currently have any formal connection to mains water / drainage / electricity. Given the neighbouring employment uses, it should be possible to obtain connections.	Yes. Site currently in use.	Site is currently undeveloped, but provision of services should be straightforward given neighbouring industrial areas.	Yes. Site in unauthorised use already.
22	Is the site within Functional Floodplain (Flood Zone 3b)?	No	No	No	No.
23	Is the site within the Green Belt?	Site is in the Green Belt, but adjacent to the Non-Green Belt Burscough Industrial Estate.	No	Yes	Yes.
24	Would development of the site affect any flight paths?	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site
25	Is there interest in site for development?	Yes. Owner has expressed interest in the site being developed for travelling Showpeople.	Yes. Site currently in authorised use.	Unknown	Site is in hands of Travellers and in use as a Traveller site.
Biodiversity					
26	Is the site within 5km of and / or likely to impact on internationally designated sites?	Yes. Within this distance of Martin Mere, however given the industrial uses adjacent, development of this site would be unlikely to impact on designated natural sites.	Yes, however is unlikely to impact on biodiversity sites.	Yes. May have an impact on biodiversity if site is a feeding ground for birds.	No
27	Is the site within 1km of and / or likely to impact on a SSSI?	No	No	No	No
28	Is the site in within 100m of areas designated to be of local nature conservation importance?	No	Site is adjacent to the wildlife corridor (canal), but is an already authorised site.	No	Yes, but the use of this site as a Traveller site should not have any detrimental impact.

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29	Is the site known to be home to protected species and / or habitats?	No	No	No	No
30	Is the site within 100m of woodlands, or trees with Tree Preservation Orders?	No	Yes	No	No
31	What could the effects of development on this site be on the sustainability of biodiversity, locally and wider over time? Will the effects be temporary or permanent?	Site would be unlikely to have an impact on local, or international, biodiversity.	Site would be unlikely to have an impact on local, or international, biodiversity.	Site would be unlikely to have a significant impact on local, or international, biodiversity.	Site would be unlikely to have a significant impact on local, or international, biodiversity.
Water and Land Resources					
32	Is the site subject to any known stability issues?	None known	None known	None known	None known
33	Is the site identified for its geological or geomorphological importance?	No	No	No	No
34	Does the site have any adverse gradients on it?	No	No	No	No
35	Is the site located on the best and most versatile agricultural land (grades 1, 2 and 3a)?	Grade 2 agricultural land	No, urban land.	Grade 2	Site falls within Grade 1 designation, although site is not used for farming.
36	Is the site an active mineral working site?	No	No	No	No
37	Is the site contaminated or derelict land?	No	No	No	No
38	Is the site previously developed land (brownfield)?	No	Site is developed and in use.	Small amount of hardstanding on site, but No permanent buildings.	Part; site in use as an (unauthorised) caravan park
39	What could the effects of development on this site be on the sustainability of land resources locally / wider over time? Will the effects be temporary or permanent?	Allocation of site would lead to loss of agricultural land.	Allocation of site would not create any detrimental effects on land resources.	Allocating the site as a Travelling Showpeople site would mean an incursion into a "new" area of Green Belt; land does not appear to be in agricultural use.	Allocation of site would not create any detrimental effects on land resources.
40	Is the site located within or adjacent to a Principal Aquifer or Source Protection Zone 1 or 2?	Unknown	Unknown	Unknown	Unknown
41	What could the effects of development on this site be on the sustainability of water quality and resources locally / wider over time? Will the effects be temporary or permanent?	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources.	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.
Climatic factors and flooding					
42	Is the site within Zones 2 or 3 of the floodplain?	No	No	No	No

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43	What could the effects of development on this site be on the sustainability of climatic factors and flooding locally / wider over time? Will the effects be temporary or permanent?	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.
Heritage and Landscape					
44	Is the site located within or within 5km of and / or likely to impact on an AONB or Heritage Coast?	No	No	No	No
45	Is the site located within or within 1km of any area designated for its local landscape importance or is it likely to have adverse impacts on the landscape?	No historic environment, landscape or nature conservation designation in vicinity of site.	No historic environment, landscape or nature conservation designation in vicinity of site.	No historic environment, landscape or nature conservation designation in vicinity of site. Openness of the site in the surrounding landscape means that screening would be required.	Site lies within an Area of Landscape History of County Importance, and is directly adjacent to the Martin Mere Mosslands Biological Heritage Site.
46	Is the site in the Green Belt? If so, would development on this site cause harm to the objectives of Green Belt designation?	Yes. Site would also result in weaker GB boundaries. Delineation of GB is currently set by trees.	No	Yes. Site would also result in weaker GB boundaries, or the need to redefine boundaries.	Yes
47	Is the site within 250m of a site or building with a nationally recognized heritage designation?	No	Yes	No	No
48	What could the effects of development on this site be on the sustainability of heritage and landscape locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Site would be likely to weaken the GB boundary, and would have an impact on the visual of the area, although evergreen screening exists around part of the site. Site would be unlikely to have impacts on heritage.	Site is already authorised and so would be unlikely to have impacts on heritage and landscape. Any issues could be mitigated through screening.	Site would be likely to have an impact on the openness of Green Belt and require new Green Belt boundaries to be redefined as the allocation of the site would encroach.	The site is largely screened on the south western side by the railway, and on the north eastern side by hedging; the front is screened by substantial wooden gates. Any issues could be mitigated through further screening.
Social equality and community services					
49	Will development of the site harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses)?	Neighbouring residents / occupiers of industrial units have raised concern regarding the moving of Travelling Showpeople equipment in relation to planning application 2013/0629; it may be possible to mitigate some of these issues e.g. via conditions on moving / storage of equipment.	Site is less than 100m from Burscough Centre and its facilities, approx. 200m from bus stops and 500m from Burscough Bridge Station. Site is within walking distance of most services and facilities. WLBC is unaware of any evidence that the existing site is harming and nearby sensitive community receptors.	The use of this site as a Travelling Showpeople yard should not place undue [extra] pressure on local roads or services, assuming its occupants relocate from elsewhere in Burscough.	The Council is unaware of this site's occupation over recent years harming any nearby sensitive community receptors.
50	How close [how many minutes walk at 5km/h average walking speed] is this site to a public transport facility (bus stop / station on regular route)? (Please note that this walking time is taken into account in the questions below referring to X minutes public transport journey from various facilities.)	Approximately 2km (24 minutes walk) from bus stop.	230m (3 minutes walk) from bus stops; 500m (6 minutes walk from Burscough Bridge Station).	Site is 850m (10 minutes walk) from bus stops on A59.	Site is 1.2km (15 minutes walk) from bus stops on A570.
51	Is the site within 30 minutes public transport journey of a Primary School?	2km to bus stop; 2.7km to school - possibly just about walkable in 30 minutes, but not for young children	Yes	Yes	Yes (Kew)

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52	Is the site within 40 minutes public transport journey of a Secondary School?	School walkable within 40 minutes; could be reached by walking and bus within 40 minutes	Yes	Yes	Yes (Kew)
53	Is the site within 60 minutes public transport journey of a Further Education Institution?	Yes - at Ormskirk	Yes	Yes	Yes
54	Is the site within 60 minutes public transport journey of a Hospital?	Yes - at Ormskirk (but would entail a long walk or two buses)	Yes - at Ormskirk (although would involve a walk or a second bus journey from Ormskirk Centre)	Yes - at Ormskirk (although would involve a walk or a second bus journey from Ormskirk Centre)	Yes
55	Is the site within 30 minutes public transport journey of a GP Practice?	Could reach a GP with a combination of walking and bus, but not ideal with 2km walk to bus stop.	Yes	Yes	GP practice at Ormskirk may be reachable in 30 minutes, depending on traffic. New GP practice being developed at Kew, which is comfortably within 30 minute public transport travel time.
56	Is the site within 30 minutes public transport journey of a Major Centre?	Burscough Centre accessible within 30 minutes (most of it involving walking). Ormskirk Centre beyond 30 minutes walk / bus combined.	Yes	Yes	Yes
57	Is the site within 10 minutes walk (800m) of a district or local centre?	No	Yes	No	No
58	Is the site within 15 minutes walk (1200m) of a Public Open Space of at least 5ha in size?	No	No	Yes (Abbey Lane)	No
59	Is the site within 10 minutes walk (800m) of a natural green space (e.g. Local Nature Reserve) of at least 2ha in size?	No	No	No	No
60	Is the site within 40 minutes public transport journey of a Leisure / Recreation / Sports Facility?	Yes - Leisure Centre, Burscough	Yes - Leisure Centre, Burscough	Yes - Leisure Centre, Burscough	Yes - facilities in Ormskirk / Southport
61	What could the effects of development on this site be on the sustainability of community health and equality, leisure and education locally and wider over time ; temporary / permanent effects?	Site is within reasonable accessible distance of services and facilities but this relies on occupants having access to motorised vehicles. Given the site's size, its development should not have any significant effect on the sustainability of community health, etc.	Site is located in the centre of Burscough and so within good accessible distance of services and facilities.	Site is within reasonable accessible distance of services and facilities if occupants had access to motorised vehicles. Given its size, its development should not have any significant effect on the sustainability of community health, etc.	Site has poor accessibility to community and social facilities, particularly if accessed by foot. There is no evidence of this longstanding site having any significant effect on the sustainability of community health, etc.
Local economy and employment					
62	Is the site within 250m of any sensitive commercial receptors, existing or proposed (e.g. sensitive business uses and tourist / visitor attractions)?	No	No	No	No
63	What could the effects of development on this site be on the sustainability of the local economy and employment locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects likely to be negligible (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.) Neighbouring industrial occupiers have expressed concern about the use of this site for Travelling Showpeople.	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)
Housing					
64	Is the site within 250m of residential dwellings (including individual houses)?	Yes. One residential property lies approx 100m to the north of the site.	Yes. Residential properties lie immediately east of the site.	No. Some existing properties on Lordsgate Lane nearby are less than 50m from similar industrial uses.	Some existing residential properties are within 250m of the site.

Q	Site Name	5. Land west of Ringtail Road, Burscough	6. Land west of the Quays, Burscough	7. Land west of Tollgate Road, Burscough	8. Pool Hey Caravan Park, Scarisbrick
65	What could the effects of development on this site be on the sustainability of housing provision locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible
Transportation and air quality					
66	Is the site located with in or adjacent to an existing Air Quality Management Area?	No	No	No	No.
67	Are there any sensitive receptors nearby (e.g. residential, community facilities) that may be impacted by dust, fumes and emissions caused by the development and end-use of the site?	Site may be impacted by noise and traffic from the adjacent industrial estate.	No. Residential and community facilities are nearby, as well as a school. However site is already in use and so further impacts would be unlikely.	Site may be impacted by Noise and traffic from the adjacent industrial estates.	No. Site is already in use (although unauthorised) so few impacts would be expected.
68	What could the effects of development on this site be on the sustainability of air quality locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality
69	How suitable is the road network to accommodate expected levels of traffic to and from the site?	This site has been put forward as a Travelling Showpeople site. The type of large vehicles associated with this site may cause issues on the unadopted road leading to the most recent proposed site access.	WLBC is unaware of any evidence that the existing site is placing undue pressure on local infrastructure, services and roads. Site is close to A59 but accessed via a narrow road between the site and the A59. The site has functioned as a Travelling Showpeople site for several years using the existing access.	Site under consideration as a Travelling Showpeople site; this involves storage and manoeuvring of large vehicles. Site lies on Tollgate Road, the "spine" road for the industrial estate, and thus appears suitable to accommodate the use of the site for Travelling Showpeople.	This lane has accommodated typical Traveller traffic for a number of years, but Pool Hey Lane includes a narrow stretch of road with a passing place and is not an ideal access road to a Traveller site.
70	Would the likely amount of traffic flowing from the site to the Primary Road Network cause adverse impacts on amenity of sensitive receptors on the route (residential, schools etc.)?	Unlikely due to the location of the site meaning that such amenities need not be passed by traffic travelling from the site to the primary road network.	No; site already in use as a Traveller site.	Unlikely due to the location of the site meaning that such amenities need not be passed by traffic travelling from the site to the primary road network.	This lane has accommodated typical Traveller traffic for a number of years. No evidence of unacceptable impact of traffic from site on the amenity of sensitive receptors.
71	Is the site within 800m of an existing or proposed Cycle Route?	Yes	Yes	No	Yes
72	Is the site within 800m of a bus stop for a high frequency bus service?	No	Yes	Site is 850m (10 minutes walk) from bus stops on A59.	No
73	Is the site within 1200m of a Rail Station?	No	Yes	No	No
74	Does the site have public footpaths, rights of way or any other type of footpath on it or near to it?	No	No	No	No
75	What could the effects of development on this site be on the sustainability of transportation locally / wider over time ; temporary / permanent effects?	Access to the site would need to be improved. Impact on nearby properties could be significant at times, but could possibly be controlled by means of conditions.	Site already in existence and in a sustainable location.	Site can be accessed from the road network, although may not be that accessible by public transport. Site would not have detrimental impacts on the road network. Good location and site access.	This lane has accommodated typical Traveller traffic for a number of years, but Pool Hey Lane includes a narrow stretch of road with a passing place and is not an ideal access road to a Traveller site.
Cumulative Impacts					

Q	Site Name	5. Land west of Ringtail Road, Burscough	6. Land west of the Quays, Burscough	7. Land west of Tollgate Road, Burscough	8. Pool Hey Caravan Park, Scarisbrick
76	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, have an adverse impact on the perceived environmental quality or character of the area?	Development of the site would have an impact on the openness of the Green Belt. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	Longstanding authorised site.	Site would have an impact on the openness of Green Belt and require new Green Belt boundaries to be redefined as the allocation of the site would encroach. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	Longstanding site, although unauthorised. As with any Traveller site, its allocation will be likely to have an impact on the perceived environmental quality or character of the area
77	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote social cohesion or inclusion in nearby communities?	The site is physically separated from predominantly residential areas, although there is one residential property approximately 100m from the site.	Longstanding site, already used and authorised as a Travelling Showpeople site. WLBC is unaware of any issues between the site occupants and the local settled community.	The site is separated from the settled community by (currently) undeveloped countryside and / or industrial development.	Generally well screened site over 700m from the nearest residential area (although there are two properties close to the site). Site has been occupied by Travellers since the 1990s and the Council has no evidence of issues between the occupants of the site and the local settled community.
78	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote the economic potential of the area?	The overall impact of this site being allocated as a Travelling Showpeople site is unlikely to have any significant impact on the economic potential of the area, although it is noted that neighbouring occupiers of industrial units have objected to the principle of this site being used as a Travelling Showpeople site.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Travelling Showpeople site is unlikely to have any significant impact on the economic potential of the area (the storage of fairground equipment, typically on trailers, is not out of keeping with the general industrial nature of the adjacent employment area).	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.

Q	Site Name	9. High Brow Farm, Pool Hey Lane, Scarisbrick	10. Land at 1-3 Southport Road, Kew, Scarisbrick	11. Land to the rear of 281 Smithy Lane, Scarisbrick	12. Land at Southport New Road, Mere Brow
1	Other site references / SHLAA site reference?	SHLAA SR.37	SHLAA SR.13	No	SHLAA TA.26
2	Site Address	High Brown Farm, Pool Hey Lane, Scarisbrick	Land at 1-3 Southport Road, Scarisbrick	Land rear of 281 Smithy Lane, Scarisbrick	Former LCC depot, Southport New Road, Mere Brow
3	Post Code			L40 8HL	
4	OS Grid Ref - E	336461	336167	340384	341715
5	OS Grid Ref - North	415280	415402	411675	418986
6	Site Area (ha)	1.28	2.70	1.01	3.26
7	Description of Site	Site is a former poultry farm containing derelict buildings and hardstanding. The site is adjacent to a former agricultural building (poultry shed) that, judging by appearance, may have roofing that contains asbestos. If the site were to be proposed for allocation, this would need to be subject to further careful investigation.	Vacant site on the edge of Southport comprising overgrown hardstanding and some scrub.	Site lies to the rear of a number of residential properties within a semi-rural area.	Site is triangular in shape, the 'eastern apex' of the triangle being a former depot, with a number of derelict buildings, hardstanding and a row of trees forming a robust 'inner western boundary'. Beyond this 'inner western boundary' is an open area in agricultural use, in separate ownership. 'Tarleton Runner' watercourse runs along the Northern perimeter of the site.
8	Description of Surrounding Area	Site is bordered by residential properties to the south and west. Open Green Belt land lies to the north and east.	The site is bordered by Kew Retail Park to the north west, the A570 to the south east and residential properties to the south. To the north lies open Green Belt land. The site is directly adjacent to one residential property. A watercourse runs on the north western boundary of the site.	Site lies to the rear of a number of residential properties within a semi-rural area. There are a number of commercial properties nearby. The surrounding area is open Green Belt / agricultural land.	To the south of the site lies Southport New Road (A565), beyond which is the small residential settlement of Mere Brow. To the Northern part of the site is open flat Green Belt, agricultural land with some residential properties nearby to the site.
9	Brief Site History	Site has been subject to enforcement action in the past due to occupation by Travellers.	Site has had planning permission for a DIY store (Wickes), allowed on appeal, which has never been implemented. Previous permission was granted consent in 2001 for erection of a sports, leisure and fitness building. Again, this was never implemented. Site has recently been sold.	No planning history relating to Gypsy/ Traveller use	PRE/2012/0514/MIN, PRE/2013/0326/MIN, 2008/0305/COU - reuse of depot for highway engineering contractor (refused), 1999/0168, 2000/0985. No planning history directly related to Travellers.
10	Relevant planning history	No p/p in relation to Gypsy/Traveller uses. 1993/0214, 2007/1350/FUL.	2004/0023, 2001/0289	None	Recent planning applications have been for change of use of site to home engineering contractors or to convert to motorcycle workshop and sales depot.
11	Land Ownership Details	Private	Private	Private	Private
12	Source of Site Suggestion	Site with previous Traveller activity, subject to enforcement action.	Site with previous Traveller activity, subject to enforcement action.	Call for sites	Unknown. The willingness of the owner of the eastern section of the site to sell as a Traveller site is unknown. The owner of the open, western section of the site has stated that they are not willing for this part of the site to be considered as a Traveller site.
13	Date of Appraisal	17/12/2013	17/12/2013	17/12/2013	19/12/2013
Deliverability Issues					
14	Are there any issues of land ownership that could prevent development on the site being delivered?	Unknown	Unknown	Site submitted in "Call for Sites" as a potential Traveller site.	The willingness of the owner of the eastern section of the site to sell as a Traveller site is unknown. The owner of the open, western section of the site has stated that they are not willing for this part of the site to be considered as a Traveller site.
15	Is the site potentially available for development?	Unknown	Unknown	Yes.	Unknown

