



	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: 10 NOVEMBER 2015**  
Start: 7.30pm  
Finish: 8.00pm

**PRESENT:**

Councillor: I Moran (Leader of the Council, in the Chair)

Councillors: Portfolio

Y Gagen	Deputy Leader of the Council & Leisure
J Hodson	Planning
J Patterson	Housing and Landlord Services
K Wilkie	Street Scene
K Wright	Health and Community Safety
C Wynn	Finance

In attendance:  
Councillors Oliver, Pendleton

Officers: Managing Director (Transformation) (Ms K Webber)  
Assistant Director Community Services (Mr D Tilleray)  
Assistant Director Housing & Regeneration (Mr B Livermore)  
Borough Treasurer (Mr M Taylor)  
Borough Solicitor (Mr T Broderick)  
Strategic Planning & Implementation Manager (Mr P Richards)  
Principal Member Services Officer (Mrs S Griffiths)

**47. APOLOGIES**

Apologies for absence were submitted on behalf of Councillor Aldridge and the Managing Director (People and Places).

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

There were no items of special urgency.

**49. DECLARATIONS OF INTEREST**

Councillor Patterson declared the following interests:-

- a disclosable pecuniary interest in item 5(l) Pay to Stay: Fairer Rents in Social Housing – Consultation as a tenant of the Council. She left the room during consideration of this item.
- a disclosable pecuniary interest in items 5(j) HRA Budget Monitoring Position and 5(k) Sale of High Value Council Houses as a tenant of a Council house but by virtue of a dispensation, was able to remain in the meeting and speak and vote on these items.

**50. MINUTES**

RESOLVED That the minutes of the Cabinet meeting held on 15 September 2015 be approved as a correct record and signed by the Leader.

**51. MATTERS REQUIRING DECISIONS**

Consideration was given to the report relating to the following matters requiring decisions as contained on pages 769 to 1258 and 1265 to 1384 of the Book of Reports.

**52. NEW ALLOTMENTS IN SKELMERSDALE**

Councillor Gagen introduced the report of the Assistant Director Community Services which provided an update on progress in relation to the establishment of new allotments in Skelmersdale and sought approval for the proposed implementation timetable, method of management, designation and allocation of plots.

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

- RESOLVED A. That the construction of a new allotment site off Marland, Ashurst be approved subject to planning consent being obtained.
- B. That the process of devolved management be supported and the Assistant Director Community Services be authorised to take all necessary steps and obtain all necessary consents to enter into negotiations with Skelmersdale Horticultural Society to take on a management agreement for the site.
- C. That the new allotment site be designated a “statutory” allotment and the Assistant Director Community Services be authorised to take all necessary steps and obtain any necessary consents to undertake this designation.
- D. That the works to extend the Digmoor allotment site be approved.

**53. LOCAL GOVERNMENT DECLARATION ON TOBACCO CONTROL**

Councillor Wright introduced the report of the Assistant Director Community Services which sought approval for the Council to become a signatory to the Local Declaration on Tobacco Control.

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

RESOLVED That the Council become a signatory to the Local Declaration on Tobacco Control.

**54. USE OF SECTION 106 MONIES IN AUGHTON PARK**

Councillor Gagen introduced the report of the Assistant Director Community Services which considered proposals for the use of Section 106 monies received from housing developers for the enhancement of public open space and recreation provision in Aughton Park.

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

RESOLVED            That the use of S106 monies for the enhancement of the existing play area at Redsands Park, Aughton be approved and the sum of up to £5,539 be made available for this project.

**55. REVISED ANTI-SOCIAL BEHAVIOUR POLICY**

Councillor Wright introduced the report of the Assistant Director Community Services which sought approval for a revised Anti-Social Behaviour (ASB) Policy.

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

RESOLVED            A. That the ASB policy, included as appendix 1 to the report, be approved.

                              B. That the Assistant Director Community Services, in consultation with the relevant Portfolio Holder, be granted delegated authority to approve any future minor changes to the policy that do not affect service delivery.

**56. REVIEW AND UPDATE OF WEST LANCASHIRE'S LIST OF LOCALLY IMPORTANT BUILDINGS**

Councillor Hodson introduced the report of the Assistant Director Planning which provided an update on the recent review of the Council's List of Locally Important Buildings (Local List) and sought approval for the updated list.

The Assistant Director Planning circulated a revised version of Appendix A.

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

RESOLVED            A. That the revised List of Locally Important Buildings set out in the revised Appendix A to the report be approved.

                              B. That the Assistant Director Planning be authorised, in consultation with the Portfolio Holder, to make the necessary arrangements to publish the revised 'Local List', and notify any property owners affected by the changes.

- C. That the Assistant Director Planning be authorised, in consultation with the relevant Portfolio Holder, to make any necessary amendments to the 'Local List' that reflect future changes to buildings identified on the list.

**57. PREFERRED OPTIONS FOR THE PROVISION FOR THE TRAVELLER SITES DEVELOPMENT PLAN DOCUMENT**

Councillor Hodson introduced the report of the Assistant Director Planning which sought approval for public consultation on the preferred options for the Provision for Traveller Sites Development Plan Document, attached as Appendix A to the report.

He confirmed that Appendix 1 to Appendix A that had been circulated via e-mail and that this had been made available on the Council's website.

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

- RESOLVED
- A. That the preferred options for the Provision for Traveller Sites Development Plan Document ('Traveller Sites DPD') at Appendix A be approved for public consultation, subject to any amendments made by the Assistant Director Planning in consultation with the relevant Portfolio Holder, following consideration of the Traveller Sites DPD by Planning Committee and Executive Overview and Scrutiny Committee, as per B. below.
  - B. That the Assistant Director Planning be authorised, in consultation with the relevant Portfolio Holder, to make any necessary amendments to the Traveller Sites DPD in the light of agreed comments from Planning Committee and Executive Overview & 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 & Scrutiny Committee on 26 November 2015.

**58. DRAFT LOCAL DEVELOPMENT ORDERS FOR SITES AT FINDON FORMER DIGMOOR SPORTS CENTRE, AND DELF CLOUGH, SKELMERSDALE**

Councillor Hodson introduced the report of the Assistant Director Planning which sought approval for public consultation on the draft Local Development Orders associated with the sites at Findon, the former Digmoor Sports Centre site and Delf Clough, Skelmersdale.

The Assistant Director Planning circulated revised Appendices A, B and C to the report and revised recommendations.

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

- RESOLVED
- A. That the draft Local Development Orders (provided at revised Appendices A–C), Statement of Reason and Design Code (provided at Appendices D & E) be approved for public consultation, subject to any amendments made by the Assistant Director Planning in consultation with the Portfolio Holder, as per B. below.
  - B. That the Assistant Director Planning be authorised, in consultation with the Portfolio Holder, to make any necessary amendments to the draft Local Development Orders and associated documents in the light of agreed comments from Planning Committee before the document is published for consultation.
  - C. That call-in is not appropriate for this item as this matter is one where urgent action is required because consultation on the draft Local Development Orders must commence on 19th November 2015 in order that the Local Development Orders can be refined and adopted by 31st March 2016, in line with the requirements of the CLG funding received to support preparation of the Local Development Orders.

**59. THE DUTY TO CO-OPERATE AND A LIVERPOOL CITY REGION STRATEGIC HOUSING & EMPLOYMENT LAND MARKET ASSESSMENT**

Councillor Hodson introduced the report of the Assistant Director Planning which provided an update on proposals for a Liverpool City Region Strategic Housing & Employment Land Market Assessment in order to provide a key evidence base document for all Local Plans in the Liverpool City Region (including West Lancashire) and sought agreement to a Memorandum of Understanding with the Liverpool City Region authorities on this matter.

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

- RESOLVED
- That the Portfolio Holder for Planning be authorised to enter into a Memorandum of Understanding (provided in draft at Appendix A) with the Liverpool City Region authorities in order to support the preparation of a Liverpool City Region Strategic Housing and Employment Land Market Assessment, subject to the Assistant Director Planning being satisfied as to the costs of, and funding for, the Assessment.

**60. REVISED CAPITAL PROGRAMME AND MID YEAR REVIEW 2015-2016**

Councillor Wynn introduced the report of the Borough Treasurer which sought agreement of a revised Capital Programme for 2015/2016 and provided an overview on the progress against it at the mid year point.

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

- RESOLVED
- A. That the Revised Capital Programme, including the re-profiling, virements and budget adjustments contained within Appendix A, be approved for consideration by Council.
  - B. That the progress against the Revised Capital Programme at the mid-year point be noted.
  - 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 26 November and Council on 16 December 2015.

## **61. HRA BUDGET MONITORING POSITION**

Councillor Patterson introduced the joint report of the Assistant Director Housing and Regeneration and the Borough Treasurer which provided a projection of the financial position on the Housing Revenue Account (HRA) and the Housing Capital Investment Programme to the end of the financial year and sought agreement to a number of budget changes.

Minute no. 30 of the Landlord Services Committee (Cabinet Working Group) held on 4 November 2015 was circulated at the meeting.

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

- RESOLVED
- A. That the progress against the HRA and the Capital Investment Programme budgets be noted.
  - B. That the revised Capital Investment Programme including the re-profiling, virements and budget adjustments contained in Appendix A be approved for consideration by Council.
  - 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 26 November 2015.

## **62. SALE OF HIGH VALUE COUNCIL HOUSES**

Councillor Patterson introduced the report of the Assistant Director Housing and Regeneration which provided an update on Government proposals to force Councils to sell "high value" Council houses upon them becoming empty, and sought authority to progress with sales prior to the legislation being introduced.

Minute no. 28 of the Landlord Services Committee (Cabinet Working Group) held on 4 November 2015 was circulated at the meeting.



A motion from Councillor Patterson was circulated at the meeting.

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

- RESOLVED
- A. That this item be referred to the Executive Overview and Scrutiny Committee on 26 November 2015 and that any agreed comments arising therefrom be submitted to Cabinet on 12 January 2016 together with this report for further consideration.
  - B. That call-in is not appropriate for this item as it is being considered by the Executive Overview and Scrutiny Committee on 26 November 2015.

### **63. PAY TO STAY - FAIRER RENTS IN SOCIAL HOUSING - CONSULTATION**

Councillor Moran introduced the report of the Assistant Director Housing and Regeneration which considered the Council's proposed response to the Department for Communities and Local Government (DCLG) consultation on Pay to Stay – Fairer Rents in Social Housing.

Minute no. 29 of the Landlord Services Committee (Cabinet Working Group) held on 4 November 2015 was circulated at the meeting.

A motion from Councillor Moran was circulated at the meeting.

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

- RESOLVED
- A. That the report be referred to the Executive Overview and Scrutiny Committee on 26 November 2015 with a request that any agreed comments from the Committee be submitted to the Assistant Director Housing and Regeneration
  - B. That the Assistant Director of Housing and Regeneration write to the Department for Communities and Local Government ( DCLG ) and advise them that this Council's response to the Consultation paper will be provided after the closing date (20 November 2015) and request that this receive consideration.
  - C. That the Assistant Director Housing and Regeneration be given delegated authority, in consultation with the relevant Portfolio Holder, to finalise the submission to the DCLG on the Pay to Stay consultation paper after having regard to any agreed comments by the Executive Overview and Scrutiny Committee.

- D. That call-in is not appropriate for this item as the matter is one where urgent action is required to provide the response at B above, and the report is being submitted to the Executive Overview and Scrutiny Committee on 26 November 2015.

(Note: Councillor Patterson declared a Disclosable Pecuniary Interest and left the meeting during consideration of this item.)

#### **64. PUBLIC INVOLVEMENT AT MEETINGS DRAFT PROTOCOL**

Councillor Moran introduced the report of the Borough Solicitor which considered the extension of public speaking at meetings by way of an agreed Protocol.

A motion from Councillor Moran was circulated at the meeting.

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

RESOLVED                      That the agreed comments to Council be “that the recommendations as set down at paragraphs 4.1, 4.2, 4.3, 4.4(a) and 4.5 of the report be supported”.

#### **65. REGULATION OF INVESTIGATORY POWERS ACT - ANNUAL SETTING OF THE POLICY AND REVIEW OF USE OF POWERS**

Councillor Moran introduced the report of the Borough Solicitor which reported upon the Council's use of its powers under the Regulation of Investigatory Powers Act 2000 (RIPA) and presented a revised RIPA policy document.

A revised Appendix 3 (to Appendix 1) and a revised recommendation were circulated by the Borough Solicitor.

In reaching the decision below, Cabinet considered the revised Appendix 3 (to Appendix 1), the revised recommendation and the details set out in the report before it and accepted the reasons contained therein.

RESOLVED                      That the revised RIPA Policy document be approved subject to the inclusion of the replacement version of Appendix 3 (to Appendix 1) to the report.

#### **66. CHEQUER LANE PLAYING FIELDS**

Councillor Gagen introduced the joint report of the Assistant Director Community Services and the Assistant Director Housing and Regeneration which considered requests from local football teams for agreements to secure the use of land at Chequer Lane Playing Field as football pitches.

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

- RESOLVED
- A. That the proposal to enter into a licence agreement with Skelmersdale United Youth Academy to use the land at Chequer Lane, Up Holland, shown at appendix 1 as football pitches, be approved.
  - B. That the entering into a lease arrangement with Skelmersdale United Youth Academy for a new changing pavilion on the site on the location of the old changing rooms, be approved in principle subject to planning consent being obtained.
  - C. That the above agreement to include community use agreements to allow Skem Men-Aces the use of a pitch and the changing pavilion.
  - D. That the Assistant Director Community Services be authorised to take all necessary steps to establish the agreements with Skelmersdale United Youth Academy, subject to all necessary consents and approvals being obtained.

**67. EXCLUSION OF PRESS AND PUBLIC**

- RESOLVED
- That under Section 100A(4) of the Local Government Act 1972, the public be excluded from the meeting during consideration of the following item of business on the grounds that it involves the likely disclosure of exempt information as defined in paragraph 3 of Part 1 of Schedule 12A of that Act and as, 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.

**68. MATTER REQUIRING DECISION**

Consideration was given to the report relating to the following matter requiring a decision as contained on pages 1259 – 1263 of the Book of Reports.

**69. REBUILD UNITS 34-36 GORSEY PLACE, SKELMERSDALE**

Councillor Moran introduced the report of the Assistant Director Housing and Regeneration which advised on the current position in relation to the above units following fire damage to the premises.

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

- RESOLVED
- That the Assistant Director Housing and Regeneration be authorised to take all necessary steps to rebuild and refurbish units 34 and 36 Gorsey Place using the insurance payments where possible, supplemented by the CRA reserves if necessary as detailed in section 5 of the report.

(Note: No representations had been received in relation to the above item being considered in private.)

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LEADER





**AGENDA ITEM: 5(a)**

**EXECUTIVE OVERVIEW &  
SCRUTINY COMMITTEE:  
26 November 2015**

**CABINET: 12 January 2016**

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**Report of: Borough Solicitor**

**Relevant Managing Director: Managing Director (People and Places)**

**Relevant Portfolio Holder: Councillor Patterson**

**Contact for further information: Mrs S Griffiths (Extn. 5097)  
(E-mail: [susan.griffiths@westlancs.gov.uk](mailto:susan.griffiths@westlancs.gov.uk))**

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**SUBJECT: SALE OF HIGH VALUE COUNCIL HOUSES**

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Borough wide interest

**1.0 PURPOSE OF THE REPORT**

- 1.1 To consider the report entitled "Sale of High Value Council Houses" referred by Cabinet on 10 November 2015 to the Executive Overview and Scrutiny Committee.

**2.0 RECOMMENDATION TO EXECUTIVE OVERVIEW AND SCRUTINY COMMITTEE**

- 2.1 That the report of the Assistant Director Housing and Regeneration 'Sale of High Value Council Houses', at Appendix 1 to the report, be considered and any agreed comments be submitted to Cabinet on 12 January 2016.

**3.0 RECOMMENDATION TO CABINET**

- 3.1 That the recommendations set out in paragraphs 2.1 to 2.4 of the report attached at Appendix 1 be considered, taking into consideration the agreed comments submitted by the Executive Overview and Scrutiny Committee (Appendix 2).

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**3.0 BACKGROUND**

- 3.1 Cabinet received a report on the Sale of High Value Council Houses at its last meeting on 10 November 2015, and resolved:-

- RESOLVED    A.    That this item be referred to the Executive Overview and Scrutiny Committee on 26 November 2015 and that any agreed comments arising therefrom be submitted to Cabinet on 12 January 2016 together with this report for further consideration.
- B.    That call-in is not appropriate for this item as it is being considered by the Executive Overview and Scrutiny Committee on 26 November 2015.
- 3.2    A copy of the report of the Assistant Director Housing and Regeneration as submitted to Cabinet on 10 November 2015 is attached as Appendix 1,
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### **Background Documents**

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

### **Appendices**

1. Cabinet report 10 November 2015 of the Assistant Director Housing and Regeneration.
2. Minute of Executive Overview and Scrutiny Committee held on 26 November 2015 (Cabinet only – 12 January 2016)
3. Comments of the Assistant Director Housing & Regeneration
4. Minute of Landlord Services Committee (Cabinet Working Group) held on 7 January 2016 (Cabinet only – 12 January 2016)



**AGENDA ITEM: 5(k)**

**CABINET: 10<sup>th</sup> November 2015**

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**Report of: Assistant Director Housing and Regeneration**

**Relevant Managing Director: Managing Director (Transformation)**

**Relevant Portfolio Holder: Councillor J. Patterson**

**Contact for further information: Mr B. Livermore (Extn. 5200)**  
**(E-mail: [bob.livermore@westlancs.gov.uk](mailto:bob.livermore@westlancs.gov.uk))**

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**SUBJECT: SALE OF HIGH VALUE COUNCIL HOUSES**

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Wards affected: Potentially Borough wide dependent on valuation of housing properties.

**1.0 PURPOSE OF THE REPORT**

- 1.1 To update Members on proposals by Government to force Councils to sell "high value" Council houses when they become empty and to seek authority to progress with sales prior to legislation being introduced.

**2.0 RECOMMENDATIONS**

- 2.1 That the Assistant Director Housing and Regeneration proceed to market and sell empty Council houses with potential values as outlined in paragraph 5.4 prior to legislation being passed to force the sale by this Council.
- 2.2 That the Exemptions in 5.7 are used allowing "high value" properties to be re-let by the Assistant Director Housing and Regeneration in accordance with the Council's policies and practices.
- 2.3 That the decision at 2.1 above be reviewed in the light of the Housing Bill being enacted.
- 2.4 That the Assistant Director of Housing and Regeneration take all necessary actions, including obtaining all consents etc. to raise finance for the HRA from the sale of high value empty properties.

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### **3.0 BACKGROUND**

- 3.1 A manifesto pledge, committed the Government to legislate to give Social Tenants in Registered Social Landlords (RSL) property a similar Right to Buy (RTB) their homes as Council Tenants.
- 3.2 A Housing and Planning Bill has recently been announced which, amongst other things, starts the process of forcing Council's to raise funds to pay for the process of forcing Council's to raise funds to pay for the costs associated with introducing the Right to Buy for RSL tenants.

### **4.0 CURRENT POSITION**

- 4.1 The Housing and Planning Bill will give some certainty about the definition of 'High Value'.
- 4.2 My opinion is that this Council will have to make some form of contribution towards this Government initiative either by sale of "high value" homes when they become vacant or some other form of mechanism to raise the finances necessary.
- 4.3 The classification of "high value" properties within the manifesto was defined in the North West in accordance with the table below.

	<b>1 bedroom</b>	<b>2 bedroom</b>	<b>3 bedroom</b>	<b>4 bedroom</b>	<b>5+ bedroom</b>
<b>North West</b>	£90,000	£130,000	£160,000	£270,000	£430,000

### **5.0 POLICY CONSIDERATIONS**

- 5.1 Members could determine that it would not be appropriate to act on this matter prior to the Housing Bill being enacted.
- 5.2 However, it is clear that the Government's intention is for local authorities to fund RTB for RSL's. Additionally, we need to find ways to fund the shortfall in the HRA and/or make savings. With this in mind, I propose that the Council determines a series of values of "high value" properties and when these become empty, these are offered for sale to the market. This will give the opportunity to test this and feedback any short comings and also, most importantly, raise funds for the protection of existing services.
- 5.3 I am proposing a lower valuation figure than the one in the manifesto as I believe that if we use that as the proposal, this would not meet the level of funding necessary.



5.4 The proposed definition of “high value” properties would be:

	<b>1 bedroom</b>	<b>2 bedroom</b>	<b>3 bedroom</b>	<b>4 bedroom</b>	<b>5+ bedroom</b>
<b>West Lancashire</b>	£80,000	£100,000	£130,000	£200,000	Not for Sale

5.5 The impact for selling homes if Members accepted my proposal are obviously dependant on properties becoming vacant which is outside of the Council’s control. However, based on turn over during 2014/15, the forecast for the area and numbers of potential sales as an average year would be as follows:

<b>Area of West Lancashire</b>	<b>Possible vacancies with high value</b>
Altcar	1
Appley Bridge	1
Ashurst	3
Aughton	1
Banks	1
Burscough	3
Hesketh Bank	1
Ormskirk	5
Parbold	1
Rufford	1
<b>Total</b>	<b>18</b>

5.6 If Members agree to this proposal, the marketing and sale of vacant properties would be undertaken in-house in the short term. Detailed costs will be assessed of both marketing and legal costs so that comparisons can be made and ensure this offers the Council and Tax Payers value for money.

5.7 I propose that the following exemptions are made to the Policy to sell “high value” properties when these become vacant. These are:

- 5 bedroomed homes.
- Sheltered accommodation.
- Properties that have been adapted for the disabled.
- Properties at the discretion of the Assistant Director Housing and Regeneration in consultation with the Portfolio Holder.

5.8 The reason I am seeking exceptions are as follows:

- We have not many 5+ bedroom homes and these are needed from time to time to house large families.
- Sheltered accommodation is excluded from Right to Buy and it would be consistent to exclude for the same reasons
- Properties that are adapted do not always sell well and the preference would be to retain these and allow residents who need the facilities to

move into the property and any property release could be considered for sale if it met the necessary criteria.

- This is a “catch all” to give flexibility. It may be used if properties were not selling and rather than being kept empty or disposed for reduced prices, the option of re-letting may be a preferred route.

## **6.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY**

- 6.1 Sales of “high value” properties would be targeted to areas with higher than average property prices which would be areas like Ormskirk, Burscough, Northern Parishes and Ashurst. The impact will be, unless replacement homes for people on limited income can be provided in their areas, there may not be a mixed and balanced community. This may force some residents with caring responsibilities to secure accommodation elsewhere and therefore not be readily available eventually to support other elderly or dependant residents.

## **7.0 FINANCIAL AND RESOURCE IMPLICATIONS**

- 7.1 It is envisaged that sale of “high value” properties will generate an estimated £1.8M per annum (for a full year). This estimate is based on historical information of properties becoming empty in areas of higher values and does not necessarily mean that this will occur.
- 7.2 The funds generated will be used to protect the HRA from either the reduction in rent which will impact from 2016/17 or forward the monies to support the RTB for RSL's.
- 7.3 There may be an impact on the Capital Programme as there will be fewer Council homes because of these sales and therefore less opportunity for our tenants to exercise their RTB. It is difficult to quantify this impact with any certainty.

## **8.0 RISK ASSESSMENT**

- 8.1 The sales of “high value” properties are a standard process that the Council have the necessary skills and experience in managing and therefore this initiative is assessed as low risk and will be managed accordingly.

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### **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**

Minute of Landlord Services Committee (Cabinet Working Group) 4 November 2015 (Cabinet only)

**LANDLORD SERVICES COMMITTEE (CABINET WORKING GROUP) – 4 NOVEMBER 2015**

**28. SALE OF HIGH VALUE COUNCIL HOUSES**

Consideration was given to the draft report of the Assistant Director Housing and Regeneration that was seeking the direction of Cabinet to progress with the sales of “high value” Council houses when they become empty, prior to legislation being introduced.

The Deputy Assistant Director Housing and Regeneration gave an overview of the proposals, provided clarification on issues raised and responded to questions.

In discussion comments and questions were raised in relation to:

- West Lancashire “High value properties” – identification; possible vacancies.
- Proposals to act prior to the Housing Bill’s enactment – advantages/disadvantages.
- Registered Social Landlords (RSL) Government proposals – financial impact.
- Policy Considerations – wider/future impact of proposed change; lack of clarity.
- Opportunities for further scrutiny.

The Borough Treasurer provided further clarification and responded to questions related to Rights to Buy and associated financial issues.

**RESOLVED:** As a consequence of the discussion on this item the agreed comment to Cabinet be that there were “mixed views” on the proposals.



## EXECUTIVE OVERVIEW AND SCRUTINY COMMITTEE – 26 NOVEMBER 2015

### 31. SALE OF HIGH VALUE COUNCIL HOUSES

Consideration was given to the report of the Borough Solicitor in relation to the report of the Assistant Director Housing and Regeneration entitled 'Sale of High Value Council Houses' attached at Appendix 1, considered by Cabinet at its meeting on 10 November, that had sought the direction of them to progress with sales of "high value" Council houses when they become empty, prior to legislation being introduced. The matter had also been considered by the Landlord Services Committee (Cabinet Working Group) on 4 November 2015.

Cabinet, in referring the item, requested the Committee to provide any agreed comments to be submitted to them prior to consideration at its next Cabinet meeting on 12 January 2016.

The Deputy Assistant Director Housing and Regeneration gave an overview of the proposals, provided clarification on issues raised and responded to questions.

In discussion comments and questions were raised in relation to:

- Properties adapted for the disabled – "exemption" definition / criteria.
- Acting prior to the Housing Bill's enactment – advantages/disadvantages.
- Identification of "high value" housing stock – numbers; properties affected; values applied;
- Sale / disposal of "identified" properties – criteria (restrictions / selection / community assets / other social uses / value); associated legal implications.
- Advertisement / Marketing - process; use of in-house / external agents.
- Voids – number / timescales.

The Assistant Solicitor (JW) and Property Services Manager also provided additional clarification on issues raised relating to community assets legislation and voids.

**RESOLVED:** As a consequence of the discussion on this item the agreed comments of the Committee to Cabinet be that:

1. the proposals are not supported at this time.
2. Cabinet reconsiders the lower values, in respect of the classification of "high value" properties, as set down at paragraph 4.3 of the report of the Assistant Director Housing and Regeneration.
3. Cabinet explore further the options for disposal of "high value" properties, including social uses.
4. properties identified for sale, are "properly marketed."



**1. The proposals are not supported at this time**

There is no requirement for the Council to agree to the proposal at the current time. Since drafting the report it is clear that the legislation will now simply calculate the monies that could be raised from the sale of high value homes in West Lancashire and a levy will be charged by Government each year. At this stage the value of the levy is not known. With all the current pressure on the Housing Revenue Account (HRA) I still take the view that sale of some homes in due course will be necessary if we are to provide sitting tenants with good quality homes and services.

I would remind Members that we need to find savings of £11.3M over the next 4 years and the funds that could be raised by sales of high value homes would offset this. If homes were sold when empty, the necessary consent of the Secretary of State would be required but this is unlikely to be refused. The levy, which has yet to be calculated, will of course be in addition to the savings of £11.3M which is as a direct result of reducing rents by 1%. The choice on whether to proceed can therefore be made locally.

**2. Cabinet reconsiders the lower values in respect of the classification of “high value” properties as set down at paragraph 4.3 of the report of the Assistant Director Housing and Regeneration.**

The values at 5.4 of the report were suggested because it had become apparent that the calculations used would not raise the level of funds required nationally to allow and fund the costs associated with supporting all applications that are likely by Housing Association Tenants to exercise their Right to Buy (RTB). Since drafting the report a “deal” has been concluded between the Government and Registered Social Landlords (RSL’s) which should now reduce the numbers of RTB’s in the early years.

**3. Cabinet explore further the options for disposal of “high value” properties, including social uses.**

The Council will be required to sell ‘high value’ properties to raise funds that will be required to be paid to Government and, based on current Secretary of State requirements, there will be a legal requirement for the Council, to achieve the best value price for sale of these properties. As these properties will be ‘high value’ in comparison to other Council homes, it is not envisaged that a sale could achieve Best Value and still have a benefit for social use as market values would probably have to be charged.

**4. Properties identified for sale are “properly marketed”**

I believe that the Council have all the skills and expertise to undertake this function through the Estates Team within Housing and Regeneration Services.







## **AGENDA ITEM: 5(b)**

**CABINET: 12 JANUARY 2016**

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**Report of: Transformation Manager**

**Relevant Managing Director: Managing Director (Transformation)**

**Relevant Portfolio Holder: Councillor Y Gagen**

**Contact for further information: Mrs S Griffiths (Extn. 5097)**  
**(E-mail: [susan.griffiths@westlancs.gov.uk](mailto:susan.griffiths@westlancs.gov.uk))**

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**SUBJECT: FUNDING OF VOLUNTARY & OTHER ORGANISATIONS WORKING GROUP**

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Wards affected: Borough wide

### **1.0 PURPOSE OF THE REPORT**

- 1.1 To advise of the recommendations of the Funding of Voluntary and Other Organisations Cabinet Working Group meetings of 10 August and 15 December 2015 in respect of the applications for one year revenue funding from April 2016.

### **2.0 RECOMMENDATION**

- 2.1 That the recommendations of the Funding of Voluntary and Other Organisations Cabinet Working Group at its meeting on 15 December 2015 as detailed in the minutes of the meeting attached at Appendix 3 be agreed.

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### **3.0 BACKGROUND**

- 3.1 The current grant agreements/service level agreements with the voluntary organisations currently funded by the Council expire on 31 March 2016.
- 3.2 The Working Group met on 10 August 2015 to consider options for a new approach to revenue funding to voluntary organisations from 1 April 2016 onwards.
- 3.3 The Working Group resolved to advertise the availability of the funding in line with good practice and to further demonstrate compliance with the Equality &

Diversity agenda. Accordingly, a notice was posted on the Council's website and in the local press. Subsequently a scoring mechanism was agreed by the Working Group to formulate a priority list of applicants.

#### **4.0 CURRENT POSITION**

- 4.1 14 applications for revenue funding were received. The Working Group met on 15 December 2015 to assess and score the applications in accordance with the agreed process and subsequently to and make recommendations as to the funding to be awarded.
- 4.2 The minutes of the meetings containing the recommendations to Cabinet, are attached as Appendix 3 to this report.

#### **5.0 FINANCIAL AND RESOURCE IMPLICATIONS**

- 5.1 The total grants recommended by the Working Group to be made in 2016-2017 exceed the current budget by £4,663 and the Working Group have therefore recommended a growth bid for this amount or an alternative distribution of funding.

#### **6.0 COMMENTS OF THE TRANSFORMATION MANAGER**

- 6.1 The Working Group assessed how the applicants met the eligibility criteria for funding. Each organisation was further requested to provide other information for assessment including the organisation's financial statements and business plan and health & safety policy.
- 6.2 Applicants will be advised of the Working Group's recommendations and that funding is not guaranteed but will form part of considerations when the Council's budget is agreed on 24 February 2016.
- 6.3 If the growth bid is not subsequently approved by Members, the Working Group has recommended reducing the amount of grant to the top three applications on the priority list in order to fund the remaining organisations listed in minute 9(A)(i).

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#### **Background Documents**

The following background documents (as defined in Section 100D (5) of the Local Government Act 1972) have been relied on to a material extent in preparing this Report.

#### **Applications**

Age UK  
Bereavement Counselling Services  
Communities in Action NW

Council for Voluntary Service W.L.  
Disability Advice West Lancashire  
Dial A Ride Association W.L.  
Forward Motion Art (CIC)  
Homestart – Central Lancashire  
Lancashire Community Finance  
Lancashire West CAB  
Learning Stars  
Relate - Lancashire  
Timesavers  
West Lancs. Ark

### **Equality Impact Assessment**

There is a significant 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
2. Minutes of the Funding of Voluntary & Other Organisations Working Group held on 10 August 2015
3. Minutes of the Funding of Voluntary & Other Organisations Working Group held on 15 December 2015



# Equality Impact Assessment Form



**Directorate:** Transformation

**Service:**

**Completed by:** Sue Griffiths

**Date:** 15 December 2015

**Subject Title:** Review of Revenue Funding to Voluntary Organisations

## 1. DESCRIPTION

Is a policy or strategy being produced or revised:	Yes
Is a service being designed, redesigned or cutback:	Yes
Is a commissioning plan or contract specification being developed:	Yes
Is a budget being set or funding allocated:	Yes
Is a programme or project being planned:	No
Are recommendations being presented to senior managers and/or Councillors:	Yes
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty ( <b>Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations</b> ):	Yes
Details of the matter under consideration:	Review of mechanism for revenue funding to Voluntary Organisations.

*If you answered **Yes** to any of the above **go straight to Section 3***

*If you answered **No** to all the above **please complete Section 2***

## 2. RELEVANCE

Does the work being carried out impact on service users, staff or Councillors (stakeholders):	Yes
If <b>Yes</b> , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered <b>Yes</b> go to <b>Section 3</b></i>	
If you answered <b>No</b> to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	

## 3. EVIDENCE COLLECTION

Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	Yes, impact on the voluntary sector in West Lancashire and users of their services.
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	Users of the services provided by the Voluntary organisations currently in receipt of revenue funding from the Council.

Which of the protected characteristics are most relevant to the work being carried out?	
Age	Yes
Gender	Yes
Disability	Yes
Race and Culture	Yes
Sexual Orientation	Yes
Religion or Belief	Yes
Gender Reassignment	Yes
Marriage and Civil Partnership	Yes
Pregnancy and Maternity	Yes
<b>4. DATA ANALYSIS</b>	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	Residents in the Borough have access to the services provided by the voluntary organisations in receipt of revenue funding.
What will the impact of the work being carried out be on usage/the stakeholders?	Risk that the voluntary organisations currently in receipt of revenue funding may not be successful in continued funding which may have an impact on their services. Conversely other voluntary organisations are afforded the opportunity to apply for funding.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	Client satisfaction statistics will be sought from the voluntary organisations applying for revenue funding from 2016 onwards.
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	<p>Applicants for revenue funding are required to offer equality of opportunity in service delivery, employment and all other aspects of its work having particular regard to the requirements of the Equalities Act 2010; and to provide the Council with an up to date statement of its equal opportunities policy.</p> <p>The voluntary organisations currently funded by the Council provide services to users/stakeholders with protected characteristics.</p>
If any further data/consultation is needed and is to be gathered, please specify:	None
<b>5. IMPACT OF DECISIONS</b>	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	There is a risk that people with protected characteristics may not be able to access services, if a voluntary organisation's funding ceases or discontinues. Other organisations not currently funded by the Council may be successful in obtaining a grant in order to enhance their services.

<b>6. CONSIDERING THE IMPACT</b>	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	<p>Notice will be given to voluntary organisations currently funded by the Council, that a revised mechanism will be adopted and that the availability of grants is to be advertised.</p> <p>The revised mechanism will ensure that the grant process is fair and transparent and in accordance with Counsel's Advice.</p>
What actions do you plan to take to address any other issues above?	No Actions
<b>7. MONITORING AND REVIEWING</b>	
When will this assessment be reviewed and who will review it?	The Funding of Voluntary and Other Organisations Working Group will consider all issues in relation to voluntary sector funding.





**PRESENT:**

Councillors: Dowling (Chairman  
Davis  
Owen  
West

Officers: Transformation Manager (Mr S Walsh)  
Principal Member Services Officer (Mrs S Griffiths)

**1. APOLOGIES**

There were no apologies for absence.

**2. DECLARATIONS OF INTEREST**

Councillors Davis and Dowling declared non-pecuniary interests in agenda item 5 (Review of Revenue Funding to Voluntary Organisations) in view of their appointments by the Council to the West Lancashire Council for Voluntary Service.

**3. MINUTES**

RESOLVED That the minutes of the last meeting of the Working Group held on 16 December 2014 be agreed.

**4. TERMS OF REFERENCE**

Consideration was given to the Terms of Reference of the Working Group.

RESOLVED That the Terms of Reference be noted.

**5. REVIEW OF REVENUE FUNDING TO VOLUNTARY ORGANISATIONS**

Consideration was given to the report of the Transformation Manager which outlined options for a revised mechanism of funding to voluntary organisations from April 2016 onwards. He explained how grants were currently awarded and reviewed and reported that the findings of an equality health check and recent advice had provided an opportunity to revise the current mechanism and proposed that option 2 as outlined in the report would be an appropriate way forward.

- RESOLVED
- A. That the Transformation Manager under his delegated authority revise the mechanism for the making of grants to voluntary organisations in line with Option 2 outlined in Appendix A to the report.
  - B. That in order to achieve best use of resources, determination of the amount of grant (if any) to be allocated to individual voluntary organisations be undertaken after the applications have been received.
  - C. That Cabinet be recommended to award the grants from April 2016 by way of a one year Grant Agreement and a further review be undertaken in relation to the allocation mechanism for 2017/2018 onwards.
  - D. That the Transformation Manager be requested to arrange visits to the voluntary organisations in receipt of funding in 2016/2017 by Members of the Working Group.

**FUNDING OF VOLUNTARY AND OTHER ORGANISATIONS CABINET WORKING GROUP**

**HELD: 15 DECEMBER 2015**

Start: 6.00pm

Finish: 7.20pm

**PRESENT:**

Councillors: Dowling (Chairman)  
Davis (Vice Chairman)  
Owen West

Officers: Transformation Manager (Mr S Walsh)  
Capital and Service Accountant (Mrs S Samosa)  
Principal Member Services Officer (Mrs S Griffiths)

**6. APOLOGIES**

There were no apologies for absence.

**7. DECLARATIONS OF INTEREST**

There were no declarations of interest.

**8. MINUTES**

RESOLVED That the minutes of the last meeting of the Working Group held on 10 August 2015 be approved as a correct record.

**9. APPLICATIONS FROM VOLUNTARY ORGANISATIONS FOR REVENUE FUNDING FROM 2016 ONWARDS**

Consideration was given to the report of the Transformation Manager which provided details of applications from voluntary organisations for revenue funding from 2016 onwards.

He reported upon the voluntary organisations that were currently in receipt of funding from the Council until 2016 and the current budget for this provision and indicated that the applications received for funding for the financial year 2016 far exceeded the amount within this budget.

He went on to remind Members of the revised mechanism for awarding funding that had previously been agreed by the Working group and provided a summary of how (or otherwise) the applicants had met the eligibility criteria. He also provided an analysis of each organisation's financial situation and business plan, together with the other information submitted by the applicants, for example in relation to Health & Safety and Equality & Diversity etc..