Q	Site Name	9. High Brow Farm, Pool Hey Lane, Scarisbrick	10. Land at 1-3 Southport Road, Kew, Scarisbrick	11. Land to the rear of 281 Smithy Lane, Scarisbrick	12. Land at Southport New Road, Mere Brow
16	Does the planning history of the site caution against its allocation?	Site has been subject to enforcement action in the past due to occupation by Travellers. No planning permission has been sought.	No, although previous consents have been for different uses.	No planning history specific to Traveller uses.	Recent planning applications have been for change of use of site to home engineering contractors or to convert to motorcycle workshop and sales depot. Most applications for change of use have been refused.
17	Are there any potential land use conflicts with nearby sites that could prevent development on the site being delivered?	The site is directly adjacent to a row of bungalows. It is unlikely that peaceful and integrated co-existence could be achieved between the two uses. No industrial processes, etc. are situated adjacent or close to the site. The closest part of Southport landfill site is approximately 500m from the site, but other residential properties are closer to the landfill site than this site is.	Site is directly adjacent to one residential property and a retail development, which may create issues between the integration of this site with the settled community. Site is close 200m (as the crow flies) to waste disposal centre, with a landfill site beyond, although it is separated by a watercourse and retail units. Mitigation by way of appropriate screening should be possible.	The only nearby use that could be considered to have negative impacts is a mushroom farm (150m away), but there are several residential properties as close, or closer, to this use.	Site is adjacent to the small settlement of Mere Brow, but is separated from residential properties by the A565 Dual Carriageway. This physical barrier may increase the possibility of peaceful co-existence, but not integrated co-existence. With the exception of power cables (although not high tension power lines) over the site, none of the stated uses are next or near to the site.
18	Is the site directly accessible from the highway network or could it reasonably become so?	Site is on a stretch of Pool Hey Lane used by commercial traffic (Kershaws), and is reasonably close to A570.	Site is adjacent to A570 with its bus services direct to Southport and Ormskirk centres. Site is within easy walking distance of supermarket and other shops. Other services are easy to access via public transport.	Site is close to the B-classified Heaton's Bridge Road, although has less than ideal access onto Smithy Lane, especially for larger vehicles associated with Travellers. Access to the site would be directly beside a residential property (283 Heaton's Bridge Road)	Site lies directly on the A565; it has previously been used as a highways depot, so access has been used in the past, but may not be supported at present due to the need for vehicles to slow to almost a standstill on a 50mph stretch of dual carriageway.
19	Does the site have any known land contamination or remediation issues?	None known	None known	None known	None known, although minor contamination may be present on account of site's previous use as a County Council depot.
20	Does the site have any known ground instability that would limit development?	None known	There is evidence of land stability issues in the immediate area. Site is directly adjacent to a watercourse.	None known	None known
21	Can adequate provision be made to supply all major utilities to the site?	Given the proximity to residential and commercial properties on Pool Hey Lane, and the fact the site has been used in the past, it is assumed that provision of utilities and drainage should be achievable.	Site does not currently appear to have these services, but given its location adjacent to development, these services should be straightforward to provide.	The site is within an area with several residential and a small number of commercial properties, and thus it is expected that there is adequate utility infrastructure provision in the area to also serve this site.	Presumably the previous depot had mains water and electricity; given the proximity to Mere Brow village, connection to these services should be feasible in future.
22	Is the site within Functional Floodplain (Flood Zone 3b)?	Site is wholly within Flood Zone 2; parts of the site are less than 50m from Flood Zone 3.	The part of the site fronting the A570 is not in Flood Zone 2; south-eastern part of the site is in Flood Zone 2.	No	Land beside Tarleton Runner is in Flood Zones 2 (typically 20-25m from the watercourse) and 3 (typically 15-20m from the watercourse).
23	Is the site within the Green Belt?	Yes - Site abuts the Brown Edge settlement area.	Front part of the site is within Brown Edge settlement area; rear of site is within Green Belt.	Yes.	Site is within the Green Belt, but adjacent to the Mere Brow settlement.
24	Would development of the site affect any flight paths?	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site
25	Is there interest in site for development?	Site is currently being marketed. Whether or not the owner would sell as a Traveller site is not known.	Site is currently for sale. Whether or not the owner would sell as a Traveller site is not known.	Site submitted in "Call for Sites" as a potential Traveller site.	Unknown.
Biodiversity					
26	Is the site within 5km of and / or likely to impact on internationally designated sites?	No	No	No	No
27	Is the site within 1km of and / or likely to impact on a SSSI?	No	No	No	No
28	Is the site in within 100m of areas designated to be of local nature conservation importance?	No	No	No	No

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29	Is the site known to be home to protected species and / or habitats?	No	No	No	No
30	Is the site within 100m of woodlands, or trees with Tree Preservation Orders?	No	Yes	No	No
31	What could the effects of development on this site be on the sustainability of biodiversity, locally and wider over time? Will the effects be temporary or permanent?	Site would be unlikely to have a significant impact on local, or international, biodiversity.	Site would be unlikely to have a significant impact on local, or international, biodiversity.	Site would be unlikely to have a significant impact on local, or international, biodiversity.	Site would be unlikely to have a significant impact on local, or international, biodiversity.
Water and Land Resources					
32	Is the site subject to any known stability issues?	Potentially. There appear to have been some land stability issues on Scarisbrick New Road nearby; further investigation required.	None known	None known	None known
33	Is the site identified for its geological or geomorphological importance?	No	No	No	No
34	Does the site have any adverse gradients on it?	No	No	No	No
35	Is the site located on the best and most versatile agricultural land (grades 1, 2 and 3a)?	Site falls within Grade 1 designation	Site falls within Grade 1 designation, although is not actively farmed land. Site contains hardstanding and has been previously developed.	Yes. Grade 1	Eastern part of site is brownfield. Western part of site is mix of grade 1 and grade 2 agricultural land.
36	Is the site an active mineral working site?	No	No	No	No
37	Is the site contaminated or derelict land?	Yes. Derelict land/farm buildings.	Yes, derelict land - areas of hardstanding.	No	Derelict buildings and hardstanding
38	Is the site previously developed land (brownfield)?	Yes. Derelict land / farm buildings.	Yes.	No	Yes, former LCC depot.
39	What could the effects of development on this site be on the sustainability of land resources locally / wider over time? Will the effects be temporary or permanent?	Site is on Grade 1 agricultural land although site is not in active use for farming, containing hardstanding and buildings. Site would be unlikely to have a detrimental effect on land resources.	Site is brownfield, containing hardstanding. Site would be unlikely to have a detrimental effect on land resources.	The use of this site for Traveller development would lead to the loss of Grade 1 agricultural land.	Development of the eastern part of the site would reuse brownfield derelict land. Development of the western part would impact on agricultural land and Green Belt.
40	Is the site located within or adjacent to a Principal Aquifer or Source Protection Zone 1 or 2?	Unknown	Unknown	Unknown	Unknown
41	What could the effects of development on this site be on the sustainability of water quality and resources locally / wider over time? Will the effects be temporary or permanent?	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources, provided utilities were incorporated on the site. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site is adjacent to Tarleton Runner. Development would need to not contaminate or detrimentally affect the Runner.
Climatic factors and flooding					
42	Is the site within Zones 2 or 3 of the floodplain?	Site is wholly within Flood Zone 2; parts of the site are less than 50m from Flood Zone 3.	The part of the site fronting the A570 is not in Flood Zone 2; south-eastern part of the site is in Flood Zone 2.	No	Yes

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43	What could the effects of development on this site be on the sustainability of climatic factors and flooding locally / wider over time? Will the effects be temporary or permanent?	Site would be located in an area of flood risk.	Part of the site would be located in an area of flood risk.	Site would be unlikely to have detrimental impacts on climate and flooding.	Land beside Tarleton Runner is in Flood Zones 2 (typically 20-25m from the watercourse) and 3 (typically 15-20m from the watercourse). This would not preclude the use of a site as a Traveller site, but would require caravans to be located away from the Flood Risk area, decreasing the net developable area and the site capacity.
Heritage and Landscape					
44	Is the site located within or within 5km of and / or likely to impact on an AONB or Heritage Coast?	No	No	No	No
45	Is the site located within or within 1km of any area designated for its local landscape importance or is it likely to have adverse impacts on the landscape?	The site is directly adjacent to an Area of Landscape History of County Importance.	No - Site is just over 100m from the edge of an area designated as Area of Landscape History of County Importance.	Site is within an Area of Landscape History of Local Importance.	No
46	Is the site in the Green Belt? If so, would development on this site cause harm to the objectives of Green Belt designation?	Yes. Part in GB.	Front part of the site is within Brown Edge settlement area; rear of site is within Green Belt.	Yes	Yes.
47	Is the site within 250m of a site or building with a nationally recognized heritage designation?	No	No	Yes	No
48	What could the effects of development on this site be on the sustainability of heritage and landscape locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Development of this site would impact upon the local landscape, especially views from neighbouring properties, although their current view is somewhat interrupted by derelict poultry sheds. Fencing or screening between the site and the currently open countryside to the North east would have a visual impact and could affect an area of landscape history importance. No effect on heritage.	Site would be unlikely to have impacts on heritage. The north western boundary has trees / bushes. Land at the back of the site is overgrown / scrubland. Introduction of visual screening at the back of the site should not lead to an unacceptable visual impact on the site's surroundings.	Site would be unlikely to have impacts on heritage. The site's development would have a local impact on landscape, especially for neighbouring properties.	Eastern part of site is screened partially by hedgerows. The site is mostly screened from the adjacent A565 by hedging. Vegetation along the Tarleton Runner watercourse screens the majority of the site from the east, and vegetation along the 'inner western boundary' screens the site from the west. Development of the western part of the site would have a much greater impact, but this part of the site is not being considered for development.
Social equality and community services					
49	Will development of the site harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses)?	It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses). There are no such receptors nearby, apart from the Crematorium, but there is no reason this should be harmed were the site to be occupied.	It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).	It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses). However, site is directly adjacent to a number of residential properties and would be likely to impact negatively upon these properties.	It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).
50	How close [how many minutes walk at 5km/h average walking speed] is this site to a public transport facility (bus stop / station on regular route)? (Please note that this walking time is taken into account in the questions below referring to X minutes public transport journey from various facilities.)	Site is 350m (4 minutes walk) from bus stops on A570.	Site is within 100m of bus stops on A570.	Site is within 150m (2 minutes walk) of bus stops on Heaton's Bridge Road.	Site is within 550m (7 minutes walk) of bus stops on A565, and within 300m (4 minutes walk) of less frequent bus services on Mere Brow Lane.
51	Is the site within 30 minutes public transport journey of a Primary School?	Yes	Yes	Yes (Scarisbrick)	Yes

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52	Is the site within 40 minutes public transport journey of a Secondary School?	Yes	Yes	Yes (Ormskirk)	Yes
53	Is the site within 60 minutes public transport journey of a Further Education Institution?	Yes	Yes	Yes	Yes (Southport)
54	Is the site within 60 minutes public transport journey of a Hospital?	Yes	Yes	Yes	Yes (change at Southport Lord Street)
55	Is the site within 30 minutes public transport journey of a GP Practice?	Yes	Yes	Yes (Ormskirk)	Yes
56	Is the site within 30 minutes public transport journey of a Major Centre?	Yes	Yes	Yes	Yes
57	Is the site within 10 minutes walk (800m) of a district or local centre?	No	Yes	No	No
58	Is the site within 15 minutes walk (1200m) of a Public Open Space of at least 5ha in size?	No	No	No	No
59	Is the site within 10 minutes walk (800m) of a natural green space (e.g. Local Nature Reserve) of at least 2ha in size?	No	No	No, although site is within easy reach of the Leeds Liverpool Canal.	No
60	Is the site within 40 minutes public transport journey of a Leisure / Recreation / Sports Facility?	Yes - facilities in Ormskirk / Southport	Yes - facilities in Southport	Yes - facilities in Ormskirk / Southport	Yes - Banks Leisure Centre
61	What could the effects of development on this site be on the sustainability of community health and equality, leisure and education locally and wider over time ; temporary / permanent effects?	Site is within reasonable accessible distance of services and facilities. Given the site's size, its development should not have any significant effect on the sustainability of community health, etc.	Site is within reasonable accessible distance of services and facilities. Given the site's size, its development should not have any significant effect on the sustainability of community health, etc.	Site is within reasonable accessible distance of services and facilities, or public transport to them. Given the site's size, its development should not have any significant effect on the sustainability of community health, etc.	Site should not place undue pressure on community services, and as local services are limited it is likely site occupants will travel to access services in Banks or Tarleton.
Local economy and employment					
62	Is the site within 250m of any sensitive commercial receptors, existing or proposed (e.g. sensitive business uses and tourist / visitor attractions)?	No	No	No	No
63	What could the effects of development on this site be on the sustainability of the local economy and employment locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)
Housing					
64	Is the site within 250m of residential dwellings (including individual houses)?	Yes. Site's proximity to residential properties is likely to lead to difficulties in ensuring peaceful co-existence between the settled and travelling community.	Yes. One property directly adjacent to site.	Yes	Yes - Mere Brow settlement to the south, and nearby residential properties to the east and west

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65	What could the effects of development on this site be on the sustainability of housing provision locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible
Transportation and air quality					
66	Is the site located with in or adjacent to an existing Air Quality Management Area?	No	No	No	No
67	Are there any sensitive receptors nearby (e.g. residential, community facilities) that may be impacted by dust, fumes and emissions caused by the development and end-use of the site?	No	No	Site is directly adjacent to a number of residential properties.	No
68	What could the effects of development on this site be on the sustainability of air quality locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality
69	How suitable is the road network to accommodate expected levels of traffic to and from the site?	The site is close to the A570. Access would involve using a 250m stretch of Pool Hey Lane which is an unclassified residential road. However, commercial vehicles associated with the Kershaw's Foods business, as well as farm traffic, use this part of Pool Hey Lane.	Site is directly off the A570 so has good access to the site and local road networks.	Site is close to the B-classified Heatons Bridge Road, although has less than ideal access onto Smithy Lane, especially for larger vehicles associated with Travellers. Access to the site would be directly beside a residential property (283 Heaton's Bridge Road).	Site lies directly on the A565 which would be able to accommodate any increased levels of traffic to/from the site, but access to the site directly from a dual carriageway is likely to be problematic, notwithstanding the previous depot use.
70	Would the likely amount of traffic flowing from the site to the Primary Road Network cause adverse impacts on amenity of sensitive receptors on the route (residential, schools etc.)?	Traffic to the site would be unlikely to create any significant further impacts, other than that which exists currently from farm / commercial / other traffic using Pool Hey Lane.	No; site has direct access onto primary road network.	Site is close to the B-classified Heatons Bridge Road; access to this uses a short stretch of Smithy Lane, although this road is also used by commercial traffic and traffic accessing the nearby large Shaw Hall Caravan Park.	Site is directly on the A565 so would not cause adverse impacts
71	Is the site within 800m of an existing or proposed Cycle Route?	Yes	Yes	Yes	Yes
72	Is the site within 800m of a bus stop for a high frequency bus service?	Yes	Yes	Yes	Yes. Site is within 550m of bus stops on A565 (and within 300m of bus stop on Mere Brow Lane).
73	Is the site within 1200m of a Rail Station?	No	No	No	No
74	Does the site have public footpaths, rights of way or any other type of footpath on it or near to it?	No	No	No	Yes on the site
75	What could the effects of development on this site be on the sustainability of transportation locally / wider over time ; temporary / permanent effects?	The site is close to the A570 and public transport services. Access would involve using a 250m stretch of Pool Hey Lane which is an unclassified residential road, but used by commercial vehicles. Site traffic unlikely to create any significant further impacts.	Site is sustainable in terms of road transport links and accessibility to bus services.	Site is close to the B-classified Heatons Bridge Road with reasonable public transport links. Traffic would be unlikely to cause any additional adverse impacts than those already created by local traffic.	Site is a reasonably sustainable location, supported by bus stops on the A565 and in the Mere Brow settlement.
Cumulative Impacts					

Q	Site Name	9. High Brow Farm, Pool Hey Lane, Scarisbrick	10. Land at 1-3 Southport Road, Kew, Scarisbrick	11. Land to the rear of 281 Smithy Lane, Scarisbrick	12. Land at Southport New Road, Mere Brow
76	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, have an adverse impact on the perceived environmental quality or character of the area?	As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	Site has been previously developed and is now derelict so development of the site would bring the site into reuse. Green Belt site, and as with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.
77	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote social cohesion or inclusion in nearby communities?	Site's proximity to residential properties is likely to lead to difficulties in ensuring peaceful co-existence between the settled and travelling community.	Site's proximity to residential properties may lead to difficulties in ensuring peaceful co-existence between the settled and travelling community.	If site is kept relatively small, it should not dominate the settled community as a whole, although impacts on a number of neighbouring properties are likely to be more significant.	Site is adjacent to the small settlement of Mere Brow, but is separated from residential properties by the A565 Dual Carriageway. This physical barrier may increase the possibility of peaceful co-existence, but not integrated co-existence.
78	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote the economic potential of the area?	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.