## FUNDING OF VOLUNTARY AND OTHER ORGANISATIONS CABINET WORKING GROUP

In accordance with the mechanism Members were requested to consider whether each application had met the eligibility criteria and to score and prioritise the applications and make recommendations to Cabinet.

Prior to consideration of the applications discussion ensued on possible future mechanisms for funding of voluntary organisations from 2017 onwards and in particular the exploration of the adoption of a commissioning style approach.

RESOLVED (A) That in accordance with the priority list, Cabinet be recommended to:-

i) approve the following funding by way of a one year Grant Agreements to:-

- |  |         |
|--|---------|
| • Lancashire West CAB  | £50,000 |
| • Dial A Ride Association  | £28,575 |
| • WL CVS   | £32,500 |
| (subject to receipt of a satisfactory Health & Safety policy in accordance with the Council's Health & Safety Manager's recommendations /financial statements) |         |
| • Disability Advice WL   | £ 5,900 |
| • Bereavement Counselling Services   | £ 5,922 |
| • West Lancs. Ark  | £18,000 |
| (subject to receipt of satisfactory Health & Safety policy in accordance with the Council's Health & Safety Manger's recommendations)                          |         |

ii) Advise the following organisations that funding is not available due to their position on the priority list:-

- Age UK
- Lancashire Community Finance
- Timesavers

iii) Refuse the following applications for the reasons indicated:-

- Communities in Action NW (not met eligibility criteria – in having not provided end of year financial statements)

## FUNDING OF VOLUNTARY AND OTHER ORGANISATIONS CABINET WORKING GROUP

- Forward Motion Art CiC (not met eligibility criteria – in having not provided current end of year financial statements)
- Homestart (not met eligibility criteria – inadequate health & safety policy)
- Learning Stars (not met eligibility criteria – in not having provided satisfactory financial statements nor business plan)
- Relate – Lancashire (not met eligibility criteria – Inadequate health & safety policy)

- (B) That Cabinet be requested to consider a growth bid of £4,560 to the Funding of Voluntary Organisations budget in order to provide one year grants to the voluntary organisations listed in A) i) above. If the growth bid is not achieved the proposed grants to the Lancashire West CAB and the Lancashire Dial A Ride Association both be reduced by £2,000 and the grant proposed to the West Lancashire CVS be reduced by £1,000.
- (C) That the applicants be advised that the recommendations of the Working Group will not guarantee funding, but will form part of considerations when the Council's budget is agreed on 24 February 2016.





## **AGENDA ITEM: 5(c)**

**CABINET: 12 January 2016**

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**Report of:** Assistant Director Planning

**Relevant Managing Director:** Managing Director (Transformation)

**Relevant Portfolio Holder:** Councillor J Hodson

**Contact for further information:** Mr Peter Richards (Extn. 5046)  
(E-mail: [peter.richards@westlancs.gov.uk](mailto:peter.richards@westlancs.gov.uk))

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**SUBJECT: COMMUNITY INFRASTRUCTURE LEVY (CIL) FUNDING PROGRAMME 2016/17**

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Wards affected: Borough wide

### **1.0 PURPOSE OF THE REPORT**

- 1.1 To report on the consultation held in autumn 2015 on the options for the CIL Funding Programme 2016/17 and propose a final recommended CIL Funding Programme for 2016/17 based on the CIL monies anticipated to have been collected by the Council by 31 March 2016.

### **2.0 RECOMMENDATIONS**

- 2.1 That the consultation feedback report and updated Infrastructure Delivery Schedule (IDS) provided at Appendices A and B be noted.
- 2.2 That the allocation of CIL monies be approved for the delivery in 2016/17 of the following projects:
- New Allotments in Skelmersdale (£20,000)
  - Improvements to Public Open Space and associated car parking at Station Approach, Ormskirk (£15,000)
  - Haskayne Cutting Nature Reserve (£8,000)
-

### **3.0 BACKGROUND**

- 3.1 The Council adopted a CIL Charging Schedule in July 2014, and has been charging CIL since 1 September 2014. In March 2015, the Council approved a CIL Governance Framework which set out how decisions would be made on the spending of CIL monies by the Council, amongst other matters. Key to this Framework is the production each year of a CIL Funding Programme to prioritise how the CIL funds raised in a given financial year will be spent the following financial year, which would be publicly consulted upon before Cabinet make a final decision on the CIL Funding Programme in January of any given year in readiness for spending the monies from April that year.
- 3.2 This report follows up on the public consultation held in autumn 2015 on the options for the CIL Funding Programme 2016/17. It reports back on the responses received and recommends which schemes should be incorporated into the 2016/17 CIL Funding Programme.
- 3.3 A key document in the process of preparing a CIL Funding Programme is the Infrastructure Delivery Schedule (IDS). The IDS is a database of infrastructure projects that are planned or desired to take place during the current Local Plan period. It originally formed part of the evidence base for the Local Plan and the CIL Charging Schedule but has become more of a “live” document now, allowing monitoring of all infrastructure projects in the Borough and so monitors how the Local Plan is performing in delivering this key aspect of sustainable development.
- 3.4 Many projects on the IDS should have a connection to new development in that they are needed or demanded because of the new development proposed and being delivered through the Local Plan. However, other projects on the IDS are not necessarily linked to new development in this way, but are still needed to upgrade existing infrastructure provision or reflect aspirations that infrastructure providers have and which, in some cases, may enable further new development in the future.
- 3.5 In relation to CIL, therefore, the IDS provides the basis for assessing which infrastructure projects CIL monies should be spent on, although it should be clarified that not all projects on the IDS will be eligible for and / or need CIL monies. This is discussed further below.
- 3.6 Infrastructure providers, ward councillors, parish councils and relevant council officers have all been given opportunity to input ideas and suggestions on schemes that could go into the latest update of the IDS, and to update details of schemes that are already in the IDS. As a result, one new project was put forward in the recent public consultation on the options for the CIL Funding Programme. As the project was an appropriate suggestion, it was added to the IDS.
- 3.7 The IDS has been updated to reflect the additional information provided by stakeholders (see Appendix B) and then the proposed schemes have been ranked to inform recommendations on how CIL monies could be spent. The full review of the feedback received as part of the public consultation on the CIL



Funding Programme is set out in the Consultation Feedback Report at Appendix A.

- 3.8 In terms of CIL monies collected thus far or anticipated to be collected by 31 March 2016:
- £45,703 was collected in 2014/15
  - £96,496 has thus far been collected in 2015/16 (at the time of writing this report)
  - A further £42,463 is anticipated to be collected by 31 March 2016
- 3.9 This therefore provides an anticipated total income from CIL by 31 March 2016 of £184,662. This total is slightly higher than that anticipated in August, when preparing the options for the CIL Funding Programme. However, this figure may increase slightly if a development comes forward sooner which was not anticipated to come forward this year or it may decrease if a developer fails to pay the required CIL charge when it is due.
- 3.10 Of this total, 5% is allocated to the Council's administrative costs of running CIL and 15% is allocated to the Parish Councils in which the developments paying CIL take place (this is referred to as the "neighbourhood" portion in the CIL Governance Framework). If a CIL-chargeable development is in a non-parished area the "neighbourhood" portion is retained by the Borough Council to spend within that non-parished area.
- 3.11 Therefore, based on the current anticipated total, **£147,730** of CIL monies is expected to be available to spend by the Council across the Borough in 2016/17 from the 80% of CIL income that the CIL Governance Framework refers to as the "strategic" portion.

#### **4.0 RECOMMENDED FUNDING PRIORITIES FOR 2016/17**

- 4.1 The IDS now contains over 100 potential projects but the vast majority are not deliverable within the next year. However, many of those that are not immediately deliverable are projects that will deliver infrastructure that is needed and that might become deliverable in the near future. Therefore, a balance must be struck between funding appropriate and deliverable projects now with the CIL monies available and consideration for "saving" CIL monies to contribute to larger (and so more costly) and more beneficial projects that the infrastructure provider can work towards making deliverable while the necessary CIL monies are "saved up".
- 4.2 In addition, the IDS also serves a function as "living" evidence base to support monitoring and delivery of the current Local Plan and will inform the preparation of the next Local Plan, and so it includes all suggested infrastructure projects in the Borough, regardless of whether that infrastructure is directly related to new development or requires CIL monies to fund it. Therefore, some IDS projects will not meet a local need or demand that has arisen from new development, which is a key test of whether CIL monies can be spent on a project, and / or may not require CIL monies as the scheme has secured funding from another source.

- 4.3 To help inform deliberation on whether a project is eligible for CIL funding and then to assist in prioritising those eligible projects, council officers used the information collated on each project to assess schemes against six key criteria:
1. Are CIL monies needed to deliver the project?
  2. Does the project meet a local need or demand that has arisen from new development?
  3. Does the infrastructure fall under the Regulation 123 list?
  4. When can the infrastructure be delivered?
  5. Does the project help meet at least one of the Council's Corporate Priorities?
  6. Is the project identified within a relevant local strategy, e.g. the Local Plan, the Highways & Transport Masterplan and the Leisure Strategy?
- 4.4 The first criterion ensures that all infrastructure projects on the IDS which do not require CIL monies are separated off at the outset, reducing unnecessary assessment of projects. The second and third criteria are essential as CIL monies can only be spent on infrastructure that meets a local need or demand that has arisen from new development and on types of infrastructure that are on the Regulation 123 list (<http://www.westlancs.gov.uk/media/132578/Regulation-123-list.pdf>). At this point, we effectively ruled out all infrastructure projects from further consideration for the CIL Funding Programme 2016/17 which would not need or be eligible to receive CIL monies based on the current information.
- 4.5 The fourth criterion is necessary to understand whether the project is deliverable by 31 March 2017 and so might benefit from having CIL monies allocated to it for spending in the next financial year. The fifth and sixth criteria are necessary to help differentiate and prioritise between projects, where several meet all of the first four criteria.
- 4.6 A further consideration is also the cost of the project and what CIL monies are required to deliver it, so as to encourage greater value for money by using CIL monies to lever in other funding.
- 4.7 When applying the above criteria, it was concluded that the following five projects on the IDS should be included as options for inclusion in the CIL Funding Programme 2016/17 as part of the consultation in autumn 2015:
- New Allotments in Skelmersdale (£20,000)
  - New Allotments in Burscough (£30,000)
  - Improvements to Public Open Space and associated car parking at Station Approach, Ormskirk (£15,000)
  - Haskayne Cutting Nature Reserve (£8,000)
  - Halsall Memorial Hall Extension (£30,000)

4.8 Looking further ahead to projects on the IDS in the medium-term delivery category (1-5 years) that were found to be unlikely to be delivered by 31 March 2017, there are a great many projects that the Council could choose to save CIL monies toward, some of which are very significant. Some of the more significant projects in the medium-term delivery category that may require some level of CIL funding (total estimated cost in brackets) are:

- A new Skelmersdale Sports Centre (£12million)
- Improvements to Park Pool, Ormskirk (£5million)
- Improvements to Burscough Sports Centre (£5million)
- Improvements to enhance open space provision in the Tawd Valley in Skelmersdale (£300,000)
- Redevelopment of Birleywood Health Centre, Skelmersdale (unknown)
- Investment in health facilities in Burscough (unknown)
- Investment in health facilities in Northern Parishes (unknown)
- Ormskirk to Skelmersdale Linear Park (unknown)
- River Douglas Linear Park, Tarleton / Hesketh Bank (unknown, but Section 106 funding and on-site delivery within a development site will deliver significant stretches of the Linear Park)

4.9 Predicting how much CIL income may be collected in future years is extremely difficult given the number of variables involved, not least uncertainty over when sites will actually commence on site (which is when CIL can begin to be collected). However, based on the anticipated delivery of CIL-chargeable housing to 2020 in West Lancashire and a conservative average house size of 80m<sup>2</sup>, a rough estimate of income over the next five years would be in excess of £3million. This is important to consider if the Council is to think about saving CIL monies towards a larger project to be delivered in the next five years.

4.10 Taking into account all of the above information, the Council consulted on three options for spending CIL monies in 2016/17:

- 1) That the following five projects have CIL monies allocated to them for spending in 2016/17 (with the remaining “strategic” CIL monies saved for spending in future years):
  - New Allotments in Skelmersdale (£20,000)
  - New Allotments in Burscough (£30,000)
  - Improvements to Public Open Space and associated car parking at Station Approach, Ormskirk (£15,000)
  - Haskayne Cutting Nature Reserve (£8,000)
  - Halsall Memorial Hall Extension (£30,000)
- 2) That fewer projects are prioritised and have CIL monies allocated to them for spending in 2016/17, so that a greater portion of the “strategic” CIL monies can be saved for spending on projects in future years. For example, this could be done on the basis that the “neighbourhood” portion anticipated to be raised in future years is spent on the smaller projects in those areas. This example would leave two projects being funded from CIL monies in 2016/17 (because those projects are in areas where little or

no “neighbourhood” portion is anticipated to be raised in the next few years):

- New Allotments in Skelmersdale (£20,000)
- Haskayne Cutting Nature Reserve (£8,000)

3) That all “strategic” CIL monies raised by 31 March 2016 are saved for spending on projects in future years.

4.11 Following the consultation feedback on these three options, officers recommend a final, preferred option that is most similar to option 2 above and that allocates CIL monies to three projects for spend in 2016/17:

- *New Allotments in Skelmersdale (£20,000)*  
This project already has £50,000 of funding allocated to it from the Council’s Capital Programme to deliver 35 allotment plots, but further funding would enable the delivery of much-needed further allotment provision in Skelmersdale, especially in light of the planned numbers of new houses in the Skelmersdale area in the Local Plan. Supplementing the Council’s Capital Programme allocation of £50,000 with £20,000 of CIL monies would enable the delivery of 50 new allotment plots in total. This would be achieved by delivering a further 15 plots at a new site in a different part of Skelmersdale. As such, this project would meet all the key criteria. Delivery of this project is dependent upon planning permission but, should that be granted, the project could be delivered by 31 March 2017.
- *Improvements to Public Open Space and associated car parking at Station Approach, Ormskirk (£15,000)*  
This project already benefits from £45,000 of Section 106 funding for the improvement of the public open space, but requires £15,000 of CIL monies to enable the delivery of the associated car park improvements to encourage people to use the open space. The car parking may also serve a dual function as time goes on to provide additional car parking for Ormskirk train station as increased development of homes in Ormskirk and surrounding areas increases demand for the train services. As such, this project would meet all the key criteria and, subject to any requirement for planning permission, is deliverable by 31 March 2017.
- *Haskayne Cutting Nature Reserve (£8,000)*  
This project from the Wildlife Trust is already being supported by Downholland Parish Council which has committed £3,700 to install a boardwalk to allow people to access the wet woodland. Up to £8,000 additional funding is being sought to be able to extend the boardwalk further into the woodland. Given recent development in Haskayne and the fact that this is one of only three nature reserves in the Borough, this project would meet all the key criteria (with the exception of being identified within a local strategy) and would be deliverable by 31 March 2017.

4.12 These three projects require a total CIL contribution of **£43,000** which, together with funding towards those projects from other sources, will enable delivery of £141,700 worth of new infrastructure in West Lancashire.

- 4.13 It is recommended that the remaining “strategic” CIL monies received by 31 March 2016 (estimated to be in the region of £105,000) should be saved and rolled forward to contribute towards more significant infrastructure projects in the future, when they are ready to be delivered.
- 4.14 The two shortlisted projects included in the consultation options that are not recommended for taking forward with “strategic” CIL funding at this time are:
- New Allotments in Burscough
  - Halsall Memorial Hall Extension
- 4.15 The new allotments in Burscough project currently requires the allocation of £30,000 of CIL monies to deliver allotments in the Burscough area (approximately 20 plots), where 850 new homes are planned over the Local Plan period. As such, this project would meet all the key criteria, subject to deliverability. However, there are two factors that concern officers regarding this project. Firstly, whether the allotments could be delivered in 2016/17, as no site has been identified for the allotments at this stage. Secondly, whether this project could be funded or delivered through alternative means, as there is the possibility that new allotments could come forward as part of the Yew Tree Farm development in Burscough and, even if they do not, that development will generate a significant “neighbourhood” portion of CIL which will be passed to the Parish Council to spend on new infrastructure. In that context, officers feel it wiser to save “strategic” CIL monies for more strategic infrastructure projects, with higher costs that the “neighbourhood” CIL monies could not deliver.
- 4.16 The Halsall Memorial Hall Extension project was submitted by Halsall Parish Council and is to provide additional facilities at Halsall Memorial Hall where the current facilities are insufficient and too small to satisfy the community demands, and it is anticipated that the demand for those facilities will increase as the two housing allocations in the Local Plan that are in the Parish, together with recent planning permissions in the Parish, come forward. The Parish Council has informed officers that the total cost of the project has increased, but it is unclear precisely how much CIL funding is now being sought, as they are also pursuing other funding sources. This project would meet all the key criteria (with the exception of being identified within a local strategy) and would likely be deliverable by 31 March 2017, subject to detailed design and any necessary planning permission.
- 4.17 However, this project received by far the least support in the public consultation on the options for the CIL Funding Programme 2016/17 and there was some question as to whether new development really would create the additional demand anticipated. Crucially, the two larger Local Plan housing allocations in Halsall (which are both located on the border with Sefton) are not yet the subject of planning applications, and so it may be premature to consider this extended facility as being necessary to support new development at this time. In addition, those housing allocations, when they come forward, will generate a not insignificant “neighbourhood” CIL portion, which the Parish Council may choose to spend on this project, allowing “strategic” CIL monies to be saved toward more strategic infrastructure projects in the future.

## **5.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY**

- 5.1 The delivery of new infrastructure funded by CIL monies will have positive implications for sustainability and contribute to the delivery of the development allocated in the West Lancs Local Plan 2012-2027 in a sustainable manner. The three projects recommended at paragraph 2.2 will contribute towards various objectives of the Council's Sustainable Community Strategy.

## **6.0 FINANCIAL AND RESOURCE IMPLICATIONS**

- 6.1 There is no additional cost to Council resources of preparing and consulting on a CIL Funding Programme given that any projects prioritised for funding will be funded by CIL monies and, in some cases, by match-funding identified by the infrastructure provider from other sources; the administration of CIL (including the CIL Funding Programme) is covered by the 5% administration fee retained by the Council from CIL receipts together with the Planning Services revenue budgets.

## **7.0 RISK ASSESSMENT**

- 7.1 There are no significant risks related to this report.

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### **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 – Consultation Feedback Report on Options for CIL Funding Programme  
2016/17

Appendix B – Infrastructure Delivery Schedule

Appendix C – Equality Impact Assessment

## **CIL Funding Programme – Consultation Feedback**

West Lancashire Borough Council invited comments on the CIL Funding Programme proposals between 1 October and 30 October 2015. The consultation sought comments on how the CIL monies received 2014-2016 should be spent in 2016/17, and on what projects they should be spent on.

16 responses were received via email, and 32 were made online through the surveymonkey portal. A summary of the comments, and results, of the consultation are outlined through this feedback report, whilst the actual responses received can be viewed through the following appended documents: CFP Email Representations, CFP Surveymonkey.

### **Survey results (from Surveymonkey)**

The survey asked a series of questions. Each question is presented below along with a summary of the responses provided.

**We have put forward three options for how we should spend CIL monies in 2016/17. Option One: Spend most of the monies; Option Two: Spend some, save some; Option Three: Save them all. Which option do you support most?**

80% supported Option 1, 20% supported Option 2 and no respondents supported Option 3.

The majority of people considered that monies should be spent under Option One to ensure that immediate infrastructure improvements can be delivered to communities, particularly at a time when there is a general austerity and cut backs in local authority funding affect delivery through other sources. Under Option One, respondents considered that the monies were being evenly spread across the Borough.

**Do you agree that CIL funds should be awarded to the following projects?**

	YES	NO
New allotments in Skelmersdale	83%	17%
New allotments in Burscough	71%	29%
Improvements at Station Approach, Ormskirk	77%	23%
Improvements at Haskayne Cutting Nature Reserve	74%	26%
Extension at Halsall Memorial Hall	57%	43%

The highest proportion of support was received for new allotments in Skelmersdale, followed by improvements at Station Approach, Ormskirk.

The survey asked respondents to justify their choices.

### ***New allotments in Skelmersdale***

There was wide support for the provision of new allotments in Skelmersdale. It was considered by many that there is a demand for allotments across the Borough, including Skelmersdale, and allotments should be provided in the town because of its size and the amount of development that is planned there. It was considered that allotments would help support new development. Allotments would deliver community benefits, health improvements and enhance opportunities to access the outdoors. It would also allow local residents to grow their own food, particularly for those residents that do not have their own gardens. Funding allotments would also help to provide investment in a deprived area.

### ***New allotments in Burscough***

Again, it was considered by many that there is demand for allotments across the Borough and respondents stated that there is a very limited existing provision in Burscough, despite local demand for allotments. It was felt that the provision of allotments would give local people the opportunity to participate in healthy lifestyle activities and access the outdoors. Some respondents considered that Skelmersdale already has a fairly significant allotment provision, and therefore available monies should be prioritised to Burscough. Some considered Burscough should be a higher priority because of the potential new development anticipated through the Yew Tree Farm allocation. Others suggested that CIL should not be used to provide allotments until the Yew Tree Farm proposals have determined whether there should be any allotment provision secured on site from the developer.

### ***Improvements at Station Approach, Ormskirk***

There was wide support for the provision of additional car parking spaces at the station. Many people stated that the existing car park is in poor condition and there are an insufficient number of car parking spaces at the rail station. It was considered that further parking spaces are needed for rail users and this would help decongest parking on the local roads surrounding the station. Others suggested that car parking provision should be the financial responsibility of the rail service providers.

Some respondents felt that Station Approach improvements should not be a high priority, with sufficient parking facilities already provided. There was a suggestion that better bicycle security facilities should be provided, which would also serve to encourage more sustainable modes of transport to and from the station/public open space and discourage travel by car.



### ***Improvements to Haskayne Cutting Nature Reserve***

Many respondents supported this proposal because it would bring community, health and environmental improvements and allow people to access nature. It was recognised that the site provides a good educational resource but currently access is poor. The proposed works would therefore improve access to all. Others considered that the proposals would not benefit enough people.

### ***Extension at Halsall Memorial Hall***

A number of responses stated that they did not have sufficient knowledge of Halsall to make a comment, but recognised improved community facilities would likely benefit local residents and the sports groups that use the venue. It was emphasised that any extension should only be delivered if a sufficient demand was created because of new development. Others suggested that funding should be provided through alternate means (eg Parish Council fundraising) or questioned the need for the additional facilities.

### ***General comments***

There was some hesitancy towards some of the schemes. One respondent considered all monies should be made available and allocated to Skelmersdale rail station because of the improvements this would bring to the town and the wider area. There were queries raised as to why monies could not be ring fenced so that they are only used in the area where developments have occurred.

### **Council comments**

Strategic CIL monies can be used anywhere across the Borough, as required, to support new development. In accordance with the CIL regulations, the majority of the funds raised (the strategic portion) can be spent anywhere across the Borough. Parish Councils are given 15% of CIL receipts from their area, which is designed to ensure that local infrastructure can be delivered in those areas where the original developments occurred.

Delivery of a Skelmersdale rail link is a priority for WLBC, and LCC, and the Council are working with a range of partners to investigate the feasibility of delivering this rail link. However, a Skelmersdale rail link would be likely to be funded through funding from Central Government and CIL monies would not be required for the rail link itself.

It should be noted that car parking provision at Station Approach would primarily be to serve the public open space, and not to support parking facilities for the rail station. However, the improvements may provide future, additional car parking for Ormskirk train station as more homes are built in and around Ormskirk and demand increases for train services.

If CIL monies were to be allocated for the Halsall Memorial Hall extension, they would only contribute part of the required funding, with over half of the cost provided by the Parish Council through match funding. There are a number of allocated housing sites in Halsall, which the Council expect to see housing delivered on, thereby justifying an extension to support new development.

**Are there any other projects on the IDS that you consider to be a high priority or that you think could be delivered in 2016/17? Please explain your reasoning.**

**Can you suggest any other infrastructure schemes that you think could be included on the IDS?**

A number of representations suggested the provision of allotments in Ormskirk, along with traffic improvements to alleviate congestion in the town.

There were calls for CIL monies to be used to provide a new library in Burscough.

There were further suggestions for an extension to Richmond Park pavilion (Burscough) to enable greater use of the park; provision of a zebra crossing at Aughton St, Ormskirk to reduce the danger to pedestrians on a busy road and; delivery of Skelmersdale rail. There were also suggestions for a sports pavilion at Banks, the replacement of missing direction signs in Skelmersdale town centre, loading bays along Liverpool Road South and improved pedestrian/cycle links through the proposed linear parks (Burscough-Ormskirk-Skelmersdale).

#### Council comments

All comments have been noted.

As a result of this consultation, Ormskirk allotments have been added to the IDS (#111).

Some of those suggestions put forward are already contained within the IDS, including Burscough library, an extension to Richmond Park pavilion, a zebra crossing at Aughton Street and Skelmersdale rail. However, if the Council are to spend CIL monies sooner rather than later, we must focus on those projects that can be delivered in short timescales and can be afforded using existing CIL receipts.

Some proposals put forward in the consultation are not considered to be infrastructure improvements for the purposes of spending CIL monies (loading bays, direction signs) and so cannot be delivered through CIL or included on the IDS. Some proposals (Burscough-Ormskirk linear parks) are already included on the IDS (see following list), but are expected to be delivered by developers as part of planning applications and through S106 monies, rather than using CIL monies.

- Ormskirk allotments - #111
- Burscough library - #22
- Richmond Park pavilion extension - #79
- Zebra crossing, Aughton St - #104
- Skelmersdale rail - #45
- Sports pavilion, Banks - #93
- Burscough-Ormskirk linear park - #11
- Ormskirk-Skelmersdale linear park - #12
- Ormskirk traffic movement strategy, Ormskirk - #4

### **Email representations**

Email responses were much wider in content than the survey responses, although not all points raised were directly relevant to the CIL Funding Programme consultation.

Registrations of support were received for Option One and Option Two. One respondent queried the use of strategic CIL monies to provide facilities, such as allotments, which in many areas are provided by parish rather than borough councils. This is of particular relevance to those areas that have already received CIL neighbourhood monies. There were also queries raised in relation to certain areas benefitting from CIL monies when there had not been any significant developments in those areas.

The Council received two new formal bids (Ormskirk allotments and Burscough towpath improvements) along with a detailed bid and costings in relation to Halsall Memorial Hall extension. Downholland Parish Council gave its support to Haskayne Cutting Nature Reserve because it would benefit the locality. There was also support registered for the delivery of the River Douglas linear park (Hesketh Bank).

### **Council comments**

All comments have been noted.

CIL has been introduced to raise funds from new developments in order to provide or improve infrastructure required to support new development in the Borough. In accordance with the CIL regulations, the majority of the funds raised (the strategic portion) can be spent anywhere across the Borough. However, to ensure local infrastructure improvements can be made directly in the area where a development occurred, Parish Councils are given 15% of those CIL monies collected in their area, known as the neighbourhood portion.

The development of allotments is supported in the draft WLBC Leisure Strategy and the Local Plan. Allotments are included on the R123 list as strategic green infrastructure and therefore the Council support the delivery of allotments through CIL funding – whether

using strategic or local portions. It is up to each individual parish council to determine how they use the neighbourhood portion of CIL monies that they receive (within certain guidelines).

The Council can use CIL monies to fund the provision of, or improvements to, infrastructure which is required to support new development across the Plan period. Whilst Halsall has had limited residential development so far, the parish has a number of allocated sites (Fine Jane's Farm, New Cut Lane) and sites with planning permission which the Council expect to come forward in the future.

The information contained within the new and updated formal bids have been added to the IDS.

#### **Actions resulting from consultation**

- Inclusion of Ormskirk allotments on IDS
- Inclusion of Burscough towpath improvements on IDS
- Update project details for Halsall Memorial Hall Extension on IDS
- Update of IDS to be issued with final CIL Funding Programme

#### **Recommendations resulting from consultation**

Whilst the majority of consultation respondents supported Option 1 (spend most of the monies), officers consider, on reflection of the comments received, that a hybrid of Option 1 and Option 2 is the most appropriate use of the monies at this time. Our justification is set out below.

- Given that the Council have a number of larger, significant projects which it wishes to deliver in the future, officers consider that some of the CIL monies should be saved towards such schemes.
- Some consultees considered that both the Burscough allotments and Halsall Memorial Hall extension schemes could be funded in the future by the Parish Council's neighbourhood portion as local, major allocated sites receive planning permission and commence development. Officers agree that CIL strategic monies could therefore be better allocated to other projects which may not receive alternative or sufficient sources of funding.
- With regard to the provision of allotments in Burscough, officers agree that it would be prudent to await further details on the delivery of allotments on the Yew Tree Farm allocated site before agreeing to fund any further allotments in Burscough using CIL strategic monies.

- In relation to Halsall Memorial Hall, officers also agree that the need for an extension should be reconsidered once the locally allocated sites begin to be built-out, so as to ensure that a demand for these additional facilities exists as a result of the new developments.
- Officers do not consider that the Ormskirk allotments scheme can be delivered by March 2017, or that the scheme is required to support current levels of new development, and so this will be retained on the IDS for consideration for funding in future years. It may also be feasible for the scheme to be funded from future neighbourhood portion receipts. (Note that as Ormskirk does not have a parish council, any neighbourhood portions would be spent by the Borough Council in consultation with the local community).

Subsequently, of the five shortlisted projects included in the consultation, officers recommendations are that CIL monies should be spent on the following projects in 2016/17:

- Skelmersdale allotments
- Station Approach Open Space, Ormskirk
- Haskayne Cutting Nature Reserve

The remainder of the CIL monies will then be retained for expenditure in future years. Appropriate projects will be identified each year, in line with the CIL Governance and Expenditure Framework, for funding in the following financial year.

## **Appendices**

## CIL Funding Programme Consultation (October 2015) - Email representations

Rep Number	1
Name	George Pratt
Organisation	-
Comments	<p>The options you give are far too prescriptive for the purpose. The whole point of CIL was to improve local infrastructure in the same area as the development. The amount of CIL due to be received for Yew Tree farm, for instance could be used to provide a new library, or a youth facility, or any of a hundred other projects. The reaction by residents of Burscough, if it were known that the unpopular development was providing funding for schemes in different parts of the borough while they suffer the disruption to their day to day activities, would no doubt be profound dissatisfaction with the Authority. This would be emphasised when it becomes more widely known that developments in Skelmersdale are zero rated as far as CIL charging is concerned.</p> <p>I understood that the CIL payments were to be split between County (20%), Parish(15%), Borough(65%). Is it likely, then, that funds for any of the projects you list would ever come about in a single year, seeing the forecast build rate is less than 50 houses on any development per year?</p> <p>In addition CIL is not payable on Affordable Housing, which will be 35% of YTF development, so if it is assumed that 35 houses are built on the site in 2016, only 23 will be chargeable. Let's assume that the GIA of these average out to 110 sq mtrs the CIL income would be £215050. LCC would receive £43,000, Burscough Parish Council would get £32,000, with WLBC retaining £140,000. Given that this income split would continue each year until 2027, it would make far more sense to undertake one larger project each year <b>in the immediate area of the development</b>, rather than diluting the impact of the funding over a wide area. In the above scenario, each of the 5 projects you list would get £28,000, which would not be enough to purchase land in Burscough for allotments, and equally unlikely to be able to fully fund the other projects.</p> <p>I would earnestly urge you to reconsider your proposals in light of the above.</p>
WLBC Response	<p>CIL has been introduced to raise funds from new developments in order to provide or improve infrastructure required to support new development in the area. In accordance with the CIL regulations, the majority of the funds raised (the strategic portion) can be spent anywhere across the Borough. Indeed, CIL monies can also be spent outside of the Borough if that infrastructure would help support the development of the district. However, to ensure local infrastructure improvements can be made directly in the area where a development occurred, Parish Councils are given 15% of those CIL monies collected in their area, known as the neighbourhood portion.</p> <p>Burscough Parish Council have already been awarded the neighbourhood portion for 2014/15 receipts, and can choose what they wish to spend the money on providing it is in accordance with the requirements of the CIL regulations. Further neighbourhood portions will be awarded following receipt of any monies. Parish Councils can also choose to allocate their funding to larger infrastructure schemes in their area, by returning their monies to the Council to spend on strategic projects.</p> <p>The charging rate was informed using viability evidence, and approved by an independent Planning Inspector in 2014. As a zero rated area, Skelmersdale will not benefit from any neighbourhood portions, but we are entitled to spend strategic monies across the Borough which will include Skelmersdale.</p>

	<p>The CIL regulations specify that CIL monies must be split as follows: Administration (5%), Local (Parish) Councils (15%) and Strategic Infrastructure (80%). There is no requirement to pass any monies to County Council, although we work closely with them in their capacity as an infrastructure provider (transport, education, community facilities) to identify required infrastructure schemes and to determine how CIL monies should be spent.</p> <p>A CIL charge is due from a development following commencement, with payments set in line with an adopted instalments policy. CIL revenue is NOT based on the number of houses built per year and so such numbers are irrelevant to CIL funding. As commencements are outside the control of Planning, we can only estimate when a development is likely to commence and subsequently the CIL revenue we can expect to collect. Nevertheless, we expect to collect a significant amount of funds over the Local Plan period based on the delivery requirements of our Local Plan. The CIL Funding Programme explains our options for spending CIL, including saving monies to build up larger funding for bigger projects. A CIL Funding Programme will be prepared annually based on that revenue which we have collected, and anticipate expecting in the forthcoming year.</p> <p>The Council are aware of the infrastructure requirements that will be created through the Yew Tree Farm development, and these have been identified through the Masterplan, the IDP and IDS. The developer(s) will be required to deliver some infrastructure through any planning approval. CIL will provide the opportunity to fund additional infrastructure but this will be assessed in line with all other schemes within the IDS at the relevant time and prioritised accordingly. The Parish Council will also have the opportunity to spend 15% of the CIL receipts collected in their area.</p>
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Rep Number	2
Name	Phil Morley
Organisation	-
Comments	<p>MY THOUGHTS ARE.</p> <p>MORE AND MORE PEOPLE ARE NOW DECIDING TO MAKE THIS AREA THE PLACE THEY WANT TO LIVE AND BRING UP A FAMILY IN, JUST LOOK AT THE FUTURE HOUSE BUILDING COMMITMENTS TO THE GOVERNMENT .</p> <p>FOR THE NEW FAMILIES MOVING IN TO THE AREA TRANSPORTATION IS A PROBLEM, A TRAIN NETWORK SERVICE THAT MAKES TRAVEL TO WORK IN PRESTON / LIVERPOOL A BIG PROBLEM, DIESEL - ELECTRIC IS NOT THE ANSWER, THE SOLUTION BRING BACK THE CURVES IN BURSCOUGH AND ELECTRIFY THEM. NOT THE COUNCILS PROBLEM I HEAR BUT ITS A PROBLEM THAT YOU COULD INFLUENCE IN SOLVING, LETS CALL IT AN IMPROVED INFRASTRUCTURE.</p> <p>ALLOTMENTS MAY SATISFY A SMALL PERCENTAGE OF THE LOCAL POPULATION BUT A LARGER PARK BIG ENOUGH FOR PEOPLE THAT DON'T OR EVEN DO DRIVE CAN ENJOY MEETING UP WITH FRIENDS AND REMEMBER MORE AND MORE CHILDREN ARE NOW BEING CARED FOR IN THE WORKING DAY BY GRANDPARENTS THAN EVER BEFORE, WHAT A NICE PLACE IT WOULD BE TO TAKE THEM.</p>



	<p>AND</p> <p>ONE LAST IDEA A PERSON THAT COULD PATROL AND INFLUENCE DRIVERS NOT TO PARK ON PAVEMENTS, THINK OF THE MUMS AND GRANDPARENTS WITH PRAMS THAT HAVE TO LEAVE THE PAVEMENTS AND TAKE TO THE ROAD JUST TO CARRY ON WITH THEIR JOURNEY</p> <p>JUST A COUPLE OF IDEAS NOW DOUBT THAT WILL BE END UP FILE 13,</p>
WLBC Response	<p>The electrification of the Burscough Curves is already listed on our IDS (#25) as an infrastructure scheme that the Council would like to see delivered. However, delivery is dependent on a number of factors, including the availability of significant levels of funding and the capacity of infrastructure providers, and is therefore a long term aspiration for the Council.</p> <p>Allotments have been identified as a requirement in the West Lancashire Leisure Strategy and in the Local Plan, and are listed within the IDS. The IDS also contains a number of projects connected to providing linear parks, or providing improvements to existing parks which are required as a result of new development. S106 monies have also, over recent years, contributed greatly to improving parks and open spaces. The CFP provides our justification for the consideration of funding at this time.</p> <p>Cars parking on pavements is a civil matter. It is not a consideration for infrastructure and therefore cannot be funded through CIL.</p>

Rep Number	3
Name	Warren Hilton
Organisation	Highways England
Comments	Thank you for letting us know at Highways England about this consultation. Having looked at the documents, there are no comments that we wish to make.
WLBC Response	Comments noted

Rep Number	4
Name	Stella Sass
Organisation	-
Comments	In my opinion the money should be allocated to Option 1 new allotments in Skelmersdale and Burscough
WLBC Response	Comments noted


Rep Number	5
Name	Margaret Atherton (Clerk)
Organisation	Downholland Parish Council
Comments	Downholland would like to give its support to the project suggested for The Nature Reserve boardwalk and feel that this would be an asset to the locality.
WLBC Response	Support noted.

Rep Number	6
Name	Ian T Cropper (Clerk)
Organisation	Hesketh-with-Becconsall Parish Council

Comments	<p>I refer to your recent letter regarding your “Options and Shortlisted Projects” for the use of WLBC CIL monies; this was considered by this Council at their October meeting earlier this week.</p> <p>My Members were somewhat surprised that some of the projects related to facilities that would normally be provided by Parish rather than District Councils. In particular, Allotments in Burscough and Halsall Memorial Hall Extension.</p> <p>In line with most Parishes, we have provided a large number of Allotment Gardens (75+) and to date have in excess of £100,000 invested in our allotment site. This has been financed entirely by locally sourced money and we feel this should be the case in Burscough - Burscough CPC will clearly have significant funds themselves from their own CIL resources especially as Yew Tree farm progresses.</p> <p>We find it hard to believe that the amount of development in Halsall since the introduction of CIL funding has made any significant demand on their village hall and in any event this should again be financed from local funds.</p> <p>It appears to this Council that the only sensible course of action at this early stage is to save all funds for future years until more needful projects caused by development come to light.</p>
WLBC Response	<p>The development of allotments is supported in the WLBC Leisure Strategy and the Local Plan. Allotments are included on the R123 list as strategic green infrastructure and therefore the Council support the delivery of allotments through CIL funding – whether using strategic or local portions. It is up to each individual parish council to determine how they use their CIL monies.</p> <p>The Council can use CIL monies to fund the provision of, or improvements to, infrastructure which is required to support new development across the Plan period. Whilst Halsall has had limited residential development so far, the parish has a number of allocated sites (Fine Janes Farm, New Cut Lane) and sites with planning permission which we expect to come forward, and as a result will place additional demand on the area.</p> <p>Comments noted.</p>

Rep Number	7
Name	Gillian Laybourn
Organisation	Historic England
Comments	Thank you for consulting Historic England on the above document. At this stage we have no comments to make on its content.
WLBC Response	Comments noted.