Q	Site Name	13. White Moss Road South (A), Skelmersdale	14. White Moss Road South (B), Skelmersdale	15. White Moss Road South (C), Skelmersdale	16. Blackacre Lane, Ormskirk
1	Other site references / SHLAA site reference?	No	No	No	No
2	Site Address	White Moss Road South (A), Skelmersdale	White Moss Road South (B), Skelmersdale	White Moss Road South (C), Skelmersdale	Land at Blackacre Lane, Ormskirk
3	Post Code				
4	OS Grid Ref - E	347632	346489	346332	341478
5	OS Grid Ref - North	405134	405299	405190	410031
6	Site Area (ha)	0.81	0.92	2.75	1.68
7	Description of Site	Site is a former Highways Agency depot, no longer in use and derelict, with buildings and hardstanding.	Site is in the hands of Travellers. Land is Green Belt / agricultural land which is unkempt. Deposits of hardcore and concrete appear to have been dumped on the site.	Site is currently open Green Belt, enclosed by a small fence, hedgerows and trees. Sites runs adjacent to the M58 and Liverpool Road South. Site is adjacent to White Moss Road South (B) site.	Site is currently open Green Belt, enclosed by a small fence, hedgerows and trees. Site contains a number of trees.
8	Description of Surrounding Area	Site is surrounded by land designated as Green Belt. To the North east of the site there is a narrow access road (White Moss Road South) and beyond that the M58 motorway. J4 of the M58 is to the east of the site. To the south / south east is an office business park.	Site is adjacent to the M58 (North) and White Moss Road South (south). To the east of the site lies Green Belt and agricultural land. A (hazardous) waste site is nearby. Site is physically separate from nearest settled community. There is one residential property approximately 300m along White Moss Road South; residential properties on White Moss Road are closer as the crow flies, and whilst separated by the M58, there is a footbridge close to the site.	Site is currently open Green Belt, enclosed by a small fence, hedgerows and trees. Sites runs adjacent to the M58 and Liverpool Road South. Site is adjacent to White Moss Road South (B) site.	Surrounding area is mainly Green Belt and agricultural land. There are a small number of residential properties nearby. The settlement of Ormskirk lies to the south.
9	Brief Site History	Site is a former Highways Agency depot, no longer in use and derelict, with buildings and hardstanding.	Application currently in for use of site for keeping houses. Pending decision.	None	Owned by Travellers, currently used for grazing horses.
10	Relevant planning history	2007/1381/FUL - Construction of garage to store winter maintenance plant (granted)	2013/1040/FUL - Change of use from agricultural land to use of the land for keeping horses, including erection of stables and paddock (Pending decision)	None	2013/0068/COU - retention of change of use from agricultural land to use of land for keeping of horses, and retention of stable block and portable horse shelters
11	Land Ownership Details	Private	Private	Private	Owned by Travellers
12	Source of Site Suggestion	Site suggested by a member of the Travelling Community.	Planning application for Traveller-related development.	Site identified by Council officers.	Site suggested in Call for Sites
13	Date of Appraisal	19/12/2013	19/12/2013	19/12/2013	19/12/2013
Deliverability Issues					
14	Are there any issues of land ownership that could prevent development on the site being delivered?	Site owner has informed the Council that the site is not available for sale at present.	Site in the hands of Travellers.	Site in agricultural use. Owner's views unknown.	Owned by Travellers
15	Is the site potentially available for development?	Site owner has informed the Council that the site is not available for sale at present. Future intentions unknown.	Yes	Site in agricultural use. Owner's views unknown.	Yes

Q	Site Name	13. White Moss Road South (A), Skelmersdale	14. White Moss Road South (B), Skelmersdale	15. White Moss Road South (C), Skelmersdale	16. Blackacre Lane, Ormskirk
16	Does the planning history of the site caution against its allocation?	No planning history	Recent application for stables approved Dec 2013.	No planning history.	No. Planning permission for change of use for keeping horses has been granted.
17	Are there any potential land use conflicts with nearby sites that could prevent development on the site being delivered?	Site is nearby to the M58 (north) and a business park (South). Site is also in close proximity to a landfill (hazardous waste) - within 500m of the waste facility.	Site is Green Belt. Site is also in proximity to a landfill (hazardous waste) - within 500m of the waste facility.	Site is Green Belt. Site is also in close proximity to a landfill (hazardous waste) and adjacent to the M58.	Site is physically separate from the built-up area of Ormskirk, although relatively close by (350m to the nearest housing). Provided the site were not large-scale, it should not dominate the settled community. Former sewage works nearby, but this use ceased several years ago and not considered to have any significant impact on the site.
18	Is the site directly accessible from the highway network or could it reasonably become so?	Yes. Site is easily accessed from the M58 J4.	White Moss Road South is generally narrow and the surface is of sub-optimal quality. However, a significant stretch of the road is used by landfill HGVs.	White Moss Road South is generally narrow and the surface is of sub-optimal quality. However, a significant stretch of the road is used by landfill HGVs.	Blackacre Lane is a narrow lane (not much wider than single track) and not suitable for the larger vehicles typically associated with Travellers. Site lies on a bend on the lane, but at present has two gated accesses.
19	Does the site have any known land contamination or remediation issues?	No contamination known of, although minor contamination may be possible on account of site's previous use as a Highways Agency depot.	None known.	None known	None known
20	Does the site have any known ground instability that would limit development?	None known.	None known.	None known	None known
21	Can adequate provision be made to supply all major utilities to the site?	It is expected that these services exist as a result of the site's previous use, or if not, they should be readily achievable given the business park nearby.	The site does not currently have these utilities / drainage given its separation from other built development. It is unclear how easy it would be to provide mains water / electricity / drainage.	The site does not currently have these utilities / drainage given its separation from other built development. It is unclear how easy it would be to provide mains water / electricity / drainage.	Site does not currently have these services. It is unclear whether they could easily be provided, but it is noted that the site is within 400m of the urban area of Ormskirk with its services / utilities.
22	Is the site within Functional Floodplain (Flood Zone 3b)?	No	No.	No	No
23	Is the site within the Green Belt?	Yes - Site abuts the Non-Green Belt White Moss Business Park.	Yes	Yes	Yes
24	Would development of the site affect any flight paths?	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site
25	Is there interest in site for development?	Unknown	Site in the hands of Travellers and a planning application has been submitted for stables.	None known	Yes
Biodiversity					
26	Is the site within 5km of and / or likely to impact on internationally designated sites?	No	No	No	No
27	Is the site within 1km of and / or likely to impact on a SSSI?	No	No	No	No
28	Is the site in within 100m of areas designated to be of local nature conservation importance?	No	No	No	No

Q	Site Name	13. White Moss Road South (A), Skelmersdale	14. White Moss Road South (B), Skelmersdale	15. White Moss Road South (C), Skelmersdale	16. Blackacre Lane, Ormskirk
29	Is the site known to be home to protected species and / or habitats?	No	No	No	No
30	Is the site within 100m of woodlands, or trees with Tree Preservation Orders?	No	Yes	Yes	No
31	What could the effects of development on this site be on the sustainability of biodiversity, locally and wider over time? Will the effects be temporary or permanent?	Site would be unlikely to have a significant impact on local, or international, biodiversity.	Development of site may have an impact on biodiversity given the proximity of the M58 wildlife corridor. This impact is likely to be minor.	Development of site may have a small impact on biodiversity given the proximity of the M58 wildlife corridor.	Site would be unlikely to have a significant impact on local, or international, biodiversity.
Water and Land Resources					
32	Is the site subject to any known stability issues?	None known	None known	None known	None known
33	Is the site identified for its geological or geomorphological importance?	No	No	No	No
34	Does the site have any adverse gradients on it?	No	No	No	No; short gentle slope towards road.
35	Is the site located on the best and most versatile agricultural land (grades 1, 2 and 3a)?	Site is brownfield. Falls under Grade 1 classification	Yes. Grade 1, although not farmed	Yes, Grade 1 land, currently being farmed.	Yes, Grade 1
36	Is the site an active mineral working site?	No	No	No	No
37	Is the site contaminated or derelict land?	Derelict buildings and hardstanding.	No.	No	No
38	Is the site previously developed land (brownfield)?	Yes, former depot	No.	No	No
39	What could the effects of development on this site be on the sustainability of land resources locally / wider over time? Will the effects be temporary or permanent?	Development of the site would re-use vacant land	Loss of grade 1 agricultural land and potential harm to the wildlife corridor.	Loss of grade 1 agricultural land and potential harm to the wildlife corridor.	Site is on Grade 1 agricultural land although site is not in active use for farming. Site would be unlikely to have a detrimental effect on land resources. Site is on the line of the proposed Ormskirk Bypass. Site subject to a financial "clawback" clause which could impact upon deliverability.
40	Is the site located within or adjacent to a Principal Aquifer or Source Protection Zone 1 or 2?	Unknown	Unknown	Unknown	Unknown
41	What could the effects of development on this site be on the sustainability of water quality and resources locally / wider over time? Will the effects be temporary or permanent?	Site would be unlikely to detrimentally affect water quality and resources, given that utilities are presumed available on the site already. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources. As with any development, consideration would need to be given to managing waste water / surface water on the site.
Climatic factors and flooding					
42	Is the site within Zones 2 or 3 of the floodplain?	No	No	No	No

Q	Site Name	13. White Moss Road South (A), Skelmersdale	14. White Moss Road South (B), Skelmersdale	15. White Moss Road South (C), Skelmersdale	16. Blackacre Lane, Ormskirk
43	What could the effects of development on this site be on the sustainability of climatic factors and flooding locally / wider over time? Will the effects be temporary or permanent?	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.
Heritage and Landscape					
44	Is the site located within or within 5km of and / or likely to impact on an AONB or Heritage Coast?	No	No	No	No
45	Is the site located within or within 1km of any area designated for its local landscape importance or is it likely to have adverse impacts on the landscape?	No - No historic environment, landscape or nature conservation designation in vicinity of site.	No - No historic environment, landscape or nature conservation designation in vicinity of site, apart from M58.	No - No historic environment, landscape or nature conservation designation in vicinity of site.	No historic environment, landscape or nature conservation designation in vicinity of site. Site is a metre or so higher than Blackacre Lane; there is no natural screening between the site and Blackacre Lane at present.
46	Is the site in the Green Belt? If so, would development on this site cause harm to the objectives of Green Belt designation?	Yes, but previously developed site.	Yes. Development would affect the openness of the Green Belt.	Yes. Development would affect the openness of the Green Belt.	Yes. Development may affect the openness of the Green Belt.
47	Is the site within 250m of a site or building with a nationally recognized heritage designation?	No	No	No	No
48	What could the effects of development on this site be on the sustainability of heritage and landscape locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Site would be unlikely to have an impact on sustainability of heritage or landscape. Use of this site as a transit site should have no greater visual impact than the site's previous highways-related use. Site is surrounded by an existing security fence and is screened by a belt of (deciduous) trees from the neighbouring business park and motorway junction uses.	Site has no immediate neighbours. Site is reasonably screened (provided existing trees, etc. are retained), and the adjacent motorway already has significant visual and acoustic impact, so the impact of the site should be limited and can be mitigated.	Site is open and in agricultural use; its use as a Traveller site would have visual impact and lead to loss of Grade 1 agricultural land. Screening by appropriate planting possible in theory, but would take several years to become established. This rectangular site is currently open on its "long sides".	Site would be unlikely to have impacts on heritage. The site's development would impact on the open countryside. Screening may help mitigate the visual impact of the site should development occur. There is no natural screening between the site and Blackacre Lane at present.
Social equality and community services					
49	Will development of the site harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses)?	It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).	No. Site is detached from main residential areas of settled communities. It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).	No. Site is detached from main residential areas of settled communities. It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).	Provided the site were not large-scale, it should not dominate the settled community. It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).
50	How close [how many minutes walk at 5km/h average walking speed] is this site to a public transport facility (bus stop / station on regular route)? (Please note that this walking time is taken into account in the questions below referring to X minutes public transport journey from various facilities.)	Site is approximately 1000-1100m (13 minutes walk) from bus stops on Railway Road; this journey involves crossing a motorway junction.	650m / 750m (8 / 9 minutes walk) from bus stops; journey involves crossing M58 motorway via a footbridge.	700m / 800m (8 / 10 minutes walk from bus stops; journey involves crossing M58 motorway via a footbridge.	600 - 650m (7-8 minutes walk) from bus stops on Grimshaw Lane.
51	Is the site within 30 minutes public transport journey of a Primary School?	Yes	Yes	Yes (although this would entail a walk of more than 10 minutes to the nearest bus stop, as per the other criteria below).	Yes

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52	Is the site within 40 minutes public transport journey of a Secondary School?	Yes	Yes	Yes	Yes
53	Is the site within 60 minutes public transport journey of a Further Education Institution?	Yes	Yes	Yes	Yes
54	Is the site within 60 minutes public transport journey of a Hospital?	Yes	Yes (change required, or a longer walk to 375 / 385 / 395 route)	Yes (change required, or a longer walk to 375 / 385 / 395 route)	Yes
55	Is the site within 30 minutes public transport journey of a GP Practice?	Yes	Yes	Yes	Yes
56	Is the site within 30 minutes public transport journey of a Major Centre?	Yes	Yes	Yes	Yes
57	Is the site within 10 minutes walk (800m) of a district or local centre?	No	No	No	No
58	Is the site within 15 minutes walk (1200m) of a Public Open Space of at least 5ha in size?	No	Yes (Blaguegate)	Yes (Blaguegate)	No
59	Is the site within 10 minutes walk (800m) of a natural green space (e.g. Local Nature Reserve) of at least 2ha in size?	No	No	No	No
60	Is the site within 40 minutes public transport journey of a Leisure / Recreation / Sports Facility?	Site is a short public transport journey from Skelmersdale Town Centre, where leisure facilities are planned, and to Blaguegate Lane football pitches.	Site is a short public transport journey from Skelmersdale Town Centre, where leisure facilities are planned, and to Blaguegate Lane football pitches.	Site is a short public transport journey from Skelmersdale Town Centre, where leisure facilities are planned, and to Blaguegate Lane football pitches.	Yes - facilities in Ormskirk
61	What could the effects of development on this site be on the sustainability of community health and equality, leisure and education locally and wider over time ; temporary / permanent effects?	Site is away from "typical residential" infrastructure and services. Given the site's size, its development should not have any significant effect on the sustainability of community health, etc.	Site is away from "typical residential" infrastructure and services. Given the site's size, its development should not have any significant effect on the sustainability of community health, etc.	Community services cannot be easily accessed by public transport or on foot. Given the site's size, its development should not have any significant effect on the sustainability of community health, etc.	Site should not place undue pressure on community services.
Local economy and employment					
62	Is the site within 250m of any sensitive commercial receptors, existing or proposed (e.g. sensitive business uses and tourist / visitor attractions)?	No	No	No	No
63	What could the effects of development on this site be on the sustainability of the local economy and employment locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)
Housing					
64	Is the site within 250m of residential dwellings (including individual houses)?	Not close to any residential properties, although some residential properties exist along Moss Lane.	There is just one residential property approximately 300m along White Moss Road South; residential properties on White Moss Road are closer as the crow flies; whilst separated by the M58, there is a footbridge close to the site.	There is a residential property approximately 400m along White Moss Road South; residential properties on White Moss Road are closer as the crow flies; whilst separated by the M58, there is a footbridge close to the site.	Site is physically separate from the built-up area of Ormskirk, although relatively close by (350m to the nearest housing).

Q	Site Name	13. White Moss Road South (A), Skelmersdale	14. White Moss Road South (B), Skelmersdale	15. White Moss Road South (C), Skelmersdale	16. Blackacre Lane, Ormskirk
65	What could the effects of development on this site be on the sustainability of housing provision locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible
Transportation and air quality					
66	Is the site located with in or adjacent to an existing Air Quality Management Area?	No	No	No	No
67	Are there any sensitive receptors nearby (e.g. residential, community facilities) that may be impacted by dust, fumes and emissions caused by the development and end-use of the site?	No. Although the site may be impacted by Noise and fumes from the M58, and the waste site.	No., although the site may be impacted by noise and fumes from the M58, and the waste site. Site is adjacent to M58 motorway and within 200m of a waste facility.	No. Although the site may be impacted by Noise and fumes from the M58, overhead pylons, and the waste site. Site is adjacent to M58 motorway and within 200m of a waste facility.	No
68	What could the effects of development on this site be on the sustainability of air quality locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	None. Although the site may be impacted by Noise and fumes from the M58, and the waste site.	None, although the site may be impacted by noise and fumes from the M58, and the waste site.	None. Although the site may be impacted by Noise and fumes from the M58, and the waste site.	Site would be unlikely to have a significant detrimental effect on air quality
69	How suitable is the road network to accommodate expected levels of traffic to and from the site?	Site lies within easy reach of the M58 (J4) which could accommodate traffic.	White Moss Road South between the site and M58 junction 4 is narrow and of sub-optimal quality. However, a significant stretch of the road is used by landfill HGVs. Access to the motorway and elsewhere could be taken in the other direction (towards junction 3). The road is relatively quiet; it should thus be able to accommodate typical Traveller vehicles.	White Moss Road South between the site and M58 junction 4 is narrow and of sub-optimal quality. However, a significant stretch of the road is used by landfill HGVs. Access to the motorway and elsewhere could be taken in the other direction (towards junction 3). The road is relatively quiet; it should thus be able to accommodate typical Traveller vehicles.	Blackacre Lane is a narrow lane (not much wider than single track) and probably unsuitable for the larger vehicles typically associated with Travellers. Access from Ormskirk (A570 via Heskin Lane, or A59 via Grimshaw Lane) would be easier than access from Burscough (A59 / B5242 Pippin Street) as this would entail less distance along Blackacre Lane.
70	Would the likely amount of traffic flowing from the site to the Primary Road Network cause adverse impacts on amenity of sensitive receptors on the route (residential, schools etc.)?	No; site very close to primary road network.	Traffic would pass a small number of residential properties on the way to the M58, but the increase in traffic levels over the traffic that already uses White Moss Road South should not be significant.	Traffic would pass a small number of residential properties on the way to the M58, but the increase in traffic levels over the traffic that already uses White Moss Road South should not be significant.	Traffic would pass residential properties on the way to the primary road network, but the increase in traffic levels for the overwhelming majority of these properties, over what already uses the local roads (Grimshaw Lane, etc.), should not be significant.
71	Is the site within 800m of an existing or proposed Cycle Route?	No	No	No	Yes
72	Is the site within 800m of a bus stop for a high frequency bus service?	Site is just over 1km on foot from bus stops on Railway Road; this involves crossing a motorway junction. Access to facilities is thus likely to require private motorised transport.	Site is 650m / 750m from bus stops on Liverpool Road (using the footbridge over the M58).	Site is 700m / 800m from bus stops on Liverpool Road (using the footbridge over the M58).	Site is 600-650m from nearest bus stops.
73	Is the site within 1200m of a Rail Station?	No	No	No	No
74	Does the site have public footpaths, rights of way or any other type of footpath on it or near to it?	No	Yes	Yes	Yes
75	What could the effects of development on this site be on the sustainability of transportation locally / wider over time ; temporary / permanent effects?	Site adjacent to a business area, but poor access to public transport, thus relatively unsustainable.	Site relatively unsustainable in location, although bus services can be reached on foot using footbridge over M58.	Site relatively unsustainable in location, although bus services can be reached on foot using footbridge over M58.	Road access to the site is not suitable for larger vehicles. Green Belt site, but within easy walking distance of public transport facilities; reasonably close to Ormskirk and its facilities.
Cumulative Impacts					

Q	Site Name	13. White Moss Road South (A), Skelmersdale	14. White Moss Road South (B), Skelmersdale	15. White Moss Road South (C), Skelmersdale	16. Blackacre Lane, Ormskirk
76	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, have an adverse impact on the perceived environmental quality or character of the area?	Site has been previously developed and is already well screened. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	Site is reasonably screened (provided existing trees, etc. are retained), and the adjacent motorway already has significant visual and acoustic impact, so the visual impact of the site should be limited. However, as with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.
77	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote social cohesion or inclusion in nearby communities?	Site is physically separate from the nearest settled communities.	Site is physically separate from the nearest settled communities.	Site is physically separate from the nearest settled communities.	Site is physically separate from the built-up area of Ormskirk, although relatively close by (350m to the nearest housing). Provided the site were not large-scale, it should not dominate the settled community.
78	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote the economic potential of the area?	There is a possibility that the use of this site as a Traveller site could impact negatively on the nearby business park.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.

Q	Site Name	17. Land south of Butchers Lane, Aughton	18. Land east of Brookfield Lane, Aughton	19. Land east of Middlewood Drive, Aughton	20. Bickerstaffe Colliery, Bickerstaffe
1	Other site references / SHLAA site reference?	SHLAA OA.053	SHLAA OA.054	SHLAA OA.061	SHLAA BK.01
2	Site Address	Land south of Butchers Lane, Aughton	Land east of Brookfield Lane, Aughton	Land east of Middlewood Drive, Aughton	Land at Jubilee Wood, Bickerstaffe Colliery, Bickerstaffe
3	Post Code				
4	OS Grid Ref - E	339897	339373	340444	345220
5	OS Grid Ref - North	403288	403881	405319	404595
6	Site Area (ha)	0.76	6.74	11.36	2.82
7	Description of Site	Site is an open field, in Green Belt, that is located in between two residential properties. Butchers Lane runs along the northern perimeter of the site. To the south of the site is a small wooded area.	Site is agricultural land, in Green Belt. Site is located between Brookfield Lane (to the west) and the railway line (to the east). In addition, the site contains natural boundaries of trees and hedgerows.	Site is agricultural land, in Green Belt, located to the south of the Aughton residential area.	Site is a wooded area, off Junction 3 of the M58 and Rainford Road (A570). Whilst predominantly wooded, the site contains some disused mine shafts, and some hardstanding areas.
8	Description of Surrounding Area	The west of the site is a linear development of residential properties, with an additional residential property to the eastern side of the site. Further east, and to the North of the site is open Green Belt land used for agriculture. Ashworth Security Prison lies due south of the site, beyond the wooded area. A small watercourse lies to the south of the site also.	Scattered residential properties are located in proximity to the site (to the North, west and south). Railway line / embankment lies to the east of the site.	Residential properties are located to the North, east and west of the site.	To the north of the site is the M58, to the east the Rainford Bypass and some built development. To the west and south the site is adjacent to further woodland and agricultural land.
9	Brief Site History	None	None	None	1998/1090, 1994/0209 - both for a hotel and leisure development (approved but lapsed)
10	Relevant planning history	None	None	None	1998/1090, 1994/0209 - both for a hotel and leisure development (approved but never implemented)
11	Land Ownership Details	Private	Private	Private	Private
12	Source of Site Suggestion	Owner	Owner	Owner	Site identified by Council officers.
13	Date of Appraisal	19/12/2013	19/12/2013	19/12/2013	19/12/2013
Deliverability Issues					
14	Are there any issues of land ownership that could prevent development on the site being delivered?	No. Site is not in the hands of Travellers but the owner has expressed willingness for the site to be considered as a Traveller site.	No. Site is not in the hands of Travellers but the owner has expressed willingness for the site to be considered as a Traveller site.	No. Site is not in the hands of Travellers but the owner has expressed willingness for the site to be considered as a Traveller site.	Owner has indicated an unwillingness for the site to be used as a Traveller site.
15	Is the site potentially available for development?	Owner has expressed a willingness for the site to be considered.	Site is not in the hands of Travellers but the owner has expressed willingness for the site to be considered as a Traveller site.	Site is not in the hands of Travellers but the owner has expressed willingness for the site to be considered as a Traveller site.	No.

Q	Site Name	17. Land south of Butchers Lane, Aughton	18. Land east of Brookfield Lane, Aughton	19. Land east of Middlewood Drive, Aughton	20. Bickerstaffe Colliery, Bickerstaffe
16	Does the planning history of the site caution against its allocation?	No planning history.	No planning history	No planning history	No.
17	Are there any potential land use conflicts with nearby sites that could prevent development on the site being delivered?	Site is in a rural area but lies between a collection of residential properties in a linear development. Surrounding landscape is open Green Belt and agricultural land. Site is within 100m of Ashworth Hospital.	Site is in a rural area and in close proximity to existing residential properties. Site and the surrounding landscape is open Green Belt and agricultural land. Site is within 100m of railway embankment, but this is not considered a constraint in terms of impact upon the residents of the site.	Site is adjacent to a significant number of residential properties; access to the site would be such that wherever it was taken from (all options involve using quiet residential streets), it would be likely to not promote peaceful and integrated co-existence.	Site is within 100m of M58 motorway, although screened by woodland. Cycle facility in adjacent woodland to the south, although it is considered that, with appropriate fencing, etc, this need not prevent the use of the northern part of the site as a Traveller site and vice versa.
18	Is the site directly accessible from the highway network or could it reasonably become so?	Site can be directly accessed from Butchers Lane. Whilst Butchers Lane is unclassified, it is wide enough to accommodate typical Traveller vehicles. The site is large enough for adequate access to be achieved.	Brookfield Lane is narrow and not ideal for typical Traveller vehicles.	Likely access would be Middlewood Road or Middlewood Drive, both narrow cul-de-sacs with significant on-street parking. Access by emergency vehicles would be likely to be difficult.	Site is accessible from A570 Rainford Bypass and close to M58, although access is not ideal (dual carriageway, less than 100m from motorway junction roundabout).
19	Does the site have any known land contamination or remediation issues?	None known	None known	None known	No specific contamination known about, although site has been used as a colliery in the past.
20	Does the site have any known ground instability that would limit development?	None known	None known	None known	Site has disused mineshafts in places.
21	Can adequate provision be made to supply all major utilities to the site?	Site does not currently have these services, but it is assumed that they can be provided given residential properties either side of the site.	Site does not currently have these services; there are some residential properties nearby, so it is assumed that services can be provided, although it is unclear how easy it would be to provide them.	Site has no known services, but it is probable these could readily be provided given the proximity to an urban area.	It is unclear how easy it would be to provide services, although it is noted that there are commercial and residential buildings within 100m of the site, so it is assumed that services exist in the vicinity of the site.
22	Is the site within Functional Floodplain (Flood Zone 3b)?	Rear of site (about 15% of site) is within Flood Zone 2, by virtue of the adjacent watercourse.	No	No	No
23	Is the site within the Green Belt?	Yes	Yes	Yes. Green Belt adjacent to settlement area.	Yes
24	Would development of the site affect any flight paths?	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site	Site is within the consultation zone for Blackpool Airport Plan C and St Anne's Radar Technical Site
25	Is there interest in site for development?	Owner has expressed a willingness for the site to be developed for Travellers.	Owner has expressed a willingness for the site to be developed for Travellers.	Owner has expressed a willingness for the site to be developed for Travellers.	None known of at present.
Biodiversity					
26	Is the site within 5km of and / or likely to impact on internationally designated sites?	No	No	No	No
27	Is the site within 1km of and / or likely to impact on a SSSI?	No	No	No	No
28	Is the site in within 100m of areas designated to be of local nature conservation importance?	No	No	No	No

Q	Site Name	17. Land south of Butchers Lane, Aughton	18. Land east of Brookfield Lane, Aughton	19. Land east of Middlewood Drive, Aughton	20. Bickerstaffe Colliery, Bickerstaffe
29	Is the site known to be home to protected species and / or habitats?	No	No	No	None known of at present.
30	Is the site within 100m of woodlands, or trees with Tree Preservation Orders?	No	No	No	Yes
31	What could the effects of development on this site be on the sustainability of biodiversity, locally and wider over time? Will the effects be temporary or permanent?	Site would be unlikely to have a significant impact on local, or international, biodiversity.	Site appears to be active farmland, and will support some biodiversity.	Site appears to be active farmland, and likely to support some biodiversity.	Potentially some adverse effects: if woodland needed to be removed to provide the site, then this could have an effect on biodiversity.
Water and Land Resources					
32	Is the site subject to any known stability issues?	None known	None known	None known	Unknown. Site likely to have disused mineshafts in places.
33	Is the site identified for its geological or geomorphological importance?	No	No	No	No
34	Does the site have any adverse gradients on it?	No - rear of site slopes gently towards a watercourse	No	No. site slopes gently in parts	Site slopes gently at access point, but majority of site does not slope to any great extent.
35	Is the site located on the best and most versatile agricultural land (grades 1, 2 and 3a)?	Yes, grade 1	Yes, Grade 1	Yes, Grade 1	Yes: officially classed as Grade 1 although the site is not agricultural land.
36	Is the site an active mineral working site?	No	No	No	No
37	Is the site contaminated or derelict land?	No	No	No	Former colliery so there is a possibility of localised contamination
38	Is the site previously developed land (brownfield)?	No	No	No	Yes: former colliery
39	What could the effects of development on this site be on the sustainability of land resources locally / wider over time? Will the effects be temporary or permanent?	Site is on Grade 1 agricultural land although site is not in active use for farming. Site would be unlikely to have a detrimental effect on land resources.	Site is on Grade 1 agricultural land and actively farmed. Use of site would have an impact on land resources.	Site is on Grade 1 agricultural land and actively farmed. Use of site would have an impact on land resources.	Colliery is no longer mined and so redevelopment of the site for Traveller use would be unlikely to have any significant effects on land resources.
40	Is the site located within or adjacent to a Principal Aquifer or Source Protection Zone 1 or 2?	Unknown	Unknown	Unknown	Unknown
41	What could the effects of development on this site be on the sustainability of water quality and resources locally / wider over time? Will the effects be temporary or permanent?	Site would be unlikely to detrimentally affect water quality and resources. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources. As with any development, consideration would need to be given to managing waste water / surface water on the site.	Site would be unlikely to detrimentally affect water quality and resources. As with any development, consideration would need to be given to managing waste water / surface water on the site.
Climatic factors and flooding					
42	Is the site within Zones 2 or 3 of the floodplain?	Rear of site (about 15% of site) is within Flood Zone 2, by virtue of the adjacent watercourse.	No	No	No

Q	Site Name	17. Land south of Butchers Lane, Aughton	18. Land east of Brookfield Lane, Aughton	19. Land east of Middlewood Drive, Aughton	20. Bickerstaffe Colliery, Bickerstaffe
43	What could the effects of development on this site be on the sustainability of climatic factors and flooding locally / wider over time? Will the effects be temporary or permanent?	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.	Site would be unlikely to have detrimental impacts on climate and flooding.
Heritage and Landscape					
44	Is the site located within or within 5km of and / or likely to impact on an AONB or Heritage Coast?	No	No	No	No
45	Is the site located within or within 1km of any area designated for its local landscape importance or is it likely to have adverse impacts on the landscape?	No historic environment, landscape or nature conservation designation in vicinity of site.	No historic environment, landscape or nature conservation designation in vicinity of site.	No historic environment, landscape or nature conservation designation in vicinity of site.	Site is not subject to any historic environment, landscape or nature conservation designation.
46	Is the site in the Green Belt? If so, would development on this site cause harm to the objectives of Green Belt designation?	Yes. Development may affect the openness of the Green Belt.	Yes. Development would affect the openness of the Green Belt.	Yes. Development would affect the openness of the Green Belt.	Yes. Development of site could be encroachment into the countryside.
47	Is the site within 250m of a site or building with a nationally recognized heritage designation?	No	No	Yes	No
48	What could the effects of development on this site be on the sustainability of heritage and landscape locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Site would be unlikely to have impacts on heritage. Screening may help mitigate the visual impact of the site should development occur. Site is located in a gap between residential properties.	Site is within open countryside. Whilst it is screened to an extent by existing trees / hedging, to achieve visual and acoustic privacy for the whole site would mean visual impact on this Green Belt area. The visual impact of the site from the adjacent railway embankment would be very difficult to mitigate in the short-medium term.	Site comprises open countryside on the edge of an urban area. Its development would have a significant impact on the local landscape.	Much of site is wooded, providing natural screening; development / use of the site (or part of the site) as a Traveller site may impact upon the woodland, although this could be mitigated through appropriate fencing / planning conditions.
Social equality and community services					
49	Will development of the site harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses)?	It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).	It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).	It is not considered that development of the site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses).	It is not considered that development of site should harm any nearby sensitive community receptors, existing or proposed (e.g. schools, hospitals and public / outdoor recreation uses), although concern has been expressed about the impact of the use of the site for Travellers on a new cycle route facility in the adjacent woodland.
50	How close [how many minutes walk at 5km/h average walking speed] is this site to a public transport facility (bus stop / station on regular route)? (Please note that this walking time is taken into account in the questions below referring to X minutes public transport journey from various facilities.)	1.8km (22 minutes walk) from bus stop on Springfield Road, Aughton.	1km (12 minutes walk) from bus stop on Springfield Road, Aughton	Site within walking distance of Town Green station (280m or 3 minutes walk at best - distance depends on access point).	Site is 450m (5-6 minutes walk) from bus stops on the A570, although walking to these bus stops entails crossing Junction 3 of the M58 (roundabout / under a flyover).
51	Is the site within 30 minutes public transport journey of a Primary School?	No	Yes	Yes	Yes

Q	Site Name	17. Land south of Butchers Lane, Aughton	18. Land east of Brookfield Lane, Aughton	19. Land east of Middlewood Drive, Aughton	20. Bickerstaffe Colliery, Bickerstaffe
52	Is the site within 40 minutes public transport journey of a Secondary School?	Yes	Yes	Yes	Yes
53	Is the site within 60 minutes public transport journey of a Further Education Institution?	Yes	Yes	Yes	Yes
54	Is the site within 60 minutes public transport journey of a Hospital?	Yes	Yes	Yes	Yes
55	Is the site within 30 minutes public transport journey of a GP Practice?	Yes	Yes	Yes	Yes
56	Is the site within 30 minutes public transport journey of a Major Centre?	No	Yes	Yes	Yes
57	Is the site within 10 minutes walk (800m) of a district or local centre?	No	No	Yes	No
58	Is the site within 15 minutes walk (1200m) of a Public Open Space of at least 5ha in size?	No	No	Yes	No
59	Is the site within 10 minutes walk (800m) of a natural green space (e.g. Local Nature Reserve) of at least 2ha in size?	No	No	No	No
60	Is the site within 40 minutes public transport journey of a Leisure / Recreation / Sports Facility?	Coronation Park / Park Pool probably reachable in 18 minutes public transport ride time from Springfield Road bus stop (22 minutes walk away).	Yes	Yes - site within reasonable distance of Town Green Station, from which leisure facilities at Ormskirk (or Liverpool) can be accessed.	Yes - via bus routes on A570.
61	What could the effects of development on this site be on the sustainability of community health and equality, leisure and education locally and wider over time ; temporary / permanent effects?	Site is not in a sustainable location from which to access community services.	Site is not in a sustainable location from which to access community services.	Site is within an accessible distance from services, but has poor access to/from the site.	Site is not in a sustainable location in terms of proximity to services, but is reasonably close to bus stops. Given the site's size, its development should not have any significant effect on the sustainability of community health, etc.
Local economy and employment					
62	Is the site within 250m of any sensitive commercial receptors, existing or proposed (e.g. sensitive business uses and tourist / visitor attractions)?	No	No	No	Restaurant close to the site (other side of A570).
63	What could the effects of development on this site be on the sustainability of the local economy and employment locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)	Effects likely to be negligible. (Travellers are often self-employed, and thus unlikely either to utilise employment sites nearby, or to offer employment on their site to local residents.)
Housing					
64	Is the site within 250m of residential dwellings (including individual houses)?	Yes	Yes	Yes	Small number of properties close to the site, but site is generally away from residential areas.