Rep Number	8
Name	David Cheetham
Organisation	-
Comments	I have recently voted for option 2 on the consultation by completing the on line form. On it I propose that money be spent on a project not currently listed, namely the replacement of missing and faded direction signs and provision of new ones in the more recently developed parts of the town.

	<p>Visitors to the town are constantly avoiding the use of the footpath system and on many occasions I have been asked direction by people who are lost! Before all the trees grew it was easy to find ones way around the town with the help of the SDC maps. These were freely available and the signs legible. As trees have matured it is no longer possible to see "destinations"!</p> <p>I attach two photographs , taken outside the Co-op Bank close to Whelmar house that show the signs to which I refer. Strangely the LCC has put finger post Public Footpath signs found the edge of the town in Whalley and on Stannanought road but it is totally unclear as to how these are reached from within the town.</p> 
WLBC Response	<p>To be considered for CIL funding, proposals must be for infrastructure required to support new development. We do not consider that the replacement of existing signage is necessary to support new development, and therefore it cannot be considered for CIL funding. We may consider new signage which serves to support new developments, but a clear need must be justified. We consider that there are more appropriate and necessary projects to deliver at present which have been justified through the CFP.</p>

Rep Number	9
Name	Dave Bond
Organisation	Halsall Parish Council
Comments	Detailed proposal for Halsall Memorial Hall extension submitted.
WLBC Response	Updated on the IDS

Rep Number	10
Name	Graham Fairhurst
Organisation	West Lancashire Light Railway Trust
Comments	<p>Thank you for the opportunity to respond to the CIL Programme document.</p> <p>Our comments recognise that with a new initiative like CIL it is desirable to start spending money and demonstrate to communities the benefits that derive from it</p>

	<p>rather than simply collect the money. We are very encouraged that the Borough seems to have a robust CIL regime stating what the money will be spent on alongside a robust Infrastructure Delivery Plan (IDP). With this type of programme, there is a requirement for active project management with adequate resource. At present, from our position as a voluntary sector stakeholder, we are not clear how this is taking place along with the process to mature and bring forward projects which are currently waiting because of perceived uncertainties.</p> <p>Our first comment therefore is to recommend that the IDP be handled as a longer-term programme of projects and be used to steer the use of CIL income more proactively and strategically. By this, we mean that the use of CIL, where possible, be used to lever in funding from other external sources rather than to top up project funding where another party has already indicated a willingness to provide initial funding. Early commitment to the use of CIL should be used to influence other stakeholders and thereby reduce perceived project uncertainties. We assume that the 5% top slicing of the CIL income is to cover for this type of project and programme management. Having said that, we do recognise that in 'Year 1' of any programme a focus will naturally be on the easiest projects to get delivered.</p> <p>The focus of the remainder of our response is largely related to one project in the IDP and the CIL project list, namely the River Douglas Linear Park and we conclude with our recommendation on spend in the 2015/2016 CIL Programme.</p> <p>The WLBC Local Plan has identified a major development site at Hesketh Bank (and just into Tarleton) as a Rural Development Opportunity (RDO) for mixed use re-development. This covers the former brickworks and some adjacent greenfield land. Last autumn, a major housing developer secured outline planning permission. Detailed studies and assessment work is now taking place ahead of the submission of a reserved matter application.</p> <p>The locality is also covered by a planning policy for the creation of a linear country park and significant parts of the RDO have the status of Biological Heritage Site (BHS) and the protection of Tree Preservation Order (TPO). A Steering Group under the leadership of WLBC (with both chair and secretary) has been working for the past 10 years to secure the implementation of the Park. This Group includes representatives of: Lancashire County Council, Chorley Borough Council, Hesketh with Beconsall Parish Council, Tarleton Parish Council, the Environment Agency, the Canal and River Trust, Lancashire Wildlife Trust and the West Lancashire Light Railway Trust. These have all invested heavily in terms of time and in some cases funding to achieve the project goals. In 2010 the Steering Group commissioned a feasibility study from specialist consultants Gillespies. This looked at how the Park could be configured and delivered. The report recommended delivery through enabling development and showed the importance of landscape, wildlife and the special local heritage to the purpose of the Park, including the extension and development of the West Lancashire Light Railway to make a thriving park with a strong stakeholder base and identity. Gillespies report especially highlighted the importance of the former brickworks site as the key gateway to the Park. Without this gateway and visitor facilities (such as car parking, toilets and interpretation), the riverbank land to the east is very difficult of access and the Park would miss most of its purpose as a quality amenity. Within the development of the Hesketh Bank Village Plan, which was carried out with extensive public engagement and consultation, the Park was a particular theme and one that received strong support.</p> <p>In June 2104 at a meeting of the River Douglas Park Steering Group, the West Lancashire Light Railway Trust presented proposals for development of the Railway and the provision of visitor facilities for the Park on a co-located/joint use basis. These proposals comprise: the extension of the Railway to the riverbank so as to serve Beconsall Old Church and the riverbank footpaths, the creation of a heritage centre and learning</p>
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	<p>facility together with visitor facilities for the River Douglas Linear Park (including a cafe, toilets and interpretation of the Park and of local heritage – the old brickworks, the former port and former Southport-Preston Railway). The footprint need for the project accords with the developer's thinking around redevelopment of the site. The Steering Group endorsed these proposals and, at the meeting, the WLBC planner recommended that these proposals be submitted as a pre-application enquiry to test the robustness of them and to establish planning credibility. This was done later in 2014. The pre-application enquiry looked at the proposals against national and local planning policy and the overall site redevelopment. The proposals received a very positive response from the planners in relation to these matters; that they showed good design and that they would complement and not prejudice the overall re-development. Whilst it was clear the proposals were robust, the planners recommended two further pieces of work be carried out to give further confidence in them. These were studies to look into the impacts of the project on: the ecological issues within the BHS and the area covered by the TPO. These two pieces of work were subsequently undertaken by specialist consultants and both have shown that the project will have positive impacts on the BHS and the TPO and that the few negative impacts are stated to be minor and fully capable of mitigation. The project concept and content also accord with NPPF and WLBC Local Plan policies for sustainable development and sustainable rural tourism and with the new, draft Lancashire Visitor Economy Strategy.</p> <p>The project is therefore mature and deliverable. Planners have also indicated that it can contribute toward the key goal of mixed use redevelopment for the RDO and avoid this simply being a housing scheme.</p> <p>For sound regeneration of the overall site, it will be essential for the implementation of these 'gateway' visitor facilities to proceed at the same time as the new housing is constructed.</p> <p>The River Douglas Linear Park is a project within WLBC's Infrastructure Delivery Plan and is on the Borough's CIL Regulation 123 list.</p> <p>The development of the visitor facilities for the Park and the development of the Railway is a project that will require substantial external funding and detailed discussions have therefore taken place with the Heritage Lottery Fund (HLF) through this year. HLF spent a full day on site, meeting the various stakeholders (including the Borough) and have indicated that they like the project a lot. However, they would like to see other stakeholders actively engaged and have indicated that they always view a measure of match funding very positively. An obvious source of match funding is from CIL.</p> <p>It is likely that a detailed planning application for the new housing development will be submitted at the end of 2015 or early in 2016 and that the site redevelopment work could then proceed quite rapidly during 2016/2017. This development will itself generate a very substantial CIL receipt. However, there will be a 'lag' in the receipt and therefore mobilisation of this CIL income. As this is a large development, the CIL also might be received in stages over a period of a few years. This could well mean that the needs for initial funding for the Park will be difficult to find from the CIL receipt from the site development itself even though this will be substantial.</p> <p>The ability to commit CIL early to the Park is probably going to be essential to give confidence to other stakeholders and also to generate match funding from other external sources. Clearly once a commitment has been made, then other aspects of the Park could be funded later-on from CIL generated by the development within the RDO site itself as this comes on stream. However, the ability to give the project up-front confidence from the general CIL fund' could be critical to successful delivery and certainly could also make a difference in the mobilisation of substantial funding from</p>
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	<p>other sources.</p> <p>Therefore, in the light of the importance of this Linear Park, it is suggested that:</p> <ol style="list-style-type: none"> <li>1. Not all of the current CIL fund be spent on other projects immediately. This is not to suggest that these projects are themselves not important, but rather that deferment take place to protect a reasonable CIL balance in the fund against needs in Hesketh Bank. The deferred projects could then take place once more money was in the CIL fund and/or there was greater clarity over the initial funding needs for the Linear Park together with an overall funding profile.</li> <li>2. That the River Douglas Linear Park be specifically identified as a project which the Borough intends to commit CIL funding at the front end (potentially in 2016/2017) so as to give confidence to stakeholders and to create leverage on other external funding.</li> </ol> <p>It is therefore the view of the West Lancashire Light Railway Trust that Option 2 or 3 in the Consultation Document be adopted.</p> <p>As these are very early days in the CIL regime, and in view of the relatively small difference in outgoings between Options 2 and 3, it could be sensible to implement Option 2 to demonstrate that CIL monies are being used already for projects which have a public good.</p> <p>The CIL consultation document itself identifies the River Douglas Linear Park as one of the most significant upcoming projects that will require need some funding from CIL. It would therefore be extremely unfortunate if it was found this project had to move forward rapidly, but met a situation where the CIL fund was at that time empty and/or CIL monies were not available as match funding to 'gear-in' funding from other sources.</p> <p>In setting out the above, I wish to make it clear that the development of the Railway is not seeking funding from CIL. Development (and moving the Railway into a long-term sustainable position) is dependent on the Linear Park proceeding and being implemented in a way which would complement our aims. Also, the discussions which have taken place with HLF have been on the basis of seeking HLF funding for co-located, potentially joint use visitor facilities (i.e. for both the Park and Railway). Through appropriate project configuration it will be possible to clearly demonstrate that CIL funding within the overall scheme would be applied to the Register 123 content.</p> <p>I would be happy to meet to clarify any of the matters presented in this consultation response. Also, I would be happy to begin to look at a framework for delivery and the long-term management of the River Douglas Linear Park with the Borough and other stakeholders.</p>
WLBC Response	<p><b>Comments noted.</b></p> <p>The Council do not expect that CIL can fund all of the projects identified through the IDP and IDS and instead it is recognised that CIL is designed to lever in match funding for the majority of schemes.</p> <p>The River Douglas linear park is listed on the IDS (#10). The linear park route is in multiple ownerships, one of which relates to a major development site which must come forward to deliver a key section of the route. A detailed proposal needs to be worked up and costed before any delivery can commence or before an amount of CIL funding can be considered. The Council will continue to work with delivery partners, including Lancashire County Council, and stakeholders to deliver the linear park.</p>

Rep Number	11
Name	Anneli Harrison
Organisation	Office of Rail and Road (ORR)
Comments	The Office of Rail and Road has no comment to make on this particular document.
WLBC Response	Comments noted.

Rep Number	12
Name	Anne-Sophie Bonton
Organisation	Lancashire County Council
Comments	<p>The West Lancashire Infrastructure delivery Scheme contains over 100 potential projects, but a large majority are not deliverable within the next year. However, many that are not deliverable now are still required and may be deliverable in the medium term (1-5 years) or long term (beyond 5 years). You have rightly identified the need to balance funding for appropriate and deliverable projects now against saving CIL monies to build a larger fund for bigger projects in the future.</p> <p>Three options for spending CIL monies in 2016/17 have been identified by your council.</p> <p>Under the second option, a large portion of the “strategic” CIL monies can be saved for spending on projects in future years and 2 projects will be prioritised for CIL funding in 2016/17.</p> <p>You will be aware that in the next few years West Lancashire is likely to see major projects taken forward mainly in highway and transport or flood defence. It seems, therefore, prudent to save a significant proportion of the available money for future years, in order to maximise the chance to secure major essential infrastructure projects. Some of them are identified in the West Lancashire Highway and Transport Masterplan.</p> <p>The 2 projects identified under option 2 are: New allotments in Skelmersdale and the Haskayne Cutting Nature Reserve. They both carry strong health benefits which the County Council value. Skelmersdale is located within a regeneration priority area and the County Council supports proposals that would bring benefits to this area. The Haskayne Cutting Nature Reserve is a Biological Heritage Site (BHS). Lancashire county council supports positive approach towards conservation and enhancement of BHS. The County Council consider the choice of these 2 projects sensible.</p> <p>For the reasons set out above, option 2 seems to be the most appropriate option to take and is the one that the County Council support.</p>
WLBC Response	Support for Option 2 noted so as to save a significant proportion of the available money for future years in order to maximise the chance to secure major essential infrastructure projects. Under Option 2, use of monies for Haskayne Cutting Nature Reserve and Skelmersdale allotments are supported

Rep Number	13
Name	Kate Wheeler
Organisation	Natural England
Comments	<p>Natural England has no specific comments to make on the draft CIL programme, however would like to make the following general comments, which we hope are helpful.</p> <p>Natural England is not a service provider, nor do we have detailed knowledge of infrastructure requirements of the area concerned. However, we note that the National</p>

	<p>Planning Policy Framework Para 114 states “Local planning authorities should set out a strategic approach in their Local Plans, planning positively for the creation, protection, enhancement and management of networks of biodiversity and green infrastructure.”</p> <p>We view CIL as playing an important role in delivering such a strategic approach. As such we advise that the council gives careful consideration to how it intends to meet this aspect of the NPPF, and the role of the CIL in this. In the absence of a CIL approach to enhancing the natural environment, we would be concerned that the only enhancements to the natural environment would be ad hoc, and not deliver a strategic approach, and that as such the local plan may not be consistent with the NPPF.</p> <p>Potential infrastructure requirements may include:</p> <ul style="list-style-type: none"> <li>• Access to natural greenspace.</li> <li>• Allotment provision.</li> <li>• Infrastructure identified in the local Rights of Way Improvement Plan.</li> <li>• Infrastructure identified by any Local Nature Partnerships and or BAP projects.</li> <li>• Infrastructure identified by any AONB management plans.</li> <li>• Infrastructure identified by any Green infrastructure strategies.</li> <li>• Other community aspirations or other green infrastructure projects (e.g. street tree planting).</li> <li>• Infrastructure identified to deliver climate change mitigation and adaptation.</li> <li>• Any infrastructure requirements needed to ensure that the Local Plan is Habitats Regulation Assessment compliant (further discussion with Natural England will be required should this be the case.)</li> </ul>
WLBC Response	<b>General comments about CIL noted.</b>

Rep Number	14
Name	Debbie Fifer
Organisation	Canal & Rivers Trust
Comments	<p>The Trust has no comment to make on the current shortlisted projects but would wish to be kept informed of ongoing work in respect of CIL within West Lancashire.</p> <p>As you may be aware, the Canal &amp; River Trust owns, manages and maintains the Leeds and Liverpool Canal which extends to a length of approximately 40 kilometres within West Lancashire including the Rufford Branch, along with the associated towpaths, bridges, locks, feeder channels and other historic waterway infrastructure. In addition, it manages the Millennium Ribble Link which connects the Lancaster Canal to the Leeds and Liverpool Canal and the wider inland waterway network via the River Douglas, Ribble Estuary and Savick Brook.</p> <p>Waterways are multi-functional assets and should be considered under a number of different categories of infrastructure as defined in the provisions for the purposes of the Community Infrastructure Levy:</p> <ul style="list-style-type: none"> <li>• green infrastructure and open space;</li> <li>• sustainable transport infrastructure; and</li> <li>• part of the infrastructure supporting flood alleviation, drainage and water supply.</li> </ul> <p>It is important to recognise that significant new developments in the vicinity of the canal network place extra liabilities and burdens upon the waterway infrastructure, particularly as a result of the use of the waterway and towpath as a form of open space and as a sustainable transport route. In addition there is often an increased burden in terms of ongoing maintenance costs for maintaining an attractive ‘waterway setting’, for</p>



	<p>example the removal of litter from the water and maintenance of the towpath.</p> <p>Proximity to a waterway can add value to new developments but it must be recognised that new developments can have an enormous impact on our budgets and it is essential that appropriate contributions continue to be secured from developers where appropriate in order to maintain and improve the condition of the infrastructure, whether through CIL or the use of Section 106 agreements.</p>
WLBC Response	Comments noted

Rep Number	15
Name	Nick Smith
Organisation	Canal & Rivers Trust
Comments	<p>Please find an attached proforma relating to scheme 76 - Burscough - Parbold Towpath Improvements as identified on the IDS providing much more detail on the intended outcomes from the project.</p> <p>See Appendix 1</p>
WLBC Response	Project already listed on the IDS under #76. Due to the length of canal towpath relating to this project, the scheme has been split with Burscough-Parbold (#76) and Burscough only (#112). Details updated on the IDS.

## **Appendix 1**

### **West Lancashire Infrastructure Projects**

Please complete this proforma to provide updated information in respect of your infrastructure project(s) already listed on the Infrastructure Delivery Schedule (IDS). Please submit a new proforma for any new projects you would like us to consider adding to the IDS.

If we do not receive completed proformas, or information is incomplete, it may make it difficult for us to include your project(s) on the shortlist of deliverable infrastructure projects, or may result in the project being removed from the IDS.

**Name of organisation:** Canal & River Trust

Project name	<b>Burscough Towpath Improvements</b>
Project description	<p>The project as proposed will deliver approximately 1.3km of towpath improvements and environmental enhancement along this popular stretch of the Leeds Liverpool Canal. Currently the towpath to the east of Burscough Village between the Wharf and Wheat Lane, is in walkable and cycleable but poor condition. The aim is to improve an important part of West Lancashire's Green Infrastructure resulting in a facility which is useable on a year round basis but which also provides a haven for wildlife helping develop the canal side visitor economy in Burscough.</p> <p>The surfacing will be of a similar construction to what has previously been delivered west of Burscough Bridge and more recently on the Rufford Branch, adjacent to Rufford Old Hall. It will be suitable for cycling as well as walking.</p> <p>The towpath is used by the Pier to Pier Cycle Route from Wigan to Preston and by one of the leisure cycle routes created by the LSTF VISIT Project.</p> <p>The project would be a legacy project for Burscough's bicentenary highlighting its canal heritage.</p>
Proposed location	Burscough Wharf to Glovers Swing Bridge (Wheat Lane)

Is the project already on the Infrastructure Delivery Schedule?	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Number 76; Burscough - Parbold Towpath Improvements.</p>
Has this project been started?	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>
Has this project been completed?  <i>If completed, there is no need to continue with this form.</i>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>

## STRATEGIC PLANS AND CIL

Is the project identified within a relevant local strategy? Eg. Local Plan, LTP3, Leisure Strategy	<input type="checkbox"/> Yes <input type="checkbox"/> No
Please provide details	<p>Policy EN3 of the Local Plan – Provision of Green Infrastructure and Open Recreation Space – supports the delivery of this project. Within the plan it is noted: It is vital that the right infrastructure is in place to support future growth in the Borough, and this includes green infrastructure. There is a growing and compelling body of evidence substantiating the potential for green infrastructure and open space to contribute to the economic, social and environmental well-being of individuals and society. It can help facilitate high quality accessible landscapes, and bring the natural world into every neighbourhood, providing benefits for individuals and community health and well-being.</p> <p>The Local Transport Plan identifies one of its 7 Transport Priorities as – Providing safe, reliable, convenient and affordable transport alternatives to the car. The overall principle is to provide safe and convenient new infrastructure for walking and cycling.</p> <p>The canal towpath is part of the proposed West Lancashire Wheel identified in the draft West Lancashire Economic Strategy.</p>
Does the project help the Council achieve its corporate priorities?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Please tick which priorities	<input checked="" type="checkbox"/> Protect and improve the environment <input type="checkbox"/> Work to create opportunities for and retain good quality jobs <input type="checkbox"/> Combat crime and the fear of crime <input checked="" type="checkbox"/> Provide opportunities for leisure and culture and healthier communities <input type="checkbox"/> Improve and deliver housing, including affordable housing
Please provide details	<p>We believe that canals are enablers and can help to contribute to key policy issues that many government organisations are seeking to address. They are cultural and environmental assets that provide a sense of place and history and provide opportunities to enhance and improve health and well-being. The canal helps to support tourism businesses in the area.</p>
Does the project fall under the infrastructure listed under the Regulation 123 list?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  <i>A copy of the R123 is attached/enclosed</i>
Please state which infrastructure type(s)	<p>Blue Green Infrastructure.</p>
Does the project meet a local need or demand that has arisen or been exacerbated as a result of new development?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Please provide details	<p>The Parish Council has evidence that this area has long been the subject of negative comments regarding its condition from members of the public.</p>

	Looking forward at the level of planned new housing development proposed for Burscough in the current Local Plan period we envisage that use and demands on the towpath will increase. The canal is a huge 'pull' factor in the attractiveness of Burscough for new residents and it is anticipated that into the future more people will use the towpath for leisure purposes as well as for accessing local town centre services.
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## WIDER BENEFITS AND IMPLICATIONS

Are there specific implications, risks or negative impacts if this project does not come forward?	<input checked="" type="checkbox"/> Strategic risks / impacts <input type="checkbox"/> Major risks / impacts <input type="checkbox"/> Minor risks/impacts <input type="checkbox"/> No risks/impacts
Please provide details	<p>The canal is part of a wider strategic network that defines many parts of West Lancashire – many of the towns along the route sprang up as a direct result of the canal. The ambition is to provide a year round facility that people can use and enjoy by improving the canal towpath – the space where the majority of activity takes place along the canal corridor. This is being achieved on a piecemeal basis at the moment as funding opportunities present themselves. The impact of an increase in use but no specific improvements would be that the towpath deteriorates further and becomes less useable.</p> <p>The poor surface of the towpath deters usage in winter or in wet weather at present. Use of the Pier to Pier Cycle Route from Wigan to Southport is constrained by the surface of the towpath.</p>
Has the project already benefitted from stakeholder engagement / discussions with the local community?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Please provide details	<p>As mentioned above, a recent meeting with the Parish Council highlighted that the current condition of the towpath through Burscough has been highlighted as an issue to be addressed by members of the local community.</p> <p>Organisations who have already expressed an interest in getting actively involved in the project are: Burscough Heritage Group, H &amp; A Barge Restoration Project, Burscough Wharf management, Tree Bee Society, Burscough Cricket Club, Dream Makers Outdoors (disability opportunity / employment) and Ormskirk Prince Trust.</p>
Does the proposal have a positive impact on equality?  (This includes gender, race, age, religion, sexuality, disability)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Please provide details	The towpath is a public facility that is open on a year-round basis for use by all irrespective of gender, race, age, religion, sexuality and disability. In its current condition however use of the towpath may at times be limited for those with mobility issues. It would be our ambition through this project to provide an improved surfacing which would reduce these limitations.

What benefits will the scheme deliver to the local area?	<input checked="" type="checkbox"/> Economic improvements <input checked="" type="checkbox"/> Environmental improvements <input checked="" type="checkbox"/> Social improvements
Please provide details	<p>We believe that improvements to a canal corridor can have positive impacts across all of the above domains. Some of the tangible benefits which could be felt as a result of this project are:</p> <p>Economic Improvements</p> <ol style="list-style-type: none"> <li>Increased number of people using canal towpath supporting <ul style="list-style-type: none"> <li>Canal side businesses, include those at Burscough Wharf and canal side pubs</li> <li>More people visiting Burscough supporting local shops in high street</li> </ul> </li> <li>Builds on Burscough canal side heritage making it more attractive place to live supporting proposed development in the town.</li> </ol> <p>Environmental Improvements</p> <ol style="list-style-type: none"> <li>Improved canal side environment.</li> </ol> <p>Social Improvements</p> <ol style="list-style-type: none"> <li>Opportunities for people who are not in work to undertake. voluntary and paid work as part of the improvement project</li> <li>Somewhere local people can take exercise on foot and by bicycle all the year round improving their health.</li> <li>Improved access for Burscough Cricket Club linking to the canal.</li> </ol>
What geographic area will the project benefit?	<input checked="" type="checkbox"/> Borough wide / beyond <input checked="" type="checkbox"/> Town / large village <input checked="" type="checkbox"/> Neighbourhood / local
Please provide details	Borough wide / beyond - As described above – the canal is a strategic asset which is of great importance locally in Burscough but also extends outside the town boundary across West Lancashire and beyond.

#### DELIVERABILITY

Can the infrastructure be delivered now?	<input checked="" type="checkbox"/> Yes – up 1 year (short term) <input checked="" type="checkbox"/> Yes – between 1-5 years (medium term) <input type="checkbox"/> Yes – over 5 years (long term) <input type="checkbox"/> No
Please provide details	All funding will need to be in place before we commence this project which may take time to secure – however if all funding were in place then we would estimate that the project could be delivered within a 6 month period. That would be from initial specification, securing and agreeing contract price to completion on site.
Is the project dependent on other drivers / need	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Please provide details	Canal & River Trust are the owner of all towpath on which these works would take place.

Which organisation will be responsible for delivering the infrastructure?	Canal & River Trust
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#### FUNDING / COSTS

What is the anticipated cost of the project?	£180,000 (approx. budget at the moment)
Is there any match funding available?	Burscough Town Council Lancashire Environment Fund
If so, how much?	£unknown at present
What CIL monies are required to deliver the project?	£150,000
Will the infrastructure need maintaining? If so, how will this be funded?	<p>The towpath will need maintaining into the future – it is estimated that the material to be used will have a natural lifespan of years.</p> <p>We will look to secure an ‘adoption’ of the canal through Burscough following on from this project from a local group. Adoption models have worked well when employed elsewhere on the canal network. They secure buy-in from the local community (in its widest sense – schools, businesses, volunteers) and enable us to secure the benefits of our projects longer into the future. They add value to the general works that Canal &amp; River Trust are bound to undertake as part of its charitable objectives within the resources it has available.</p>

Respondent ID	4250753103
Respondent Name	Adrian Owens

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

The Station Approach improvements are a high priority

Do you agree with the projects selected under Option One? If not, why?

Do you agree with the projects selected under Option Two? If not, why?

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Station Approach?

Haskayne Cutting?

Halsall Memorial Hall extension?

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary	Support for Option One. Station Approach improvements are a high priority.
Council response	Support for Option One noted. Support for Station Approach improvements noted.



Respondent ID	4293678500
Respondent Name	Alison Wall

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option Two. Spend some of the monies on projects in 2016/17 and save a large remainder to spend in future years.

Why do you prefer that option?

It seems a sensible option.

Do you agree with the projects selected under Option One? If not, why?

They are all good projects, however more money may become available for some of them through future developments.

Do you agree with the projects selected under Option Two? If not, why?

Yes.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?	Yes, CIL funds should be granted
Burscough allotments?	No, CIL funds should not be granted
Station Approach?	No, CIL funds should not be granted
Haskayne Cutting?	Yes, CIL funds should be granted
Halsall Memorial Hall extension?	No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale	Demand there already
New allotments in Burscough	Better to wait until new development at Yew Tree Farm is finished.
Improvements at Station Approach, Ormskirk	Many people already use the footpath. I don't think the open space there merits a car park, although rail users could probably use more spaces.
Improvements to Haskayne Cutting Nature Reserve	Part of option 2. I have no local knowledge of Haskayne.
Extension at Halsall Memorial Hall	Again, I have no local knowledge of Halsall.

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

I would like money to be spent on allotments in Ormskirk.

Summary of representation and Council response

Summary

Support Option Two. Support Skelmersdale allotments and HCNR. Demand is present in Skelmersdale already. No support for Burscough allotments, Station Approach or Hasall Memorial Hall. Burscough allotments could be aided by Yew Tree Farm. No knowledge of Halsall. Do not think that Station Approach open space merits more car parking, but acknowledged rail station could do with more parking spaces.  
Further suggestion for Ormskirk allotments.

Council response

Support for Option Two noted. Support for individual schemes noted, along with comments.  
Ormskirk allotments have been added to the IDS as a new project (#111)

Respondent ID	4293132696
Respondent Name	Alison Wall

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

They are all good projects. Use the money while it is there.

Do you agree with the projects selected under Option One? If not, why?

Do you agree with the projects selected under Option Two? If not, why?

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Station Approach?

Haskayne Cutting?

Halsall Memorial Hall extension?

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary

Support Option One. Also registered support for Option Two.

Council response

Respondent ID	4251445118
Respondent Name	Anne Prescott

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

It's a mess down there and parking very ad hoc.  
Dangerous for children getting to and from school

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

No

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Halsall Memorial Hall extension?

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary

Support for Option One. Particular support for Burscough allotments and Station Approach.

Council response

Support for Option One noted. Support for individual proposals noted.

Respondent ID	4251671121
Respondent Name	CATHERINE SYLVIA SHACKLADY

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

The need for additional car parking spaces at Ormskirk station along with improvements to the whole area in general, such as resurfacing and better drainage. You can reduce the waiting list for allotments by providing more of them, allowing people to cultivate their own produce and enjoy outdoor activity to boost their health whilst also interacting with like-minded people in their local area. This option provides a wider spread of the funds available to benefit more people in the Borough more speedily, rather than with-holding most of the money for future use. There is an immediate need for these projects in the Borough.

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

No. Too selective and nothing for Ormskirk.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Station Approach?

Haskayne Cutting?

Halsall Memorial Hall extension?

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Funds should be awarded. Please refer to my earlier statement.

New allotments in Burscough

Funds should be awarded. Please see my earlier statement.

Improvements at Station Approach, Ormskirk

Funds should be awarded. Please see my earlier statement.

Improvements to Haskayne Cutting Nature Reserve

Funds should be awarded to promote outdoor activity.

Extension at Halsall Memorial Hall

Funds should be awarded for the benefit of the local community.

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary

Support for Option One. Provides a wide spread of benefits for immediate benefit.

Council response

Support for Option One noted. Support for individual proposals noted, particularity Station Approach and allotments.



Respondent ID	4251871301
Respondent Name	Christopher J. Heppenstall

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

This option will bring tangible benefits to our local communities at a time of overall austerity and cutbacks in local authority funding

Do you agree with the projects selected under Option One? If not, why?

I broadly agree with the projects under this option although I would place a strong emphasis upon the Station Approach improvements to provide more car parking at Ormskirk Station to relieve pressure on surrounding residential streets

Do you agree with the projects selected under Option Two? If not, why?

I agree

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Station Approach?

Haskayne Cutting?

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

See my previous comments

New allotments in Burscough

See my previous comments

Improvements at Station Approach, Ormskirk

This project should be given priority

Improvements to Haskayne Cutting Nature Reserve

See my previous comments

Extension at Halsall Memorial Hall

See my previous comments

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

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Summary of representation and Council response

Summary

Support for Option One noted, as benefits will be brought to communities immediately amongst funding cutbacks. Largest support for Station Approach.

Council response

Support for Option One. Strongest support for Station Approach proposal.

Respondent ID	4272870156
Respondent Name	DAVID CHEETHAM

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option Two. Spend some of the monies on projects in 2016/17 and save a large remainder to spend in future years.

Why do you prefer that option?

It is a compromise between the two extremes of spend all and save all CIL monies. The spending of money raised by the WLBC by public vote is a major departure from decision making by elected councillors

Do you agree with the projects selected under Option One? If not, why?

The station approach at Ormskirk should be improved after or as part of the road bridge improvements in own. I am not familiar with either Haskayne or Halsall and consequently cannot comment.

Do you agree with the projects selected under Option Two? If not, why?

For reasons given above.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Station Approach?

Haskayne Cutting?

Halsall Memorial Hall extension?

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Yes.I consider that the CIL should be spent on replacing missing direction signs on the foot path network in Skemersdale. Many of the concrete support slabs remain in place a but few direction signs. The few remaining ones are faded and carry the Skelmersdale Dev Co Logo. New signs and supports should be provided in the more recently developed parts of the town. These would encourage greater us of the footpath network and be consistent with the Council's transport policy. As each sign would be relatively inexpensive the reinstallation programme could be scheduled to available funds.

Summary of representation and Council response

Summary

Support Option Two. Achieves a compromise between save all and spend all. Suggest that Station Approach works should be done as part or after the road bridge improvements.  
Further suggestion that CIL is spent on replacing missing direction signs on Skelmersdale town centre footpaths.

Council response

The Council are seeking the views of the public on CIL funding, and will use these to inform their recommendations to Members. However, a final decision on spending will be made by Councillors.  
Works to the rail bridge are still being discussed and nothing formal has been agreed.  
CIL monies cannot be spent on replacing direction signs in Skelmersdale.

Respondent ID	4250846091
Respondent Name	David MUTCH

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Action needs to be taken now.

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

Undecided

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

No, CIL funds should not be granted

Burscough allotments?

No, CIL funds should not be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

No, CIL funds should not be granted

Halsall Memorial Hall extension?

No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

We need more parking spaces and it will improve the look of the area, which for many is 'welcome to Ormskirk'

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

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Summary of representation and Council response

Summary

Support Option One, however the CIL monies should only be used for Station Approach. More parking spaces are needed at Ormskirk rail station.

Council response

Support for Option One noted. Support for Station Approach noted.

Respondent ID	4255051021
Respondent Name	George Pratt

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option Two. Spend some of the monies on projects in 2016/17 and save a large remainder to spend in future years.

Why do you prefer that option?

It ensures some immediate benefit to communities, while providing more funds for larger projects in the future

Do you agree with the projects selected under Option One? If not, why?

All projects should be ring-fenced, so that they are funded directly by developments in their immediate area. The outline Planning application for Yew Tree Farm in Burscough provides for allotment provision. This should be confirmed by a Section 106 order

Do you agree with the projects selected under Option Two? If not, why?

Skelmersdale is well provided with existing allotments, and there is no additional demand as a result of development. The lack of CIL-rated development also applies to Haskayne Cutting.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?	No, CIL funds should not be granted
Burscough allotments?	No, CIL funds should not be granted
Station Approach?	Yes, CIL funds should be granted
Haskayne Cutting?	No, CIL funds should not be granted
Halsall Memorial Hall extension?	Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale	No new demand
New allotments in Burscough	No new demand
Improvements at Station Approach, Ormskirk	Likely to be affected by additional development across the Borough
Improvements to Haskayne Cutting Nature Reserve	No new demand
Extension at Halsall Memorial Hall	Likely to be an additional demand for public amenities due to development

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

There is an existing demand for a new library in Burscough, and additional development will increase that demand. Lancashire County are considering their options, but a contribution from CIL may make all the difference in ensuring a positive decision

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Provision of loading/unloading bays along that stretch of Liverpool Road South in Burscough between Square Lane and The Bull and Dog public house. Compulsory Purchase may be necessary to provide this, and CIL would go a long way in financing this. Such provision would improve traffic flow through the village immeasurably.

## Summary of representation and Council response

### Summary

Support Option Two. Ensures some immediate benefit to communities whilst providing funds for future, larger projects. All projects should be ring-fenced so they are funded directly by developments in their immediate area. Skelmersdale is well provided with existing allotments and there is no additional demand as a result of development. There is also a lack of CIL rated development in relation to HCNR. CIL funds should only be used for Station Approach and Halsall memorial hall extension. There is demand in Burscough for a new library and a contribution from CIL may help the deliver. Also suggest the provision of loading bays along Liverpool Road South.

### Council response

CIL monies can be spent anywhere in the Borough, as required to support new development. They will not be ring-fenced. Parish Councils are given 15% of all CIL receipts in their area which helps ensure that infrastructure can be provided directly in the area of the original development. Burscough library is already listed in the IDS (#22) although details for its delivery are currently unknown. The Council continue to liaise with LCC in relation to a library. Provision of loading bays cannot be classed as infrastructure nor provided through CPOs or CIL.



Respondent ID	4251926488
Respondent Name	George Wensley

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Ormskirk car parking is getting more congested, more car parking is required and I think extending the if the station car park with a foot bridge from the station to the Burscough Rd side would help

Do you agree with the projects selected under Option One? If not, why?

I am mainly interested in Station Rd car parking

Do you agree with the projects selected under Option Two? If not, why?

No opinion

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

No, CIL funds should not be granted

Burscough allotments?

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Halsall Memorial Hall extension?

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Little funding is spent in Ormskirk even though more cars are coming into the town

New allotments in Burscough

Same as above

Improvements at Station Approach, Ormskirk

This in my opinion is important there have recently been occasions where at 10:00 am there were no parking spots

Improvements to Haskayne Cutting Nature Reserve

No opinion

Extension at Halsall Memorial Hall

No opinion

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

The number of cars within the town, I believe there are more cars trying to park or travel through town

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Car parking and better routing

Summary of representation and Council response

Summary

Support for Option One. Support for additional car parking at Ormskirk Rail Station.

CIL funds should not be granted to Skelmersdale allotments. Not enough funding is spent in Ormskirk. Town needs improved parking to cope with the traffic. Better routing also required.

Council response

Support for Option 1 noted.

Support for Station Approach and improved parking facilities noted.

There are already projects on the IDS to help address traffic congestion and movement in Ormskirk (#4).

Respondent ID	4251593512
Respondent Name	Gordon Johnson

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

As the monies will be more evenly spent across the borough

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

No, money should be spread across the borough more as in the option one projects

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Yes, CIL funds should be granted

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary

Support Option One. Money should be spread across the Borough. Support for all projects.

Council response

Support for Option One noted. Support for proposals noted.

Respondent ID	4246701979
Respondent Name	Hazel Scully

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option Two. Spend some of the monies on projects in 2016/17 and save a large remainder to spend in future years.

Why do you prefer that option?

In my opinion the first year spending can be monitored if two projects have investment. Following years could provide investment in larger projects.

Do you agree with the projects selected under Option One? If not, why?

Do you agree with the projects selected under Option Two? If not, why?

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?	Yes, CIL funds should be granted
Burscough allotments?	No, CIL funds should not be granted
Station Approach?	No, CIL funds should not be granted
Haskayne Cutting?	Yes, CIL funds should be granted
Halsall Memorial Hall extension?	No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale	More allotments have been required for many years.They provide a theraputic hobby with the benefit of good ,home grown produce.
New allotments in Burscough	
Improvements at Station Approach, Ormskirk	
Improvements to Haskayne Cutting Nature Reserve	The importance of nature is paramount in the present climate of disappearing species.
Extension at Halsall Memorial Hall	

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

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Summary of representation and Council response

Summary

Support Option Two. Will allow investment in larger projects. Support for Skelmersdale allotments and HCNR. Allotments have been needed for many years and provide a therapeutic hobby with the benefit of good, home grown produce. Important to protect nature in present climate of disappearing species.

Council response

Support for Option Two noted. Support for Skelmersdale allotments and HCNR noted.

Respondent ID	4255102333
Respondent Name	Ian Yates

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option Two. Spend some of the monies on projects in 2016/17 and save a large remainder to spend in future years.

Why do you prefer that option?

Prudent use of money to ensure we can react to any future changes in need

Do you agree with the projects selected under Option One? If not, why?

Yes; I believe this evenly distributes the CIL money across the borough; targeting specific need

Do you agree with the projects selected under Option Two? If not, why?

No. It seems like the money is being targeted into too narrow a field - the money should be spent on more than 2 projects.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Yes, CIL funds should be granted

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

As most of the new housing will be in Skelmersdale, it seems fair to spend some of the money on new allotments

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Much needed improvements in this key area, which will promote further economic investment

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Halsall is a significant town in the borough and the community would benefit from this

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Improvements on St Helens Road in Ormskirk to better manage the traffic accessing and egressing Edge Hill University. Delineate two lanes on the Ormskirk bound approach to the University.

Summary of representation and Council response

Summary

Support Option Two. Prudent use of money to ensure we can react to future changes in need. CIL should be distributed evenly across the Borough targeting specific needs. As most new housing will be in Skelmersdale, it seems fair to spend some of the money on allotments. Station Approach proposal will help provide much needed improvements in area and help promote further economic investment. Halsall community will benefit from the extension. Further suggestion that improvements be made on St Helens Road, Ormskirk to improve traffic in/out of Edge Hill Uni.

Council response

Support for Option Two noted. Support for projects noted. Ormsirk town centre movement strategy is already listed in the IDS (#4) to provide a package of measures to address congestion and movement in Ormskirk.



Respondent ID	4250839970
Respondent Name	Jane Thompson (Jane Rhompson[sic])

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

We don't know what will happen in the future and there may be no money to spend as it may be cut .

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

Yes

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

No, CIL funds should not be granted

Halsall Memorial Hall extension?

No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

These residents need allotments , most don't have gardens

New allotments in Burscough

Allotments are great , encourages local people to grow there own veg etc

Improvements at Station Approach, Ormskirk

There is not enough car parking and this will remove pressure off the town centre car parks . The area suggested is ' lying waste ' at the moment and un used and ideal for parking

Improvements to Haskayne Cutting Nature Reserve

No, the rangers are paid to cut this

Extension at Halsall Memorial Hall

No ,

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary

Support for Option One. Support use of CIL funds for allotments and Station Approach. Not enough car parking currently at Ormskirk rail station. No support for HNCr and Halsall extension.

Council response

Support for Option One noted. Support for individual projects noted.  
Note that the HNCr proposal relates to the extension of a boardwalk at the nature reserve.

Respondent ID	4232499695
Respondent Name	Jason Grice

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Why do you prefer that option?	None of the options
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Do you agree with the projects selected under Option One? If not, why?	I cannot believe given the amount of development that is to happen under the local plan that this is all you can do with the CIL you will receive.
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Do you agree with the projects selected under Option Two? If not, why?	As above
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Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Station Approach?

Haskayne Cutting?

Halsall Memorial Hall extension?

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale	
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New allotments in Burscough	
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Improvements at Station Approach, Ormskirk	
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Improvements to Haskayne Cutting Nature Reserve	
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Extension at Halsall Memorial Hall	
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Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?	
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Can you suggest any other infrastructure schemes that you think should be included on the IDS?	
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Summary of representation and Council response

Summary

Cannot believe given the amount of development that is to happen under the local plan that this is all you can do with the CIL you will receive.

Council response

Comments noted. This is the first year in which the Council have had CIL receipts available to spend. However, it is expected that CIL receipts will be received on an annual basis, as CIL chargeable developments commence. The consultation has asked whether we should spend, or save, CIL monies and on what projects. If we choose to spend CIL monies now, this needs to be on those projects which can be delivered in the short term and which can support new development. Use of future CIL monies will be considered annually.

Respondent ID	4243000966
Respondent Name	Jennifer Walton

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option Two. Spend some of the monies on projects in 2016/17 and save a large remainder to spend in future years.

Why do you prefer that option?

It does leave a reasonable sum of monies for future use. Allotments in Skelmersdale would be a very good idea. Something needs to be done with Haskayne Cutting!

Do you agree with the projects selected under Option One? If not, why?

Yes.

Do you agree with the projects selected under Option Two? If not, why?

Yes.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?	Yes, CIL funds should be granted
Burscough allotments?	No, CIL funds should not be granted
Station Approach?	No, CIL funds should not be granted
Haskayne Cutting?	Yes, CIL funds should be granted
Halsall Memorial Hall extension?	No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale	It is a very good idea to encourage community growing initiatives in Skelmersdale.
New allotments in Burscough	No comment
Improvements at Station Approach, Ormskirk	No comment
Improvements to Haskayne Cutting Nature Reserve	Something positive needs to be done to make it more attractive and accessible.
Extension at Halsall Memorial Hall	No Comment

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

No.79: Richmond Park pavilion extension - would enable greater use of the park. No.104: Zebra crossing at Aughton Street, Ormskirk - to lessen the ever present danger to pedestrians on this very, very busy road!

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

No

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Summary of representation and Council response

Summary

Support Option Two. Allows reasonable sum of monies for future use. Support use of CIL monies for Skelmersdale allotments and HCNR.  
Should also consider IDS projects at Richmond Park (#79) and Aughton St (#104).

Council response

Support for Option Two noted. Support for individual proposals noted. Support for IDS #79 and #104 noted.

Respondent ID	4251002798
Respondent Name	Jo Rotheram

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Do you agree with the projects selected under Option One? If not, why?

Do you agree with the projects selected under Option Two? If not, why?

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?	Yes, CIL funds should be granted
Burscough allotments?	Yes, CIL funds should be granted
Station Approach?	Yes, CIL funds should be granted
Haskayne Cutting?	Yes, CIL funds should be granted
Halsall Memorial Hall extension?	Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale	
New allotments in Burscough	
Improvements at Station Approach, Ormskirk	
Improvements to Haskayne Cutting Nature Reserve	
Extension at Halsall Memorial Hall	

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary	Support Option One. Support all proposed schemes.
Council response	Support for Option One noted. Support for proposed schemes noted.



Respondent ID	4250909962
Respondent Name	John Hearn

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

It spreads the money evenly

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

I prefer option one

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Yes, CIL funds should be granted

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary	Support for Option One. Support for all proposals.
Council response	Support for Option One noted. Support for proposed schemes noted.

Respondent ID	4250948099
Respondent Name	John McDonald

### Survey response

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Do you agree with the projects selected under Option One? If not, why?

Do you agree with the projects selected under Option Two? If not, why?

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Burscough allotments?

Station Approach?

Haskayne Cutting?

Halsall Memorial Hall extension?

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary	Support Option One.
Council response	Support for Option One noted.

Respondent ID	4251698955
Respondent Name	John Williams

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Most Of The Money Should Be Spent Sooner Than Later

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

Station Approach Improvements needed now

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

No, CIL funds should not be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

No, CIL funds should not be granted

Halsall Memorial Hall extension?

No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Deprived area needs investment for locals

New allotments in Burscough

More money should be spent on worthwhile infrastructure to accommodate increased housing

Improvements at Station Approach, Ormskirk

Improvements needed now to ease parking in residential areas and make using rail transport easier

Improvements to Haskayne Cutting Nature Reserve

Would not benefit enough people

Extension at Halsall Memorial Hall

Is there a need for it?

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

No

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

No

## Summary of representation and Council response

### Summary

Support for Option One. Support for Station Approach and Skelmersdale allotments. Skelmersdale needs investment because it is a deprived area. Improvements are needed in Ormskirk to ease parking in residential areas and make access to rail transport easier. No support for Burscough allotments - money should be spent on other infrastructure to accommodate increased housing. No support for HCNr - will not benefit enough people. Question over whether there is a demonstrable need for an extension at Halsall Hall.

### Council response

Support for Option One noted. Support for Station approach and Skelmersdale allotments noted.

Respondent ID	4231143562
Respondent Name	Mark Andrew Walters

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Option 1 would benefit the most people in the long term. Healthy exercise is good.

Do you agree with the projects selected under Option One? If not, why?

Yes I do.

Do you agree with the projects selected under Option Two? If not, why?

I do, but option 1 has more far reaching benefits for the people.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?	Yes, CIL funds should be granted
Burscough allotments?	Yes, CIL funds should be granted
Station Approach?	No, CIL funds should not be granted
Haskayne Cutting?	Yes, CIL funds should be granted
Halsall Memorial Hall extension?	No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale	Healthy benefits to people - exercise and home-grown produce tastes better and costs less.
New allotments in Burscough	Healthy benefits to people - exercise and home-grown produce tastes better and costs less.
Improvements at Station Approach, Ormskirk	Not high on my priority list.
Improvements to Haskayne Cutting Nature Reserve	It will improve access to the site, allowing more people to enjoy the wonderful sights and sounds of nature in this area. Fresh air and exercise is good for you.
Extension at Halsall Memorial Hall	Couldn't money be fund-raised for this?

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

No

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

No

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Summary of representation and Council response

Summary

Support Option One. Benefits most people in the long term. Support proposals for Skelmersdale allotments, Burscough allotments and HCNR. They provide health benefits and access to the outdoors. No support for Station Approach or Halsall Hall extension. Could extension not be funded through fund-raising?

Council response

Support for Option One noted. Support for individual proposals noted, and reason for it.



Respondent ID	4270222024
Respondent Name	Michael Forth

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Creates more car parking in Ormskirk

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

Prefer option 1ie car parking in Ormskirk

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Yes, CIL funds should be granted

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Benefits the community

New allotments in Burscough

As 8

Improvements at Station Approach, Ormskirk

Desperately needed

Improvements to Haskayne Cutting Nature Reserve

Enhances the community

Extension at Halsall Memorial Hall

As 11

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

N/A

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

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Summary of representation and Council response

Summary

Support Option One. Support for Station Approach car parking facilities which are desperately needed. Support for other proposals. Allotments benefit the community, HCNR and Halsall Memorial Hall enhances the community.

Council response

Support for Option One noted. Support for individual projects noted.

Respondent ID	4286256731
Respondent Name	Mrs Elizabeth-Anne Broad

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Lathom South Parish Council supports Option One – spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years. We prefer that option because the money should be used for the public benefit as soon as possible.

Do you agree with the projects selected under Option One? If not, why?

yes

Do you agree with the projects selected under Option Two? If not, why?

yes

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?	Yes, CIL funds should be granted
Burscough allotments?	Yes, CIL funds should be granted
Station Approach?	Yes, CIL funds should be granted
Haskayne Cutting?	Yes, CIL funds should be granted
Halsall Memorial Hall extension?	Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale	Yes, but funds should be used where they are generated first. This Parish Council wishes to put the benefits as near as possible to the developments that had provided the money, because it helps to offset the concerns that the developments have created.
New allotments in Burscough	The Parish Council would prioritise allotments in Burscough above allotments in Skelmersdale, because Burscough has had to put up with some of the development creating the funds and Skelmersdale already has some fairly significant allotment provision.
Improvements at Station Approach, Ormskirk	lower priority than Burscough, Banks, because this Parish Council wishes to put the benefits as near as possible to the developments that had provided the money, because it helps to offset the concerns that the developments have created.
Improvements to Haskayne Cutting Nature Reserve	lower priority than Burscough, Banks, because this Parish Council wishes to put the benefits as near as possible to the developments that had provided the money, because it helps to offset the concerns that the developments have created.
Extension at Halsall Memorial Hall	lower priority than Burscough, Banks, because this Parish Council wishes to put the benefits as near as possible to the developments that had provided the money, because it helps to offset the concerns that the developments have created.

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

This council would support the construction of a sports pavilion at Banks (Item 95) because much of the money has been generated in the Banks and nearby areas.

Summary of representation and Council response

Summary

Support Option One. Money should be used for the public benefit as soon as possible. Support all proposed schemes. Funds should however be used where they are generated. Monies should be used on Burscough allotments over Skelmersdale allotments as Skelmersdale already has allotment provision. Other proposals should consider use of monies in those areas where they are generated.

Council response

Support for Option One noted. Support for all proposals noted.  
CIL monies can be used to fund infrastructure required to support new development anywhere in the Borough. Parish Councils are given 15% of the CIL receipts from their area to ensure that infrastructure can be provided in the area of the development that the money stemmed from.

Respondent ID	4276352854
Respondent Name	Ray Fowler

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Use it or lose it. There is bound to be more development input to CIL in the future.

Do you agree with the projects selected under Option One? If not, why?

NO Too many

Do you agree with the projects selected under Option Two? If not, why?

NO Not enough

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

No, CIL funds should not be granted

Halsall Memorial Hall extension?

No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

There is a demand for allotments in Skelmersdale

New allotments in Burscough

There is a demand for allotments in Burscough

Improvements at Station Approach, Ormskirk

Long over due

Improvements to Haskayne Cutting Nature Reserve

Next year

Extension at Halsall Memorial Hall

Next year

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

There is a demand for allotments in Ormskirk. With Tower Hill under threat with the possible sale of land around the tower the situation worsens. A reasonable solution would be to move the allotments onto part of the Thompson Avenue Recreation Ground. A simple and not too expensive task and well within the CIL remit. Should be included in the high priority schedule and delivered in 2016/17.

Summary of representation and Council response

Summary

Support Option One, although there are too many projects to be provided and too few under Option Two. Monies should be used to fund Skelmersdale and Burscough allotments and Station Approach. There is a demand for allotments in both areas and Station Approach improvements are long overdue. There is a demand for allotments in Ormskirk.

Council response

Support for Option One noted. Support for allotments and Station Approach works noted. Ormskirk allotments have been added to the IDS (#111).

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

All the options especially station car park will benefit more people

Do you agree with the projects selected under Option Two? If not, why?

Skelmersdale allotments?	Yes, CIL funds should be granted
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Burscough allotments?	Yes, CIL funds should be granted
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Station Approach?	Yes, CIL funds should be granted
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Haskayne Cutting?	Yes, CIL funds should be granted
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Halsall Memorial Hall extension?	Yes, CIL funds should be granted
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New allotments in Skelmersdale to give more people the space to grow vegetables

New allotments in Burscough	as above
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Improvements at Station Approach, Ormskirk parking has already reached capacity

Improvements to Haskayne Cutting Nature Reserve needed on a very muddy stretch of a popular walk

Extension at Halsall Memorial Hall	improvement needed to improve facilities
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Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?



Summary of representation and Council response

Summary

Support Option One. Support all proposed schemes, particularly Station Approach as parking is already at capacity.

Council response

Support for Option One noted. Support for all proposed schemes noted.

Respondent ID	4228166265
Respondent Name	Ronald Webster

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Why do you prefer that option?

I do not support these options.

Do you agree with the projects selected under Option One? If not, why?

I do not agree. Every effort and all monies should go towards Skelmersdale Railway Station. The money should be used to Prepare the area for Building the Station.

Do you agree with the projects selected under Option Two? If not, why?

No. Again as above. The LONG awaited Railway Station should be given ABSOLUTE Priority for ANY Spending Program in the whole of Lancashire. We are MANY Thousands of Citizens without that vital LINK.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

No, CIL funds should not be granted

Burscough allotments?

No, CIL funds should not be granted

Station Approach?

No, CIL funds should not be granted

Haskayne Cutting?

No, CIL funds should not be granted

Halsall Memorial Hall extension?

No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Skelmersdale Railway Station - Preparation of Build area.

New allotments in Burscough

Skelmersdale Railway Station - Preparation of Build area.

Improvements at Station Approach, Ormskirk

Skelmersdale Railway Station - Preparation of Build area.

Improvements to Haskayne Cutting Nature Reserve

Skelmersdale Railway Station - Preparation of Build area.

Extension at Halsall Memorial Hall

Skelmersdale Railway Station - Preparation of Build area.

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Skelmersdale Railway Station - Preparation of Build area.

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Skelmersdale Railway Station - Preparation of Build area.

Summary of representation and Council response

Summary

I do not support these options. All monies should go towards funding Skelmersdale rail station and this should have absolute priority.

Council response

The Council recognise the need for Skelmersdale rail connection and this is listed in the IDS (#45). However, delivery of the rail link will be in the long-term, and is likely to be funded through LEP or DfT funding. Subsequently, CIL monies will not be used for this project meaning that we can look to spend them elsewhere.

Respondent ID	4251737783
Respondent Name	Sandra Morrison

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

This will help boost the local economy e.g. by offering some work opportunities.

Do you agree with the projects selected under Option One? If not, why?

Allotments are in short supply and increasing the number will encourage more people to grow their own.

Do you agree with the projects selected under Option Two? If not, why?

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?	Yes, CIL funds should be granted
Burscough allotments?	Yes, CIL funds should be granted
Station Approach?	No, CIL funds should not be granted
Haskayne Cutting?	Yes, CIL funds should be granted
Halsall Memorial Hall extension?	No, CIL funds should not be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale \*Allotments are needed and help people to maintain a healthy lifestyle.

New allotments in Burscough As above\*

Improvements at Station Approach, Ormskirk Station Approach area is perhaps also the responsibility of the railway services who could be approached to help with improvements.

Improvements to Haskayne Cutting Nature Reserve This is an area that those with an interest in the countryside can benefit from.

Extension at Halsall Memorial Hall Unsure about this one really. If there is to be an increase in housing in Halsall, then maybe an extension is needed.

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

I would like to see more pedestrian/cycle links utilising the disused railway tracks in the area including Ormskirk to Skelmersdale and Ormskirk to Burscough. This would encourage cycling and walking in the area as it would be safer; an also reduce congestion.

Summary of representation and Council response

Summary

Support for Option One.  
Support for allotments in both Skelmersdale and Burscough. No support for Station Approach and Halsall Hall extension. Allotments will help people to maintain a healthy lifestyle. Station Approach is considered to be the responsibility of the railway company and they should be responsible for providing any improvements. Support for HCNR. Support for Halsall Hall extension, providing that additional housing is delivered.  
Further support for pedestrian/cycle link provision and improvements through linear parks.

Council response

Support for Option One noted. Support for allotments noted. Comments in relation to Halsall extension, HCNR and Station Approach also noted.  
Support for pedestrian/cycle links noted. The Council are working to deliver linear parks between Ormskirk and Burscough and Ormskirk and Skelmersdale. These are already listed on the IDS (#11,#12). There are also projects on the IDS to help address traffic congestion and movement in Ormskirk (#4).

Respondent ID	4252685345
Respondent Name	stephen kent

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

There is a need for these projects asap. Saving funds for one big project in future years would likely overlook these smaller schemes.

Do you agree with the projects selected under Option One? If not, why?

Yes - but I would also add a further project. : Ormskirk Allotments. There is as much demand for allotments in Ormskirk as there is in Burscough and Skelmersdale

Do you agree with the projects selected under Option Two? If not, why?

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Yes, CIL funds should be granted

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Area of greatest demand. Area of health and economic deprivation.

New allotments in Burscough

Very limited existing provision.

Improvements at Station Approach, Ormskirk

Car park currently in very poor condition. Would compliment existing S106 project to improve public open space. Good green space linkage out of town

Improvements to Haskayne Cutting Nature Reserve

Valuable reserve, good education resource, very poor current access

Extension at Halsall Memorial Hall

Would satisfy local demand

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Ormskirk Allotments - great demand demonstrated by waiting list. Land available at Thompson Avenue playing field or other site. Creation of allotments can be done quickly.

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Ormskirk Allotments

Summary of representation and Council response

Summary

Support Option One. Support proposed scheme. Further suggest Ormskirk allotments be considered

Council response

Support for Option One noted. Support for proposed schemes noted. Support for Ormskirk allotments noted. Ormskirk Allotments are now included in the IDS (#111)

Respondent ID	4251452413
Respondent Name	SUE DOWLING

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

These projects need doing now so why save money they are not going to go away but could get forgotten if somethings else crops up

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

No as no explanation given to why money would be saved and what for

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Yes, CIL funds should be granted

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Many residents in Skem do not have gardens, allotments would provide some with space to grow veg/ flowers etc, it offers relaxation, pride and promotes well being.

New allotments in Burscough

Would not of thought quite as needy as above but for all of the same reasons

Improvements at Station Approach, Ormskirk

Parking is not good at present with not enough spaces and some just muddy puddles in winter. Also inadequate spaces means people use surrounding area to park

Improvements to Haskayne Cutting Nature Reserve

Anything connected to wild life should be promoted and preserved

Extension at Halsall Memorial Hall

Another community facility which is used for many things, if not there how many groups/people would lose out

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Many of the roads in Ormskirk are in need of resurfacing but the Redgate estate is in a terrible state and becomes extremely dangerous after snow fall providing very little grip at all

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Not sure at this time



Summary of representation and Council response

Summary

Support Option One. Support proposed schemes. Many roads in Ormskirk are in need of resurfacing, particularly the Redgate estate.

Council response

Support for Option One noted. Support for proposed schemes noted.  
Highway resurfacing is a matter for LCC, and is a result of current traffic. It is not considered that it is an infrastructure improvement required as a result of new development and cannot be funded through CIL monies.

Respondent ID	4263294291
Respondent Name	Terry Lake

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

I believe these are essential project which will create new opportunities in the relevant communities and should go ahead as money is now available.

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

Yes

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Yes, CIL funds should be granted

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Long waiting lists need to be addressed and allotments provide healthy life style for those involved. As past secretary to WLAF lobbying for this it is good to see an opportunity to progress.

New allotments in Burscough

Again need is there and the regeneration at Richmond Avenue demonstrates community action and initiative. This development would give more people the opportunity to participate in healthy lifestyle activities

Improvements at Station Approach, Ormskirk

improved parking/access benifits many.

Improvements to Haskayne Cutting Nature Reserve

I have worked as a volunteer at this delightful small site and public access to more of this environment would be good for people and wildlife.

Extension at Halsall Memorial Hall

I know little about this but feel sure this development would be a positive for the Halsall community.

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Not at present

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Allotments/Green space for people and wildlife alongside the Whalleys Houseing development in Skelmersdale whenever it starts.

Summary of representation and Council response

Summary

Support Option One. Support proposed schemes. Further suggestion to provide allotments/green space in relation to the Whalleys development, Skelmersdale.

Council response

Support for Option One noted. Support for proposed schemes noted. On-site open space will be delivered through the Whalleys site by developers through S106 agreements.

Respondent ID	4231380413
Respondent Name	Whitfield

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Recommended by Lancashire wildlife trust who carefully consider this kind of project. Also, because projects, once started, start to yield benefits. Unlike money in the bank.

Do you agree with the projects selected under Option One? If not, why?

Yes

Do you agree with the projects selected under Option Two? If not, why?

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments? Yes, CIL funds should be granted

Burscough allotments? Yes, CIL funds should be granted

Station Approach? Yes, CIL funds should be granted

Haskayne Cutting? Yes, CIL funds should be granted

Halsall Memorial Hall extension? Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

New allotments in Burscough

Improvements at Station Approach, Ormskirk

Improvements to Haskayne Cutting Nature Reserve

Extension at Halsall Memorial Hall

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary	Invalid. No full name provided.
Council response	

Respondent ID	4233409462
Respondent Name	Wyn Mason

**Survey response**

We have put forward three options for how we should spend the CIL. Which option do you support the most?

Option One. Spend most of the monies on projects in 2016/17 and save a small remainder to spend in future years.

Why do you prefer that option?

Providing more allotments, better access to nature reserves and generally making life more pleasant will get people out into the fresh air to enjoy themselves!

Do you agree with the projects selected under Option One? If not, why?

Yes!

Do you agree with the projects selected under Option Two? If not, why?

Spend the money so that people can sooner begin to enjoy more of their area.

Do you agree CIL funds should be awarded to the following projects?

Skelmersdale allotments?

Yes, CIL funds should be granted

Burscough allotments?

Yes, CIL funds should be granted

Station Approach?

Yes, CIL funds should be granted

Haskayne Cutting?

Yes, CIL funds should be granted

Halsall Memorial Hall extension?

Yes, CIL funds should be granted

Please give your reasons for why you think that CIL funds should, or shouldn't, be awarded to each of those projects

New allotments in Skelmersdale

Help people to grown their own food and socialise with other allotment holders.

New allotments in Burscough

Help people to grown their own food and socialise with other allotment holders.

Improvements at Station Approach, Ormskirk

All improvements to stations are welcome, particularly if bicycle security areas are provided.

Improvements to Haskayne Cutting Nature Reserve

Making improvements to nature reserves always attracts more visitors.

Extension at Halsall Memorial Hall

An extension could attract increased useage generating more income.

Are there any other projects on the Infrastructure Delivery Scheme that you consider to be a priority?

Can you suggest any other infrastructure schemes that you think should be included on the IDS?

Summary of representation and Council response

Summary

Support Option One. Support proposed schemes. Bike security facilities would also be a welcome addition at Ormskirk rail station.

Council response

Support for Option One noted. Support for proposed schemes noted. Suggestion of bike security facilities at Ormskirk rail station noted.





Infrastructure Delivery Schedule - Current Schemes													
The information in this IDS is updated regularly based on information from the infrastructure providers. Blank spaces or unknowns indicate that information has not been provided to us.													
#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
Children, Young People & Schools													
20	Not started	Extension to primary school	Potential extension to increase a 1 form entry to a 2 form entry primary school.	Burscough	LCC - Education		YTF Masterplan SPD	No	Yes	Beyond 5 years (long term)	Unknown	Unknown	Unknown
21	Not started	Increase secondary provision in the Burscough area	Increase secondary provision in the Burscough area	Burscough	LCC - Education		YTF Masterplan SPD	No	Yes	Beyond 5 years (long term)	Unknown	Unknown	Unknown
Green													
31	Not started	Community Woodland	New community woodland to be created in Burscough	Burscough	WLBC Leisure & Cultural services	Parish Council	Local Plan	Yes	No	Beyond 5 years (long term)	£200,000	Not known	£100,000
33	Not started	New Allotments in Newburgh	New Allotments in Newburgh	Eastern Parishes	WLBC Leisure & Cultural services		-	Yes	No	1-5 years (medium term)	£30,000	No	£30,000
34	Not started	New Allotments in Parbold	New Allotments in Parbold	Eastern Parishes	WLBC Leisure & Cultural services	Private sector/ Parbold Parish Council	-	Yes	No	1-5 years (medium term)	£30,000	No	£30,000
55	Not started	Haskayne Cutting Nature Reserve	Installing a boardwalk to allow people to access the wet woodland, creating and installing on site and internet interpretation	Western Parishes	Wildlife Trust	Haskayne Parish Council, Forestry Commission		Yes	Yes	Up to 1 year (short term)	£3700	We intend to use the current funding of £3,700 from the Parish Council to obtain additional funding of £8,000 to extend the boardwalk further into the woodland. We are currently seeking this funding.	Unknown at this stage; this will depend on the amount that can be raised from other sources.
73	Not started	Allotments in Skelmersdale	Provision of new allotment facilities in Skelmersdale	Skelmersdale	WLBC Leisure & Cultural services	West Lancs Community Food Growing Initiative	-	Yes	Yes	Up to 1 year (short term)	£50,000	Yes. £50,000 WLBC Capital.	£0. However further funding would allow for further allotment provision

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
81	Not started	New allotments in Burscough	Creation of new allotment facility	Burscough	WLBC Leisure & Cultural services		Local Plan.	Yes	Yes	Up to 1 year (short term)	£30,000	Not known	£30,000
107	Not started	Flooding - Hurlston Brook Study	Various improvements to infrastructure to alleviate flooding issues - recommendation of study on Hurlston Brook. In relation to Halsall Lane, Altys Lane, Railway Path, Cottage Lane. Various locations in Ormskirk.	Ormskirk	LCC		-	No	No	1-5 years (medium term)	Unknown	Unknown	Unknown
108	Not started	Flooding - Surface water study investigation	Surface water study investigation into flooding - Parrs Lane / Prescott Road & Town Green Lane, Aughton	Aughton	LCC		-	No	No	Up to 1 year (short term)	£5000	Unknown	Unknown
109	Not started	Installation of dedicated highway surface water drainage system	Installation of dedicated highway surface water drainage system - Tarleton Highway surface water infrastructure	Tarleton	LCC		-	No	Yes	1-5 years (medium term)	£155,000	Unknown	Unknown
Leisure													
50	Not started	Touring Caravan Pickup Point	New Touring Caravan pick up point at Beacon Country Park	Skelmersdale & Up Holland	WLBC Leisure & Cultural services		-	Yes	No	1-5 years (medium term)	£50,000	No	£50,000
69	In progress	Chequer Lane Lake Improvements	Environmental improvments and new recreational facilities including play area, seating and picnic tables, and new fishing platforms	Chequer Lane Lake, Upholland	WLBC Leisure & Cultural services		Leisure Strategy	Yes	Yes	Up to 1 year (short term)	£62,000	Yes. £62,000 from S106 monies.	£0
70	Ongoing	Cheshire Lines Path	Improvements to access, signage, surfacing and interpretation.	Great Altcar/Downholland	WLBC Leisure & Cultural services	Trans Pennine Trail	-	Yes	No	1-5 years (medium term)	£40,000	No	£40,000
74	Not started	Playing field drainage improvements in Ormskirk & Burscough	Extensive drainage works to playing fields in Ormskirk & Burscough	Burscough	WLBC Leisure & Cultural services	Burscough Juniors FC, Burscough Parish Council	Leisure Strategy & Playing pitch strategy	Yes	Yes	1-5 years (medium term)	£240,000	Yes. £65,000 Sport England - secured £77,000 WLBC - secured £98,000 Football Foundation - to be confirmed	£98,000 if Football Foundation funding bid is unsuccessful.

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
75	In progress	Ormskirk bowling greens	Construction of 2 new bowling greens in Ormskirk	Land adjacent Ormskirk Cricket Club	WLBC Leisure & Cultural services	Ormskirk Bowling Club / Landowner (Ormskirk School)	New Leisure Strategy	Yes	Yes	1-5 years (medium term)	£176,000	All £176K is available and approved through existing S106 funding.	£0
79	Not started	Richmond Park Pavilion Extension	Extension of existing changing pavilion to accommodate new officials changing facility at Richmond Park, Burscough	Burscough	WLBC Leisure & Cultural services			Yes	No	Up to 1 year (short term)	£20,000	No	£20,000
80	Not started	New changing facilities - Whittle Drive	Improvement / re-building of existing changing facility	Whittle Drive playing fields	WLBC Leisure & Cultural services		-	Yes	No	1-5 years (medium term)	£60,000	Not known	£60,000
92	Not started	High Sands Play Area, Rufford	Replacement of old play area at High Sands Play Area, Rufford	Rufford	WLBC Leisure & Cultural services		Site is seen as high value in new Play Strategy	Yes	No	1-5 years (medium term)	£40,000	No	£40,000
93	Not started	Aveling Drive Sports Pavilion	Construction of new purpose built pavilion	Aveling Drive, Banks	North Meols Parish Council	WLBC		Yes	Yes	1-5 years (medium term)	£150,000	Not aware of any	£150,000
95	Not started	Hesketh Avenue sports pavilion	Construction of a new purpose built pavilion	Hesketh Avenue, Banks	North Meols Parish Council	WLBC	-	Yes	Yes	1-5 years (medium term)	£150,000	Not aware of any	£150,000
Social													
8	In progress	Mere Sands Wood Visitor Centre	Extension and refurbishment of Mere Sands Wood visitor Centre to improve public facilities and financial sustainability of attraction.	Borough wide	Wildlife Trust	LCC, WLBC, developer		Yes	No	1-5 years (medium term)	£400,000	£30,000 secured Applications will be made to Heritage Lottery, Lancashire Environmental Fund and charitable trusts for the remainder	Uncertain at this stage; dependent on other funding secured. CIL monies would be used to lever in other funding for grant applications - eg using £2000 to obtain a grant of £20,000

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
9	Ongoing	Playground improvements (various)	Playground Improvements (various)	Borough wide	WLBC Leisure & Cultural services		Leisure Strategy - Play Strategy	Yes	Yes	1-5 years (medium term)	Unknown	WLBC Play Capital - currently £30,000 per year	Unknown
22	Not started	Burscough library	Provision of a new library of appropriate size in central location to support additional development	Burscough	LCC	Developer, WLBC	YTF Masterplan SPD	Yes	Yes	1-5 years (medium term)	Unknown	Unknown	Unknown
29	Not started	Burscough Sports Centre	The existing sports centre will be upgraded	Burscough	WLBC Leisure & Cultural services	LCC / Serco	Leisure Strategy. Local Plan.	Yes	Yes	1-5 years (medium term)	£5,000,000	Not known	£5,000,000
40	In progress	Coronation Park	Coronation Park - final phase of environmental and facility improvements (art, water features, stone wall repairs, flower beds)	Ormskirk & Aughton	WLBC Leisure & Cultural services		Leisure Strategy. Local Plan.	Yes	Yes	1-5 years (medium term)	£30,000	No.	£30,000
41	Not started	Park Pool	Improvements to existing facilities	Ormskirk & Aughton	WLBC Leisure & Cultural services	LCC/Serco	Leisure Strategy. Local Plan.	Yes	Yes	1-5 years (medium term)	£5,000,000	Not known	£5,000,000
47	Not started	New changing facilities at Tower Hill	New football changing facilities at Tower Hill, Up Holland	Skelmersdale & Up Holland	WLBC Leisure & Cultural services	Football Club	Leisure Strategy - Playing Pitch Strategy	Yes	No	Beyond 5 years (long term)	£80,000	No	£80,000
48	Not started	New changing facilities at Chequer Lane	New football changing facilities at Chequer Lane, Up Holland	Skelmersdale & Up Holland	WLBC Leisure & Cultural services	Football Club	Leisure Strategy	Yes	Yes	1-5 years (medium term)	£80,000	Possibly	£80,000
49	Not started	New Visitor Centre at Beacon Country Park	New Visitor Centre at Beacon Country Park	Skelmersdale & Up Holland	WLBC Leisure & Cultural services	LCC	Leisure Strategy. Local Plan.	Yes	No	Beyond 5 years (long term)	£750,000	No	£750,000
51	Not started	Skelmersdale Sports Centre	New £12 million sports centre to replace the exisitng sports centre	Skelmersdale & Up Holland	WLBC Leisure & Cultural services	LCC/Serco	Leisure Strategy. Local Plan.	Yes	Yes	1-5 years (medium term)	£12,000,000	No	£12,000,000
58	Not started	Tawd Valley Improvements	Improvements to enhance the Tawd Valley	Skelmersdale & Up Holland	WLBC Leisure & Cultural services	LCC	Leisure Strategy. Local Plan.	Yes	Yes	1-5 years (medium term)	£300,000	Unknown	Unknown
59	Not started	New changing facilities at Bramble Way, Parbold	New changing room facilities at Bramble Way, Parbold	Parbold	WLBC Leisure & Cultural services		Leisure Strategy	Yes	Yes	1-5 years (medium term)	£50,000	-	£50,000
61	Not started	Hunters Hill Country Park	Improvements to Hunters Hill Country Park	Parbold	WLBC Leisure & Cultural services		Leisure Strategy	Yes	Yes	1-5 years (medium term)	£60,000	£60,000	No

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
82	Not started	Investment in health facilities in Tarleton, Hesketh Bank and Banks	Upgrade and develop services in this locality to address locality demand constraints and infrastructure issues	Tarleton, Hesketh Bank, Banks	CCCG	NHS Property Services, WLBC	The CCG is currently undertaking a review of its estate infrastructure and capacity needs as a consequence of its developing commissioning strategy and implementation plan. A proposed locality investment plan is currently being worked up by the CCG, NHSE and NHS Property Services.	Yes	Yes	1-5 years (medium term)	Final capital costs are being scoped as part of the detailed planning and option appraisal process.	Unknown	Unknown
83	Not started	Redevelopment of Birleywood Health Centre	Upgrade and extension to Birleywood health centre to address locality demand constraints and infrastructure issues	Birleywood , Skelmersdale	CCCG	NHS Property Services, WLBC	The CCG is currently undertaking a review of its estate infrastructure and capacity needs as a consequence of its developing commissioning strategy and implementation plan. This scheme is currently being worked up by the CCG, NHSE and NHS Property services and has been identified as the highest priority.	Yes	Yes	1-5 years (medium term)	Final capital costs are being defined as part of the detailed planning process but the likely estimate is circa £2.5 m	Unknown	Unknown

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
84	Not started	Investment in health facilities in Burscough	Upgrade and develop services in Burscough to address locality demand constraints and infrastructure issues	Burscough	CCCG	NHS Property Services, WLBC	The CCG is currently undertaking a review of its estate infrastructure and capacity needs as a consequence of its developing commissioning strategy and implementation plan. A proposed development is currently being worked up by the CCG, NHSE and NHS Property services.	Yes	Yes	1-5 years (medium term)	Final capital costs are being scoped as part of the detailed planning and option appraisal process.	Unknown	Unknown
94	Not started	North Meols Community Centre	Renovations for existing community centre	Hoole Lane, Banks	North Meols Parish Council	WLBC		Yes	Yes	1-5 years (medium term)	£15,000	Not aware of any	£15,000
97	Not started	Halsall Memorial Hall Extension	Construction of additional facilities at Halsall Memorial Hall	Halsall	Halsall Parish Council	WLBC		Yes	Yes	Up to 1 year (short term)	£75,000	Match funding applied for (Awards for all) S106 funding for external POS uses. Breakdown to be advised.	£30,000
98	Not started	Improvements to play area/field at Appley Lane South	-	Appley Bridge	Wrightington Parish Council	WLBC Leisure	-	Yes	No	Unknown	Unknown	Unknown	Unknown
99	Not started	Improved drainage at Mossy Lea playing fields	Improved drainage at Mossy Lea playing fields	Wrightington	Wrightington Parish Council	WLBC	-	Yes	No	Unknown	Unknown	Unknown	Unknown
Social / Green													
30	Not started	New Burscough Park	New Park proposal as part of Yew Tree Farm Development	Burscough	Private developer	WLBC	Local Plan and YTF Masterplan SPD	No	Yes	1-5 years (medium term)	unknown	developer to fund	nil
77	Not started	Station Approach Open Space	Improvements works to open space at Station Approach, Ormskirk, including car parking	Ormskirk	WLBC Leisure & Cultural services		Local Plan. Leisure Strategy.	Yes	Yes	up to 1 year (short term)	£60,000	Yes. £45,000 from S106	£15,000