Q	Site Name	17. Land south of Butchers Lane, Aughton	18. Land east of Brookfield Lane, Aughton	19. Land east of Middlewood Drive, Aughton	20. Bickerstaffe Colliery, Bickerstaffe
65	What could the effects of development on this site be on the sustainability of housing provision locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible	Effects of the development of this site on the sustainability of housing provision locally are likely to be negligible
Transportation and air quality					
66	Is the site located with in or adjacent to an existing Air Quality Management Area?	No	No	No	No
67	Are there any sensitive receptors nearby (e.g. residential, community facilities) that may be impacted by dust, fumes and emissions caused by the development and end-use of the site?	No	No	No	No. Although the site may be impacted by noise and fumes from the M58. Other residential uses already exist alongside the M58 however.
68	What could the effects of development on this site be on the sustainability of air quality locally and in the wider Borough and sub-region over time ; temporary / permanent effects?	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality	Site would be unlikely to have a significant detrimental effect on air quality, although the site itself may be impacted by noise and fumes from the M58. Other residential uses already exist alongside the M58 however.
69	How suitable is the road network to accommodate expected levels of traffic to and from the site?	Whilst Butchers Lane is unclassified, it is wide enough to accommodate typical Traveller vehicles and should have capacity to cope with traffic associated with this site, were it to be allocated.	Brookfield Lane is narrow and not ideal for typical Traveller vehicles.	Likely access would be Middlewood Road or Middlewood Drive, both narrow cul-de-sacs with significant on-street parking. Extra through traffic likely to prove problematic.	Site is accessible from A570 Rainford Bypass and close to M58, both of which could take extra vehicles, although access to the site is not ideal (dual carriageway, less than 100m from motorway junction roundabout).
70	Would the likely amount of traffic flowing from the site to the Primary Road Network cause adverse impacts on amenity of sensitive receptors on the route (residential, schools etc.)?	No; site would be small, and traffic generated by it would be unlikely to cause any significant adverse impact.	Possibly: Brookfield Lane is narrow and not suitable for typical Traveller vehicles.	Yes, given the narrow and "heavily parked" roads close to the site, one of which would need to be used for access.	No; site has direct access to primary road network.
71	Is the site within 800m of an existing or proposed Cycle Route?	Yes	Yes	Yes	Cycle lanes exist on A570; cycle facility being developed in Jubilee Wood.
72	Is the site within 800m of a bus stop for a high frequency bus service?	No. Site lies on a school bus route, but is over 1km from any "public" bus stop.	A "custom bus stop" exists adjacent to the site, but the nearest "mainstream" service to Ormskirk is over 1km from the site. Few local accessible services.	Site is close to Town Green Station (distance depends on access point) plus bus routes on Town Green Lane.	Site is 450m from bus stops on the A570, although walking to these bus stops entails crossing Junction 3 of the M58 (roundabout / under a flyover).
73	Is the site within 1200m of a Rail Station?	No	No	Yes	No
74	Does the site have public footpaths, rights of way or any other type of footpath on it or near to it?	No	Yes on the site	Yes on the site	Yes
75	What could the effects of development on this site be on the sustainability of transportation locally / wider over time ; temporary / permanent effects?	Relatively unsustainable location, although access by road is reasonable.	Relatively unsustainable location.	Reasonably sustainable location, but access by motor vehicle likely to have adverse impact on nearby streets.	Site is accessible from A570 Rainford Bypass and close to M58, although access is not ideal. Within reasonable walking distance of public transport facilities, but involves crossing a motorway junction underpass.
Cumulative Impacts					

Q	Site Name	17. Land south of Butchers Lane, Aughton	18. Land east of Brookfield Lane, Aughton	19. Land east of Middlewood Drive, Aughton	20. Bickerstaffe Colliery, Bickerstaffe
76	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, have an adverse impact on the perceived environmental quality or character of the area?	As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	Yes. Would affect the openness of the Green Belt. Site is within open countryside. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	Development would affect the openness of the Green Belt. As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.	As with any Traveller site, its allocation or development will be likely to have an impact on the perceived environmental quality or character of the area.
77	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote social cohesion or inclusion in nearby communities?	Site's proximity to residential properties is likely to lead to difficulties in ensuring peaceful co-existence between the settled and travelling community.	Site is physically separate from the nearest settled communities. Site's location near a number of residential properties may lead to difficulties in ensuring peaceful co-existence between the settled and travelling community.	Site's proximity to residential properties is likely to lead to difficulties in ensuring peaceful co-existence between the settled and travelling community.	Site is generally separate from settled community and is well screened by trees.
78	Will locating a new development on this site, including in conjunction with other existing and proposed development in the vicinity, be likely to inhibit or to promote the economic potential of the area?	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.	The overall impact of this site being allocated as a Traveller site is unlikely to have any significant impact on the economic potential of the area.



Provision for
Traveller Sites
Development
Plan Document –
Options and
Preferred Options

Habitats Regulations
Assessment

February 2014

UNITED
KINGDOM &
IRELAND



Revision Schedule

HRA Report
January 2014

Rev	Date	Details	Prepared by	Reviewed by	Approved by
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The conclusions and recommendations contained in this Report are based upon information provided by others and upon the assumption that all relevant information has been provided by those parties from whom it has been requested and that such information is accurate. Information obtained by URS has not been independently verified by URS, unless otherwise stated in the Report.

The methodology adopted and the sources of information used by URS in providing its services are outlined in this Report. The work described in this Report was undertaken during January 2014 and is based on the conditions encountered and the information available during the said period of time. The scope of this Report and the services are accordingly factually limited by these circumstances.

Where assessments of works or costs identified in this Report are made, such assessments are based upon the information available at the time and where appropriate are subject to further investigations or information which may become available.

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Unless otherwise stated in this Report, the assessments made assume that the sites and facilities will continue to be used for their current purpose without significant changes.

Where field investigations are carried out, these have been restricted to a level of detail required to meet the stated objectives of the services. The results of any measurements taken may vary spatially or with time and further confirmatory measurements should be made after any significant delay in issuing this Report.

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1 Introduction

- 1.1 URS has been appointed by West Lancashire Borough Council (“the Council”) to assist in undertaking a Habitats Regulations Assessment (HRA) of the potential effects of the Provision for Traveller Sites Development Plan Document – Options and Preferred Options on the Natura 2000 network and Ramsar sites.
- 1.2 The Habitats Directive applies the precautionary principle to Natura 2000 sites (Special Areas of Conservation, SACs, and Special Protection Areas, SPAs; as a matter of UK Government policy, Ramsar sites¹ are given equivalent status). For the purposes of this Habitats Regulations Assessment (HRA) candidate SACs, proposed SPAs and proposed Ramsar sites are all treated as fully designated sites. The need for HRA (also often referred to as Appropriate Assessment or AA) is set out within Article 6 of the EC Habitats Directive 1992, and interpreted into British law by the Conservation of Habitats and Species Regulations 2010 (**Box 1**). The ultimate aim of the Directive is to “*maintain or restore, at favourable conservation status, natural habitats and species of wild fauna and flora of Community interest*” (Habitats Directive, Article 2(2)). This aim relates to habitats and species, not the European sites themselves, although the sites have a significant role in delivering favourable conservation status.

Box 1. The legislative basis for Appropriate Assessment

Habitats Directive 1992

“Any plan or project not directly connected with or necessary to the management of the site but likely to have a significant effect thereon, either individually or in combination with other plans or projects, shall be subject to appropriate assessment of its implications for the site in view of the site’s conservation objectives.”

Article 6 (3)

Conservation of Habitats and Species Regulations 2010

“A competent authority, before deciding to ... give any consent for a plan or project which is likely to have a significant effect on a European site ... shall make an appropriate assessment of the implications for the site in view of that sites conservation objectives ... The authority shall agree to the plan or project only after having ascertained that it will not adversely affect the integrity of the European site”.

- 1.3 Chapter 2 of this report explains the process by which the HRA has been carried out. Chapter 3 explores the relevant pathways of impact resulting from the selection of traveller sites. Chapter 4 provides the results of the screening of the five preferred sites contained within the DPD. The conclusion of the HRA is then summarised in Chapter 5.

¹ Wetlands of International Importance designated under the Ramsar Convention 1979

2 Methodology

Introduction

- 2.1 This section sets out our approach and methodology for undertaking the HRA.

A Proportionate Assessment

- 2.2 Project-related HRA often requires bespoke survey work and novel data generation in order to accurately determine the significance of effects. In other words, to look beyond the risk of an effect to a justified prediction of the actual likely effect and to the development of avoidance or mitigation measures.
- 2.3 However, the draft CLG guidance² makes it clear that when implementing HRA of land-use plans, the AA should be undertaken at a level of detail that is appropriate and proportional to the level of detail provided within the plan itself: *“The comprehensiveness of the [Appropriate] assessment work undertaken should be proportionate to the geographical scope of the option and the nature and extent of any effects identified. An AA need not be done in any more detail, or using more resources, than is useful for its purpose. It would be inappropriate and impracticable to assess the effects [of a strategic land use plan] in the degree of detail that would normally be required for the Environmental Impact Assessment (EIA) of a project.”*
- 2.4 In other words, there is a tacit acceptance that appropriate assessment can be tiered and that all impacts are not necessarily appropriate for consideration to the same degree of detail at all tiers.

The Process of HRA

- 2.5 The HRA is likely to be carried out in the continuing absence of formal central Government guidance. CLG released a consultation paper on AA of Plans in 2006³. As yet, no further formal guidance has emerged from CLG. However, Natural England has produced its own informal internal guidance and Countryside Council for Wales has produced guidance for Welsh authorities which has been produced to supplement Technical Advice Note 5: Nature Conservation and Planning (2009). Although there is no requirement for an HRA to follow either guidance, both have been referred to in producing this final version of the HRA.
- 2.6 **Figure 1** below outlines the stages of HRA according to current draft CLG guidance (which, since it is Central Government and West Lancashire Borough is an English authority has been considered to take precedence over other sources of guidance). The stages are essentially iterative, being revisited as necessary in response to more detailed information, recommendations and any relevant changes to the plan until no likely significant effects remain.

² CLG (2006) Planning for the Protection of European Sites, Consultation Paper

³ Ibid

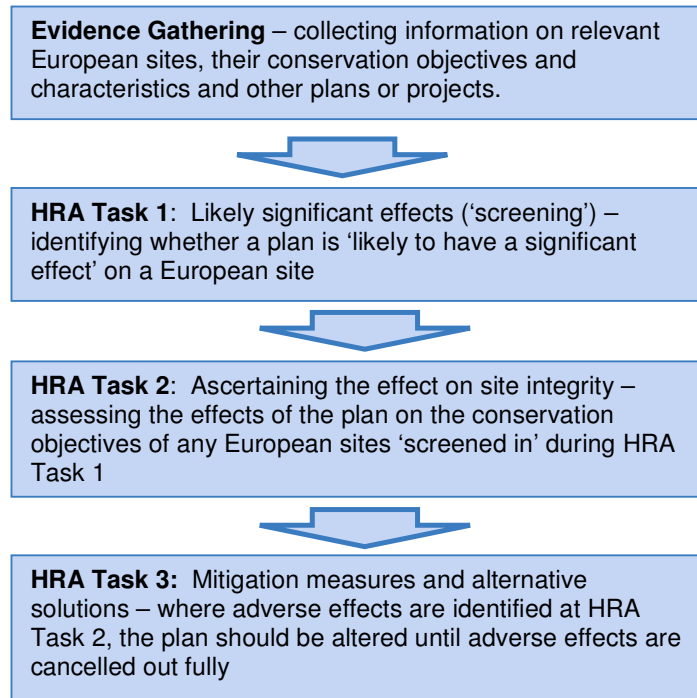


Figure 1: Four-Stage Approach to Habitats Regulations Assessment

2.7 In practice, we and other practitioners have discovered that this broad outline requires some amendment in order to feed into a developing land use plan such as a DPD. The following process has been adopted for carrying out the subsequent stages of the HRA.

Task One: Likely Significant Effect Test (Screening)

2.8 The first stage of any Habitats Regulations Assessment is a Likely Significant Effect (LSE) test - essentially a high level risk assessment to decide whether the full subsequent stage known as Appropriate Assessment is required. The essential question is: *“Is the Plan, either alone or in combination with other relevant projects and plans, likely to result in a significant effect upon European sites?”*

2.9 In evaluating significance, URS has relied on our professional judgement as well as stakeholder consultation. The level of detail concerning developments that will be permitted under land use plans is rarely sufficient to make a detailed quantification of effects. Therefore, we have again taken a precautionary approach (in the absence of more precise data) assuming as the default position that if an adverse effect cannot be confidently ruled out, avoidance or mitigation measures must be provided. This is in line with CLG guidance that the level of detail of the assessment, whilst meeting the relevant requirements of the Habitats Regulations, should be ‘appropriate’ to the level of plan or project that it addresses.

2.10 Task One: determination of likely significant effects is the purpose of this document.

Physical scope of the HRA

2.11 The physical scope of the HRA is dictated to a large extent by the potential pathways for impact that exist. In determining the potential pathways of impact associated with the five traveller sites, it is important to understand that a traveller sites DPD is not aimed at increasing the population of the area, but is rather concerned with ensuring that there are sufficient legal pitches available for traveller needs. As such, there is no basis to assume that the provision of the five preferred sites identified in this DPD would lead to an increase in the population of West Lancashire.

2.12 If an increase in the population can be discounted then the principal pathways of impact are associated with whether any of the actual preferred sites would be likely to lead to any disturbance effects on sensitive European sites through proximity, or loss of important supporting habitat outside the boundaries of the European sites. This pathway is discussed further in Chapter 3.

2.13 Based on the potential pathways identified above, the physical scope of the HRA is as shown in Table 1.

Table 1: Physical scope of the HRA

European site	Reason for inclusion
Martin Mere	Located 1.7km from the preferred traveller sites at its closest point.
Ribble and Alt Estuaries SPA/Ramsar site and Sefton Coast SAC	Located 2km from the preferred traveller sites at its closest point.

2.14 Further details regarding the interest features and vulnerabilities of the European sites included within the scope of the HRA are given below. All baseline data relating to these European Sites presented in subsequent Chapters of this report is taken from Joint Nature Conservancy Council websites (JNCC) unless otherwise stated.

The ‘in combination’ scope

2.15 It is a requirement of the Regulations that the impacts and effects of any land use plan being assessed are not considered in isolation but in combination with other plans and projects that may also be affecting the European site(s) in question. In practice, ‘in combination assessment’ is of greatest importance when the DPD would otherwise be screened out because the individual contribution is inconsequential. It is neither practical nor necessary to assess the ‘in combination’ effects of the DPD within the context of all other plans and projects within the locality. The principal other plans and projects that we are considering are:

- Housing figures identified for West Lancashire as a whole, and housing figures for neighbouring authorities, along with policies relating to employment provision and any significant infrastructure.
- HRA of the West Lancashire Local Plan, and any HRAs for Local Plans of surrounding authorities.
- RSPB and Lancashire Wildlife Trust (July 2008) Wind Turbines, Sensitive Bird Populations and Peat Soils: A Spatial Planning Guide for on-shore wind farm developments in Lancashire, Cheshire, Greater Manchester and Merseyside;
- United Utilities Final Draft Water Resource Management Plan 2015-2040;
- West Lancashire Borough Council Open Space Study (2012);
- Lancashire County Council Local Transport Plan 3 (2011-2021); and
- Environment Agency North West River Basin Management Plan.

2.16 It should be noted that, while the broad potential impacts of these other projects and plans will be considered, we do not propose carrying out full HRA on each of these plans.

3 Pathways of Impact

Introduction

- 3.1 In carrying out an HRA it is important to avoid confining oneself to effectively arbitrary boundaries (such as Local Authority boundaries) but to use an understanding of the various ways in which land use plans can impact on European sites to follow the pathways along which development can be connected with European sites, in some cases many kilometres distant. Briefly defined, pathways are routes by which a change in activity associated with a development can lead to an effect upon a European site. It is also important to bear in mind CLG guidance which states that the AA should be '*proportionate to the geographical scope of the [plan policy]*' and that '*an AA need not be done in any more detail, or using more resources, than is useful for its purpose*' (CLG, 2006, p.6⁴).
- 3.2 The following indirect pathways of impact were considered relevant to the Habitats Regulations Assessment of the Travellers DPD.