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
78	Not started	Station Approach Linear Park	Creation of a green link between public open space sites on the old railway line, Ormskirk	Ormskirk	WLBC Leisure & Cultural services			Yes	Yes	1-5 years (medium term)	£40,000	No	£40,000
88	Not started	Improvements to Skelmersdale employment areas	Improvements to infrastructure within Skelmersdale employment areas including entrance signage, green spaces, public realm and car parks to improve attractiveness of areas for business purposes	Skelmersdale	WLBC		Economic Development Strategy	Yes	No	1-5 years (medium term)	Unknown	Unknown	Unknown
111	Not started	New allotments in Ormskirk	Creation of new allotment site in Ormskirk	Ormskirk	WLBC Leisure & Cultural services	WLBC	Local Plan; Leisure Strategy	Yes	Yes	Up to 1 year (short term)	£30,000	Possible contribution if Tower Hill land is sold.	£30,000
Transport													
4	Not started	Ormskirk Town Centre Movement Strategy	Package of measures to address congestion and movement in Ormskirk.	Borough wide	LCC - Transport	WLBC	West Lancs Highways & Transport Masterplan	Yes	Yes	1-5 years (medium term)	unknown	unknown	unknown
24	Not started	Reinstatement of Burscough Curves	Reinstatement of the Burscough Curves to Link Ormskirk - Southport - Preston.	Burscough	LCC - Transport	WLBC, Network Rail, Merseytravel	West Lancs Highways & Transport Masterplan	Yes	Yes	Beyond 5 years (long term)	Unknown	Unknown	Unknown
25	Not started	Electrification Ormskirk - Preston; First phase Burscough Junction	Electrification of the Liverpool - Ormskirk Line to Burscough Junction to open up the Liverpool travel to work area. Second phase to extend Burscough Junction to Preston.	Burscough	LCC - Transport	WLBC, Network Rail, Merseytravel	West Lancs Highways & Transport Masterplan, West Lancs Local Plan	Yes	Yes	Beyond 5 years (long term)	Unknown	Unknown	Unknown
32	Not started	Appley Bridge Park and Ride	Park and Ride facilities and accessibility improvements at - Appley Bridge	Eastern Parishes	GMPTE	WLBC		Yes	Yes	Unknown	Unknown	Unknown	Unknown
36	Not started	Green lane link road	Green Lane Link Road. Required to remove HGV traffic off rural road network in Tarleton.	Northern Parishes	LCC - Transport	WLBC	West Lancs Highways & Transport Masterplan	Yes	Yes	1-5 years (medium term)	Unknown	To be funded through LTP	Nil
39	Not started	Ormskirk bus station	Ormskirk bus station upgrade	Ormskirk & Aughton	LCC - Transport	WLBC	LCC Transport Masterplan & LTP	Yes	No	1-5 years (medium term)	£1,000,000	Funded through LTP	nil

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#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
42	Not started	Cycle links between Edge Hill University and Ormskirk rail & bus stations	Upgraded pedestrian links and new cycle links between Edge Hill University and Ormskirk rail & bus station	Ormskirk & Aughton	LCC - Transport	WLBC	LCC Transport Masterplan & LTP	Yes	Yes	1-5 years (medium term)	Unknown	Potential £700k from S106 and LTP monies	Unknown
43	Not started	Tawd Valley cycle path linking Skelmersdale with West Lancs College	Improvement to access through Tawd Valley to link Skelmersdale local neighbourhoods and West Lancashire College / town centre	Skelmersdale & Up Holland	LCC - Transport	WLBC	LTP	Yes	Yes	1-5 years (medium term)	£472,000	To be funded through S106 monies and LCC	nil
44	Not started	Skelmersdale Movement Strategy	Package of measures to improve connectivity throughout Skelmersdale and open up public realm	Skelmersdale & Up Holland	LCC - Transport	WLBC	West Lancs Highways & Transport Masterplan	Yes	Yes	1-5 years (medium term)	Unknown	Unknown	Unknown
45	Not started	Skelmersdale rail connection	Provision of a rail connection, together with a rail/bus interchange and parkway facilities, to serve Skelmersdale, with services to both Manchester and Liverpool	Skelmersdale & Up Holland	LCC - Transport	WLBC, Network Rail, Merseytravel, Merseyrail, Northern Rail	West Lancs Local Plan West Lancs Highways & Transport Masterplan	Yes	Yes	Beyond 5 years (long term)	Unknown	Likely to be funded through LEP or DfT funding	nil
52	Ongoing	Demand Responsive Transport System	Demand Responsive Transport System serving Skelmersdale and Up Holland residents wishing to access employment on the Pimbo estate	Skelmersdale & Up Holland	WLBC	LCC		No	Yes	1-5 years (medium term)	£1000 per annum	None	None
63	Not started	Yew Tree Farm to Burscough Town Centre access improvements	Provide widened footway to cater for cyclists on the west side of Liverpool Road between the new access junction (south of Higgins Lane) to Lord Street and to include pedestrian improvements at the Trevor Road signals.	Burscough	LCC - Transport	WLBC	YTF Masterplan SPD LCC Transport Masterplan	Yes	Yes	1-5 years (medium term)	Unknown	Unknown	Unknown
64	Not started	Burscough Town Centre Public Realm Improvements	Public realm improvements and shared space scheme on Liverpool Road between Mill Lane and Bobby Langton Way.	Burscough	LCC - Transport	WLBC	LCC Transport Masterplan LTP	Yes	Yes	1-5 years (medium term)	Unknown	Unknown	Unknown



#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
65	Not started	Skelmersdale Public Transport Connectivity and New Interchange	New bus station and interchange facilities to support cycling and links with rail facility	Skelmersdale	LCC - Transport	WLBC	LCC Transport Masterplan	Yes	Yes	Beyond 5 years (long term)	Unknown	Unknown	Unknown
66	Not started	Route management opportunities	Effective route management for HGVS as a result of the Switch Island link road	Borough wide	LCC - Transport	WLBC	LCC Transport Masterplan	Yes	Yes	1-5 years (medium term)	Unknown	Unknown	Unknown
67	Not started	Rural connectivity	Improve rural access by considering how best to provide transport links. Footways to be reviewed and made more attractive for cyclists.	Rural areas	LCC - Transport	WLBC	LCC Transport Masterplan	Yes	No	1-5 years (medium term)	Unknown	Unknown	Unknown
100	Not started	Puffin pedestrian crossing, Ormskirk Parish Church	Construct a staggered puffin pedestrian crossing on the A570 at the junction of Derby Street West / Southport Road / Church	Ormskirk	LCC - Transport		West Lancs Highways & Transport Masterplan	Yes	No	1-5 years (medium term)	£125,000	Unknown	Unknown
101	Not started	Cycle footpath linking to industrial estates in Skelmersdale (Whiteledge South to Nipe Lane)	Cycle footpaths linking to industrial estates. 2 schemes possible. Scheme A - Whiteledge South footbridge to Nipe Lane	Skelmersdale	LCC - Transport			Yes	No	1-5 years (medium term)	Scheme A £79,000 / Scheme B £47,400	Unknown	Unknown
102	Not started	Off road cycle path at Whitehey Lane, Skelmersdale	Off road cycle path at roundabout linking to industrial estate and footway linking to bus stop	Skelmersdale	LCC - Transport			Yes	No	1-5 years (medium term)	£55,300	Unknown	Unknown
103	Not started	Refuge and footway improvement	Refuge and footway improvement on A5147 Wainshar Lane, Haskayne (35m north of Rosemary Lane)	Haskayne	LCC - Transport		LCC Transport and Highways Masterplan	Yes	No	1-5 years (medium term)	£40,000	Unknown	Unknown
104	Not started	Zebra crossing at Aughton St, Ormskirk	Construction of a zebra crossing at junction of Aughton St / Bridge St, Ormskirk	Ormskirk	LCC - Transport		LCC Transport & Highways Masterplan	Yes	No	1-5 years (medium term)	£35,000	Unknown	Unknown
105	Not started	Burscough Transport Interchange	Relocation of existing library into a larger more suitable premises. Dual project with ticketing and transport office	Burscough	LCC - Transport			Yes	No	1-5 years (medium term)	£100,000	Unknown	Unknown

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
106	Not started	Skelmersdale subway improvements	Urban Art project with local young people to repaint 8 subways	Skelmersdale	LCC - Transport		Issue raised in Skelmersdale Town Centre SPD	No	No	Up to 1 year (short term)	£40,000		£35,000
110	Not started	Cycle footpath linking to industrial estates in Skelmersdale (Nipe Lane to Pimbo Road)	Cycle footpaths linking to industrial estates. Scheme B - Nipe Lane to Pimbo Road	Skelmersdale	LCC - Transport			Yes	No	1-5 years (medium term)	Scheme A £79,000 / Scheme B £47,400	Unknown	Unknown
Transport / Green													
10	Not started	River Douglas Linear Park	New multi use linear park providing an off road path linking Hesketh Bank to Tarleton	Tarleton/Hesketh Bank	WLBC	LCC / EA / Parish Councils/ Canal & Rivers Trust	West Lancs Local Plan	Yes	Yes	1-5 years (medium term)	Unknown	Unknown	Unknown
11	Not started	Ormskirk to Burscough Linear Park	New multi use linear park providing a largely off road path linking Ormskirk to Burscough	Ormskirk to Burscough	WLBC	LCC	West Lancs Local Plan, Yew Tree Farm Masterplan SPD, Grove Farm Development Brief and West Lancashire Highways & Transport Masterplan	No	Yes	1-5 years (medium term)	Unknown	S106 monies from two applications totalling £229k potentially available (£100k received and committed; £129k yet to be received)	Unknown
12	Not started	Ormskirk to Skelmersdale Linear Park	New multi use linear park providing a largely off road path following route of former railway line	Ormskirk/Skelmersdale	WLBC	LCC	West Lancs Local Plan, Firwood Road Development Brief and West Lancashire Highways & Transport Masterplan	Yes	Yes	1-5 years (medium term)	Unknown	Unknown	Unknown
13	Not started	Banks Linear Park	New multii use linear park providing an off road path following former railway line	Banks	WLBC	LCC	West Lancs Local Plan and West Lancashire Highways & Transport Masterplan	Yes	Yes	1-5 years (medium term)	Unknown	Unknown	Unknown
76	Not started	Burscough-Parbold Towpath Improvements	Improvement works to the towpath between Parbold and Burscough, in particular the section between Ring O'Bells Lane and Spencer's Bridge	Burscough / Parbold	LCC	Canal & Rivers Trust	LCC Transport Masterplan LTP	Yes	No	1-5 years (medium term)	Unknown	Unknown	Unknown

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
89	Ongoing	(re) Cycle to Work	Scheme provided for Skelmersdale and Up Holland residents, working on Pimbo or White Moss employment areas, and earning under £25k per annum, to provide them with reconditioned cycles to access work/encourage sustainability	Skelmersdale and Up Holland	WLBC	ExselCIC		No	Yes	1-5 years (medium term)	£1000 per annum	Funded through S106 monies (Walkers & Maple View)	No
96	Not started	Newburgh-Parbold Canal towpath improvements	Improvements to the towpath between Newburgh and Parbold	Newburgh	Newburgh Parish Council		Delivery of project needs support of Canal & Rivers Trust. CRT have already informed Newburgh Parish Council that the works are not in their implementation schedules, or identified as being necessary works	Yes	No	Unknown	Unknown	No details of any match funding	Unknown

#	Status	Project Name	Project description	Location	Lead agency	Delivery partners	Relevant strategies	Infrastructure listed on CIL R123?	Does it meet a need created by new development?	Timescales / Delivery	Anticipated cost	Match funding available	CIL monies required
112	Not started	Burscough towpath improvements	Approximately 1.3km of towpath improvements and environmental enhancement between Burscough Wharf and Glovers Swing Bridge.	Burscough	Canal & Rivers Trust	Burscough Parish Council	Local Plan Policy EN3; Local Transport Plan  The Local Transport Plan identifies one of its 7 Transport Priorities as – Providing safe, reliable, convenient and affordable transport alternatives to the car. The overall principle is to provide safe and convenient new infrastructure for walking and cycling.  The canal towpath is part of the proposed West Lancashire Wheel identified in the draft West Lancashire Economic Strategy.	Yes	Yes	Up to 1 year (short term)	£180,000	Burscough Town Council Lancashire Environment Fund  £unknown at present	£150,000
Utilities & Waste													
6	Ongoing	New Lane WWTW	Solution for waste water treatment capacity issue at New Lane	Catchment for New Lane WWTW	United Utilities		Local Plan	No	Yes	Unknown	Unknown	to be funded by UU	Nil
7	Ongoing	Water supply	Upgrade the Southport boreholes and Bickerstaffe water treatment works	Borough wide	United Utilities			No	No	Unknown	Unknown	to be funded by UU	Nil
27	Not started	Burscough drainage	In addition to usual on-site SuDS, surface water removal from existing system	Burscough	Private developer	United Utilities	YTF Masterplan SPD	No	Yes	1-5 years (medium term)	Unknown	Improvements to be funded by developer	Nil
28	Not started	Ormskirk drainage	In addition to usual on-site SuDS, surface water removal from existing system	Ormskirk	Private developer	United Utilities	Grove Farm Development Brief	No	Yes	1-5 years (medium term)	Unknown	Improvements to be funded by developer	Nil

# Equality Impact Assessment Form



<b>Directorate: Transformation</b>	<b>Service: Planning</b>
<b>Completed by: Peter Richards</b>	<b>Date: 27 November 2015</b>
<b>Subject Title: Community Infrastructure Levy (CIL) Funding Programme 2016/17</b>	
<b>1. DESCRIPTION</b>	
Is a policy or strategy being produced or revised:	No <i>*delete as appropriate</i>
Is a service being designed, redesigned or cutback:	No
Is a commissioning plan or contract specification being developed:	No
Is a budget being set or funding allocated:	Yes
Is a programme or project being planned:	Yes
Are recommendations being presented to senior managers and/or Councillors:	Yes
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty ( <b>Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations</b> ):	Yes
Details of the matter under consideration:	The approval of proposed funding priorities for spending CIL monies in 2016/17.
<i>If you answered <b>Yes</b> to any of the above go straight to Section 3</i> <i>If you answered <b>No</b> to all the above please complete Section 2</i>	
<b>2. RELEVANCE</b>	
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	Yes/No* <i>*delete as appropriate</i>
If <b>Yes</b> , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered <b>Yes</b> go to Section 3</i>	-
If you answered <b>No</b> to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	-
<b>3. EVIDENCE COLLECTION</b>	
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	CIL provides funding to provide or improve infrastructure required as a result of new development and growth in the Borough. CIL expenditure will benefit the residents and businesses within the Borough by delivering

	improvements to infrastructure. Infrastructure projects, identified as suitable for expenditure in 2016/17, have been shortlisted from the Infrastructure Delivery Schedule (IDS). The IDS has been compiled through consultation with infrastructure providers. Some schemes on the IDS will need to be delivered in partnership with the infrastructure providers and their deliverability, timescales and costs have been a consideration in identifying project priorities.
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	<p>This report seeks approval to consult on the proposed funding priorities for spending CIL monies in 2016/17 but does not seek to make any final recommendations at this stage. Such recommendations will be made following receipt and consideration of consultation responses.</p> <p>The schemes proposed for funding serve to provide or make improvements to public open space, a nature reserve and allotments in the Borough, the need for which has arisen as a result of new development. Such projects will be prepared in acknowledgement of equality and diversity to ensure that all groups may access the schemes.</p>
<p>Which of the protected characteristics are most relevant to the work being carried out?</p> <p>Age Gender Disability Race and Culture Sexual Orientation Religion or Belief Gender Reassignment Marriage and Civil Partnership Pregnancy and Maternity</p>	<p><i>*delete as appropriate</i></p> <p>Yes Yes Yes Yes No No No No No</p>
<b>4. DATA ANALYSIS</b>	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	Service-users will include, but not be limited to, members of the public and local community groups.
What will the impact of the work being carried out be on usage/the stakeholders?	Provision of improved infrastructure can only benefit stakeholders.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	Public consultation on options for the CIL Funding Programme was held in Autumn 2015, and the feedback from this consultation has informed the final recommendation for allocating CIL monies in 2016/17.

What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	An equality survey form was attached to all comments forms, although was not a mandatory requirement for respondents to complete in order for their comments to be accepted. Any completed equality surveys have been analysed and reported on.
If any further data/consultation is needed and is to be gathered, please specify:	-
<b>5. IMPACT OF DECISIONS</b>	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	Provision of improved infrastructure can only benefit all parts of the community, including those with protected characteristics.
<b>6. CONSIDERING THE IMPACT</b>	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	No negative impacts have been identified.
What actions do you plan to take to address any other issues above?	No actions.  <i>If no actions are planned state no actions</i>
<b>7. MONITORING AND REVIEWING</b>	
When will this assessment be reviewed and who will review it?	A CIL Funding Programme will be prepared each year to consider how best to spend CIL monies received by the Council on strategic infrastructure.







## **AGENDA ITEM: 5(d)**

**CABINET: 12 January 2016**

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<b>Report of:</b>	<b>Assistant Director Planning</b>
<b>Relevant Managing Director:</b>	<b>Managing Director (Transformation)</b>
<b>Relevant Portfolio Holder:</b>	<b>Councillor J Hodson</b>
<b>Contact for further information:</b>	<b>Helen Hatch (Ext. 5171)</b> <b>(e-mail: <a href="mailto:helen.hatch@westlancs.gov.uk">helen.hatch@westlancs.gov.uk</a>)</b>

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**SUBJECT: SKELMERSDALE & UP HOLLAND (RE)CYCLE TO WORK SCHEME**

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Wards affected: All Skelmersdale Wards and the wards of Up Holland, Wrightington and Bickerstaffe

### **1.0 PURPOSE OF THE REPORT**

- 1.1 To update Members on the performance of the (re)Cycle to Work scheme, and to seek approval to increase the grant offered and to provide the scheme providers with a springboard grant to improve stock availability.

### **2.0 RECOMMENDATIONS**

- 2.1 That the report be noted.
- 2.2 That the funding provided to the nominated supplier to cover the cost of each cycle together with associated safety equipment (helmet and lights) be increased in value from £50 to £100, and that a repayable springboard grant of £800 be provided to the nominated supplier to improve stock availability.
- 2.3 That delegated authority be granted to the Assistant Director Planning to negotiate terms and enter into an agreement with the nominated supplier and, in consultation with the Portfolio Holder, to make any necessary further changes in the future to the value of the cycle grants.

- 2.4 That delegated authority be granted to the Assistant Director Planning, in consultation with the Portfolio Holder, to decide whether to continue with the scheme should uptake remain low.

### **3.0 BACKGROUND**

- 3.1 As Members will be aware, the Borough Council has been developing a range of options to help link residential and employment areas, utilising available S106 funds. Such schemes are designed to improve connectivity and help those seeking employment in Skelmersdale and Up Holland to access work. To date, these options have included provision of, or improvements to, cycle/footpaths and the setting up of a Demand Responsive Transport Service (DRTS), along with the (re)Cycle to Work scheme.
- 3.2 The (re)Cycle to Work scheme allows employees to apply for a grant to assist them to purchase a reconditioned bicycle, from a nominated supplier, to help them travel to employment. Cabinet approved the scheme in November 2013, and the scheme went live in June 2014. A nine month review of the pilot scheme was reported to Cabinet in March 2015, with Members agreeing to extend the scheme to additional users by increasing the salary cap and by removing the condition relating to no alternative transport options in order to encourage sustainable travel to employment. Members also agreed to extend the service to the White Moss employment area with alternative S106 funding.
- 3.3 To be eligible for the (re)Cycle to Work scheme, applicants are required to live in the Skelmersdale/Up Holland area (see Appendix A), work or have an offer of employment on the Pimbo Employment Estate or White Moss Business Park and earn under £25,000 per annum. Applicants should be referred to the scheme by Job Centre Plus, private recruitment companies or their employer and must submit an application form to the Council to have their eligibility checked.
- 3.4 Upon membership approval, an order is raised with the bicycle supplier to purchase a reconditioned bicycle, and the applicant is informed when they can collect the bicycle. Bicycles are supplied with safety equipment, at a current total cost of £50 each. The bicycles conform to the relevant British Standards.
- 3.5 Only one grant per person is available to purchase a bicycle. Bicycles are then the property of the employee and they are responsible for maintenance/upkeep and security. No additional grants will be given for bicycles that become damaged or are stolen.

### **4.0 CURRENT POSITION**

- 4.1 Previous Cabinet reports have reported that the performance of the (re)Cycle to Work scheme was lower than that anticipated, and Members have granted approval to extend the operation of the scheme in an attempt to increase uptake.

Together with renewed marketing campaigns, the changes have resulted in an increase of applications to the scheme. In 2014/15 there were 18 applications, increasing to 35 applications in the first six months of 2015/16.

- 4.2 In the first 18 months of the scheme, the Council has received a total of 53 applications for reconditioned bicycles, of which 20 have been collected. Each cycle together with safety equipment costs £50 and therefore the total cost of the scheme so far stands at £1000 (£650 in 2015/16, £350 in 2014/15).
- 4.3 The November 2013 Cabinet report estimated the costs of the (re)Cycle to Work scheme based upon the take up of the DRTS at that time. Assuming that the level of demand for the recycled bikes would be the same as that for the DRTS, the report included an estimate that the annual running cost of the cycle scheme would be £9,920. However it also included a caveat that it was likely that actual take-up levels would be far lower. Clearly, current performance shows take-up of the cycle scheme has been significantly lower than had been hoped for.
- 4.4 Officers have tried to identify why take up has been low. Inevitably, cycling may not appeal to all people, and in winter months interest will typically reduce. Each marketing campaign sees a degree of renewed interest and a number of new applications, but, once this saturation of initial interest is met, the scheme will largely be dependent on new employees starting in those employment areas. A similar pattern can be seen in the performance of the DRTS which suggests a low turnover of new staff in each employment area.
- 4.5 In purporting to identify issues relating to the collection of cycles, officers sought feedback from the bicycle provider Total Reuse (formerly called ExselCIC). Often bicycles are not collected as a result of the applicant changing their mind or a change in circumstance. For example, many applicants are Eastern European and may return home before they collect the bicycle. Such factors are beyond the control of the Council or Total Reuse. Only one bicycle so far has been refused based on the aesthetics of the bicycle.
- 4.6 However, feedback has highlighted delays in the provision of bicycles due to a stock shortage of sizes available for both men and women. As part of the contract with WLBC, Total Reuse agreed that they would be able to supply bikes to meet the requirements set out through the contract. At that time, Total Reuse had been assured by various sources (including the police) that free bicycle donations were available. Since that time, however, many of the sources have failed to yield (for example, the police have decided to auction off stolen bicycles rather than donate them to social enterprises). In addition, of those bicycles being donated to Total Reuse, most are for children and there is subsequently a shortage of adult bicycles, for both males and females.
- 4.7 Consequently, to address this issue, and enable Total Reuse to meet the conditions of the agreement, Total Reuse have been purchasing bicycles themselves, paying around £55 for each bicycle and then £15 for safety equipment. Each bicycle is therefore costing the company £70, but they are only

receiving £50 from WLBC, making a loss of £20 per bicycle. The original price structure is thereby prohibitive to the scheme.

- 4.8 Total Reuse has looked at similar schemes in Manchester and Merseyside to identify comparable costs. A Wigan scheme charges £120 per reconditioned bicycle and safety equipment, whilst other schemes ([www.recycleabike.co.uk](http://www.recycleabike.co.uk)) charge £100. It is considered that an increase in prices will reflect similar schemes elsewhere and be conducive to supporting the scheme financially. It is therefore recommended that the grant amount be increased from £50 to £100 per applicant, to cover the cost of bicycles and safety equipment, with any future increases to be agreed under the delegated authority of the Assistant Director Planning in consultation with the Portfolio Holder for Planning. This would create a margin for Total Reuse to reinvest in the purchase of bicycles, to help ensure continuous availability of stock.
- 4.9 Total Reuse has also requested that a £800 springboard grant be provided to enable them to purchase bicycles to provide the readily available stock necessary to facilitate the scheme in the short term. This stock would thereafter be replenished through the profit margin that would be secured should the grant per bicycle be increased to £100 as set out in paragraph 4.8. The springboard grant will be repayable to the Council at the end of the agreement. Total Reuse is already investigating alternative sources for bicycles – for example the Wigan Gearing Up programme has already been approached to assist and has agreed in principle.
- 4.10 Subject to Cabinet approval, the agreement with Total Reuse will be amended to reflect the recommendations pertaining to an increase in the grant awarded to each bicycle and the introduction of a springboard grant. The scheme can then continue with periodic reviews of its performance. The agreement will also be modified to extend the time period for the scheme to 36 months – the original agreement only referred to the 9 month pilot period.
- 4.11 Whilst it is recognised that the scheme is not performing as well as intended, its low management time and low costs mean that the scheme can continue to operate with little impact on Council resources. S106 monies remain available to fund and sustain the (re)Cycle to Work project and the scheme is considered to be of value – it recycles bicycles, supports sustainability, improves the environment, promotes health and exercise and facilitates access to employment.
- 4.12 Unfortunately, the restrictions of the S106 agreements involved mean that the scheme cannot be extended to other employment areas of Skelmersdale or the wider Borough. Use of S106 monies must be geographically linked to the location of the development from which they stemmed.

## **5.0 FUNDING**

- 5.1 The (re)Cycle to Work scheme which serves Pimbo is funded from the S106 monies received from the Walkers development. There is currently £107,825 available to spend. Note that the Walkers monies are also allocated to spend on the Demand Responsive Transport Scheme (DRTS).
- 5.2 In addition, £14,056 from the S106 planning obligation at Maple View, Skelmersdale is used to fund the (re)Cycle to Work scheme which serves the White Moss Business Park.
- 5.3 Current estimates, based on existing levels of use and the proposed changes to the funding of the scheme, indicate that the cycle to work scheme will only utilise a small proportion of the available S106 monies. Optimistically assuming 15 bicycles are awarded each year, a total cost of £6,000 over 4 years would be expected from this point forward, in addition to the springboard grant of £800. Given the low level costs of running this scheme and the amount of S106 available, it is possible to fund the cycle scheme over the next few years, whilst also being able to support other schemes such as the DRTS.

*Table 1: Current uptake and costs*

	Grant	Cycles collected (actual)	Cycles collected (estimate)	Actual / Estimated cost
2014/15	£50 per cycle	7	-	£350
2015/16 (to date)		13	-	£650
				£1000

*Table 2: Estimated uptake and costs*

	Grant	Cycles collected (actual)	Cycles collected (estimate)	Actual / Estimated cost
2015/16 (rest of year)	£100 per cycle	-	8	£800
2016/17		-	15	£1500
2017/18		-	15	£1500
2018/19		-	15	£1500
Springboard grant				£800
Total				£6100

- 5.4 Performance will continue to be monitored and the cycle scheme managed in response.

## **6.0 VIEWS OF THE ASSISTANT DIRECTOR PLANNING**

- 6.1 The (re)Cycle to Work scheme has the potential to provide some real benefits to the local community, by providing an affordable and sustainable alternative transport solution, facilitating access to employment, promoting health and exercise, improving the environment and supporting local employment. Despite the low take-up of the scheme, it is expected that there will remain an interest in it from new and existing employees.

- 6.2 Whilst it is recognised that the scheme is not performing as well as hoped, its low management time and low costs mean that the scheme can continue to operate with little impact on Council resources. This report recommends that the amount of funding that is awarded for each bicycle should be increased from £50 to £100, and that a springboard grant of £800 should also be awarded to Total Reuse to help improve the availability of bicycle stock. S106 monies remain available to fund and sustain the scheme, and the low cost of the scheme means that a large proportion of S106 monies will remain available for use on other transport schemes.
- 6.3 It is therefore recommended that the (re)Cycle to Work scheme continues with the proposed variations to the scheme. The performance of the scheme will continue to be regularly reviewed and managed.

## **7.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY**

- 7.1 Subject to its on-going success, the (re)Cycle to Work scheme will meet many of the aims of the Sustainable Community Strategy. It will assist in getting people to work and will reduce the use of private cars and therefore reduce the amount of carbon emitted. Thus it will have economic, environmental and social benefits.

## **8.0 FINANCIAL AND RESOURCE IMPLICATIONS**

- 8.1 The continuation of the scheme can be funded through existing S106 monies specifically acquired for such a scheme.
- 8.2 Typically, S106 monies which are not spent by their deadline may need to be returned to developers and so it is important that the monies are fully spent on suitable projects by the deadline for the use of those S106 monies.

## **9.0 RISK ASSESSMENT**

- 9.1 Some of the Section 106 funding is ring-fenced specifically for alternative transport provision within Skelmersdale and contractually will have to be returned to developers if not spent within a set timescale for schemes such as the (re)Cycle to Work scheme.

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## **Background Documents**

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

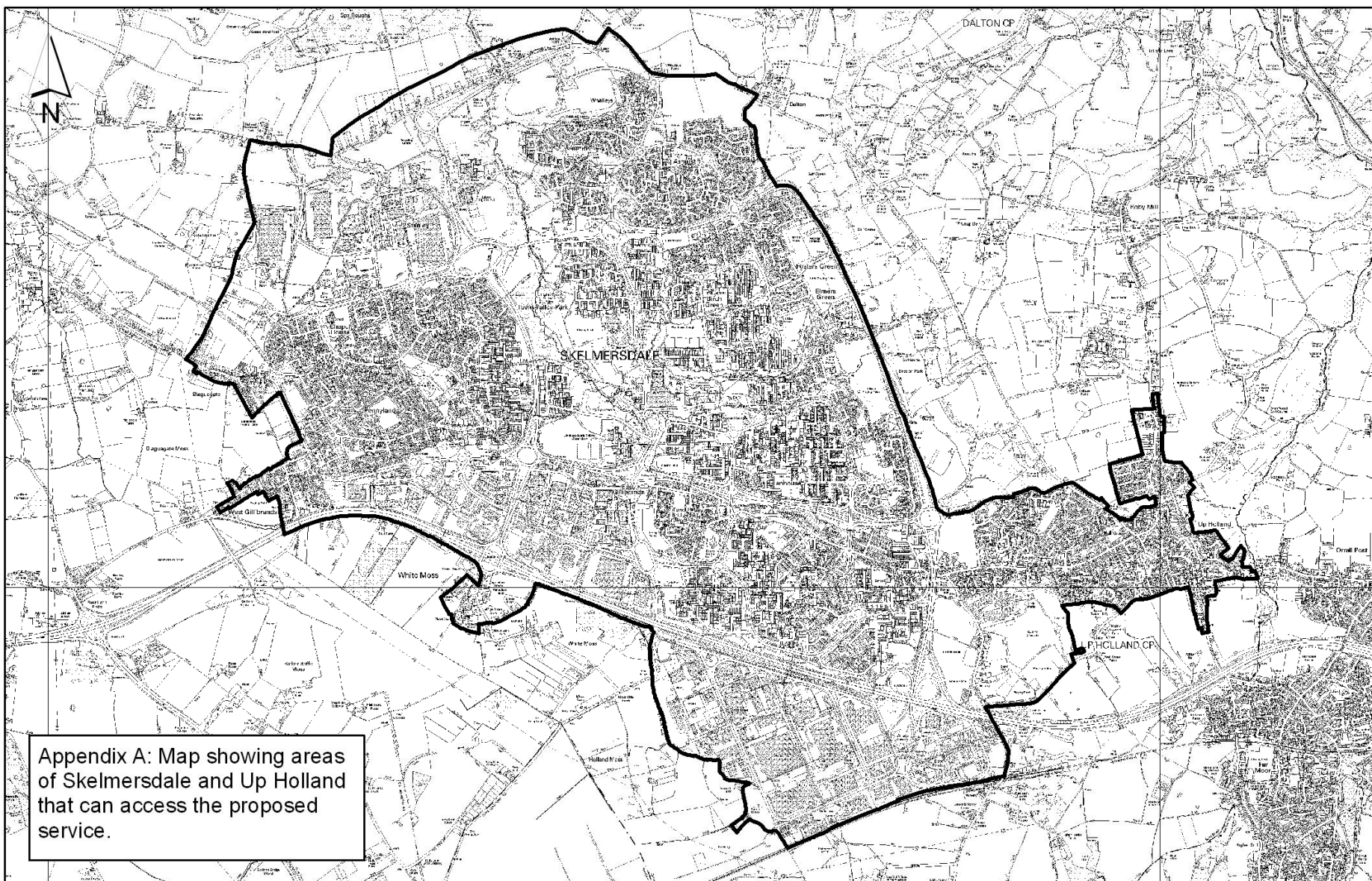
### **Equality Impact Assessment**

There is a significant 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 when undertaking the actions detailed within this article.

### **Appendices**

Appendix A – Map showing the areas that can access the proposed scheme

Appendix B – Equality Impact Assessment





# Equality Impact Assessment Form



<b>Directorate: Transformation</b>	<b>Service: Planning</b>
<b>Completed by: Helen Hatch</b>	<b>Date: 16/10/2015</b>
<b>Subject Title: SKELMERSDALE AND UP HOLLAND CYCLE TO WORK SCHEME</b>	
<b>1. DESCRIPTION</b>	
Is a policy or strategy being produced or revised:	YES
Is a service being designed, redesigned or cutback:	YES
Is a commissioning plan or contract specification being developed:	YES
Is a budget being set or funding allocated:	YES
Is a programme or project being planned:	YES
Are recommendations being presented to senior managers and/or Councillors:	YES
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty ( <b>Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations</b> ):	YES
Details of the matter under consideration:	The revision of the (re)Cycle to Work scheme to increase the financial grant awarded per cycle and to provide the supplier with a springboard grant to improve the availability of stock.
<i>If you answered <b>Yes</b> to any of the above go straight to Section 3</i> <i>If you answered <b>No</b> to all the above please complete Section 2</i>	
<b>2. RELEVANCE</b>	
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	Yes/No* <i>*delete as appropriate</i>
If <b>Yes</b> , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered <b>Yes</b> go to <b>Section 3</b></i>	
If you answered <b>No</b> to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	

<b>3. EVIDENCE COLLECTION</b>	
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	The Cycle to Work scheme serves Skelmersdale and Up Holland residents accessing employment on the Pimbo and White Moss employment estates.
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	The scheme is limited to those residents in Skelmersdale and Up Holland due to the limitations imposed by the funding source (S106) and provides affordable and sustainable transport for employees to access those estates which are not served by public transport. The scheme is open to all Skelmersdale and Up Holland residents employed on Pimbo or White Moss, earning under £25,000 per annum.
Which of the protected characteristics are most relevant to the work being carried out?  Age Gender Disability Race and Culture Sexual Orientation Religion or Belief Gender Reassignment Marriage and Civil Partnership Pregnancy and Maternity	YES YES YES No No No No No No YES
<b>4. DATA ANALYSIS</b>	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	<p>The service is being used by Skelmersdale and Up Holland residents employed on the Pimbo and White Moss employment estates. From the demographic information collected from those members who chose to answer the equality questionnaire, scheme members represent a mix of ages and genders. A number of applications have been submitted from Polish employees, resident in Skelmersdale.</p> <p>Due to the physical nature of the scheme (cycling) the scheme is unsuitable for some disability groups – such as visually or mobility impaired. Applications from disabled applicants will not be refused – and no declaration is required - it is up to the applicant to determine their safety on the cycles.</p> <p>Similarly, it is the decision of the individual (ie pregnant women) as to whether they wish to apply for a cycle.</p>
What will the impact of the work being carried out be on usage/the stakeholders?	No impact. The proposed changes only relate to the scheme finances. There will be no impact

	on the end users, other than an increased availability of stock.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	<p>Feedback from scheme members so far has suggested that the scheme is of value in providing alternative, affordable means of transport that would not otherwise be available.</p> <p>The limitations imposed by the funding sources (S106) mean that this scheme is restricted to employees on the Pimbo and White Moss estate.</p> <p>The proposed changes only relate to the scheme finances. There will be no impact on the end users, other than an increased availability of stock.</p>
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	On registration, members are asked to complete a short survey on their equalities characteristics. The data is kept separately to their application and recorded anonymously. Not all applicants chose to complete this information and so the information is only as strong as the data received.
If any further data/consultation is needed and is to be gathered, please specify:	N/A
<b>5. IMPACT OF DECISIONS</b>	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	<p>The service is an 'opt-in' and stakeholders must apply to join the scheme.</p> <p>Proposed changes to the scheme are unlikely to have negative impacts on protected characteristics.</p>
<b>6. CONSIDERING THE IMPACT</b>	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	N/A
What actions do you plan to take to address any other issues above?	No actions
<b>7. MONITORING AND REVIEWING</b>	
When will this assessment be reviewed and who will review it?	Ongoing review of the protected characteristics of users, and potential users, of the scheme. Future changes to the scheme will be considered in reference to analysis of the characteristic data gathered.





**AGENDA ITEM: 5(e)**

**CABINET: 12 January 2016**

**PLANNING COMMITTEE: 14 January 2016**

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**Report of:** Assistant Director Planning

**Relevant Managing Director:** Managing Director (Transformation)

**Relevant Portfolio Holder:** Councillor J Hodson

**Contact for further information:** Mr Stephen Benge (Extn. 5274)  
(E-mail: [Stephen.benge@westlancs.gov.uk](mailto:Stephen.benge@westlancs.gov.uk))

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**SUBJECT: WEST LANCASHIRE STATEMENT OF COMMUNITY INVOLVEMENT  
2016 UPDATE**

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Wards affected: Borough wide

**1.0 PURPOSE OF THE REPORT**

- 1.1 To seek Cabinet's approval for consulting on the draft West Lancashire Statement of Community Involvement 2016 as attached at Appendix A to this report.

**2.0 RECOMMENDATIONS TO CABINET**

- 2.1 That the draft West Lancashire Statement of Community Involvement 2016 attached at Appendix A be approved for public consultation, subject to any amendments made by the Assistant Director Planning in consultation with the Portfolio Holder, following consideration of the Statement of Community Involvement by Planning Committee, as per recommendation 2.2 below.
- 2.2 That the Assistant Director Planning be authorised, in consultation with the Portfolio Holder, to make any necessary amendments to the Statement of Community Involvement in the light of agreed comments from Planning Committee, before the document is published for consultation.

### **3.0 RECOMMENDATIONS TO PLANNING COMMITTEE**

- 3.1 That the content of this report and the Statement of Community Involvement attached at Appendix A to this report be considered, and that agreed comments be referred to the Assistant Director Planning for consideration, in consultation with the Portfolio Holder.
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### **4.0 BACKGROUND**

- 4.1 Section 18 of the Planning and Compulsory Purchase Act 2004 requires local planning authorities to produce a Statement of Community Involvement (SCI), which should explain how they will engage local communities and other interested parties in producing their planning policy documents and determining planning applications.
- 4.2 There are various legislative requirements for the local planning authority to consult with various stakeholders when carrying out its planning functions. For example, the Town and Country Planning (Local Planning) (England) Regulations 2012 require public participation when preparing planning policy documents. Similarly, the Town and Country Planning (Development Management Procedure) (England) Order 2015 sets out the minimum requirements for consultation on planning applications. Consultation is also required in relation to the Community Infrastructure Levy, Neighbourhood Plans, Tree Preservation Orders, and reviews of Conservation Area designations.
- 4.3 The Borough Council first adopted an SCI in July 2007. This original SCI was prepared in accordance with the Town and Country Planning (Local Development) (England) Regulations 2004. An Addendum to the 2007 SCI was published in January 2009, reflecting updated (2008) government Regulations. Since 2009, there have been further significant changes to planning legislation, and the revisions to the Regulations referred to in paragraph 4.2 above require a reconsideration of the current SCI and its Addendum.
- 4.4 Furthermore, technology has evolved since the adoption of the 2007 SCI, leading to, for example, the widespread use of social media and mobile telecommunications. The potential of the use of such means of communication in planning consultation and community engagement should be recognised in the SCI.

### **5.0 CURRENT POSITION**

- 5.1 In view of the changes to national planning law and procedure, it has become necessary to update the West Lancashire SCI. The draft West Lancashire SCI 2016 at Appendix A to this report takes account of the changes to planning legislation and procedure since 2009, and reflects the most up-to-date Regulations. In addition, the document covers a number of additional topics,

such as neighbourhood planning, the Duty to Co-operate and the Community Infrastructure Levy.

- 5.2 It is proposed to publish the draft West Lancashire SCI 2016 for a six week period of stakeholder consultation from Thursday 4 February to Friday 18 March 2016. Any representations received will be considered, and, where appropriate and / or necessary, the SCI will be amended before being brought back to Cabinet.

## **6.0 SUSTAINABILITY IMPLICATIONS / COMMUNITY STRATEGY**

- 6.1 The principle of sustainable development is a 'golden thread' running through plan making and decision taking on planning matters. By setting out procedures and standards for community engagement in preparing planning documents and in determining planning applications, the SCI provides stakeholders with clarity on how they may make representations on sustainability (and other) matters, in order that these be taken into account.
- 6.2 The SCI ties in with the 2007 Sustainable Community Strategy vision of West Lancashire being a place where everyone is valued and has the opportunity to contribute, and with the key objective of developing community participation and pride in the Borough's neighbourhoods.

## **7.0 FINANCIAL AND RESOURCE IMPLICATIONS**

- 7.1 There are no direct financial implications arising from this report. All public consultation in relation to planning documents, planning applications and other planning services that is carried out by the Council is funded through the Planning Service's revenue budget.

## **8.0 RISK ASSESSMENT**

- 8.1 Updating the current SCI to take into account changes to government Regulations and society's increased use of electronic and mobile means of communication will help to ensure that local communities and other interested parties can remain engaged with the Council as new planning policy documents emerge and as planning applications are determined. This will assist in ensuring that the Council continues to adopt sound planning policies and reach robust planning decisions.

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### **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 – Draft West Lancashire Statement of Community Involvement 2016

Appendix B – Equality Impact Assessment





***Draft***

# **West Lancashire Statement of Community Involvement 2016**

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West Lancashire Borough Council**



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## **1.0 INTRODUCTION**

### **1.1 What is a Statement of Community Involvement?**

A Statement of Community Involvement (SCI) is a document which sets out how the local planning authority (LPA) will consult with the community, businesses, stakeholders and other organisations about the development of their area, and explains how they can engage with the planning system.

### **1.2 What does it do / cover?**

West Lancashire Borough Council, as the LPA for the area, is responsible for producing planning policy documents (including the Local Plan) and determining most types of planning applications (excluding minerals and waste applications, which are dealt with by Lancashire County Council).

West Lancashire Borough Council, as the Charging Authority for the Community Infrastructure Levy (CIL) for the area, is also responsible for preparing a CIL charging schedule.

This document will set out the background and context for the SCI, detail **what** will be subject to consultation, **who** could be consulted, **how** consultation can be carried out and **when** consultation will take place.

### **1.3 Why is a new SCI required?**

The Council published their original SCI in 2007, with an addendum produced to update it in 2009. Since then, there have been several significant changes to planning legislation, and these need to be reflected in a new SCI. An updated SCI also provides the Council with the opportunity to review and improve its approaches to consultation, based on experience and best practice, and to reflect new consultation methods – such as the use of social media.

The SCI formerly had ‘Development Plan Document’ status, but this is no longer the case. As a result, the Council can adopt the SCI without it being submitted to the Secretary of State for independent examination. The new West Lancashire SCI will replace the 2007 SCI and its 2009 addendum.

### **1.4 Why is consultation important?**

The Government have placed an ever-increasing emphasis on localism – to empower local communities to get involved in decision making. The Council also recognise that engagement with local communities and other ‘stakeholders’ can help in the planning process and increase public acceptability of developments. In more general terms, local authorities have a duty to act fairly in the exercise of their functions. One aspect of fairness is to consult stakeholders on matters that may affect them.

It is, however, important that people understand that whilst all views made to the Council are considered, it is not always appropriate and / or possible for the Council to accommodate each request for change. Part of the Council's role is to balance competing interests and this will inevitably disappoint some stakeholders. It should also be remembered that feedback from public consultation is only part of the evidence base upon which decisions are taken.

Furthermore, when consulting on planning matters, it is not the quantity of comments registered but the relevance of the planning-related arguments contained within them that are important. As an LPA, the Council need to balance the views of all sides in forming their decisions. The Council will clearly document how they have reached their decisions to demonstrate how all comments have been considered. These are called **Feedback Mechanisms**.

### 1.5 What are the legal requirements?

- The ***Planning and Compulsory Purchase Act 2004, Section 18 (Part 1)***, sets the requirement for LPAs to produce a Statement of Community Involvement;
- The ***Town and Country Planning (Local Planning) (England) Regulations 2012*** (as amended) set out the minimum requirements for consultation on planning policy documents;
- The ***Town and Country Planning (Development Management Procedure) (England) Order 2015*** sets out the minimum requirements for consultation on planning applications;
- The ***Localism Act 2011, Section 110***, sets out a 'Duty to Co-operate' between public bodies on planning issues that cross administrative boundaries;
- The ***Neighbourhood Planning (General) Regulations 2012*** set out the requirements for consultation on Neighbourhood Plans;
- The ***National Planning Policy Framework (NPPF) 2012*** sets out the importance of community involvement and multi-agency consultation, and further emphasises the importance of cross-boundary co-operation;
- The ***Community Infrastructure Levy Regulations 2010*** (as amended) set out the minimum requirements for consultation on the Community Infrastructure Levy;
- ***Section 69*** of the ***Planning (Listed Building and Conservation Areas) Act 1990*** sets out the need to periodically review Conservation Area designations in consultation with the community;
- The ***Town and Country Planning Act 1990, Section 199***, sets out the need to consult persons and consider representations and objections in relation to Tree Preservation Orders (TPOs).

This SCI addresses the above consultation requirements. Once the SCI is adopted, the Council will need to follow the procedures for consultation and engagement set out in the document.

When Council-produced development plan documents (DPDs)<sup>1</sup> are examined by independent Inspectors appointed by the Secretary of State, the documents will be tested for “soundness”<sup>2</sup> and for “legal compliance”, i.e. to ensure that legal requirements have been met. One of the legal requirements is to verify that the consultation on the DPD at its various stages of preparation has been carried out in accordance with the Statement of Community Involvement.

## **1.6 Duty to co-operate**

The Localism Act 2011 requires all LPAs to engage with neighbouring authorities and other statutory bodies to consider joint approaches to plan-making. This ‘Duty to Co-operate’ is repeated in the NPPF, which requires LPAs to work collaboratively with other bodies to ensure that strategic priorities across local boundaries are properly co-ordinated and clearly reflected in individual local plans, and to enable delivery of sustainable development.

The Borough Council are committed to fulfilling this Duty and, as a matter of practice, work closely with neighbouring authorities and other partner organisations and stakeholders. Regulation 4 of the Town and Country Planning (Local Planning) (England) Regulations 2012 lists the Duty to Co-operate ‘prescribed bodies’. These bodies are listed in Appendix A of this SCI.

## **1.7 Contexts and links with other strategies**

A number of documents are also relevant to the preparation of the SCI. These include:

- [West Lancashire Borough Council Sustainable Community Strategy 2007-2017 \(SCS\)](#) – this sets out the Council’s approach to community engagement
- [West Lancashire Borough Council Local Development Scheme \(LDS\)](#) – this sets out the timetable for the preparation of planning policy documents

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<sup>1</sup> The term “development plan document” and the term “local plan” are used interchangeably. The Town and Country Planning (Local Planning) (England) Regulations 2012 define the term “local plan”, and states that “local plans” are prescribed as “development plan documents” for the purposes of Section 17(7)(a) of the Planning and Compulsory Purchase Act 2004.

<sup>2</sup> A straightforward interpretation of the word ‘sound’ is that it ‘shows good judgement’ and ‘is able to be trusted’. To be considered ‘sound’ a document should be ‘positively prepared, justified, effective and consistent with national policy’.





## 2.0 PREPARING PLANNING POLICY DOCUMENTS

The Council are responsible for producing local planning policy which, along with national policy, is used to inform decisions in Development Management. There are different types of policy documents, each carrying different weight, and each requiring a different level and / or nature of engagement with the local community and other stakeholders. The most common policy documents which involve consultation are development plan documents (DPDs), including the Local Plan, and supplementary planning documents (SPDs). The processes for producing DPD and SPDs vary, and, consequently, so do consultation arrangements / procedures.

### 2.0.1 Who do we consult?

The Council is required to consult certain organisations and bodies, and is advised to consult others, depending on the type of policy document. This is in accordance with the regulations of the **Town and Country Planning (Local Planning) (England) Regulations 2012** (referred to from now on as “the 2012 Regulations”).

The 2012 Regulations set out who must be consulted at the defined stages of plan production. These organisations / companies are known as specific consultation bodies, or **statutory consultees**, and are listed in Appendix B of this SCL.

The LPA can also identify a number of other bodies it may wish to consult at key stages. These are known as general consultation bodies, or **general consultees**, and are listed in Appendix C.

The lists of statutory and general consultees may change as a result of amendments to the 2012 Regulations or organisational changes.

The LPA are also committed to involving a wide range of other individuals and organisations, including the community and ‘hard to reach’ groups. These ‘**other consultees**’ are also identified by the Council.

The Council will maintain a **database** containing the contact details of individuals, groups and other bodies that wish to be kept informed of planning consultations. The database will be administered in accordance with the provisions of the Data Protection Act, and will be regularly updated. If you wish to be added to, or removed from, this database of ‘other consultees’, please contact the Strategic Planning and Implementation Team on 01695 585284, by email at: [Localplan@westlancs.gov.uk](mailto:Localplan@westlancs.gov.uk), or register / opt out directly online by following the links from : <http://www.westlancs.gov.uk/planningpolicy>.

### 2.0.2 When do we consult?

The Council’s Local Development Scheme (LDS) gives an indication of the timescales for the preparation of DPDs and SPDs. This should enable people to broadly know when to expect consultation. Each formal consultation stage will be publicised by the Council.

The section below explains how to get involved.

## **2.1 Development Plan Documents**

Development Plan Documents (DPDs) are planning documents that set out the planning strategy, policies and proposals for a local planning authority area. The main DPD is the Borough-wide West Lancashire Local Plan 2012-2027<sup>3</sup>. DPDs are a primary consideration in the determination of planning applications.

The 2012 Regulations set out three formal stages of DPD production where consultation and / or publicity is required, and specify who should be consulted. These stages are listed as Stages 2, 5 and 8 in Table 2.1 on the following page.

However, the statutory consultation stages do not always provide adequate opportunity for the views of the community to feed into preparation of the DPD, or the accompanying Sustainability Appraisal. Therefore, in the interests of best practice and positive public engagement, the Council may also consult on a number of the informal stages of the DPD's preparation. These may include the Options and Preferred Options stages.

### **2.1.1 When do we consult?**

Table 2.1 (overleaf) sets out the stages of the DPD's production and whether consultation and / or publicity is required.

In accordance with the 2012 Regulations, each formal stage of consultation should include a 'Statement of Representations Procedure' which is a document setting out what is being consulted upon, where the consultation documents can be found, and how comments can be made on them. The Council may produce a Statement of Representations for informal stages as well, where consultation has been undertaken at these stages.

Under Regulation 22, before the LPA can submit a DPD for examination, it must prepare a 'Statement of Consultation' which sets out who was consulted at each stage of the DPD's preparation, what issues were raised by consultees and how those issues have been addressed in the final DPD. The Council must publish that statement, along with a copy of the DPD, the Sustainability Appraisal report (see Section 2.1.2), copies of representations made under Regulation 20 (see Table 2.1), and any relevant supporting documents. The Council must also provide a statement setting out how it has met its requirements in relation to the 'Duty to Co-operate'.

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<sup>3</sup> The terms 'DPD' and 'Local Plan' can be used interchangeably in this section.

**Table 2.1 Consultation during the preparation of a Development Plan Document**

Stage	DPD Preparation Stage	Regulation number <sup>4</sup>	Purpose	Consultation required?	Publicity required?
1	Evidence gathering	-	To gather evidence in order to identify the issues and opportunities for development in the Borough	As necessary for each element of evidence	As necessary for each element of evidence
2	Scoping	Reg. 18	To notify persons/groups of the subject of the DPD and invite them to make representations about what the DPD should contain  Comments received will inform the preparation of the next stage	Y	Y
3	Issues and Options	-	To gather evidence on the issues and options for suggested policy directions and to undertake initial work on the Sustainability Appraisal.  To notify persons/groups of the issues for the DPD and invite them to make representations on the issues and options  If consulted upon, comments received will inform the preparation of the next stage	Optional (i.e. not required by 2012 Regulations, but the Council may choose to consult at this stage)	Optional (i.e. not required by 2012 Regulations, but the Council may choose to publicise at this stage)
4	Preferred Options	-	To prepare a draft document taking into account the comments made at the Issues and Options stage and to produce a Sustainability Appraisal.  If consulted upon, comments received will inform the preparation of the next stage	Optional	Optional
5	Publication	Reg. 19  Reg. 20	To prepare a final draft document taking into account the comments made at previous stages, along with a Sustainability Appraisal report. The document will be made available for public consultation.	Y	Y

<sup>4</sup> Town and Country Planning (Local Planning) (England) Regulations 2012

Stage	DPD Preparation Stage	Regulation number <sup>4</sup>	Purpose	Consultation required?	Publicity required?
6	Submission of a Local Plan to the Secretary of State	Reg. 22	All representations received at Publication stage will be collated, summarised, and forwarded to the independent Planning Inspector appointed by government to examine the DPD.  A statement setting out how the DPD meets the SCI commitments will also be submitted.	N	Y
7	Independent examination by a Planning Inspector (formal)	Reg. 24	The Examination considers the soundness of the DPD, which includes an assessment of whether the LPA has considered the views of the community and met the requirements of the SCI.	N	Y
8	Main Modifications		The Inspector may recommend a series of modifications to make the DPD sound. Where these are major in nature, we will consult with those who made representations at the Publication stage.  Any comments received will be considered by the Planning Inspector.	Y	Y
9	Publication of Inspector's Report  Adoption of the DPD	Reg. 25  Reg. 26	Subject to the recommendations of the Planning Inspector, the Council will adopt the DPD document as soon as practical and will notify consultees of the publication of the Inspector's Report and the adoption of the Plan.	N	Y
10	Monitoring & review		Annual Monitoring will be undertaken to track the performance of policies and to advise on any necessary adjustments.	N	N

### 2.1.2 Sustainability Appraisal

Under the Environmental Assessment of Plans and Programmes Regulations 2001 and the European Directive 2001/42/EC ('the SEA Directive'), all DPDs require a Strategic Environmental Assessment (SEA) and Sustainability Appraisal (SA). These appraisals are produced in tandem with the DPDs to assess their environmental, social and economic impacts, and to guide the choice of policies / allocations, etc.

Three statutory consultees are consulted as a matter of course when preparing SAs and / or SEAs; these are Natural England, Historic England, and the Environment Agency. Sustainability Appraisal reports are also subject to wider public consultation, usually at the same time as the DPD to which they relate.

### 2.1.3 How do we consult?

Consultation methods for each stage of DPD production will vary. Each stage will involve a number of set methods and, in addition, may involve one or more of the optional methods. Table 2.2 sets out the methods to be used at each stage of consultation on the DPD.

**Table 2.2 Consultation on emerging DPDs**

Method	Stage of preparation of DPD			
	Pre-Draft Consultation (Scoping) (Reg.18)	Draft Consultation (Options / Preferred Options) (Optional)	Publication & Submission (Regs.19,20,22)	Inspector's Report & Adoption (Regs. 25,26)
Website	✓	(✓)	✓	✓
Email out (database)	✓	(✓)	✓	✓
Mail out (database)	✓	(✓)	✓	✓
On deposit	✓	(✓)	✓	✓
Press release	Optional	Optional	Optional	Optional
Press notice	Optional	Optional	Optional	Optional
Press advertisement	Optional	Optional	Optional	N/A
Leaflets	Optional	Optional	Optional	N/A
Neighbour letters	N	N	N	N
Staffed exhibitions	Optional	Optional	Optional	N/A
Unstaffed exhibitions	Optional	Optional	Optional	N/A
Forums	Optional	Optional	Optional	N/A
Drop-in sessions	Optional	Optional	Optional	N/A
Social media	Optional	Optional	Optional	N/A
Schools	Optional	Optional	Optional	N/A
Groups consulted / notified	Statutory, general and public.	Statutory, general and public. Representors from previous stage.	Statutory, general and public. Representors from previous stage.	Statutory, general and public. Representors from previous stage.
Duration	Minimum 4 weeks	Minimum 6 weeks	Minimum 6 weeks	
Feedback Report produced	Y	Y	Y	N

#### **2.1.4 How will we feed back the results?**

Following each round of consultation, the Council will prepare a **Feedback Report** (or Consultation Statement), which will summarise the issues raised through the representations, how the Council have responded to them and what has been changed in the DPD as a result of the comments. This will be shared with Members to inform their decisions on the next stage of the DPD's preparation, and will be published on the Council's website. The Council is not bound to respond to each individual submission / representation to the consultation.

## 2.2 Supplementary Planning Documents

Supplementary Planning Documents (SPDs) are planning documents that provide greater detail in relation to the policies in the Local Plan or other DPDs. SPDs can be topic or area based. They do not have the same status as DPDs, and do not form part of the statutory development plan, but are material considerations in any planning decision.

The 2012 Regulations set out two stages of SPD production where consultation and / or publicity is required. They are the public participation stage (Regulations 12 and 13) and adoption (Regulation 14).

However, the regulatory stages may not always provide adequate opportunity for the views of the community to feed back into preparation of the SPD. Therefore, in the interests of best practice and positive public engagement, the Council may sometimes carry out an extra stage of consultation when preparing an SPD, for example if there are significant changes proposed to the document following one round of consultation.

### 2.2.1 When do we consult?

Table 2.3 below sets out the stages of the SPD's production and whether consultation and / or publicity is required.

**Table 2.3 Preparation Stages for SPDs**

Stage	Preparation Stage	2012 Regulation	Purpose	Consultation required?	Publicity required?
1	Evidence gathering	-	To gather evidence to inform the preparation of the SPD	N	N
2	Scoping / Issues	12(a)	To set the scope of, and identify issues for, the SPD. Comments received at this stage will inform the preparation of the draft SPD. A Consultation Statement will be produced (Reg. 12(a)).	Informal / limited consultation required (i.e. to specific bodies)	Optional
3	Public participation on draft SPD	Reg.12(b) Reg.13	To prepare the draft SPD. To publish the Consultation Statement (Reg. 12(a)) and draft SPD, and to invite representations on the draft SPD. Comments received at this stage will inform the preparation of the final SPD.	Y	Y
4	Final SPD	-	To produce the final SPD.	N	N
5	Adoption of the SPD	Reg.14	Adoption of the SPD	N	Y
6	Monitoring & review		Annual Monitoring to track the performance of policies and make any necessary adjustments.	N	N

## 2.2.2 Sustainability Appraisal of SPDs

The requirement to carry out a Sustainability Appraisal (SA) / Strategic Environmental Assessment (SEA) applies to all DPDs. However amendments to the Town and Country Planning Regulations in 2009 removed the automatic need to undertake SA / SEA for SPDs.

The Council, however, are required to determine whether an SPD requires SA / SEA, 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?'

If SA / SEA is undertaken for an SPD, this process would take place in tandem with the preparation of the SPD, and the SA / SEA reports would normally be consulted upon at the same time as the SPD.

## 2.2.3 How do we consult?

The methods for consultation at each stage of the SPD production will vary. Each stage will involve a number of set methods and, in addition, one or more of the optional methods.

Table 2.4 below sets out the methods to be used at each stage of consultation on the SPD.

**Table 2.4 Consultation on emerging SPDs**

Method	SPD Preparation Stage			
	Pre-Draft (Scoping / Issues) (Reg. 12(a))	Draft SPD (Reg. 12(b) & 13)	Final SPD (optional stage)	Adoption (Reg.14)
Website	Optional	✓	Optional	✓
Email out (database)	Optional	✓	Optional	✓
Mail out (database)	Optional	✓	Optional	✓
On deposit	Optional	✓	Optional	✓
Press release	Optional	Optional	Optional	Optional
Press notice	Optional	Optional	Optional	Optional
Press advertisement	Optional	Optional	Optional	Optional
Leaflets	Optional	Optional	N/A	N/A
Neighbour letters	Optional	Optional	N/A	N/A
Staffed exhibitions	Optional	Optional	N/A	N/A
Unstaffed exhibitions	Optional	Optional	N/A	N/A
Forums	Optional	Optional	N/A	N/A



Method	SPD Preparation Stage			
	Pre-Draft (Scoping / Issues) (Reg. 12(a))	Draft SPD (Reg. 12(b) & 13)	Final SPD (optional stage)	Adoption (Reg.14)
Drop-in sessions	Optional	Optional	N/A	N/A
Social media	Optional	Optional	N/A	N/A
Schools	Optional	Optional	N/A	N/A
Groups consulted / notified	Statutory, general and public.	Statutory, general and public. Representors from previous stage.	Statutory, general and public. Representors from previous stage.	Statutory, general and public. Representors from previous stage.
Feedback Report produced	Y	Y	Y	N
Duration	Minimum 4 weeks	Minimum 6 weeks	Minimum 4 weeks	-

#### 2.2.4 How will we feed back the results?

Following each round of consultation, the Council will prepare a **Feedback Report**, which will summarise the issues raised through the representations, how the Council have responded to them and what has been changed in the SPD as a result of the comments.

## 2.3 Development Briefs

Development Briefs provide guidance and a framework for the development of a specific site. Usually, these are prepared for larger sites that have been allocated for development within the Borough-wide Local Plan. As with SPDs, Development Briefs are not subject to independent examination and their purpose is simply to provide supporting guidance in relation to the policies for the site in question. Development Briefs are not part of the statutory planning framework.

Consultation on Development Briefs will usually be similar in nature to consultation on SPDs in that the Council will publish a draft Development Brief for consultation, and the comments received will inform preparation of the final Development Brief.

Due to the localised nature of most Development Briefs, extensive consultation is not considered to be appropriate for reasons of time and cost. The table below sets out what methods are considered to be appropriate for Development Briefs. Where possible, the Council will run Development Briefs alongside other DPD / SPD consultation to maximise publicity.

### 2.3.1 When do we consult?

**Table 2.5 Development Brief preparation stages and consultation**

Stage	Preparation Stage	2012 Regulation	Purpose	Will we consult?	Will we publicise?
1	Evidence gathering	N/A	To gather evidence in order to identify the issues and opportunities for development	N	N
2	Identification of issues	N/A	To identify issues for the SPD This is an <u>optional</u> consultation stage. Comments received at this stage will inform the preparation of the draft development brief. A Feedback Report will be produced.	Optional	Optional
3	Draft Development Brief	N/A	To prepare the draft development brief. To invite representations on the draft development brief. Comments received at this stage will inform the preparation of the final development brief. A Feedback Report will be produced.	Y	Y
4	Final Development Brief	N/A	To produce the final Development Brief.	Optional	Optional
5	Adoption of the Development Brief	N/A	Adoption of the Development Brief by Council.	N	Y

### 2.3.2 How do we consult?

**Table 2.6 Consultation on Development Briefs**

Method	Development Brief			
	Pre-Draft (Issues) (Optional stage)	Draft Development Brief	Final Development Brief	Adoption
Website	Optional	✓	Optional	✓
Email out (database)	Optional	✓	Optional	✓
Mail out (database)	Optional	✓	Optional	✓
On deposit	Optional	✓	Optional	✓
Press release	Optional	Optional	Optional	Optional
Press notice	Optional	Optional	Optional	Optional
Press advertisement	Optional	Optional	Optional	Optional
Leaflets	N	N	N	N
Neighbour letters	Optional	Optional	Optional	Optional
Staffed exhibitions	Optional	Optional	Optional	N
Unstaffed exhibitions	Optional	Optional	Optional	N
Forums	N	N	N	N
Drop-in sessions	Optional	Optional	Optional	N
Social media	Optional	Optional	Optional	Optional
Schools	N	N	N	N
Groups consulted / notified	Statutory, general and public.	Statutory, general and public. Representors from previous stage.	Statutory, general and public. Representors from previous stage.	Statutory, general and public. Representors from previous stage.
Feedback Report produced	Y	Y	Y	N
Duration	Minimum 6 weeks	Minimum 6 weeks	Minimum 6 weeks	-

## 2.4 Methods for publicity and consultation

Consultation on planning policy documents will be undertaken using a variety of methods. For non-optional consultations (i.e. those required by the 2012 Regulations), the Council will use set methods as a minimum. Additional methods may also be used, dependent on the type of document or the nature of the document's subject matter.

### 2.4.1 Methods for publicity and consultation

Methods to be used as a minimum:

- **Website.** The Council's website will contain a consultation page to provide information on recent, current and future consultations. This will include all the relevant documents, guidance on how to comment and comments forms (online and paper based). The Council may also publish the results of consultation exercises, including any feedback reports, on the website.
- **Email.** People will be able to register onto a consultation database to receive the latest news and updates on consultation and the preparation of policy documents. To ensure that costs are kept to a minimum, the Council will encourage people to register using their email address. This method will be used as a default unless consultees indicate they require communication by letter. Registration can be done online through the Planning Consultation pages of the Council's website ([www.westlancs.gov.uk/planningpolicy](http://www.westlancs.gov.uk/planningpolicy))
- **Letter.** For those people who still wish to receive notification by letter, they may register onto the Council's planning consultation database to receive news and updates on consultation and the preparation of policy documents via post. To register for notification by letter, please contact the Strategic Planning and Implementation team by telephone (01695 585171) or by post (West Lancashire Borough Council, Planning Policy, 52 Derby Street, Ormskirk, Lancashire, L39 2DF).
- **Availability of documents 'on deposit' at libraries and Council offices.** The Council will make all documents and guidance available at libraries and Council offices.

Additional methods to include one or more of the following:

- **Press release.** Press releases may be issued to local newspapers to draw attention to policy documents. However, where releases are issued, the Council have no control of what the paper chooses to publish.
- **Press notice.** Press notices are public notices posted in the local press (normally the Champion Group newspapers).
- **Press advertisement.** The Council may publish advertisements in the local press to promote planning consultation. Due to their cost, they will usually only be used for significant policy documents which have an impact on a wider area, such as those affecting the whole Borough or for strategic development sites.
- **Leaflets.** Leaflets can often be a good way of informing local residents and businesses about planning policy documents, however they can also be costly and time consuming.

Leaflets will be used for significant policy documents which have an implication on a wider area, such as those affecting the whole Borough or for strategic development sites.

- **Neighbour letters.** Letters may be sent to properties neighbouring (immediately adjacent to) a development site to notify them about the preparation of a planning document. Due to cost, if a decision is made to send out neighbour letters, these will only be used for those policy documents which have an impact on a more localised area, such as a Development Brief for an allocated site.
- **Staffed Exhibitions.** Exhibitions help display information on policy proposals and give local people access to information. They also enable the public to speak to planning staff. Where staffed exhibitions are used, the Council will endeavour to arrange them during the earlier part of the consultation period in order to provide sufficient time for people to formulate and submit comments.
- **Unstaffed Exhibition.** Exhibitions help display information on policy proposals and give local access to information. Where unstaffed exhibitions are used, they will normally be available throughout the consultation period in a publicly accessible location.
- **Forums.** Public forums will be used to support discussions and workshops. As forums are often restricted in terms of capacity (both as a result of venue size, and the workable ratio of attendees to Council officers), attendance will be required to be registered in advance. Such forums will be advertised via some of the mediums set out above, so that interested individuals may register to attend.
- **Drop-in sessions.** Drop-in sessions enable members of the public to 'drop-in' to organised sessions at advertised venues, and to ask planning officers any questions they may have.
- **Social media (Facebook, Twitter).** Consultations will be publicised through social media wherever possible, and updated technologies.
- **Schools.** The Council are keen to engage with young people and schools provide one opportunity for this. Where appropriate, the Council will contact schools to offer them the opportunity to work with planning officers, who can attend schools to run workshops with pupils.

It should be noted that all consultations are public and that means they must be open to everyone, subject to limitations on numbers due to Health and Safety considerations or officer resources. We cannot restrict attendance at public events to certain specific societal groups, nor can we exclude certain individuals / groups from attending, unless they are aggressive towards other members of the public or Council officers. Where numbers are restricted, registration will be required for an event; this will be advertised and registration will be on a first-come first-served basis. Where demand is high and events are over-subscribed, the Council may seek to arrange additional events, where possible

We will try to ensure that all events are held in accessible locations which can be reached using public transport. We will also try to ensure that events are held at convenient times to as wide a range of people as possible, including weekdays, weekday evenings and, where appropriate, Saturdays.

Methods of consultation will vary depending on the type of document being consulted upon.

### 2.4.2 How we will accept representations

The Council will encourage the use of electronic-based modes (email, web, etc.) to submit and receive representations, in order to keep administrative costs and time to a minimum. The Council will, however, also accept representations on paper from those without access to the internet and / or a printer.

- **Electronic based**

- **Website:** We will aim to have electronic surveys, questionnaires and forms available to complete from the Council website.
- **Email:** Comments can be emailed to [localplan@westlancs.gov.uk](mailto:localplan@westlancs.gov.uk)

- **Paper based**

- **Forms:** Paper based surveys, questionnaires and forms can be printed from the website, or collected from Council offices and public libraries.
- **Comments:** Comments can be posted to Planning Policy, West Lancashire Borough Council, 52 Derby Street, Ormskirk, L39 2DF.

## **2.5 Neighbourhood Plans**

### **2.5.1 What is a Neighbourhood Plan?**

The Localism Act 2011 introduced the opportunity for communities to produce 'Neighbourhood Plans'. A Neighbourhood Plan is a community-led framework for guiding the future development, regeneration and conservation of an area. It is about the use and development of land and may contain a vision, aims, planning policies, proposals for improving the area or providing new facilities, or the allocation of key sites for specific kinds of development.<sup>5</sup>

A Neighbourhood Plan can add detail and locally-set objectives to support and complement the Borough-wide Local Plan. It must be in conformity with the Borough-wide Local Plan, and with national planning policy (the National Planning Policy Framework), and cannot be used to block or veto development.

If successful at public referendum, a Neighbourhood Plan will become part of the statutory development plan for the area.

### **2.5.2 How will the Council be involved?**

The Council have a statutory "Duty to Support" local groups in the preparation of Neighbourhood Plans. The amount of assistance will be dependent upon the level of resources available to the Council at the time of the request.

The Council will support those neighbourhoods who wish to prepare a Neighbourhood Plan, but the preparation of such plans is required to be led by community organisations such as the Parish Council or a Neighbourhood Forum (a group designated by the Local Authority in non-parished areas). While a Neighbourhood Plan is being prepared, consultation on it will be the responsibility of the individual Parish Council or Neighbourhood Forum and is therefore outside the scope of this SCI.

However, once a Neighbourhood Plan has been drawn up and submitted to the local planning authority, the local planning authority must carry out a statutory consultation on the proposed Neighbourhood Plan before it is examined by an independent and suitably qualified person.

Where appropriate, the Council will publish copies of any Neighbourhood Plans and updates on the progress of Plan preparation on its website.

Table 2.7 below sets out the different stages of consultation involved in producing a Neighbourhood Plan and whose responsibility it is to carry out this consultation.

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<sup>5</sup> Neighbourhood Plans Road Map Guide:  
<http://locality.org.uk/resources/neighbourhood-planning-roadmap-guide/>

**Table 2.7 Neighbourhood Plan consultation responsibilities**

<b>Stage</b>	<b>Responsibility</b>
Designating the 'neighbourhood area' - consultation on the area to be subject to the Neighbourhood Plan	Local Planning Authority
Preparing a Draft Neighbourhood Plan - engagement and consultation with those living and working in the neighbourhood area and those with an interest in, or affected by, the proposals	Parish Council / Neighbourhood Forum
Pre-submission consultation – on Draft Neighbourhood Plan	Parish Council / Neighbourhood Forum
Consultation to satisfy requirements in relation to European directives, if and where they apply to a Draft Neighbourhood Plan	Parish Council / Neighbourhood Forum
Statutory consultation on a submitted Neighbourhood Plan	Local Planning Authority
Examination of Neighbourhood Plan	Local Planning Authority
Neighbourhood Planning referendum	Local Planning Authority



### **3.0 COMMUNITY INFRASTRUCTURE LEVY**

The Community Infrastructure Levy (CIL) allows local authorities in England and Wales to raise funds from developers who are undertaking new building projects in their area. The money raised is used to pay for infrastructure required to support new development. CIL must be administered in accordance with the Community Infrastructure Levy Regulations 2010 (as amended). The CIL Regulations state when and how the Council must consult at specific stages of the CIL preparation process.

#### **3.1 Preparation of a Charging Schedule**

In preparing a Charging Schedule, the Council must follow a series of stages as set out in, and required by, Part 3 of the CIL Regulations. Some of the stages require consultation and/or publicity and include:

- Consultation on a Preliminary Draft Charging Schedule (Regulation 15)
- Publication of a Draft Charging Schedule (Regulation 16)
- Representations relating to a draft charging schedule (Regulation 17)
- Submission of documents and information to the examiner (Regulation 19)
- CIL examination: right to be heard (Regulation 21)
- Publication of the examiner's recommendations (Regulation 23)
- Approval and publication of a charging schedule (Regulation 25)

##### **3.1.1 Who will we consult?**

At most stages the Council, as the Charging Authority, must notify the consultation bodies which comprise adjoining local planning authorities, the County Council and Parish Councils. The Council must also invite representations from residents and businesses in the Borough and voluntary bodies.

##### **3.1.2 When will we consult?**

Table 3.1 below sets out the stages of preparation of the Charging Schedule and whether consultation and / or publicity is required.

**Table 3.1 Preparation of CIL Charging Schedule and consultation**

Stage	Charging Schedule Preparation Stage	CIL Regulation number	Purpose	Requires Consultation	Requires Publicity
1	Evidence gathering	-	To gather evidence to inform CIL	N	N
2	Preliminary Draft Charging Schedule	Reg.15	<p>Publish and invite representations on Preliminary Draft Charging Schedule.</p> <p>Comments received at this stage will inform the preparation of the draft charging schedule.</p> <p>A Feedback Report will be produced.</p>	Y	Y
3	Draft Charging Schedule	Reg.16	<p>Publish and invite representations on Draft Charging Schedule.</p> <p>Comments received at this stage will be considered by the examiner.</p>	Y	Y
4	Submission	Reg.19 Reg.21	<p>Submission of Draft Charging Schedule and accompanying documents and representations to the examiner.</p> <p>Publication of matters</p>	N	Y
5	Publication of the examiners recommendations	Reg.23	Publication of the examiner's recommendations	N	Y
6	Adoption	Reg.25	Approval and publication of CIL Charging Schedule by Council.	N	Y

**3.1.3 How will we consult and publicise?**

Consultation and publicity methods vary slightly with each stage of CIL preparation. The table below outlines the methods that are required at each stage, although further consultation or publicity methods may also be used. An explanation of the methods can be found in the preceding chapter.

For the stages covered by Regulations 15 and 16, the Council will prepare a Statement of Representations setting out the availability of documents and how comments can be submitted.

Method	Stage: CIL					
	Preliminary Draft Charging Schedule (Reg.15)	Draft Charging Schedule (Reg.16)	Submission (Reg.19)	Right to be heard (Reg.21)	Examiners Report (Reg.23)	Adoption (Reg.25)
Website	✓	✓	✓	✓	✓	✓
Mail out	✓	✓	✓	✓	✓	✓
On deposit	✓	✓	✓		✓	✓
Press notice		✓		✓		✓
Feedback Report produced	✓	✓	✓			
Duration	Min.6 weeks	Min.6 weeks	Min.6 weeks	-	-	-

### 3.1.4 How will we feed back the results?

Following the key rounds of consultation (Preliminary Draft Charging Schedule and Draft Charging Schedule), the Council will prepare a **Feedback Report**, which will summarise the issues raised through the representations, how the Council have responded to them, and what has been changed to the Charging Schedule as a result of the comments.

### 3.1.5 Review of a Charging Schedule

Regulations 26 and 27 govern the correction of errors in a Charging Schedule. The Council will follow the requirements of the CIL Regulations in the case of any necessary changes to the Charging Schedule, and subsequent notification or consultation.

Viability will be monitored and reviewed at regular periods. Should any necessary changes to the Charging Schedule be needed as a result, the procedure for preparing a CIL Charging Schedule will be repeated and consultation undertaken at each stage.



## **4.0 COMMUNITY INVOLVEMENT IN DEVELOPMENT MANAGEMENT**

This section explains how planning and related applications are dealt with and outlines the Council's consultation arrangements. In total the Council receives approximately 1400 planning applications per year. A principal aim of the planning process is to regulate the development and use of land in the public interest.

### **4.1 The Planning Application Process**

The planning application process involves the making, consideration and determination of applications for "development" which can be either building works or a material change of use. There are also other types of applications that do not involve development but fall under the management of the local planning authority and include applications for advertisement consent and listed building consent.