Disturbance

- 3.3 The proximity of new development sites to European sites designated for sensitive species (such as over-wintering birds) can result in noise and visual disturbance.
- 3.4 Human activity can affect birds either directly (e.g. through causing them to flee) or indirectly (e.g. through damaging their habitat or rendering it less usable through, for example, light pollution). The most obvious direct effect is that of immediate mortality such as death by shooting, but human activity can also lead to behavioural changes (e.g. alterations in feeding behaviour, avoidance of certain areas *etc.*) and physiological changes (e.g. an increase in heart rate) that, although less noticeable, may ultimately result in major population-level effects by altering the balance between immigration/birth and emigration/death⁵.
- 3.5 The degree of impact that varying levels of noise will have on different species of bird is poorly understood except that a number of studies have found that an increase in traffic levels on roads does lead to a reduction in the bird abundance within adjacent hedgerows - Reijnen et al (1995) examined the distribution of 43 passerine species (i.e. 'songbirds'), of which 60% had a lower density closer to the roadside than further away. By controlling vehicle usage they also found that the density generally was lower along busier roads than quieter roads⁶.
- 3.6 Disturbing activities are on a continuum. The most disturbing activities are likely to be those that involve irregular, infrequent, unpredictable loud noise events, movement or vibration of long

⁴ Department for Communities and Local Government. 2006. *Planning for the Protection of European Sites: Appropriate Assessment*. <http://www.communities.gov.uk/index.asp?id=1502244>

⁵ Riley, J. 2003. Review of Recreational Disturbance Research on Selected Wildlife in Scotland. Scottish Natural Heritage.

⁶ Reijnen, R. et al. 1995. The effects of car traffic on breeding bird populations in woodland. III. Reduction of density in relation to the proximity of main roads. *Journal of Applied Ecology* 32: 187-202

duration. Birds are least likely to be disturbed by activities that involve regular, frequent, predictable, quiet patterns of sound or movement or minimal vibration. The further any activity is from the birds, the less likely it is to result in disturbance.

Loss of Offsite Habitat of Value to Qualifying Species

- 3.7 While most European sites have been geographically defined in order to encompass the key features that are necessary for coherence of their structure and function, this is not the case for all such sites. Due to the highly mobile nature of waterfowl it is inevitable that areas of habitat of crucial importance to the maintenance of their populations are outside the physical limits of the European site for which they are an interest feature. However, this area will still be essential for maintenance of the structure and function of the interest feature for which the site was designated and land use plans that may affect this land should still therefore be subject to HRA.
- 3.8 In examining the potential constraints for offshore wind development in the region in 2008 the RSPB and Lancashire Wildlife Trust published a mapping exercise that identified sensitive areas for pink-footed geese and whooper swans. These include a zone of sensitivity for pink-footed geese and mapping for whooper swan generated as 1km squares of sensitivity rather than more precise habitat zones as prepared for the geese. It is understood that work is currently underway to update this exercise on a more national basis and if the data become available during the timetable of this project the HRA will be updated to take it into account. However, for the time being, these data (presented in Appendix 1 of this report) have been used to determine proximity of preferred sites to sensitive areas for SPA birds.

4 Background to European sites

Martin Mere

- 4.1 Martin Mere SPA and Ramsar (119.89 ha) is located north of Ormskirk in West Lancashire, North West England. The outstanding importance of Martin Mere is its large and diverse wintering, passage and breeding bird community.
- 4.2 It occupies part of a former lake and mire that extended over some 1,300 ha of the Lancashire Coastal Plain during the 17th century. In 1972 the Wildfowl and Wetlands Trust purchased 147 hectares of the former Holcrofts Farm, consisting mainly of rough damp pasture, with the primary aim of providing grazing and roosting opportunities for wildfowl. Since acquisition, the rough grazed pastures have been transformed by means of positive management into a wildfowl refuge of international importance. Areas of open water with associated muddy margins have been created, whilst maintaining seasonally flooded marsh and reed swamp habitats via water level control. In September 2002, an additional 63 hectares of land were purchased on the southernmost part of the refuge at Woodend Farm, with the aid of the Heritage Lottery Fund, to restore arable land to a variety of wetland habitats including seasonally flooded grassland, reedbed, wet woodland and open water habitats.
- 4.3 The complex now comprises open water, seasonally flooded marsh and damp, neutral hay meadows overlying deep peat. It includes a wildfowl refuge of international importance, with a large and diverse wintering, passage and breeding bird community. In particular, there are significant wintering populations of Bewick's swan (*Cygnus columbianus bewickii*), whooper swan (*Cygnus cygnus*), pink-footed geese (*Anser brachyrhynchus*) and pintail (*Anas acuta*). There is considerable movement of wintering birds between this site and the nearby Ribble and Alt Estuaries SPA/Ramsar.

Reasons for Designation

- 4.4 This site qualifies for SPA under Article 4.1 of the Directive (79/409/EEC) by supporting populations of European importance of the following over wintering birds listed on Annex I of the Directive:
- Bewick's swan, 449 individuals representing at least 6.4% of the wintering population in Great Britain (5 year peak mean 1991/2 - 1995/6)
 - Whooper swan 621 individuals representing at least 11.3% of the wintering population in Great Britain (5 year peak mean 1991/2 - 1995/6)
- 4.5 This site also qualifies under Article 4.2 of the Directive (79/409/EEC) by supporting populations of European importance of the following over wintering migratory species:
- Pink-footed geese, 25,779 individuals representing at least 11.5% of the wintering Eastern Greenland/Iceland/UK population (5 year peak mean 1991/2 - 1995/6)

- Pintail 978 individuals representing at least 1.6% of the wintering North Western Europe population (5 year peak mean 1991/2 - 1995/6)
- 4.6 The assemblage of birds present makes the site a wetland of international importance. The area qualifies under Article 4.2 of the Directive (79/409/EEC) by regularly supporting at least 20,000 waterfowl. Over winter, the area regularly supports 46,196 individual waterfowl (5 year peak mean 1991/2 - 1995/6) including: pochard (*Aythya farina*), mallard (*Anas platyrhynchos*), teal (*Anas crecca*), wigeon (*Anas penelope*), pintail, pink-footed geese, whooper swan, and Bewick's swan.
- 4.7 It is additionally designated as a Ramsar European site in accordance with Criterion 5 (UN, 2005) for supporting up to 25,306 waterfowl (5-year peak mean 1998/99 – 2002/03) in winter, and in accordance with Criterion 6 for supporting internationally important populations of pink-footed geese, Bewick's swan, whooper swan, Eurasian wigeon and northern pintail.

Historic Trends and Current Pressures

- 4.8 Since the site's designation as a Wetland of International Importance under the Ramsar Convention and as a Special Protection Area in 1985, there has been a gradual increase in the usage of the mere by wildfowl and wading birds as a direct consequence of positive management. The site is geared towards attracting visitors, with a number of hides from which the Mere and its birds may be viewed. In addition to the wild species for which it is designated, the site holds a collection of about 1,500 captive birds of 125 species from around the world, as well as a number of other visitor attractions. This is because the site is a Wildfowl and Wetlands Trust reserve.
- 4.9 The environmental pressures experienced by Martin Mere in terms of its bird community are likely to be those common to all reedbed and wetland habitats as set out in Lancashire BAP:
- Direct loss of characteristic species as a result of nutrient enrichment from agricultural fertilisers and run-off;
 - Loss of reedbed due to weakening of stems through poor growth conditions;
 - Natural succession to woodland;
 - Changes in farming practice; grazing management is largely dependent upon cattle from surrounding farms;
 - Reduced water level caused by surface and ground water abstractions or agricultural drainage, which causes the habitat to dry out and begin succession towards 'alder/willow carr woodland, hastening the overall process of succession towards broadleaved woodland';
 - Removal of reeds and other vegetation from whole stretches of watercourses (e.g. neighbouring the site) through routine management of ditches and riverbanks (in some instances);

- Erosion of reedbeds due to increased recreational use of waterbodies and waterways (notably canals) including the site and immediate environs;
- Habitat loss or degradation due to the isolation of reedbeds as a result of losses elsewhere, in turn due to the above or other factors.

4.10 In addition, the following site-specific pressures have been documented:

- Invasive plant species: Regular herbicide control of trifid burr marigold is necessary in order to prevent this plant from invading lake/ scrape margins to the detriment of bird populations;
- Water quality problems: water levels on the Mere are controlled to maintain optimum levels throughout the winter period, then lowered progressively in summer to expose marginal mud and the underlying damp pastures and maintain a mosaic of shallow pools. Ditches are regularly cut and dredged and all areas of pasture are positively managed under a Countryside Stewardship Scheme. Nutrients brought in with the water supply from the surrounding arable farmland and inadequate sewage treatment adds considerably to the large deposits of guano from wintering waterfowl. This results in the site being highly eutrophic with extremely poor water quality conditions. The Wildfowl and Wetlands Trust have started to address this issue with the creation of reedbed water filtration systems and a series of settlement lagoons helps to reduce suspended solids of effluent water arising from waterfowl areas;

4.11 Due to the eutrophication described above, the site is also at risk of waterborne disease that could affect wildfowl, although no such outbreaks have been recorded.

Ribble & Alt Estuaries/Sefton Coast

4.12 The Ribble and Alt Estuary SPA and Ramsar Site is approximately 12,360ha, and consists of extensive sand- and mud-flats and, particularly in the Ribble Estuary, large areas of saltmarsh. There are also areas of coastal grazing marsh located behind the sea embankments. The saltmarshes, coastal grazing marshes and intertidal sand- and mud-flats all support high densities of grazing wildfowl and are used as high-tide roosts. Important populations of waterbirds occur in winter, including swans, geese, ducks and waders. The highest densities of feeding birds are on the muddier substrates of the Ribble.

4.13 The SPA is also of major importance during the spring and autumn migration periods, especially for wader populations moving along the west coast of Britain. The larger expanses of saltmarsh and areas of coastal grazing marsh support breeding birds during the summer, including large concentrations of gulls and terns. These seabirds feed both offshore and inland, outside of the SPA. Several species of waterbird (notably pink-footed geese) utilise feeding areas on agricultural land outside of the SPA boundary. There is considerable interchange in the movements of wintering birds between this European site and Morecambe Bay, the Mersey Estuary, the Dee Estuary and Martin Mere.

4.14 Located to the north of Liverpool, the Sefton Coast SAC (approximately 4,560ha) consists of a mosaic of sand dune communities comprising a range of ages from embryonic (i.e. dune

formation) to more established communities. A number of other habitats are also present, including scrub, heath, coniferous woodland, lagoons, estuaries and riverine environments.

Reasons for Designation

- 4.15 The Ribble and Alt Estuaries Site is designated as an SPA for its Birds Directive Annex I species, both breeding and over-wintering, and these are:

During the breeding season:

- common tern *Sterna hirundo*: 182 pairs = 1.5% of the breeding population in Great Britain;
- ruff *Philomachus pugnax*: 1 pair = 9.1% of the breeding population in Great Britain;

Over winter:

- bar-tailed godwit *Limosa lapponica*: 18,958 individuals = 35.8% of the population in Great Britain;
- Bewick's swan *Cygnus columbianus ssp. bewickii*: 229 individuals = 3.3% of the population in Great Britain;
- golden plover *Pluvialis apricaria*: 4,277 individuals = 1.7% of the population in Great Britain
- whooper swan: 159 individuals = 2.9% of the population in Great Britain.

- 4.16 It also meets the criteria for SPA designation under Article 2 of the Birds Directive, supporting internationally important populations of lesser black-backed gull *Larus fuscus*, ringed plover *Charadrius hiaticula*, sanderling *Calidris alba*, black-tailed godwit *Limosa limosa ssp. limosa*, dunlin *Calidris alpina alpina*, grey plover *Pluvialis squatarola*, knot *Calidris canutus*, oystercatcher *Haematopus ostralegus*, pink-footed geese, pintail, redshank *Tringa totanus*, sanderling *Calidris alba*, shelduck *Tadorna tadorna*, teal *Anas crecca* and wigeon. It also qualifies by regularly supporting up to 29,236 individual seabirds, and, over winter, 301,449 individual waterfowl.

- 4.17 It is additionally designated as a Ramsar Site in accordance with Criterion 5 (UN, 2005) for supporting up 89,576 waterfowl (5-year peak mean 1998/99 – 2002/03), and in accordance with Criterion 6 for supporting internationally important populations of common shelduck *Tadorna tadorna*, black-tailed godwit *Limosa limosa ssp. limosa*, redshank *Tringa totanus*, Eurasian teal *Anas crecca*, northern pintail and dunlin *Calidris alpina alpina*.

- 4.18 The Ribble and Alt Estuaries also qualifies as a Ramsar as it meets criterion 2 by supporting over 40% of the UK population of natterjack toad. The natterjack Toad occurs on the Sefton Coast in seaward dunes between Southport and Hightown. In 2000 it was present on 13 sites (three of which are reintroductions). The breeding population is estimated at just over 1000 females.

- 4.19 The largest populations are on Ainsdale Sand Dunes NNR and Ainsdale and Birkdale Sandhills LNR. Natterjacks are absent from much of the dune coast and some breeding sites are considered to be isolated (North Merseyside Biodiversity Action Plan, undated).
- 4.20 The Sefton Coast qualifies as a SAC for both habitats and species. Firstly, the European site contains the Habitats Directive Annex I habitats of:
- Embryonic shifting sand dunes: considered rare, as its total extent in the United Kingdom is estimated to be less than 1,000 hectares – the Sefton Coast SAC is considered to be one of the best areas in the United Kingdom;
 - Shifting dunes along the shoreline with marram *Ammophila arenaria* (“white dunes”): the Sefton Coast SAC is considered to be one of the best areas in the United Kingdom;
 - Fixed dunes with herbaceous vegetation (“grey dunes”): the Sefton Coast SAC is considered to be one of the best areas in the United Kingdom;
 - Dunes with creeping willow *Salix repens ssp. argentea (Salicion arenariae)*: considered rare, as its total extent in the United Kingdom is estimated to be less than 1,000 hectares – the Sefton Coast SAC is considered to support a significant presence of the species;
 - Humid dune slacks: the Sefton Coast SAC is considered to be one of the best areas in the United Kingdom;
 - Atlantic decalcified fixed dunes (*Calluno-Ulicetea*): considered rare, as its total extent in the United Kingdom is estimated to be less than 1,000 hectares – the Sefton Coast SAC is considered to support a significant presence.
- 4.21 Secondly, the European site contains the Habitats Directive Annex II species petalwort *Petalophyllum ralfsii*, for which it is one of the best areas in the United Kingdom, and great crested newt *Triturus cristatus*, for which the area is considered to support a significant presence.

Historic Trends and Current Pressures

- 4.22 As an estuarine site linked with the Liverpool Bay, this site has been subject to the same changes as described for the Liverpool Bay SPA but additionally its own unique pressures (some similar to those experienced in the Mersey Estuary). The estuaries were largely undisturbed until the 19th century, at which point there was extensive modification and dredging of the river channel for the Port of Preston, as well as landfill and drainage along the shoreline in order to increase agricultural usage of the land. The Ribble Estuary has over the past century experienced ‘a general pattern of sediment accretion in the inner estuary and erosion in outer areas,’ but the estuary has begun ‘to revert to its natural state... since maintenance of the Ribble Channel for shipping ceased in 1980. There have been dramatic changes in the course of channels in the outer Estuary, and these are expected to continue. Anticipated climatic and sea level changes are likely to exaggerate existing patterns of erosion and accretion, although sea level rise is not expected to cause significant loss of intertidal land in the Ribble’ (Ribble Estuary Strategy Steering Group, 1997, p.15).

- 4.23 The Ribble and Alt Estuaries are among ‘*the most popular holiday destinations in Britain,*’ with Blackpool as the largest resort and Southport increasing in visitors. Leisure activities include ‘*watersports such as sailing and windsurfing; fishing and shooting; bird watching; land yachting; and generally relaxing at the coast... enjoyed by both local people and visitors*’ (Ribble Estuary Strategy Steering Group, 1997, p.10).
- 4.24 Some of the main environmental pressures relevant to the nature conservation objectives of the Ribble and Alt Estuaries SPA / Ramsar Site are:
- Loss or damage of habitat as a result of increasing off-shore exploration and production activity associated with oil and natural gas;
 - Over-grazing of the saltmarshes by cattle-farming;
 - Heavy metal pollution (lead, cadmium, arsenic and other poisons) from either industry or disturbance of sediment (legacy pollution bound into the sediment);
 - Pollution via rivers by agricultural effluent flowing off fields, ‘leading to increased fertility of inshore waters and associated algal blooms and de-oxygenation of seawater, particularly in enclosed bays and estuaries’;
 - Pollution via rivers and drains by both treated sewerage and untreated runoff containing inorganic chemicals and organic compounds from everyday domestic products, which ‘may combine together in ways that make it difficult to predict their ultimate effect of the marine environment. Some may remain indefinitely in the seawater, the seabed, or the flesh, fat and oil of sea creatures’;
 - Damage of marine benthic habitat directly from fishing methods;
 - Damage of marine benthic habitat directly or indirectly from aggregate extraction;
 - ‘Coastal squeeze’ (a type of coastal habitat loss) from land reclamation and coastal flood defences and drainage used in order to farm or develop coastal land, and from sea level rise;
 - Harm to wildlife (especially birds) or habitat loss due to increasing proposals/demand for offshore wind turbines;
 - Pollution, direct kills, litter, disturbance or loss of habitat as a result of water-based recreation or other recreation activity and related development along the foreshore⁷;
 - Disturbance to birds from aircraft, both from Blackpool Airport and from a private testing station;
 - Introduction of non-native species and translocation;
 - Selective removal of species (e.g. bait digging, wildfowl, fishing)⁸;
 - Interruption of dune accretion processes leading to over-stabilisation of dunes;

⁷ Wildlife Trust (2006) – The Wildlife Trust For Lancashire, Manchester And North Merseyside (2006). *Uses and abuses*. [Online]. Available at: <http://www.lancswt.org.uk/Learning%20&%20Discovery/theirishsea/usesandabuses.htm> (accessed 15th June 2009).