#### **4.1.1 Timescales**

The government sets targets for the time taken to determine planning applications. These are currently 13 weeks for major<sup>6</sup> applications and 8 weeks for all others. If an Environmental Impact Assessment is required as a result of the scale of development, then this period will extend to 16 weeks.

### **4.2 Permitted Development**

However, not all "development" requires an application for planning permission. Some works can be carried out as "Permitted Development" whereby planning permission is automatically granted by the Town and Country Planning (General Permitted Development) (England) Order 2015. Similarly, not all advertisements require consent from the Council; certain types of advert may be displayed with "Deemed Consent."

If you are unsure whether or not you need planning permission, or other planning related consents, for the development you are contemplating, you should visit the Council's website: <http://www.westlancs.gov.uk/planning/planning-applications-enforcement/do-i-need-planning-permission.aspx>.

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<sup>6</sup> The government's definition of a Major application is development involving any one or more of the following

- (a) the winning and working of minerals or the use of land for mineral-working deposits;
- (b) waste development;
- (c) the provision of dwellinghouses where -
  - (i) the number of dwellinghouses to be provided is 10 or more; or
  - (ii) the development is to be carried out on a site having an area of 0.5 hectares or more and it is not known whether the development falls within sub-paragraph (c)(i);
- (d) the provision of a building or buildings where the floor space to be created by the development is 1,000 square metres or more; or
- (e) development carried out on a site having an area of 1 hectare or more

The planning pages on the Council's website have useful advice including a link to the government's Planning Portal website. This includes an 'interactive house', a useful resource if you are considering works to your house.

In most cases, where you need to know whether or not an application for planning permission is required, you may be advised to submit a request (in the form of an application) for a "Certificate of Lawfulness of Proposed Use or Development". A fee is charged for this process, at 50% of a planning application fee for the same development. Pre-application planning advice may also be sought.

For up-to-date information on how to make a planning application, guidance notes are available on our website: [www.westlancs.gov.uk/planning](http://www.westlancs.gov.uk/planning). The government's Planning Portal provides a wealth of guidance on the same topic at: <http://www.planningportal.gov.uk/permission/>

## **4.3 Pre-Application Advice**

### **4.3.1 Why should I seek pre-application advice?**

West Lancashire Borough Council welcomes and encourages applicants and developers to seek pre-application advice from the Council prior to the submission of a formal planning application. There are a number of benefits in seeking advice before making an application, including:

- It provides early guidance on the planning policies relevant to your development and helps you to understand how these policies apply to your proposal;
- It can identify at an early stage whether there is a need for specialist information such as a tree survey, flood risk assessment, ecological assessment;
- It enables proposals to be changed and potential problems overcome before an application is submitted, saving time during the application process and minimising the risk of planning permission being refused;
- It will ensure you know what information you need to submit with the application, thereby making sure it can be registered and validated without undue delay;
- It can give a greater degree of certainty of whether your application is likely to be successful;
- An application received following proper and full pre-application engagement will be fast-tracked through to a decision.

In summary, pre-application discussions can help to achieve a better standard of application, which improves the chance of a successful outcome.

#### **4.3.2 What is required when submitting a pre-application enquiry?**

Normally pre-application enquiries involve the submission of sketch drawings and other relevant detail and applicants are asked to fill in forms which are available on the Council's web site. We aim to provide a response within 28 days wherever possible, or if a meeting is required, within 14 days of the meeting being held. We will advise on the likelihood of gaining an approval on an informal basis.

The schedule of charges for pre-application advice as well as the procedures for gaining pre-application advice is available at:

<http://www.westlancs.gov.uk/planning/planning-applications-enforcement/pre-application-advice.aspx>

#### **4.3.3 How will the Council consult on pre-application enquiries?**

For major pre-application enquiries the Council may seek advice from statutory consultees e.g. the highway authority, the Environment Agency, etc, and from non-statutory consultees e.g. Merseyside Environmental Advisory Service, in order to provide comprehensive pre-application advice.

During pre-application discussions officers will also advise developers on whether or not we feel the proposals would benefit from a process of community involvement before the application is submitted. National Planning Practice Guidance advises that "pre application engagement with the community is encouraged where it will add value to the process and the outcome." The Council understands that different developments will require public consultation to be tailored to suit the individual circumstances but on significant schemes a public meeting, exhibition and leaflet drop in the local area may be required. At pre-application stage, the Planning Officer will be able to agree an appropriate consultation plan for major development proposals.

For wind energy development pre-application consultation with the local community is mandatory for all onshore wind development of more than two turbines or where the hub height of any turbine exceeds 15 metres.

The community consultation measures outlined above are not necessary for small scale applications e.g. house extensions or single dwellings although we encourage applicants/ developers to discuss proposals with neighbours who may be affected by the development and take account of their comments when drawing up the formal planning application.

## **4.4 Managing Development**

### **4.4.1 Who will we consult?**

The Council exercises its development management functions in the public interest and is committed to publicising and consulting widely on planning proposals. Upon receipt of a planning application the Council will undertake a period of formal consultation.

Depending on the type of planning application being considered, the Council is also required to consult various organisations and bodies and to invite them to make representations, as set out in the Town and Country Planning (Development Management Procedure Order) (England) (2015) (DMPO).

The main type of consultation groups include:-

- Public – including consultation with neighbouring residents and Parish Councils;
- Statutory Consultees – this is where there is a requirement in law to consult a specific body who in turn are under a duty to respond, for example, the Environment Agency, The Coal Authority, United Utilities, and Lancashire County Council as Highway Authority;
- Non Statutory Consultees – these are not required by law but advice is sought where non statutory bodies are likely to have an interest in the proposed development, for example the Health and Safety Executive and Merseyside Environmental Advisory Service.

### **4.4.2 How will we consult?**

The level of consultation carried out for planning applications, will be proportionate to the type and scale of planning application being determined. In all cases, publicity will meet legal requirements and in some cases, additional publicity will be carried out.

The regulations set out in the Town and Country Planning (Development Management Procedure) (England) Order 2015, The Planning (Listed Building and Conservation Areas) Regulations and The Planning (Listed Buildings and Conservation Areas) Act 1990, state how planning applications need to be publicised, either by site notice or individual neighbour notification.

Neighbour notification by letter is the principal method of consultation on most planning applications. For most planning applications, letters are sent to all owners/occupiers of properties that immediately adjoin the boundary of the application site. Where the Council is unsure of the owner of an adjoining site, for example where the application site adjoins open land, a site notice will be displayed.

In addition, a press notice and site notice is also required for the following types of applications:



- Erection of 10 or more dwellings, or a site area of 0.5 hectares or more
- Erection of 1000 square metres of floorspace or site area of 1 hectare or more
- An application accompanied by an Environment Impact Statement
- A departure from the Local Plan
- A development that would affect the public right of way, under part III of the Wildlife and Countryside Act 1981
- Development affecting the character or appearance of a Conservation Area
- Development affecting the setting of a Listed Building.

Neighbours / interested parties are given 21 days to respond in writing to the consultation.

A weekly list of all planning applications is sent to Councillors, Parish Councils, the local press, the Borough's libraries, the Citizen's Advice Bureau and local amenity groups. A copy of the list is also made available on the Council's web site.

The West Lancashire Conservation Advisory Panel is consulted on applications affecting listed buildings or Conservation Areas.

We consult neighbouring Councils where appropriate and also consult directly any properties in other Boroughs which directly adjoin an application site.

There are various types of planning and related applications that are commonly submitted to the Council for determination. These are listed in Table 4.1 below along with details of whom and how we will usually consult on different types of applications, depending on the particular circumstances.

**Table 4.1 Consultation procedure for Planning Applications – by type**

Types of application	Characteristics	Publicity and Consultation
Small scale planning applications	These may include householder applications involving proposals to alter or enlarge a single house, including works within the garden, or minor proposals for non-residential development like small commercial extensions.	Notify immediate neighbours;  Consult relevant statutory and non-statutory consultees  Publish on weekly list
Major planning applications	These may be proposals for: <ul style="list-style-type: none"> <li>Housing development of 10 or more dwellings, or a site area of 0.5 hectares or more.</li> <li>Other development where the floor space to be built is 1,000 sq m or more, or where the site area is 1 hectare or more.</li> </ul>	Notify neighbours, site and press notices.  Consult relevant statutory and non-statutory consultees. Publish on weekly list
Applications affecting a listed building or conservation area	These may involve proposals for alterations, extensions or demolition of a listed building or any works to be carried out within a conservation area.	Notify neighbours, site and press notices.  Consult relevant statutory and non-statutory consultees  Consult Conservation Area Advisory Panel.  Publish on weekly list
Advertisement consent	Certain adverts require express consent from the Council to be displayed and will typically include adverts on shops and other commercial buildings.	Notify neighbours and highway authority if public safety impact.  Publish on weekly list
Outline planning applications	This type of application is designed to establish the principle of a particular scheme, the full details are often not given at this stage, for example the full design details of the houses on a residential scheme. The full details are usually considered at the “reserved matters” stage.	Notify immediate neighbours;  Consult relevant statutory and non-statutory consultees  For major developments produce site and press notice.  Publish on weekly list
Reserved matters applications	This type of application follows on from an outline planning permission and considers the full details of the scheme, for example the house design and landscaping.	Notify immediate neighbours;  Consult relevant statutory and non-statutory consultees  For major developments produce site and press notice.  Publish on weekly list
Change of use applications	This type of application considers an alternative use for a building or land, for example a change of use from grocers shop to a hot food takeaway.	Publish on weekly list  Notify immediate neighbours  Consult relevant statutory and non-statutory consultees

Types of application	Characteristics	Publicity and Consultation
		For major developments produce site and press notice.
Tree Preservation Order applications	This type of application considers works to protected trees	Discretionary neighbour notification/consultation.
Notification of works to trees in a Conservation Area	This type of application is a technical assessment of the work by a tree specialist that is not protected by a Tree Preservation Order.	Discretionary neighbour notification/consultation.
Non material amendments	This type of application involves a minor amendment to the approved scheme that does not require the submission of a new application.	No notifications carried out
Prior approval applications	There are several types of proposal where the applicant must submit an a prior approval application to the Council e.g. for demolition of some buildings, for some forms of telecommunications development, for agricultural buildings, for larger home extensions	Publish on weekly list. Notify neighbours if appropriate. Display site notice if required. Notify consultees if appropriate
Lawful development certificates (existing)	This type of application is made where a change of use or development has already been carried out and the applicant wants to confirm that it is lawful	Notify immediate neighbours. Publish on weekly list
Lawful development certificates (proposed)	This type of application is made where a change of use or development has not yet been carried out and the applicant wants to confirm that it is lawful	No notification carried out
Discharge of conditions applications	This type of application is made because planning and related applications are often approved subject to conditions which require the submission of further information e.g. details of building materials or landscaping.	Notify relevant consultees
EIA screening opinion	This type of application seeks to establish whether a proposed development will require an Environmental Impact Assessment.	Notify relevant consultees
EIA scoping opinion	This type of application seeks to establish what information will need to be provided as part of an Environmental Impact Statement.	Notify relevant consultees

#### **4.4.3 Notifying you of amendments**

Following submission of a planning application, negotiations between Planning Officers and developers, and their agents may result in a revision to the proposed development necessitating the submission of amended plans. If the amendments are significant, the Council will, upon receipt of amended plans, carry out a further consultation on these amendments. This consultation is likely to include re-notification of neighbours, Parish Councils and statutory consultees, depending on the nature of the changes and the likely implications. In view of the tight time scales to determine planning applications the re-notification time may be set at 14 days.

#### **4.4.4 How to comment on a planning application**

Planning applications can be viewed in full on the Council's website. Alternatively, applications can be viewed online using computers at the Council's Customer Service points (52 Derby Street, Ormskirk, and 1<sup>st</sup> Floor, The Concourse, Skelmersdale). Applications for planning permission will be entered on a register. Maintaining a planning register is a statutory obligation and the information is available on the Council's website.

Comments may be made on any planning application, by anyone, regardless of whether or not they were consulted individually. All comments must be made in writing and must contain the name and address of the author. The Council will not take into consideration any anonymous comments received.

All comments received are public documents and cannot legally be kept confidential. All written representations received on applications are published on the Council's website. Therefore comments should not include any personal information, for example phone numbers or signatures. When submitting comments by email it is recommended that they are sent as an attachment in order to avoid publication of personal email addresses.

Please note comments should be submitted within the identified consultation period as the Council may be in a position to determine the application as soon as the consultation period expires. If this date cannot be met, consultees should contact the case officer well in advance of the consultation period ending to see whether it is possible for an extension of time to be granted for comments to be submitted.

The name and phone number of the Planning Officer dealing with the application is available on the Council's website and on notification letters. Telephone discussions may be held with Planning Officers during office hours. Meetings with Case Officers may be made by appointment.

The Council welcomes comments, whether in support or opposition to an application, but the Council can only take account of material planning considerations. These include matters like the effect on traffic or parking, the appearance of the proposal, overlooking or disturbance, overshadowing, loss of privacy, and loss of ecological habitats. We cannot take into account matters such as loss of property value, private disputes between neighbours,

matters covered by leases or covenants, the impact of construction work and competition between firms. A list providing examples of valid (and invalid) planning considerations is included in Appendix E.

#### **4.4.6 How are Applications determined?**

The views of statutory consultees and the public are important in making decisions on planning and related applications. However they are just one consideration in the overall decision making process and must be weighed alongside national and local planning policy and guidance and other material planning considerations.

Having assessed an application the case officer will prepare a report summarising the comments received from consultees and other interested parties and taking account of planning policy and other material considerations, will recommend whether or not the application should be approved or refused. The application will then be determined under delegated powers by authorised officers of the Council. Some 90% of planning applications are determined in this way under the delegated powers of the Assistant Director Planning.

However, most major and/or controversial applications are reported to the Planning Committee for decision by Members of the Council. If the application is to be decided by the Planning Committee comments received from consultees or the public will be set out in the Planning Officer's report. The Committee agendas are published 5 clear working days in advance of the meeting and are available on the Council web site.

#### **4.4.7 Applications referred to Planning Committee**

Planning Committee meetings are held in public and if an application is to be determined in this way we will inform the applicant/agent, the Parish Council and anyone who was directly notified in writing by the Council who has submitted comments on a particular application, of the date of the meeting.

The Council allows public speaking at Planning Committee meetings subject to prior notification to the Council (at least 3 working days) before the Committee meeting. The following people may address the Planning Committee:

- Anyone objecting to an application who has been notified under the neighbour notification process by the Council, or his/her representative
- The clerk of a Parish council or his/her representative
- The applicant or his / her representative but only where it has been agreed that a third party objecting to the proposal may speak.

Planning Committee agendas are often long and complex and meetings can last for several hours. In order to ensure that Planning Committee meetings are effectively managed, requests to speak are to be put before the Committee Chairperson. If there is more than one speaker in any category then the Chairperson will decide how many can speak; this will

be done the day before the meeting. Groups (e.g. of residents) are asked to nominate one person to speak on their behalf. In the case of large and complex schemes if two objectors are heard they must avoid duplicating points made by other speakers. Each speaker has no more than three minutes. If you feel unable to address the Planning Committee, a Ward Councillor may be willing to put your view to the Committee. Details of Ward Councillors are available on the Council website at: <http://www.westlancs.gov.uk/about-the-council/councillors.aspx>

#### **4.4.8 Notifying you of a decision**

A list of planning decisions is available on the Council's website. A copy of the officer's report setting out the reasons for the decision will be available on the web site. The Council would advise that interested parties check the status of the application on the web site as we no longer write to people who have commented on an application to advise them that a decision has been made.

#### **4.4.9 Planning Appeals**

If an application for planning permission is refused by the local planning authority, or it is granted with conditions, an appeal can be made to the Secretary of State against the refusal or the conditions attached. There is also a right of appeal if an application is not determined within a specific time. Appeals are examined by an independent Planning Inspector. We will notify in writing all those who expressed an interest in the original application. Copies of their comments will be forwarded to the Planning Inspectorate and the Council will inform people how to make further representations to the Planning Inspectorate. Further advice on the appeal process is available at:

<http://www.planningportal.gov.uk/planning/planninginspectorate>

## **5.0 WORKS TO TREES**

Tree Preservation Orders (TPOs) provide protection to trees, either as individual trees, groups of trees, or as woodlands, to prevent or control the cutting down, uprooting, topping, lopping, wilful damage or destruction of the trees or woodlands.

Trees in Conservation Areas have a level of protection whereby proposed tree works are notified to the Council to consider if the works are appropriate. If the works are not considered to be appropriate or reasonable then the Council has the option to make a TPO.

Any new TPO is open to a period for objections and representations, before the Council decides to confirm the Order or not. Any persons that may be affected or have an interest in the new Order will be served a copy.

To undertake work on a protected tree, permission must be obtained from the Council, unless the proposed works are exempt.

### **5.1 When will we consult?**

The Council is not under an obligation to undertake a consultation, but will seek to consult on any applications for work on trees that are considered to be of particular interest to the wider public.

The standard timescale for allowing people to make representations is 14 days. However, if proposed works are of significant interest to the wider public, the period for making representations can be extended.

### **5.2 Who will we consult?**

The Council will consult anyone who is considered to have an interest in the proposed tree works, including neighbours, the Parish Council, tree wardens and residents groups. There is also the option to take proposed works to Planning Committee for determination by Council Members.

Where a neighbour or any other party submits an application, the Council will endeavour to make sure the owner or occupier of the land on which the tree stands is informed and given a chance to comment.

### **5.3 How will we consult?**

Where we consult, we will use one or more of the following methods: letters, site notices, email, telephone, and occasionally press advertisements. The Council will keep a register of all applications for consent under a TPO. This register will be available for inspection by the public during office hours and on the Council's website via the public portal.

#### **5.4 Hedgerow Removal Applications**

Under the ***Hedgerow Regulations 1997***, the LPA is required to consult the local Parish Council upon receipt of a 'Hedgerow Removal Notice'. The time given for a response is a minimum of 42 days.

#### **5.5 High Hedges Complaints**

Where complaints are made in relation to high hedges between residential properties, most cases are unlikely to raise wider neighbourhood issues and the Council will not normally publicise these complaints. An exception might be where the trees in the hedge are protected by a TPO, or the hedge is situated in a Conservation Area.

The Council may occasionally seek views from the occupiers of properties, other than the complainant's, that might be affected by the hedge and so could potentially be affected by the Council's decision on the complaint. This may include properties that lie between the complainant's and the land with the hedge, or where a single hedge borders several adjoining properties. Otherwise, the Council will not normally take into account representations from people not directly involved in the dispute.

When consulting upon high hedges disputes, the Council will confine its consultations to those specialist organisations or individuals whose expert input will help inform the decision on the complaint, for example, English Heritage in the case of a hedge associated with a listed building.



## **6.0 CONSERVATION OF THE HISTORIC ENVIRONMENT**

### **6.1 Conservation Projects**

The Council's Heritage and Environment Team are involved in supporting various heritage and conservation projects from time to time. Work which affects a heritage asset, whether a listed building, conservation area or historic park is rarely undertaken in isolation and very often involves the need to work in partnership with others, after consultation. The Council will often use a number of methods to consult communities for this purpose. This includes publishing details on the Council website, writing to residents directly affected by proposals and issuing Press Releases

### **6.2 Conservation Area Appraisals**

The Council has an obligation under Section 69 of the Planning (Listed Building and Conservation Areas) Act 1990 to review, from time to time, its Conservation Area designations, and under Section 71 of this Act to formulate and publish proposals for the preservation and enhancement of these areas. The outcome of such a review might result in a change to the boundary of the Conservation Area.

Whilst the Council do not have to directly consult with communities, unless there are proposed amendments to the designated boundary of the conservation area or changes to Permitted Development Rights, best practice guidance (published by Historic England) identifies a need to consult with residents and community organisations over Conservation Area Appraisal proposals.

When new documents related to the Borough's heritage are produced, designations revised or planning controls amended; the Council will use a variety of methods to consult or inform people. These are set out in Table 6.1 overleaf.

**Table 6.1 Consultation methods in relation to changes within Conservation Areas**

	<b>Website</b>	<b>Letters to residents affected</b>	<b>Notice in newspapers</b>	<b>Press Release</b>
Conservation Area Appraisal update	✓	✓	---	✓
Proposed changes to Conservation Area boundary	✓	✓	✓	---
Withdrawal of Permitted Development Rights through an Article 4 Direction	✓	✓	✓	---

## 7.0 GENERAL CONSIDERATIONS

### 7.1 Communication

The Council want to make sure that communication is clear. The Council's Public Relations team have produced a Community Engagement Protocol, which contains good practice guidance for Council officers on the matter of consultation and community engagement. This Protocol is available on the Council website:

<http://www.westlincs.gov.uk/about-the-council/how-the-council-works/equality-and-diversity/find-more-information.aspx>

Council officers will endeavour to follow the Protocol when carrying out planning-related public engagement.

### 7.2 Equality & Diversity

All our consultation methods are in accordance with the Equality Act 2010, the Human Rights Act 1998 and the Freedom of Information Act 2000.

We will try to tackle difficulties with consultation in the following ways:

I have literacy problems	Upon request, we can make our information available in different formats, including other languages and braille. We can arrange for a planning officer to meet with you and explain policies and proposals and help you fill in relevant forms.
English is not my first language	
My vision is impaired	
I find it difficult to understand technical planning documents	Planning is often quite complex with technical words (jargon). These are often required because of the technical and legal nature of planning. However, we do try to make sure that all our communication, consultation and publicity materials can be understood so people feel they can get involved in shaping their area.
I do not have access to private transport	We try to plan meetings in convenient and local locations which can be accessed by public transport. Consultation documents will be placed 'on deposit' at accessible libraries and Council offices across the Borough. Information will also be available on the Council website.
I find it difficult to attend meetings as I have children and no child minder	Children are welcome at our events. We try to arrange meetings in the daytime, in the evenings and sometimes at weekends to make sure that people can attend. We encourage older children to get involved in planning too!

I do not have any spare time to attend events	You can contact the Council by phone, letter or email to give us your views. Information is available on the Council website and can be accessed at any time.
Planning documents are too expensive for me to buy and get involved	All our documents are available on our website; most can be viewed at local libraries and Council offices.
I live in a remote, rural area and do not usually receive consultation documents	We try to make sure that publicity materials reach residents in the most rural areas of the Borough. However, all information can be found on the website. You can subscribe to our consultation database to make sure you receive notifications by email.
I do not have internet access	The internet and email tend to be the best form of communication from the point of view of the Council. However, the Council is aware that not everyone has access to the internet. The Council will still use traditional methods to support consultation and publicity. The internet can be accessed for free at libraries and at Council offices.
I feel my views are ignored	The views of the community are important. Even if the eventual decision made by the Council on a planning matter is not what you requested or recommended, this does not mean your views were not taken into account. A range of factors are taken into account in making planning decisions, the views of the public being one such factor.
I don't like speaking in public	You can put your views in writing to us during any consultation. If you don't wish to speak, you may be able to nominate someone to do it for you.
I want to remain anonymous	Planning is a public process, and so we have to make names and comments publically available. We cannot accept anonymous comments. We will always comply with the Data Protection Act and not display personal details such as signatures, address, emails or telephone numbers.
I receive too much consultation material	Our consultation database enables you to refine your details, so you can opt in or out of certain consultation topics.

In keeping with the Council policies, consultation pro-formas and surveys will usually be accompanied by a non-compulsory 'Equality and Diversity' questionnaire. The Council request that these be completed and returned along with any planning representations made. This information will be kept confidential at an individual level, but collectively will enable the Council to gain a better understanding of the diversity of the population with which it is dealing, and should help make sure that the Council targets its services appropriately. If necessary, we can review our consultation methods to make sure that various equality groups are being reached.

### **7.3 How we will safeguard the information**

Personal information supplied to the Council must be held securely in accordance with the provisions of the Data Protection Act 1998.

### **7.4 Freedom of Information Act 2000**

The Council is required under the Freedom of Information Act 2000 to pass on certain information if requested by third parties or government departments unless the Act allows us to withhold that information. Examples of when this might occur are if the information requested is held in confidence, or if the information requested is commercially sensitive. If information is passed on in response to a Freedom of Information request, any personal data would be removed from the said information before being passed on.



# APPENDICES

**Please note: the lists within the following appendices are not exhaustive and will be updated as necessary.**

## **Appendix A: Duty to Co-Operate Bodies**

The Localism Act 2011 and the 2012 Regulations prescribe the following bodies who are subject to the Duty to Co-operate in relation to the local development documents where they relate to a strategic matter. These duties also apply to the Local Planning Authorities and County Councils.

- Lancashire County Council (as County Council, transport authority, highway authority, education authority and as minerals and waste authority)
- Sefton Metropolitan Borough Council (MBC) (as neighbouring authority and neighbouring highway authority)
- Knowsley MBC (as neighbouring local planning authority (LPA) and neighbouring highway authority)
- St Helens MBC (as neighbouring LPA and neighbouring highway authority)
- Wigan MBC (as neighbouring LPA and neighbouring highway authority)
- Chorley Borough Council (neighbouring LPA)
- South Ribble Borough Council (neighbouring LPA)
- Fylde Borough Council (neighbouring LPA)
- Highways England
- Environment Agency
- Historic England
- Natural England
- Civil Aviation Authority
- Homes and Communities Agency
- Lancashire Care NHS Foundation Trust (as the Primary Care Trust)
- Office of Rail Regulation
- Liverpool City Region Combined Authority (as a neighbouring Integrated Transport Authority)
- Greater Manchester Combined Authority (as a neighbouring Integrated Transport Authority)
- Marine Management Organisation
- Lancashire Enterprise Partnership

The 2012 Regulations also include Transport for London and the Mayor of London in the list of Duty to Co-Operate bodies.

## **Appendix B: Specific Consultation Bodies**

(These incorporate Statutory Consultees; they may be replaced by successor bodies.)

- The Coal Authority
- The Environment Agency
- Historic England
- Marine Management Organisation
- Natural England
- Network Rail Infrastructure Limited
- Highways England
- Adjacent Local Planning Authorities
- Parish Councils
- Telecommunications companies
- Utilities companies (electricity, gas, sewerage, water)
  - United Utilities
  - National Grid
  - Electricity North West
  - Scottish Power
- Health authority (Lancashire Care NHS Foundation Trust - as Primary Care Trust)
- Homes and Communities Agency
- Education authority (Lancashire County Council)
- Highways authority (Lancashire County Council)
- Emergency services
  - North West Ambulance Service
  - Lancashire Police
  - Lancashire Fire & Rescue Service
- Health services
  - Southport and Ormskirk Hospital NHS Trust
  - NHS West Lancashire Clinical Commissioning Group
- Office of Rail Regulation
- Civil Aviation Authority
- Lancashire Enterprise Partnership
- Lancashire Local Nature Partnership
- Civil Aviation Authority



## **Appendix C: General Consultation Bodies**

- Canal & River Trust
- Sport England
- West Lancashire Council for Voluntary Service (CVS)
- Liverpool City Region Authorities
- Lancashire Authorities
- Department for Environment, Food and Rural Affairs (DEFRA)
- Age UK
- Airport Operators
- Church Commissioners
- Diocesan Board of Finance
- Disability Rights Commission
- Campaign for Rural England
- RSPB
- Wildlife Trusts
- Friends of the Earth
- Forestry Commission
- The Theatres Trust
- Gypsy Council, other organisations representing Gypsies and Travellers
- Post Office property holdings / Post Office operators
- Rail Companies
- Voluntary bodies working in the area
- Bodies which represent the interests of different racial, ethnic or national groups in the area;
- Bodies which represent the interests of different religious groups in the area;
- Bodies which represent the interests of disabled persons in the area;
- Bodies which represent the interests of persons carrying out business in the area.
- The Council website contains a list of different equality groups that it uses for consultation:  
<http://www.westlancs.gov.uk/about-the-council/how-the-council-works/equality-and-diversity/find-more-information.aspx>

## **Appendix D: Other Consultees**

- Local business groups
- Local community groups
- Local leisure and sports groups
- Local registered social landlords
- Local resident associations
- Council developer partner(s)
- Developers and landowners
- General public

## **Appendix E – Valid Planning Considerations**

In reaching decisions on planning applications, the Council must take into account the policies of the Local Plan, any supporting guidance which is relevant and national legislation. The Council also take into account any comments made which are in relation to ‘material planning considerations’.

Material planning considerations are matters that can be taken into account when deciding a planning application or an appeal. The planning system does not exist to protect the private interest of one person against the activities of another. Therefore, it cannot make decisions in relation to any resulting financial or other loss. To make decisions on planning applications, the Council need to ask whether the proposal would unacceptably affect amenities and existing use of land and buildings which should be protected in the public interest.

The list below provides some common examples of material planning considerations although it is not exhaustive.

- Local, strategic and national planning policies
- Other government circulars, orders, statutory instruments
- Amenity and privacy of dwellings
- Environmental qualities of the surrounding area or the visual character of a street (including the design and materials, scale and landscaping, layout and density)
- Availability of a mixed housing stock
- Road safety (in terms of dangerous access, additional traffic, car parking)
- Retention of local services
- Character of the area in terms of noise, light and other forms of pollution
- Impact on trees, especially if protected by a Tree Preservation Order
- Impact on public services, such as water supply, drainage
- Public rights of way
- Impact on character and appearance of Listed Buildings or Conservation Areas
- Need to safeguard valuable resources such as high quality agricultural land or mineral reserves
- Disabled persons access
- Previous planning decisions
- Nature conservation
- Archaeology

In some circumstances, arguments are made which do not consider planning issues and therefore are not taken into account when reaching a decision on an application. Applicants may sometimes use personal arguments in an effort to support their application. However, in many cases these will not outweigh the more general planning considerations as the use of the land and any buildings located on it will remain long after the applicants personal circumstances have ceased.

The list below provides a number of common points found in comments received by the Council which cannot be taken into consideration. Councillors will be advised that such

arguments should not be taken into account when making decisions on applications. Again, this list is not exhaustive.

- The applicant has already started work on the proposed development (carrying out any work prior to receiving planning permission is done at the persons own risk; the fact work has commenced will not affect the Council's decision)
- The applicant does not own the land to which the application relates. This issue can be overcome through agreements with the landowner.
- Fear that the proposal may devalue neighbouring properties. Such market forces, and private financial matters, are outside the control of planning.
- The applicant has carried out unauthorised development in the past. Each case is considered on its own merits.
- Objections relating to concerning competition in business trading
- Moral objections – e.g. for casinos or betting shops
- Allegations that proposals may affect private rights. These are legal matters and objectors should consult their own solicitors / advisors. Planning officers are not able to provide advice on such issues.
- The loss of an individual's attractive view
- The fact that an objector may be a tenant of the land where the development is proposed. The landowner can terminate the tenancy whenever they choose and whether development takes place or not, therefore any consequences are considered to be unrelated to the application.
- The belief that the applicant has submitted the application in order to profit from the land.

It is important to understand that any considerations of relevance to a particular planning application will be considered in reaching the final decision and will each be weighted according to its relative importance in planning terms.



# Equality Impact Assessment Form



<b>Directorate:</b>	<b>Transformation</b>	<b>Service:</b>	<b>Planning</b>
<b>Completed by:</b>	<b>Stephen Benge</b>	<b>Date:</b>	<b>1/12/15</b>
<b>Subject Title: Draft Statement of Community Involvement 2016</b>			
<b>1. DESCRIPTION</b>			
Is a policy or strategy being produced or revised:	Yes		
Is a service being designed, redesigned or cut back:	No		
Is a commissioning plan or contract specification being developed:	No		
Is a budget being set or funding allocated:	No		
Is a programme or project being planned:	No		
Are recommendations being presented to senior managers and/or Councillors:	Yes		
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty ( <b>Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations</b> ):	Yes		
Details of the matter under consideration:	Seeking approval for public consultation on a document that sets out the Council's proposed standards for consultation when carrying out its various planning functions.		
<i>If you answered <b>Yes</b> to any of the above go straight to Section 3</i> <i>If you answered <b>No</b> to all the above please complete Section 2</i>			
<b>2. RELEVANCE</b>			
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	<div style="text-align: right;"><i>*delete as appropriate</i></div> Yes/No*		
If <b>Yes</b> , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered <b>Yes</b> go to Section 3</i>			
If you answered <b>No</b> to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>			

<b>3. EVIDENCE COLLECTION</b>	
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	<p>The document has the potential to impact on almost all stakeholders in, or with an interest in, the Borough.</p> <p>The new draft Statement of Community Involvement (SCI) sets out how the Council will engage with and consult stakeholders when carrying out its various planning functions, e.g. preparing planning policy documents, dealing with planning applications, Neighbourhood Planning. These different functions have the potential to impact a very wide range of stakeholders.</p> <p>The SCI under consideration will influence how such stakeholders are consulted on planning matters by setting out minimum standards that must be adhered to.</p>
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	There should be no particular group affected more than others.
<p>Which of the protected characteristics are most relevant to the work being carried out?</p> <p>Age Gender Disability Race and Culture Sexual Orientation Religion or Belief Gender Reassignment Marriage and Civil Partnership Pregnancy and Maternity</p>	<p>All of these protected characteristics are indirectly relevant to the work being carried out. The SCI sets out standards for consultation and seeks to ensure that people with any protected characteristic can engage equally easily in the planning process.</p>
<b>4. DATA ANALYSIS</b>	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	<p>Previous engagement with the general public in relation to planning policy matters and consultation exercises across the Borough (for example for the Local Plan between 2008 and 2013) show that it tends to be those of a white-British ethnic background and those of older age groups who most actively engage in the process of preparing general planning policy.</p>
What will the impact of the work being carried out be on usage / the stakeholders?	<p>The document in question is intended to replace an existing, older, SCI, but continuing with the same principles of meaningful engagement with all sections of the community. In that sense, the impact of the work should not be significant, but it simply reflects changes to planning legislation that affect, for example, the number of stages of a document's preparation, or the procedure for development management.</p>

What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	<p>The DPD is not a 'service' as such. This report is seeking approval to consult on a draft document.</p> <p>Looking back to the engagement carried out since the adoption (in 2007) of the existing SCI, it is evident that some customers have ended up being more satisfied than others. It would appear, however, that levels of satisfaction are most closely related to the outcome of the planning decision in question (e.g. permission being granted for development that may affect their outlook), rather than to the nature of the consultation carried out.</p> <p>The SCI is concerned with consultation procedures, rather than planning decisions.</p>
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	We have very little, if any, data on the impact of our consultation methods to date on people with various protected characteristics. We have included equalities monitoring forms alongside our comments forms when undertaking consultation exercises, but very few have been returned, and cannot be used to arrive at any statistically robust conclusions.
If any further data / consultation is needed and is to be gathered, please specify:	The report is seeking approval to consult on the draft SCI for 6 weeks (February - March 2016).
<b>5. IMPACT OF DECISIONS</b>	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	As previously stated, the SCI is an update to an older, now out-of-date, SCI (out-of-date in terms of the planning legislation it refers to). The new SCI does not represent any significant change in approach to community engagement and seeking to facilitate the involvement in planning of people with protected characteristics.
<b>6. CONSIDERING THE IMPACT</b>	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	We do not envisage any negative impact associated with the new SCI.
What actions do you plan to take to address any other issues above?	N/A

## 7. MONITORING AND REVIEWING

When will this assessment be reviewed and who will review it?

It is anticipated that the new SCI, once adopted, will not need reviewing for several years.

Equalities monitoring questionnaires will continue to be used in tandem with consultations on planning policy documents to monitor how well different sections of the community and other stakeholders are being engaged.





**AGENDA ITEM: 5(f)**

**CABINET: 12 JANUARY 2016**

**CORPORATE & ENVIRONMENTAL  
OVERVIEW & SCRUTINY  
COMMITTEE:  
18 FEBRUARY 2016**

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**Report of: Transformation Manager**

**Relevant Head of Service: Managing Director (Transformation)**

**Relevant Portfolio Holder: Councillor I Moran**

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

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**SUBJECT: QUARTERLY PERFORMANCE INDICATORS (Q2 2015/16)**

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Wards affected: Borough wide

**1.0 PURPOSE OF THE REPORT**

- 1.1 To present performance monitoring data for the quarter ended 30 September 2015.

**2.0 RECOMMENDATIONS TO CABINET**

- 2.1 That the Council's performance against the indicator set for the quarter ended 30 September 2015 be noted.
- 2.2 That the call-in procedure is not appropriate for this item as the report is being submitted to the next meeting of the Corporate & Environmental Overview & Scrutiny Committee on 18 February 2016.

**3.0 RECOMMENDATIONS TO CORPORATE & ENVIRONMENTAL OVERVIEW & SCRUTINY COMMITTEE**

- 3.1 That the Council's performance against the indicator set for the quarter ended 30 September 2015 be noted.
-

## **4.0 CURRENT POSITION**

- 4.1 Members are referred to Appendix A of this report detailing the quarterly performance data.
- 4.2 34 data items are reported quarterly, two of these are data only. Of the 32 PIs with targets reported:
- 22 indicators met or exceeded target
  - 3 indicators narrowly missed target; 5 were 5% or more off target
  - 2 indicators have data unavailable at the time of the report (*NI 191: Residual household waste; NI192: Percentage of household waste sent for reuse, recycling and composting*)

As a general comparison, Q2 performance in 2014/15 gave 21 (from 32) indicators on or above target (to enable a comparison this figure does not include 14/15 outturn information for WL08a, WL18, or WL24 as in 15/16 these indicators either do not have targets or are no longer monitored quarterly).

- 4.3 Improvement plans prepared by service managers 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 and will be relevant for future monitoring purposes.
- 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.
- 4.6 The performance indicator data appended to this report details the council's quarterly performance against key performance indicators. The performance information aims to help demonstrate performance against the corporate priorities as well as providing some service-specific information. The full suite of indicators for 2015/16 was agreed by Cabinet in March 2015. Annual outturn for the full suite is reported to Council within the Annual Report.