⁸ (Wildlife Trust, 2006 and Ribble Estuary Strategy Steering Group, 1997);

- The spread of rank grasses and scrub, partly caused by a decline in rabbit-grazing, further reducing suitable habitat;
- Losses to development, forestry and recreational uses have reduced the area of available habitat;
- Fragmentation of habitat has led to isolation of populations;
- Creation of permanent water bodies in the dunes has encouraged populations of invertebrates which prey on natterjack tadpoles and, most seriously, populations of common toads which both predate and suppress the development of natterjack tadpoles;
- Gassing of rabbits, especially on golf courses, can kill natterjacks using burrows and removes a valuable grazing animal;
- Collecting and disturbance of spawn and tadpoles can reduce metamorphic success;
- Inappropriate management can cause the loss of low vegetation structure and open ground used by natterjacks for foraging;
- Water abstraction, conifers and scrub lower the water table locally and reduces the number of pools in which natterjack tadpoles can develop to maturity.

There is both formal and informal recreation along the Sefton Coast and intensity varies with season, event and attraction. Recreation is informal within the Ribble Estuary itself.

4.25 The dune habitats of the Sefton Coast SAC are dependent on natural erosive processes. Various human activities which interrupt natural sedimentation and deposition patterns within the Liverpool Bay have had an effect on the extent and wildlife value of these dunes. Since as early as the 18th century, *'dredging, river training and coastline hardening have imposed a pattern of accretion and erosion on the shoreline where previous conditions were much more variable'* (Liverpool Hope University College, 2006). More recently, the dunes have been partially stabilised through vegetation maintenance, the planting of pine trees, and artificial sea defences for protecting the developed shorelines. Another compounding influence is that the inland lakes and mosses behind the belt of coastal dunes have been drained and claimed for agricultural production (Liverpool Hope University College, 2006).

4.26 The environmental requirements of the Sefton Coast SAC can be described as:

- The need to reduce the fragmentation of habitats, and the impact of fragmentation, to provide stepping stones for the movement of species;
- The need to counter negative changes to low-nutrient habitats resulting from atmospheric nutrient deposition;
- The need to manage the continuing coastal erosion at Formby Point which leads to a squeeze on habitats. This management would not involve formal defences, as these would in themselves harm the dune ecosystem, but the management of pine plantations preventing dune roll-back. The dunes require sufficient space that natural processes can maintain the important habitats through roll-back;

- The need to consider the potential impact of climate change on shorelines, wetlands and dunes;
- The need to manage abstraction from the underlying aquifer for sources such as golf courses. The aquifer is critical to some features of the European site, such as the humid dune slacks and the great crested newts;
- To manage recreational pressures and direct disturbance to qualifying habitats;
- The need to develop and maintain management practices which sustain the conservation value of the area;
- The need to avoid loss of great crested newt habitat, and such habitats being further fragmented by distance or barriers.

5 Screening of Travellers Sites Preferred Options

Introduction

5.1 The Travellers Sites DPD essentially presents five preferred sites. Of these, one site: Site 6 (Land west of The Quays, Burscough), is already permitted. As such, it is excluded from this HRA. The remaining four sites are:

- Site 3: Sugar Stubbs Lane, Banks 3 pitches
- Site 8: Pool Hey Caravan Park, Scarisbrick 6 pitches
- Site 14: White Moss Road South (B), Skelmersdale 15 pitches
- Site 5: Land at Ringtail Road / Site 7: Land west of Tollgate Road, Burscough⁹

5.2 This screening assessment therefore examines the proximity of these sites to the Martin Mere SPA and Ribble & Alt Estuaries SPA and determines whether these sites would constitute important supporting habitat for SPA birds.

⁹ One of these sites would be chosen as a Preferred Site. Council officers consider Site 7 preferable in planning policy terms, but the intentions of the owners of Site 7 are currently unknown, therefore consultation is proposed on both Site 5 and Site 7. Either site would be a site for Travelling Showpeople, with space for equipment and at least one residential pitch.

Table 4. Likely Significant Effect of Preferred Sites

Site	Proximity to European sites	Sensitive habitat for SPA birds?	Likely Effect?	Significant
Site 3: Sugar Stubbs Lane, Banks	2km from Ribble & Alt Estuaries 6.5km from Martin Mere	Site is within a whooper swan 1km square but habitat is bare ground/scrub and is unsuitable.	No	
Site 8: Pool Hey Caravan Park, Scarisbrick	6km from Ribble & Alt Estuaries 4km from Martin Mere	Site lies within a whooper swan 1km square and a pink-footed goose area but constitutes bare ground and caravans and is unsuitable.	No	
Site 14: White Moss Road South (B), Skelmersdale	12km from Ribble & Alt Estuaries 6km from Martin Mere	Site is potentially suitable short grassland habitat but it is adjacent to a motorway and not in a sensitive area	No	
Site 5: Landwest of Ringtail Road, Burscough	10.km from the Sefton Coast SAC and 11km from Ribble & Alt Estuaries 2.2km from Martin Mere	Site consists of relatively short sparse grassland so potentially would be suitable habitat but it does not lie within a sensitive area and comprises only a narrow strip of suitable habitat.	No	
Site 7: Land west of Tollgate Road, Burscough	10.8 km from the Sefton Coast SAC and 11.8km from Ribble & Alt Estuaries	Site consists of relatively short sparse grassland so potentially would be suitable habitat but it does not lie within a sensitive area	No	

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Site	Proximity to European sites	Sensitive habitat for SPA birds?	Likely Effect?	Significant
	2.6km from Martin Mere			

6 Role of Other Plans and Projects

6.1 The other plans and projects that have the potential to create likely significant adverse effects on Martin Mere SPA and Ramsar are as follows.

6.2 In considering disturbance of bird species for which the SPA/Ramsar are designated, the HRA of the West Lancashire Local Plan concluded that policy wording was sufficient to be able to confirm that this was unlikely. Despite a presumption in favour of sustainable development, policy SP1 (A Sustainable Development Framework for West Lancashire) indicates that future development in West Lancashire will have to demonstrate compliance with other policies in the Local Plan. These provide robust protection for development affecting European sites. The Local Plan states that:

'Where there is reason to suspect that there may be protected species on or close to a proposed development site, planning applications should be accompanied by a survey assessing the presence of such species and, where appropriate, making provision for their needs. In particular, the HRA of the Local Plan identifies a series of sites (in Appendix 8 of that document) where the potential of the site to supporting important habitat for birds associated with Martin Mere SPA cannot be ruled out at this stage. For those sites (and any others which may support suitable habitat) the applicant should submit an Ornithology Report containing sufficient information to demonstrate that consideration has been given to the potential for effects on SPA birds and, if necessary, that suitable mitigation measures will be implemented to address this to the satisfaction of the Council and ensure no adverse effect on site integrity. The report could, depending on the site, be a confirmation that no suitable habitat is in fact present and therefore no loss of supporting habitat would result.'

Therefore, all other potential developments within West Lancashire that might occur on land supporting designated bird species will be subject to the same caveats as Yew Tree Farm.

6.3 The Council is currently preparing a SPD for Yew Tree Farm, and the Local Plan HRA indicates that this should also be subject to commitment to provide an ornithological survey report as part of any planning applications. Without such a commitment, there would remain potential for birds to be disturbed in combination with any disturbance resulting from development at Yew Tree Farm.

6.4 However, once the Yew Tree Farm SPD makes clear the recommendations in paragraph 5.29 above will be adhered to, then it can be concluded that no likely significant effects on Martin Mere SPA and Ramsar site will arise, through disturbance of qualifying bird species, as a result of the SPD either alone or in combination with other plans and projects.

6.5 The HRA of the West Lancashire Local Plan states, with respect to consideration of water quality that:

'New development proposed in the areas of Ormskirk, Burscough, Rufford and Scarisbrick that are affected by limitations on wastewater treatment must be phased to ensure delivery of the development coincides with delivery of an appropriate solution which meets the requirements of the Council, the Undertaker and the Regulators.'

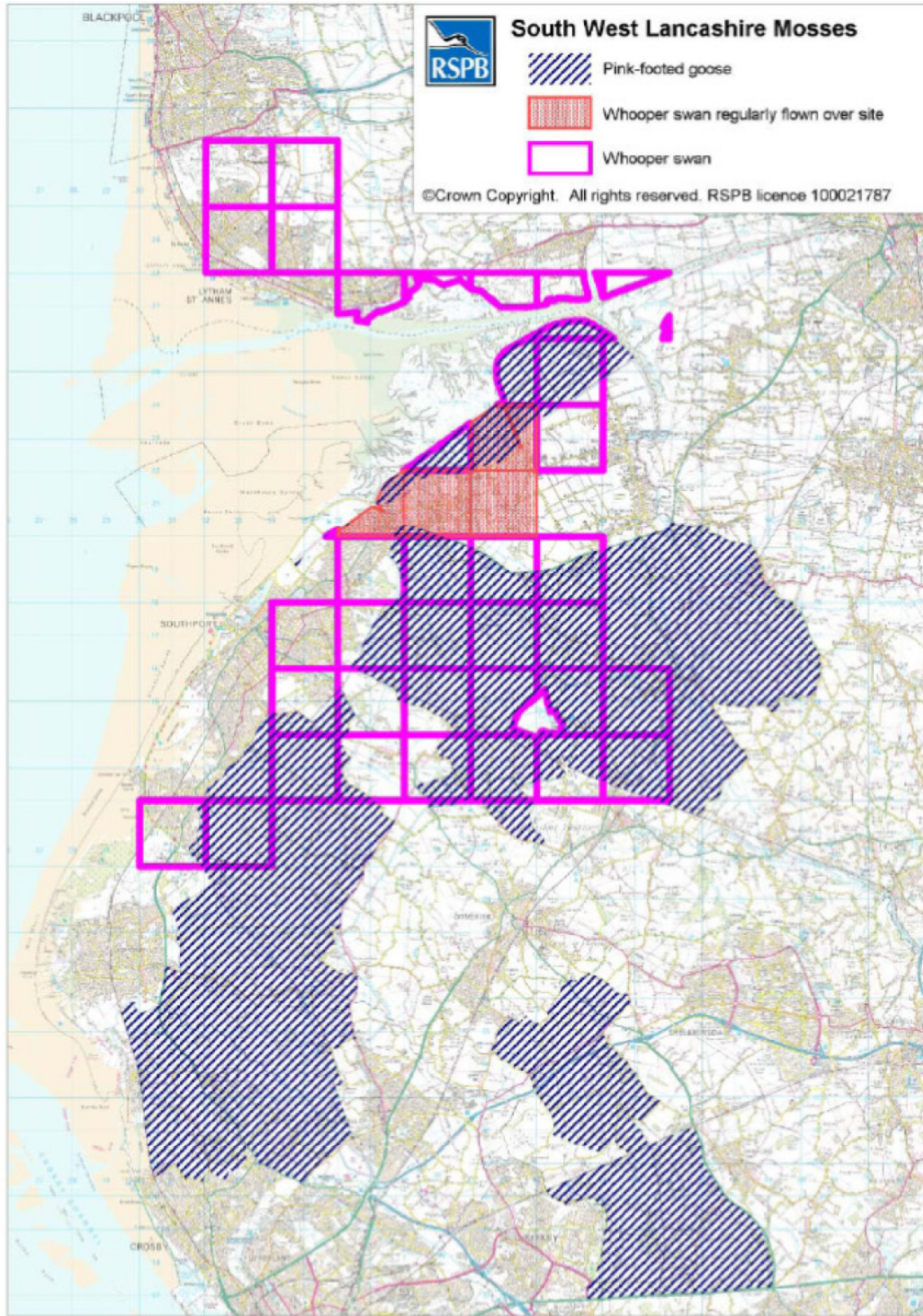
Given this, it can be concluded that other developments will not contribute to increased nutrient enrichment at Martin Mere, since they should conform with the Local Plan policy.

- 6.6 Due primarily to the unsuitability of habitat, distance from European sites and/or lack of being within a sensitive area for SPA/Ramsar birds, there is no mechanism for any of the preferred traveller sites to operate in combination with these other projects and plans.

7 Conclusions

- 7.1 The HRA of the Traveller Sites DPD Options and Preferred Options has been able to conclude that no likely significant effects will occur on European sites either alone or in combination with other projects and plans.

Appendix 1 – Qualifying Bird Species Sensitivity Map: South West Lancashire



HABITATS REGULATIONS
ASSESSMENT REPORT

February 2014

**Provision for Traveller Sites Development Plan Document
Options and Preferred Options**

**Consultation and
Duty to Co-Operate Report**

February 2014

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West Lancashire Borough Council**



Provision for Traveller Sites Development Plan Document: Options and Preferred Options

Consultation Report and Duty to Co-Operate Statement (Regulation 18)

Introduction

This report sets out the consultation that West Lancashire Borough Council has undertaken between September 2013 and January 2014 in relation to the emerging Provision for Traveller Sites Development Plan Document: Options and Preferred Options. Further consultation will take place as the DPD progresses through its preparation stages; this will be summarised in future consultation reports.

The two main tenets of the consultation to date are:

1. 'Scoping' Consultation
2. Duty to Co-operate letters

1. ‘Scoping’ Consultation

In accordance with Regulation 18 of the Town and Country Planning (Local Planning) (England) Regulations 2012, the West Lancashire Borough Council notified a number of specific and general consultation bodies (as defined in Paragraph 2 of the Regulations), plus a number of other interested parties, of the subject matter of the Traveller Sites DPD, and invited them to make representations of what the DPD ought to contain.

Table 1 below lists the bodies contacted by the Council under this ‘Scoping’ consultation, and Table 2 below lists and summarises the responses made to the Borough Council’s initial “Scoping” consultation letter, listed in alphabetical order of respondent. All comments have been noted.

Table 1 Consultation Bodies contacted by the Council

	Organisation	Type of Consultee
1	The Coal Authority	Specific consultation body
2	Environment Agency	Specific consultation body
3	English Heritage	Specific consultation body
4	Marine Management Organisation	Specific consultation body
5	Natural England	Specific consultation body
6	Network Rail	Specific consultation body
7	Merseyrail	Other
8	Merseytravel	Other
9	Transport for Greater Manchester (GMPTE)	Other
10	Northern Rail	Other
11	Arriva NW Ltd	Other
12	Peel Airports	Other
13	Highways Agency	Specific consultation body
14	Sefton Council	Specific consultation body
15	Wigan Council	Specific consultation body
16	St Helens Council	Specific consultation body
17	Chorley Council	Specific consultation body
18	South Ribble Council	Specific consultation body
19	Fylde Council	Specific consultation body
20	Knowsley Council	Specific consultation body
21	Liverpool Council	Specific consultation body
22	Lancashire County Council	Specific consultation body
23	United Utilities	Specific consultation body
24	National Grid	Specific consultation body
25	Electricity North West	Specific consultation body
26	Scottish Power Manweb	Specific consultation body
27	N Power renewables	Specific consultation body

	Organisation	Type of Consultee
28	Shell UK Ltd	Specific consultation body
29	Sabic Pipeline	Specific consultation body
30	Mono Consultants	Specific consultation body
31	Central Lancashire NHS	Specific consultation body
32	Ormskirk and Southport Hospital Trust	Specific consultation body
33	West Lancashire GP Consortia	Specific consultation body
34	NHS England	Specific consultation body
35	Homes and Communities Agency	Specific consultation body
36	Lancashire Constabulary	Specific consultation body
37	Lancashire Fire and Rescue	Other
38	North West Ambulance Service NHS Trust	Other
39	Canals and Rivers Trust	Other
40	Sport England	Other
41	West Lancashire Local Strategic Partnership	Other
42	West Lancashire Council for Voluntary Service	Other
43	Civil Aviation Authority	Other
44	Office of Rail Regulation	Other
45	Lancashire Local Enterprise Partnership	General consultation body
46	Mersey Fire & Rescue Authority	Other
47	Merseyside Police	Specific consultation body
48	Helena Partnership (Registered Social Provider)	Other
49	Mersey Fire & Rescue Authority	Other
50	NHS Sefton	Other
51	Merseyside Police	Other
52	Irish Community Care Merseyside	General consultation body
53	Liverpool City Region Local Enterprise Partnership	Other
54	Irish Community Care Merseyside	General consultation body
55	National Federation of Gypsy Liaison Groups	General consultation body
56	Friends, Families and Travellers	General consultation body
57	Alison Heine (Agent representing Travellers)	Other
58+	Parish Councils in and adjacent to West Lancashire	Specific consultation body

Table 2 Responses made to Regulation 18 ‘Scoping’ Consultation

	Organisation / Body	Summary of response
1	Alison Heine (Agent)	<p>DPD should consider following points:</p> <ul style="list-style-type: none"> - Full summary of GTAA and comparison with previous assessment / what changed / explain any differences; - Evidence that criteria policy has also informed any site selection; - Evidence of duty to co-operate; - Does the need for Travellers have to respect housing market areas (NPPF para. 47)? - Importance of offering choice of sites to include range of location, size, tenure, also flexibility and some contingency; - Importance of front loading provision to be sure immediate need is met at outset. Most of need in West Lancs is immediate; - Need to include explanation for choice of sites in sustainability appraisal summary; - Note that Showpeople store equipment year round on sites, not just in the winter.; - For transit sites, could consider potential to provide as part of small private family Gypsy sites as well as separate provision.
2	Bickerstaffe Parish Council	Jubilee Colliery (Bickerstaffe) is not an appropriate site for Traveller accommodation on account of highways access, neighbouring uses and ownership.
3	English Heritage	No comments to make at this stage.
4	Highways Agency	At this initial stage, the Agency is content with the matters that the DPD intends to cover. As the DPD progresses, the Agency would welcome the opportunity to comment on proposed sites in order to consider any potential impact of these on the strategic road network.
5	Liverpool City Council	Clarification sought as to whether the DPD will cover the Local Plan period of 2012-2027 or fifteen years from the anticipated DPD adoption date, 2015-2030.
6	Marine Management Organisation	No comments to make at this stage.
7	Natural England	<p>No specific comment to make on the document itself at this stage but, in order to allocate the most appropriate sites to deliver high quality, sustainable development, environmental issues and opportunities should be considered as an integral part of the assessment process.</p> <p>Detailed comments made about biodiversity (designated sites, habitats), geological conservation, landscape, best and most versatile agricultural land, public rights of way / access, and Green Infrastructure.</p>
8	Network Rail	<ol style="list-style-type: none"> 1. The Council should ensure that no Network Rail land is included within the policy consultation; 2. The policy should consider security of the railway boundary from trespass. Any site adjacent to the railway needs suitable trespass proof fencing (minimum 1.8m in height). 3. Request that sites are situated away from level crossings (and not on any highways leading to level crossings), as any

	Organisation / Body	Summary of response
		proposal may result in a material increase in type and volume over the crossing and the developer could be liable for all mitigation costs required to ensure the on-going safety of the crossing.
9	Newburgh Parish Council	Newburgh Parish Council support the drawing up of a plan; however, it is difficult to comment further until the detail has been put together.
10	The Coal Authority	The LPA should give due consideration to coal mining legacy issues when considering site allocations.
11	United Utilities	No specific comments to make at this stage, but wish to be included in further consultations, to ensure that all new growth can be delivered. Previous UU responses to the West Lancashire Local Plan remain valid.
12	Wrightington Parish Council	The Parish Council cannot see the need for a permanent site for "Travellers" as the term itself implies that the people in question are always on the move and do not require a permanent place of residence. Also, the Parish Council believe that "Showpeople" should be subject to business rates in the same way any other business operating within the Borough.

2. Duty to Co-operate – initial liaison

The Localism Act and the NPPF require LPAs to fulfil the Duty to Co-operate on planning issues, including provision for Travellers, in order to ensure that their approaches are consistent, and that they address cross-border issues with neighbouring authorities. Regulation 4 of the Town and Country Planning (Local Planning) (England) Regulations prescribe which bodies, as a minimum, should be contacted under the Duty to Co-operate.

West Lancashire Borough Council intends to consult relevant organisations on an ongoing basis under the Duty to Co-operate as the Traveller Sites DPD is prepared. In October 2013, the Council wrote to a number of different organisations, setting out what it considers are the primary cross-boundary issues with regard to provision of accommodation for Travellers, asking for views on whether the Council's understanding of cross-boundary issues was correct, and for any other comments. The Council's letter is appended to this report as Appendix 1.

Table 3 below lists the bodies that the Council has contacted so far under the Duty to Co-operate, and Table 4 sets out the responses received to the Council's initial Duty to Co-operate letter, listed in alphabetical order of respondent. All comments have been noted.

Table 3 Bodies contacted by WLBC in October 2013 under the Duty to Co-operate

Organisation Contacted	"Prescribed body" (as required by Regulation 4)?
Environment Agency	Yes
English Heritage	Yes
Marine Management Organisation	Yes
Natural England	Yes
Network Rail	
Merseytravel	Yes
Transport for Greater Manchester (GMPTE)	Yes
Highways Agency	Yes
Sefton Council	Neighbouring authority
Wigan Council	Neighbouring authority
St Helens Council	Neighbouring authority
Chorley Council	Neighbouring authority
South Ribble Council	Neighbouring authority
Fylde Council	Neighbouring authority
Knowsley Council	Neighbouring authority
Lancashire County Council	Neighbouring / common authority
United Utilities	
NHS Property Services Ltd	
Ormskirk and Southport Hospital Trust	Yes
West Lancashire GP Consortia	
NHS England	Yes
Homes and Communities Agency	Yes
Lancashire Constabulary	
West Lancashire Local Strategic	

Organisation Contacted	“Prescribed body” (as required by Regulation 4)?
Partnership	
West Lancashire Council for Voluntary Service	
Civil Aviation Authority	Yes
Office of Rail Regulation	Yes
Lancashire Local Enterprise Partnership	Yes
Merseyside Police	
Lancashire County Council (Highways)	Yes
Parish Councils in and directly adjacent to West Lancashire Borough	Common / neighbouring administrative areas.

Table 4 Responses to WLBC’s initial Duty to Co-operate letter

	Body	Summary of response
1	Chorley BC	Can confirm that the Central Lancashire authorities will provide for the Traveller needs identified in the Central Lancashire GTAA within the Central Lancashire administrative boundaries.
2	English Heritage	In terms of English Heritage’s interest, in the absence of any identified sites, it is difficult to know whether or not there are likely to be any strategic cross-boundary issues affecting the historic environment. In the development of the <i>Provision for Traveller Sites DPD</i> it is important that consideration is given to the potential impact which allocations might have upon heritage assets within neighbouring local planning authority areas. If there is potential for a proposed site to have a significant impact upon such assets, then English Heritage would be expected to be involved in any discussions regarding that site.
3	Environment Agency	No further comments to make at this stage. The EA will be happy to provide further comments when specific sites have been formally proposed for allocation.
4	Fylde BC	Fylde BC have just commissioned a GTAA for Fylde, Wyre and Blackpool. Until that study is complete (end of March 2014), it is not possible to state the issues in the Fylde area.
5	Homes and Communities Agency	No reason to dispute WLBC’s understanding of cross-boundary issues.
6	Knowsley MBC	Broadly agree with the assessment of cross-boundary issues. It may be helpful to refer more specifically to the status of the emerging Knowsley, Liverpool, Sefton, St Helens, West Lancashire and Wirral Gypsy and Traveller Accommodation Assessment, the recommendations of which have yet to be finalised. This Assessment will recommend pitch provision for both transit and permanent sites across the study area for a fifteen year period and may thereby impact upon the first and third cross-boundary issues identified in the letter. In advance of the publication of this Assessment, and given the different preparation stages and status of Local Plans within the sub-region, it may be premature at the present time to assume that all authorities will be able to meet their own needs for permanent sites within their own boundaries.
7	Lancashire County Council	In regard to the West Lancashire’s co-operation with Merseyside authorities about the provision of transit sites, it is felt that this provision needs to be combined with the provision of permanent

	Body	Summary of response
		<p>sites. The provision of transit sites on their own are not sufficient and should instead be coupled with a permanent site. The Council should also co-operate with Merseyside authorities on the issue of permanent provision.</p> <p>In regard to the Council's assumption in bullet point 3 that each neighbouring LPA will meet its own need for permanent sites, it is agreed that this should be the case. In order to assist in cross-boundary working between neighbouring authorities, a working group has been set up between all the districts of Lancashire.</p> <p>From the County Council's point of view, once the Council gets to the stage of their DPD production where they are ready to discuss specific sites, the County Council is willing to provide advice and guidance on access improvements required to make allocated sites safe and sustainable in terms of transport requirements.</p>
8	Lancashire LEP	No comments to make.
9	Merseyside Police	<p>We have a static site in Broad Lane (Sefton) already. There is a planning application for 4 extra pitches on this site which technically would be in Green Belt land.</p> <p>From time to time through the spring/summer period we have illegal encampments in the Sefton area. The largest ones in recent years being in the Crosby area. It is fair to say there is nowhere available for them to be told of in the local area. The provision of any places locally would obviously be of benefit.</p>
10	Natural England	No comments to make at this stage
11	Network Rail	No comments to make regarding cross-boundary issues.
12	NHS England	The Council's understanding of cross-boundary issues is correct.
13	Sefton MBC	<p>Consider WLBC has correctly identified the cross-boundary issues in Sefton. Also agree that being at different stages of the Local Plan process makes it difficult to embark on a joint Traveller Sites DPD at this time. Nevertheless, given that our respective Councils are part of the study group currently undertaking the Merseyside and West Lancashire Traveller Accommodation Assessment, I feel that we have a good overview on the sub-regional Traveller pitch requirements in the sub-region. It may be useful to build upon this and co-operate in identifying some common criteria in a Traveller site selection methodology. Welcome further discussion on this issue.</p> <p>Sefton is anticipating meeting its own requirement for permanent Traveller sites in the borough, particularly as its site requirement is largely driven by demand from existing residents on Sefton's one permanent Traveller site.</p>
14	South Ribble BC	<p>Central Lancashire authorities are currently updating their Gypsy and Traveller Accommodation Assessment and cross-boundary issues form an important consideration.</p> <p>We accept that there is a need for a full discussion on this issue and welcome the opportunity to meet to discuss the outcome of our respective Gypsy and Traveller Accommodation Assessments and any cross boundary issues that may arise as a result of this evidence.</p> <p>The Central Lancashire Gypsy and Traveller Accommodation Assessment is due to be completed by the end of 2013, therefore we will be in a better position to discuss with you in early 2014.</p>
15	St Helens MBC	Will have to await the outcome of the final Merseyside and West Lancashire GTAA to be sure [of cross-boundary issues], but we feel that the need identified for each LPA by the study should be addressed by each individual authority on the basis of meeting needs where they arise. This logic is also likely to extend to transit

	Body	Summary of response
		<p>site provision, especially as we are unclear of the linkages between unauthorised encampments in different authority areas.</p> <p>Do not feel that joint plan preparation is feasible at this time as St Helens are committed to a full allocations local plan which will take longer than a single topic Gypsy and Travellers local plan.</p>
16	United Utilities	No comments to make at this stage.
17	West Lancashire CCG (NHS)	<p>The clinical commissioning group already deals with cross boundary issues in relation to the commissioning of health services and so this issue would not cause any major concerns for the organisation. Once the locations of the traveller sites are know, the CCG will be able to comment in more detail on any specific impacts on health commissioning.</p>
18	Wigan MBC	<p>Agree that the list of potential cross-boundary issues included in WLBC's letter give an accurate overview of the situation and that there are unlikely to be any cross-boundary issues with regard to the provision of permanent Traveller sites if each authority meets its own need for such sites.</p>

Appendix 1

West Lancashire Borough Council's initial Duty to Co-Operate Letter



Directorate of Transformation

John R Harrison DipEnvP, MRTPI
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To: Prescribed Bodies

Date: 14 November 2013
Our ref: GTDPD / DtC / 01

Dear Sir / Madam

West Lancashire Provision for Traveller Sites DPD: Duty to Co-operate

West Lancashire Borough Council are preparing a Development Plan Document (DPD) to set out the accommodation requirements in West Lancashire for the Travelling Community, to set criteria against which planning applications for Traveller sites can be assessed, and to allocate specific sites to meet the accommodation needs of the Travelling Community.

The Localism Act and the National Planning Policy Framework (NPPF) create a duty on local planning authorities (LPAs), county councils and other "Prescribed Bodies" to cooperate with each other to address strategic matters relevant to their areas in the preparation of a DPD. I am writing to you, as the representative of one of the "Prescribed Bodies" (as set out in Regulation 4 of the Town and Country Planning (Local Planning) (England) Regulations 2012), or as a representative of another body that may have a direct interest in the DPD.

It is likely that we have previously liaised with you over the West Lancashire Local Plan 2012-2027, which was adopted by the Council on 16 October. The Submission version of this Plan contained a criteria-based policy on Traveller site location (Policy RS4), setting out criteria against which planning applications for Traveller sites could be judged. There was a recognition that some Green Belt land may be required to meet Traveller accommodation needs. Under the Duty to Co-operate, no objections were raised by neighbouring authorities or other Prescribed Bodies over the soundness of Policy RS4, nor over the potential use of Green Belt land in West Lancashire to meet Traveller accommodation needs. However, the Local Plan Inspector advised that he could not find Policy RS4 sound as it did not identify a five year supply of specific deliverable sites. It was recommended that the policy be deleted from the Local Plan and that a separate DPD be prepared as quickly as possible to identify and allocate appropriate Traveller sites.

An important part of the evidence base behind the new Provision for Traveller Sites DPD is a joint Gypsy and Traveller Accommodation Assessment, currently being undertaken by consultants on behalf of this Council and the five Merseyside authorities. We are expecting the results of this study soon.

At present, our understanding of cross-boundary issues relating to provision for the Travelling Community is as follows:

- There is a need for this Council to co-operate with Merseyside authorities on the issue of transit site provision (transit sites are intended to meet the short term needs of Travellers who are passing through local authority areas on their way to other destinations or choose to occasionally visit the area for short periods), as Travellers who require such sites are almost certain to be moving between different boroughs.
- We are unaware of any significant cross-boundary issues between West Lancashire and Wigan / Central Lancashire in terms of transit site provision.
- If each LPA were to meet its own need for permanent Traveller sites (which may be used for Travellers to base themselves throughout the majority of the year, or for Travelling Showpeople to live and store their equipment outside their touring season), there should be no cross-boundary issues in terms of a need for sites. As far as we are aware, our neighbouring authorities are intending to fully meet their needs for permanent Traveller sites within their own boundaries.
- However, dependent upon the location of any proposed site allocations, it may be the case that occupants of sites may seek to make use of facilities and services (education, health, etc.) in a neighbouring Borough. As we understand it, we and our neighbouring authorities, are not yet at the stage where specific sites have been formally proposed for allocation, and thus cannot comment at present as to whether cross-boundary issues are likely to arise as a result of specific site locations.
- The government's Planning Policy for Traveller Sites document (Section 9(c)) requires that local planning authorities consider production of joint development plans that set targets on a cross-authority basis. Given the differing timescales for the different authorities surrounding West Lancashire, and the West Lancashire Local Plan Inspector's recommendation that the Council have this Traveller Sites DPD adopted as soon as possible, it is our view that production of a joint development plan would not be realistic.

As part of this Council's actions under the Duty to Co-operate for the Traveller Sites DPD, we are intending to hold a workshop with Prescribed Bodies to discuss cross-boundary issues and how West Lancashire Borough Council intends to deal with them. This workshop would be likely to take place at the Council offices in Ormskirk in late 2013 or early 2014.

I would be grateful if you would reply to this letter, and let us know your views on:

- a) Do you agree with our understanding of the cross-boundary issues, as above? What amendments need to be made to the list (additions / deletions / alterations) to give a more accurate overview of the issues?
- b) Would you wish to attend the proposed workshop in the New Year, to discuss cross-boundary issues, and how they might be addressed?

I look forward to receiving your views on (a) and (b) above. I would be grateful if you could reply by **29 November 2013**. Contact details for a response (including email address) are provided overleaf.

Yours faithfully

Peter Richards
Planning Policy and Implementation Team Leader

<p>1. Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service / policy / strategy / decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people: <i>People of different ages – including young and older people</i> <i>People with a disability;</i> <i>People of different races / ethnicities / nationalities;</i> <i>Men; Women;</i> <i>People of different religions/beliefs;</i> <i>People of different sexual orientations;</i> <i>People who are or have identified as transgender;</i> <i>People who are married or in a civil partnership;</i> <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave;</i> <i>People living in areas of deprivation or who are financially disadvantaged.</i></p>	<p>No. The document referred to in the Cabinet / Planning Committee Report (i.e. the Provision for Travellers Sites Development Plan Document: Options and Preferred Options) should have a positive effect on certain people of different ethnicities.</p>
<p>2. What sources of information have you used to come to this decision?</p>	<p>Government policy and guidance (Planning Policy for Traveller Sites, March 2012, and Designing Gypsy and Traveller Sites: Good Practice Guide, May 2008).</p>
<p>3. How have you tried to involve people / groups in developing your service / policy / strategy or in making your decision (including decisions to cut or change a service or policy)?</p>	<p>The document being reported on (Traveller Sites DPD) represents the first draft of what will be a Local Plan to allocate specific sites for Traveller accommodation. The purpose of the Cabinet report is seek approval of the document for public consultation for six weeks. A wide range of different individuals and bodies will be contacted directly to advise about the consultation. In addition, the document will be publicised in the press and on the Council’s website. People will be invited to submit their views on the content of, and proposals contained within, the document. These views will be taken into account in preparing the subsequent version of the document.</p>
<p>4. Could your service / policy / strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:- <i>Eliminate discrimination, harassment and victimisation;</i> <i>Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people);</i> <i>Foster good relations between people who share a protected characteristic and those who do not share it.</i></p>	<p>The purpose of the Traveller Sites DPD is to allocate land to meet the objectively-assessed accommodation needs of the travelling community (of whom, Romany Gypsies and Irish Travellers are groups recognised as having a protected characteristic under the Equality Act 2010). By facilitating the provision of authorised, permanent sites of adequate standards and in suitable locations, the DPD should contribute towards meeting each of the duties listed at left.</p>
<p>5. What actions will you take to address any issues raised in your answers above</p>	<p>(The relevant actions are referred to above.)</p>