## **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.
- 

### **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 Q2 July-September 2015/16

Appendix B – Current Improvement Plans

- B1: TS24b: Average time to re-let local authority housing-Supported Needs
- B2: NI157b+c: Processing of planning applications: Minor apps/ Other applications
- B3: WL121 Working Days Lost Due to Sickness Absence
- B4: WL01: No. residual bins missed per 100,000 collections



## APPENDIX A: QUARTERLY PERFORMANCE INDICATORS

Icon key					
PI Status			Performance against same quarter previous year		
	OK (within 0.01%) or exceeded	22		Improved	15
	Warning (within 5%)	3		Worse	11
	Alert (by 5% or more)	5		No change	6
	Data only	2	/	Comparison not available	0
	Awaiting data	2		Awaiting data	2
N/A	Data not collected for quarter	0			
Total number of indicators		34			

### Shared Services <sup>1</sup>







PI Code & Short Name	Q2 2013/14	Q3 2013/14	Q4 2013/14	Q1 2014/15	Q2 2014/15	Q3 2014/15	Q4 2014/15	Q1 2015/16	Q2 2015/16	Current Target	Comments	Q2 15/16 vs Q2 14/15	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
ICT1 Severe Business Disruption (Priority 1)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	99.0%			
ICT2 Minor Business Disruption (P3)	100.0%	100.0%	100.0%	100.0%	100.0%	99.0%	99.0%	99.0%	99.0%	97.0%			
ICT3 Major Business Disruption (P2)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	97.0%			
ICT4 Minor Disruption (P4)	99.0%	99.0%	99.0%	99.0%	99.0%	99.0%	99.0%	99.0%	99.0%	97.0%			
B1 Time taken to process Housing Benefit/Council Tax Benefit new claims and change events (ytd)	7.66	8.31	7.44	6.79	7.66	8.23	6.62	8.89	8.07	12.00			
B2 Overpayment Recovery of Housing Benefit overpayments (payments received)	£84,613	£123,567	£170,909	£34,524	£82,895	£130,906	£203,868	£67,408	£149,382	£84,611			
R1 % of Council Tax collected	55.47%	82.85%	95.32%	28.95%	56.11%	83.60%	96.03%	29.64%	56.69%	54.90%			
R2 % council tax previous years arrears collected	11.71%	16.94%	20.94%	3.38%	12.36%	27.34%	33.56%	8.97%	25.31%	12.36%			

PI Code & Short Name	Q2 2013/14	Q3 2013/14	Q4 2013/14	Q1 2014/15	Q2 2014/15	Q3 2014/15	Q4 2014/15	Q1 2015/16	Q2 2015/16	Current Target	Comments	Q2 15/16 vs Q2 14/15	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
R3 % of Non-domestic Rates Collected	58.57%	84.58%	95.53%	30.75%	58.26%	83.29%	96.40%	28.09%	54.83%	54.70%		↓	✓
R4 % Sundry Debtors % of revenue collected against debt raised	66.83%	71.07%	90.05%	62.59%	79.34%	86.49%	90.73%	72%	83.67%	65.75%		↑	✓











## Housing & Regeneration

PI Code & Short Name	Q2 2013/14	Q3 2013/14	Q4 2013/14	Q1 2014/15	Q2 2014/15	Q3 2014/15	Q4 2014/15	Q1 2015/16	Q2 2015/16	Current Target	Comments	Q2 15/16 vs Q2 14/15	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
HS1 % Housing repairs completed in timescale	96.57%	96.46%	96.68%	96.36%	95.86%	96.58%	97.36%	97.04%	96.11%	97.00%	Head of Service's amber assessment: improvement plan not required.	↑	⚠
HS13 % LA properties with CP12 outstanding	0.04%	0.01%	0.1%	0.1%	0.04%	0.06%	0.1%	0.05%	0.01%	0%	Reported performance is an average from months in the period. August and September both had 0 properties outstanding. Target based on legal requirement for all eligible properties to have certificate. No plan has been prepared but we continue to focus on rigorous procedures to ensure compliance.	↑	⛔
TS1 Rent Collected as a % of rent owed (excluding arrears b/f) <sup>2</sup>	97.58	98.25	98.47	99.2	98.04	98.18	98.65	102.3	100.12	97.00	A higher than anticipated rent collection rate in Q1 was achieved which has been maintained and carried on into Q2	↑	✓
TS24a Average time taken to re-let local authority housing (days) - GENERAL NEEDS	49.52	58.10	65.74	30.25	18.19	22.77	29.42	26.63	25.93	28.00		↓	✓
TS24b Average time taken to re-let local authority housing (days) - SUPPORTED NEEDS	64.73	98.01	62.31	79.20	41.39	65.66	92.24	60.33	63.09	50.00	Figure skewed by the allocation of 1 long term category II sheltered void. If this were excluded turnaround time would be within target. Improvement plan attached at Appendix B1	↓	⛔







## Planning

PI Code & Short Name	Q2 2013/14	Q3 2013/14	Q4 2013/14	Q1 2014/15	Q2 2014/15	Q3 2014/15	Q4 2014/15	Q1 2015/16	Q2 2015/16	Current Target	Comments	Q2 15/16 vs Q2 14/15	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
NI 157a Processing of planning applications: Major applications <sup>3</sup>	77.78%	54.55%	85.71%	100%	76.92%	44.44%	62.50%	100%	100%	65.00%			
NI 157b Processing of planning applications: Minor applications	84.62%	82.43%	72.15%	74.67%	70.00%	70.59%	80.88%	72.22%	66.15%	75.00%	Outturn is above the government target of 65%. Improvement plan attached at Appendix B2		
NI 157c Processing of planning applications: Other applications	93.02%	92.99%	84.35%	79.83%	76.10%	84.51%	88.71%	85.03%	83.33%	85.00%	Improvement plan attached at Appendix B2		











## Transformation

PI Code & Short Name	Q2 2013/14	Q3 2013/14	Q4 2013/14	Q1 2014/15	Q2 2014/15	Q3 2014/15	Q4 2014/15	Q1 2015/16	Q2 2015/16	Current Target	Comments	Q2 15/16 vs Q2 14/15	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
BV8% invoices paid on time	97.03%	97.75%	96.24%	96.53%	98.44%	98.73%	99.27%	99.06%	98.65%	98.24%			
WL19b(ii) % Direct Dial calls answered within 10 seconds <sup>4</sup>	80.18	80.49	81.82	82.01	81.50	82.13	82.28	81.30	80.80	82.21	This relates to 64,735 calls. 89.7% of which were answered within 20 seconds. Head of Service's amber assessment: improvement plan not required. Information has been circulated to staff to remind them of telephone protocol during absences from their desk.		
WL90 % of Contact Centre calls answered	93.6%	92.6%	91.3%	93.1%	93.6%	91.1%	91.6%	90.6%	93.8%	91.0%			
WL108 Average answered waiting time for callers to the contact centre (seconds)	17.00	25.00	34.00	20.00	24.00	44.00	31.00	43.00	23.00	30.00			
WL121 Working Days Lost Due to Sickness Absence	2.74	2.88	1.87	1.71	1.93	2.32	2.76	2.61	2.73	2.02	Improvement plan attached at Appendix B3		









## Community Services

PI Code & Short Name	Q2 2013/14	Q3 2013/14	Q4 2013/14	Q1 2014/15	Q2 2014/15	Q3 2014/15	Q4 2014/15	Q1 2015/16	Q2 2015/16	Current Target	Comments	Q2 15/16 vs Q2 14/15	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
WL08a Number of Crime Incidents	1,403	1,449	1,329	1,312	1,277	1,277	1,105	1,120	1,169				
WL_18 Use of leisure and cultural facilities (swims and visits) <sup>5</sup>	313,674	243,378	326,547	310,875	315,366	254,704	322,129	314,915	303,157				

## Street Scene

PI Code & Short Name	Q2 2013/14	Q3 2013/14	Q4 2013/14	Q1 2014/15	Q2 2014/15	Q3 2014/15	Q4 2014/15	Q1 2015/16	Q2 2015/16	Current Target	Comments	Q2 15/16 vs Q2 14/15	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
NI 191 Residual household waste per household (Kg) <sup>6</sup>	111.36	140.5	134.38	133.82	125.47	129.69	117.6	122.66	(124.9%)	123.75	Provisional amber outturn. Awaiting external confirmation of data.		
NI 192 Percentage of household waste sent for reuse, recycling and composting <sup>6</sup>	42.16%	39.93%	37.10%	50.88%	49.70%	41.66%	41.08%	51.08%	(51.37%)	50.00%	Provisional above target outturn. Awaiting external confirmation of data. Traditionally Q1 and Q2 provide the highest composting figures.		
NI 195a Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Litter	0.83%	1.67%	0.16%	N/A	1.17%	1.00%	0.33%	N/A	1.17%	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	7.09%	2.70%	2.47%	N/A	2.75%	2.50%	8.89%	N/A	3.41%	5.00%	Survey carried out three times each year. No data for Q1.		
NI 195c Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Graffiti	0.33%	0.00%	0.17%	N/A	0.33%	2.17%	1.00%	N/A	0.00%	1.00%	Survey carried out three times each year. No data for Q1.		



PI Code & Short Name	Q2 2013/14	Q3 2013/14	Q4 2013/14	Q1 2014/15	Q2 2014/15	Q3 2014/15	Q4 2014/15	Q1 2015/16	Q2 2015/16	Current Target	Comments	Q2 15/16 vs Q2 14/15	Quarter Performance
	Value	Value	Value	Value	Value	Value	Value	Value	Value				
NI 195d Improved street and environmental cleanliness (levels of litter, detritus, graffiti and fly posting): Fly-posting	0.00%	0.00%	0.00%	N/A	0.00%	0.00%	0.00%	N/A	0.00%	0.00%	Survey carried out three times each year. No data for Q1.		
WL01 No. residual bins missed per 100,000 collections	63.54	65.40	134.20	90.52	87.07	85.20	74.23	81.12	93.34	70.00	Improvement plan attached at Appendix B4		
WL06 Average time taken to remove fly tips (days)	1.07	1.08	1.12	1.12	1.06	1.08	1.09	1.07	1.05	1.09			
WL122 % Vehicle Operator Licence Inspections Carried Out within 6 Weeks	N/A	N/A	N/A	100%	100%	100%	100%	100%	100%	100%			

Notes:

<sup>1</sup> Managed through LCC/BTLS contract. Contractual targets are annual. Quarter targets are provided as a gauge for performance only. Improvement plans are not provided since actions planned to improve performance are discussed and managed through contractual monthly Quality of Service meetings. ICT data and RBS data reflect progress to year end.

<sup>2</sup> TS1: For 2014/15, this replaced BV66a with a simplified calculation. A direct comparison with 2013/14 outturn is therefore not possible, but data is provided for reference/information.

<sup>3</sup> NI157a: For 2014/15, following updated guidance from DCLG, the 13 weeks period is not counted in those cases where a time extension is agreed with the applicant. A direct comparison with previous year quarter outturn is therefore not possible, but data is provided for reference/information.

<sup>4</sup> WL19bii / WL121: Data does not include BTLS seconded staff.

<sup>5</sup> WL18: from Q1 2014/15, Community Resource Centre (CRC) data is no longer included. Data from 2013/14 has been restated without CRC to allow comparison with previous performance.

<sup>6</sup> NI191-192: Data is provided to WLBC with a time lag due to time involved to confirm final figures.

‘NI’ and ‘BV’ coding retained for consistency/comparison although national reporting no longer applies.

Following the annual review of PIs, the following changes to QPIs were approved by Cabinet for 2015/16:

TS1 Rent Collected – target changed to 97% from 99.83%; WL90 % of Contact Centre calls answered – target changed to 91% from 90.6%; WL108 Average answered waiting time for callers – target changed to 30 from 26.25s; NI 191 Residual household waste per household – target changed to 495 from 493.91kg; NI 192 Percentage of household waste sent for reuse, recycling and composting – target changed to 50% from 47.58%; NI 195b Improved street and environmental cleanliness (levels of detritus) – target changed to 5% from 7.33%; NI 195c Improved street and environmental cleanliness (levels of graffiti) – target changed to 1.00% from 1.11%; WL01 missed bins – target changed to 80 from 70; WL08a Number of Crime Incidents & WL\_18 Use of leisure and cultural facilities – reported as data only; WL24 Building Regs within 5 weeks – annual outturn only.

PERFORMANCE IMPROVEMENT PLAN	
<b>Indicator</b>	TS24b - Average time taken to re-let local authority housing (days) - SUPPORTED NEEDS
<b>Reasons for not meeting target</b>  <p>Three 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. Three properties let in Quarter 2 had been empty for over 6 months due to the lack of demand for sheltered accommodation. Letting these properties skews the performance figures.</p> <p>If these were to be excluded the quarters performance would be on target at 28.6 days.</p>	
<b>Brief Description of Proposed Remedial Action</b>  <p>Options Appraisals of sheltered schemes have been commissioned.</p> <p>All investment in Category II sheltered schemes will be considered in light of the Council's Asset Management Plan. Improvements to Evenwood Court, Tanhouse are planned.</p> <p>Facebook is now being utilised to generate demand plus further promotional exercises will be undertaken as appropriate.</p>	
<b>Resource Implications</b> Loss of rental income	
<b>Priority</b> High	
<b>Future Targets</b>	
<b>Action Plan</b>	
<b>Tasks to be undertaken</b>	<b>Completion Date</b>
Options Appraisals	Ongoing
Asset Management Planning	Ongoing
Promotion of low demand schemes	Complete
Declassification programme	Complete

PERFORMANCE IMPROVEMENT PLAN	
Indicator	NI 157b Processing of planning applications: Minor applications NI 157c Processing of planning applications: Other applications
<p><b>Reasons for not meeting target</b></p> <p>This drop in performance reflects a number of factors;</p> <ul style="list-style-type: none"> <li>- A reduced staffing resource as a result of long term sickness absence .</li> <li>- A significant increase in workloads</li> </ul>	
<p><b>Brief Description of Proposed Remedial Action</b></p> <p>We experienced considerable staffing difficulties in Q2 when a member of the team who primarily deals with minor and other applications was on long term sick leave. This coincided with the annual holiday period and a higher level of workload due to the economic upturn. The member of staff has now returned to work and following a phased return has resumed dealing with a full caseload of applications.</p>	
Resource Implications	From within existing budget
Priority	High
Future Targets	
Action Plan	
Tasks to be undertaken	Completion Date
As set out above.	Completed

PERFORMANCE IMPROVEMENT PLAN	
Indicator	WL121 Working Days Lost Due to Sickness Absence
<b>Reasons for not meeting target</b>  <p>The Council's target for 2015/16 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 (FTE). The quarterly outturn for the period Q2 showed an outcome of 2.73 days per FTE. This compares to the Q1 period, which shows an outturn figure of 2.61.</p> <p>All cases continue to be closely monitored and are intensely managed by Service managers, assisted by the HR team. However, there remain a number of long term absence cases, which by their nature, have been complex and difficult to resolve quickly. The HR team and Managers continue to work closely with staff and trade unions to facilitate speedy returns or other solutions, such as exits from the organisation where appropriate.</p>	
<b>Brief Description of Proposed Remedial Action</b> <ul style="list-style-type: none"> <li>• 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</li> <li>• The Council will continue to focus on providing detailed management information to assist managers in identifying all short-term cases of sickness absence which have exceeded the agreed 'trigger' levels, together with all on-going long-term cases of sickness absence.</li> <li>• The HR team will continue to meet with individual Heads of Service, where appropriate, to provide advice and support to ensure managers have the continued skills and confidence to address absence issues appropriately.</li> <li>• The HR team will provide enhanced support in the day to day management of sickness cases, and encourage a robust approach to the use of the existing policy to manage sickness absences.</li> <li>• The Council will continue to work closely with the Occupational Health provider (OH Assist)</li> </ul>	
<b>Resource Implications</b> <p>Timely interventions and practical support from the HR Team and OH Assist will continue to be needed by managers, which can make a real positive difference to attendance levels.</p>	
<b>Priority</b> <p>High</p>	
<b>Future Targets</b> <p>Continue with existing target.</p>	
<b>Action Plan: Tasks to be undertaken</b>	<b>Completion Date</b>
See proposed remedial action (above)	Ongoing

PERFORMANCE IMPROVEMENT PLAN	
<b>Indicator</b>	WL01: missed bins per 100,000 collections
<b>Reasons for not meeting target</b>  Due to a loss of regular drivers (Team Leaders) there was an impact on “local knowledge” in the collection area. During the period 322,349 collections of residual waste took place across the borough, and of the 298 missed bins, 121 (41%) were from the Skelmersdale area, a part of the borough where this local knowledge is particularly beneficial.	
<b>Brief Description of Proposed Remedial Action</b>  The introduction of the in-cab communication system will assist all collection team members that are unfamiliar with a collection round. The system will provide the driver with the opportunity to refer to a collection round and therefore reduce the likelihood of missed collections.  A revision of what constitutes a missed collection should be considered, possibly limiting the reporting period to 24 hours after the day of collection.	
<b>Resource Implications</b>  Purchase of in-cab communications - the funding of the system has been identified and approved.	
<b>Priority</b>  Medium	
<b>Future Targets</b>  Continue with existing performance target.	
<b>Action Plan</b>	
<b>Tasks to be undertaken</b>	<b>Completion Date</b>
Weekly performance monitoring	March 2016





**AGENDA ITEM: 5(g)**

**CABINET: 12 January 2015**

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**Report of: Transformation Manager**

**Relevant Managing Director: Managing Director (Transformation)**

**Relevant Portfolio Holder: Councillor Moran**

**Contact for further information: Ms S Lewis (Extn. 5027)**  
**(E-mail: [sharon.lewis@westlancs.gov.uk](mailto:sharon.lewis@westlancs.gov.uk))**

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**SUBJECT: REVISED EQUALITY OBJECTIVES 2015/18**

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Wards affected: Borough wide

**1.0 PURPOSE OF THE REPORT**

- 1.1 To ask Cabinet to approve the new Equality Objectives 2015-18, together with plans for the future monitoring of these objectives.

**2.0 RECOMMENDATIONS TO CABINET**

- 2.1 That the revised Equality Objectives for 2015-2018, as realigned to the Council Plan 2015-18 at Appendix 3 be approved.

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**3.0 BACKGROUND**

- 3.1 During 2013 specialist equality consultants Social Re:Focus were commissioned to carry out an equality audit, which included:
- Developing equality objectives and equality information (see Appendix 1)
  - Reviewing the Equality Scheme and Equality Impact Assessment process
  - Reviewing how services have responded to consultation and engagement
  - Identifying how equality information is being used in business planning
  - Specific reviews of HR and Procurement policies and procedures

- 3.2 Following the recommendations made during the audit, Social Re:Focus was asked to provide:
- A summary report that explained the key findings for general release,
  - An action plan that identified the tasks needed to build on the review,
  - A programme of training that supports the implementation of key recommendations.
- 3.3 The activities that have been undertaken as part of the equality action plan include:
- Enhancing the use of equality data within decision- making processes;
  - Establishing equality objectives for the Council; refreshing HR policies;
  - Enhancing the opportunity to learn more about customer needs;
  - Embedding equality considerations within business planning cycles;
  - Enhancing the approach to monitoring and evaluation;
  - Using the procurement policies to further the Council's inclusive value;
  - Demonstrating that decision-makers take account of impact.
- 3.5 The updated Equality Action Plan is attached at Appendix 2 for information and is published on the Equality pages of the Council's website along with other equality information.

#### **4.0 CURRENT POSITION**

- 4.1 Council agreed, on 21 October 2015, a new set of values and priorities as detailed in the Council's Plan 2015-18. The Council's current Equality Objectives 2013/15 established as part of the Equality Action Plan noted above, were linked to the former Council priorities. Good progress is being made against these objectives, and members will note that a report relating to the first objective, Financial Inclusion Strategy, features elsewhere on this agenda.
- 4.2 The objectives for 2015/18 have now been reviewed and compared to the new Council priorities. It is suggested that a new set of Equality Objectives, realigned to the Council Plan 2015-18 are agreed. The proposed revision is detailed in Appendix 3 attached.
- 4.2 The progress against the new Equality Objectives will be monitored and progress will be reported, as appropriate.

#### **5.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY**

- 5.1 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.

#### **6.0 FINANCIAL AND RESOURCE IMPLICATIONS**

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



## **7.0 RISK ASSESSMENT**

- 7.1 The adoption of the recommendations contained in this report will assist the Council in continuing to evidence its compliance with the requirements of the Equality Act 2010 and its Public Sector Equality Duty.

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### **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 Objectives 2013/15
2. Summary Action Plan Update November 2015
3. Equality Objectives 2015-18
4. Equality Impact Assessment



## **Appendix 1**

### **West Lancashire Borough Council Equality Objectives 2013/15**

#### **Equality Objective**

To support the development of the financial inclusion strategy and the role of the financial inclusion officer by:

- understanding how tenants might be particularly vulnerable because of one or more of their personal characteristics and planning support to meet these specific needs, including debt and budgeting advice,
- specialised support to benefit claimants with complex needs and identifying cases where specific arrangements need to be in place,
- integrating equality analysis into the Local Support Services Framework for universal credit (and other welfare reform),
- using different communication and delivery channels to meet the specific needs of tenants, including digital inclusion.

#### **Equality Objective**

To support the work of the Local Priorities Group in addressing the causes and effects of ASB by:

- understanding who is most vulnerable to becoming a victim of ASB and developing strategies with them to remove or limit this risk,
- understanding who is least likely to report ASB or seek help and take action to improve their confidence and address their concerns,
- building on the ASBRAC framework, which identifies at risk young people, with a programme of targeted interventions that reflect their specific needs,
- supporting the Working Together with Families programme, in particular reducing the impact of ASB offending behaviour on wider family outcomes.

#### **Equality Objective**

To develop an appropriate labour market initiative(s) within the emerging West Lancashire economic strategy that improve the life chances of residents and have a positive impact on the West Lancashire economy, including:

- understanding which residents might be particularly vulnerable to long-term unemployment because of one or more of their personal characteristics,
- working towards a shared information protocol across local and national partners, such as Job Centre Plus, which allows for fuller analysis of worklessness data and experience,

- looking at how to sustain and embed the good practice within the West Lancs Challenge Project including the tracking of positive outcomes and of missed referrals,
- evaluating the barriers to local people for becoming, and staying, economically active and addressing these within the strategy.

### **Equality Objective**

To further develop the organisational re-engineering (OR) model to allow for the tracking of customer journeys related to specific personal characteristics, or a combination of these, where this is appropriate and helpful:

- building equality analysis in to the OR model in order that relevant customer profiles can be developed and these specific experiences sought,
- supporting those services due to be the subject of future reviews, scheduled or ad hoc, to put appropriate data packages in place before work begins,
- developing relationships with key VCS organisations that support or advocate for vulnerable groups and that can help to fill knowledge gaps.

## Appendix 2

### West Lancashire Borough Council

#### Revised Equality Action Plan 2014 (Updated 18 November 2015)

Theme	What we will do	Who by	When by **	What will happen as a result
<b>Equality Objectives and Analysis</b> Enhance the use of equality data within decision-making processes	Review the capacity to improve the collection and sharing of customer data around protected characteristic	S Walsh	<b>Completed</b>	Legal responsibilities are met and we are using equality analysis to help us meet our priorities and commitments
	Continue to develop data sets to support the delivery of each equality objective	K Warmington S Jackson P Huber A Hill	<b>Completed</b>	
	Learning reviewed annually and shared across council	EDSSG	<b>Completed</b>	
	Objectives reviewed and revised annually and update Published		<b>Completed</b>	
<b>Human Resources</b> Refresh the policy approach to equality amongst managers and staff	Improve and enhance the analysis of employee information that is used and published and reported annually to Service Managers	S Lewis	<b>Completed</b>	Legal responsibilities continue to be met and our staff and managers have enhanced understanding of their responsibilities to customers, the Council and to each other
	Management competencies adapted to include corporate equality values		<b>Completed</b>	
	Continue to develop a Dignity at Work policy to replace the policy statement and procedure for dealing with complaints of harassment or bullying		<b>Completed</b>	
	Provide training for staff and managers on a new Equality Impact Assessment process		<b>Will be completed by March 2016</b>	
	Continue to publish information to meet the specific equality duties (currently equality objectives and equality information in respect of employees and services)		<b>Annually Activity</b>	
<b>Consultation and Engagement</b> Enhance the opportunity to learn more about customer needs	Roll out new community engagement guidance	E Leigh	<b>Completed</b>	We are able to act on the different experiences of citizens by protected characteristic
	Continue to publish revised and enhanced equality groups resource as part of new web pages – contact organisations annually to request updates	E Leigh S Lewis	<b>Completed</b>	
	Continue with annual impact assessment of the results of the Citizens Survey	E Leigh	<b>Annual Activity</b>	
<b>Equality Impact Assessment</b> Embedding within	Develop and refresh the EIA policy and process and include guidance following learning sessions held with key managers	S Lewis	<b>Completed</b>	Continue to ensure that our managers and staff able to meet our

business planning cycles	Build on existing equality analysis in budget setting cycle	M Taylor	<b>Completed</b>	legal responsibilities by using equality analysis in their work
<b>Equality Scheme</b> Enhanced approach to monitoring and evaluation	Formally replace existing 2011-2015 Equality Scheme	S Lewis	<b>Completed</b>	The commitments we have made in respect of equality practices are clear and resources are provided to meet the needs of our staff and managers
	Publish revised and enhanced equality pages, and associated resources, on the Council's internet webpages		<b>Completed</b>	
<b>Procurement</b> Using procurement policies to further WLBC's inclusive values	Review the equalities clause within the standard procurement contract to be more explicit about PSED	J Ryding	<b>Completed</b>	Contractors are able to provide us with an audit trail of how they have met the public sector equality duties
	Review how contracts are monitored in respect of how equality commitments are met		<b>Completed</b>	
<b>Business Planning</b> Demonstrating that decision-makers take account of impact	Implement equality objectives and embed these within business plan	A Grimes	<b>Completed</b>	We have evidence in place that shows how we fully consider the equality impact of the decisions we take
	Refresher briefing for elected members on PSED	J Denning	<b>Will be Completed by March 2016</b>	

\*\*Dates are indicative and may be subject to change

## **Appendix 3**

### **West Lancashire Borough Council**

#### **Equality Objectives 2015-2018**

West Lancashire Borough Council recognises that people who provide and use our services come from diverse backgrounds and have different experiences and needs. We value this diversity and the ways in which it contributes to the richness of life and character of our community.

We will develop commission and deliver services that will help to overcome discrimination and disadvantage. We want every resident and visitor to West Lancashire to be treated fairly and with dignity regardless of age, gender, disability, race, belief and sexual orientation and with respect to their marriage and civil partnership, pregnancy and maternity or gender reassignment status. We will use our position and influence to promote equality in all aspects of community life.

As a public body, West Lancashire Borough Council is subject to the requirements of the Equality Act 2010 and the Public Sector Equality Duty (PSED).

We must, in the exercise of all our functions, have due regard to these three aims:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.

The Equality Act explains that the second aim (advancing equality of opportunity) involves, in particular:

- Removing or minimising disadvantages suffered by people due to their protected characteristics.
- Taking steps to meet the needs of people with certain protected characteristics where these are different from the needs of other people.
- Encouraging people with certain protected characteristics to participate in public life or in other activities where their participation is disproportionately low.

To assist us in doing this we have the following Equality Objectives, which have been developed to complement the key priorities adopted by the Council in the Council Plan 2015- 2018.

The objectives will remain in place for the duration of Council Plan 2015 - 2018, and will be reviewed annually.

## Equality Objectives 2015 to 2018

Council Plan Priority	Equality Objective	What we will do	Lead Officer
<b>Ambitious for Our Economy</b> – retain and grow jobs, increase skills levels and encourage business and wealth.	To support the delivery of appropriate labour market initiative(s) within West Lancashire that improves the life chances of residents and has a positive impact on the West Lancashire economy	<ul style="list-style-type: none"> <li>• Understand which residents might be particularly vulnerable to long term unemployment because of one or more of their personal characteristics.</li> <li>• Work towards sharing information across local and national partners, such as Job Centre Plus, which allows for fuller analysis of worklessness data and experiences.</li> <li>• Look at how to sustain and embed the good practice developed from the West Lancashire Challenge Project into new projects.</li> <li>• Working with businesses and partners to support development and growth whilst matching employment opportunities to skills needs.</li> <li>• Greenshoots – Providing infrastructure for business to grow and develop.</li> <li>• Apprenticeships – Supporting and promoting apprenticeships within both the Council and the wider business community.</li> </ul>	<b>Economic Regeneration Manager</b>
<b>Ambitious for our Environment</b> – enhancing the built and physical environment, and cleanliness and tidy and combat crime and the fear of crime.	To combat crime and fear of crime through tackling anti-social behaviour (ASB)	<ul style="list-style-type: none"> <li>• Understanding who is most vulnerable to become a victim of ASB and developing strategies with them to remove or limit risk.</li> <li>• Understanding who is least likely to report ASB or seek help and take action to improve their confidence and address their concerns.</li> <li>• Building on the ASBRAC framework, which identifies at risk young people, with a</li> </ul>	<b>Environmental Protection and Community Safety Manager</b>



		<p>programme of targeted interventions that reflect their specific needs.</p> <ul style="list-style-type: none"> <li>• Working together with other agencies to support families programme, in particular reducing the impact of Anti- Social Behaviour on communities.</li> <li>• Encouraging the development of premises to be built to standards that limit opportunities for crime and anti- social behaviour to take effect.</li> </ul>	
<p><b>Ambitious for Our Health and Wellbeing</b> - improving the health and wellbeing of local communities</p>	<p>To support the continued development of the financial inclusion strategy and the role of the financial inclusion officer, to improve the financial wellbeing of tenants of the Council's social housing provisions.</p>	<ul style="list-style-type: none"> <li>• The Council invest nearly £3/4 million on altering properties to meet the requirements of either individuals or families who have physical disabilities. This makes their life more manageable and improves the quality of this.</li> <li>• Understanding how tenants might be particularly vulnerable because of one or more of their personal characteristics and planning support to meet these specific needs, including debt and budgeting advice.</li> <li>• Specialised support to benefit claimants with complex needs and identifying cases where specific arrangements need to be in place.</li> <li>• Using different communication and delivery channels to meet the specific needs of tenants including digital inclusion.</li> <li>• Alter properties, because of residents disabilities, to improve the quality of their lives.</li> <li>• Working with community based facilities to improve their accommodation.</li> </ul>	<p><b>Housing Operations Manager</b></p>



# Equality Impact Assessment Form



<b>Directorate: Transformation</b>	<b>Service: Human Resources</b>
<b>Completed by: S Lewis</b>	<b>Date: 18 November 2015</b>
<b>Subject Title: Revised Equality Objectives 2015-18</b>	
<b>1. DESCRIPTION</b>	
Is a policy or strategy being produced or revised:	Yes <i>*delete as appropriate</i>
Is a service being designed, redesigned or cutback:	No
Is a commissioning plan or contract specification being developed:	No
Is a budget being set or funding allocated:	No
Is a programme or project being planned:	No
Are recommendations being presented to senior managers and/or Councillors:	Yes
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty ( <b>Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations</b> ):	Yes
Details of the matter under consideration:	The purpose of the revised Equality Objectives is to realign them to the new Council Plan 2015/18 and to ensure objectives are monitored appropriately.
<i>If you answered <b>Yes</b> to any of the above go straight to Section 3</i> <i>If you answered <b>No</b> to all the above please complete Section 2</i>	
<b>2. RELEVANCE</b>	
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	Yes/No* <i>*delete as appropriate</i>
If <b>Yes</b> , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered <b>Yes</b> go to Section 3</i>	
If you answered <b>No</b> to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	
<b>3. EVIDENCE COLLECTION</b>	
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	The recommendations will impact on the entire Council workforce and the community

	of West Lancashire and as such has an impact on all protected characteristics.
If the work being carried out, relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	See Above.
Which of the protected characteristics are most relevant to the work being carried out?	<i>*delete as appropriate</i>
Age Gender Disability Race and Culture Sexual Orientation Religion or Belief Gender Reassignment Marriage and Civil Partnership Pregnancy and Maternity	Yes Yes Yes Yes Yes Yes Yes Yes Yes
<b>4. DATA ANALYSIS</b>	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	Please note it is considered to potentially have an impact on all protected characteristics.
What will the impact of the work being carried out be on usage/the stakeholders?	It is anticipated that any altered impacts in these areas are envisaged to be positive for the stakeholders and the Council.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	The Council engages with the local Trade Unions on all aspects of amendments or changes to HR policy or practice. Local community consultation takes place when any service changes are implemented on a service by service basis. The actions within the original equality action plan have also been shared with the CVS.
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	Census Data Profile information available on the Council's website Workforce Profile Equality Policies within the Council Equal Pay Audit Trade union consultation CVS consultation
If any further data/consultation is needed and is to be gathered, please specify:	N/A
<b>5. IMPACT OF DECISIONS</b>	

In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	The decision to agree to the revisions of the Equality Objectives and ensure they are monitored appropriately will influence positively on the stakeholders and not have any adverse impact on any particular Protected Characteristic.
<b>6. CONSIDERING THE IMPACT</b>	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	See above in 5.
What actions do you plan to take to address any other issues above?	No further actions on equality impact need to be taken.
<b>7. MONITORING AND REVIEWING</b>	
When will this assessment be reviewed and who will review it?	Equality activities are reviewed annually. EIA's will also be reviewed to ensure there has been no change to the assessed impact on any protected characteristic group.





## **AGENDA ITEM: 5(h)**

**CABINET: 12<sup>th</sup> January 2016**

**EXECUTIVE OVERVIEW AND  
SCRUTINY: 28<sup>th</sup> January 2016**

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**Report of:** Borough Treasurer

**Relevant Managing Director:** Managing Director (People and Places)

**Relevant Portfolio Holder:** Councillor C. Wynn

**Contact:** Marc Taylor (Extn. 5092)  
(E-mail: [Marc.Taylor@westlancs.gov.uk](mailto:Marc.Taylor@westlancs.gov.uk))

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**SUBJECT: GENERAL REVENUE ACCOUNT BUDGET 2016-17**

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Wards affected: Borough Wide

### **1.0 PURPOSE OF THE REPORT**

1.1 To provide a summary of the current General Revenue Account budget position.

### **2.0 RECOMMENDATIONS TO CABINET**

- 2.1 That the financial position for 2016-17 and later years be noted, and consideration given to how a balanced budget can be achieved.
- 2.2 That the Portfolio Holder for Finance be given delegated authority to submit firm proposals to Council on 24<sup>th</sup> February 2016 to enable the budget to be set.
- 2.3 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 28<sup>th</sup> January 2016.

### **3.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW AND SCRUTINY COMMITTEE**

- 3.1 That the budget position be considered and that any comments agreed by the Committee be submitted to the Portfolio Holder for Finance in advance of the Council meeting to be held on 24<sup>th</sup> February 2016.
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#### **4.0 BACKGROUND**

- 4.1 The Council must set a budget before the start of each financial year, and this budget will set out the financial basis for the Council's corporate and service plans. The budget that is set must enable the Council's priorities to be delivered but must also be affordable. In addition it should comply with best practice requirements on budget setting, and must meet statutory and accounting regulations. The Council meeting on the 24<sup>th</sup> February will provide all Members with the opportunity to debate and agree this budget.
- 4.2 The Policy Options report to July Council estimated that there was a projected budget gap of £1,571,000 facing the Council in 2016-17. This budget gap figure reflects the difference between the spending that is required to maintain services at their agreed level and the resources that are expected to be available. At this meeting a number of income, efficiencies and other policy options with a total value of £312,000 were agreed. This then meant that the remaining budget gap that had to be bridged next year was £1,259,000.
- 4.3 The Policy Options report to October Council identified a further £563,000 of efficiencies and additional income that would not have a significant adverse service impact. This included further budget streamlining / base budget review savings, the Digital by Preference initiative, additional income from increasing fees and charges in line with inflation, and the use of a favourable budget variance from 2014-15. This then left a balance of £696,000 of savings to be found and a range of options were identified for consultation that would enable this budget gap to be closed.
- 4.4 The scale of the projected budget gap facing the Council was estimated earlier this year based on the information that was available at that time and after making assumptions about the level of government funding that would be provided. Now that the Local Government Finance Settlement has been published, and the work on producing detailed budget estimates for 2016-17 has been completed, a revised assessment of the budget gap has been calculated.

#### **5.0 LOCAL GOVERNMENT FINANCE SETTLEMENT**

- 5.1 The Local Government Finance Settlement was published in December and provided each local authority with details of the grant funding it would receive from the Government in the next financial year. As expected this settlement included very large reductions in funding, although the scale of these reductions was higher than the projections contained in the medium term financial forecast. The key features in this settlement for 2016-17 included:



- A £809,000 (34%) reduction in core revenue support grant funding to £1,576,000. This was above the £715,000 (30%) reduction that had been projected
  - An increase of £345,000 in New Homes Bonus grant funding based on the net number of additional houses built in the Borough and long term empty properties brought back into use. While this provides significant additional funding it is less than the £443,000 increase that had been projected
  - Additional funding will no longer be provided to Councils that freeze their council tax levels (council tax freeze grant). It had been assumed for planning purposes that the Council would freeze its council tax level next year and consequently would benefit from a grant of around £70,000.
  - Most District Councils can increase their council tax levels by up to 2% without requiring a local referendum. Our Band D Council tax is currently £183.55, and consequently a 1.99% increase would equate to a rise of £3.65 for the year, and would generate an additional £123,000 of income.
- 5.2 The settlement also provided indicative grant details for future years, which show that further grant reductions can be expected in the period up to 2019-20. These figures show that the Council will no longer receive any Revenue Support Grant by 2019-20, and that levels of New Homes Bonus funding will also reduce (subject to consultation). This information will be used to update the Medium Term Financial Forecast and to produce revised estimates of the budget gap facing the Council in future years.

## **6.0 BUDGET POSITION FOR 2016-17**

- 6.1 Draft estimates have been prepared for next year, and are included in the Appendix, that set out a provisional budget for the Council covering all areas of expenditure and income. These estimates are based on rolling forward existing budgets to enable agreed service levels to be maintained. These estimates also include a number of increases to cover standard budget factors including the impact of an estimated 1% national pay increase, contractual increments, and contract inflation in line with contractual agreements. These estimates also incorporate the £312,000 of policy options agreed at July Council and the £563,000 of policy options agreed at October Council that did not require consultation as they would not have a significant adverse service impact. The estimates do not however include the £696,000 of policy options that are currently subject to consultation.
- 6.2 The cost of the base budget uplift has come in lower than expected as a result of a number of factors including contractual inflation uplifts being relatively low as a result of current inflation rates, and a higher level of budget streamlining savings being achieved compared to the original projection. Taking into account all relevant factors, including the finance settlement and the draft estimates, the scale of the remaining budget gap is now £838,000, which is £142,000 more than originally anticipated. There are however a number of budget areas that have still to be finalised including:

- The level of the council tax base and the estimated council tax deficit / surplus position for the year will not be set until the 15<sup>th</sup> January statutory deadline
  - An estimate of the business rates income collectable for next year is currently being prepared based on a Government return (the NNDR1 form). This form was issued just before Christmas and does not have to be submitted until the 31<sup>st</sup> January
- 6.3 The draft estimates will be reviewed to ensure that they are robust for the purposes of the budget calculation in accordance with the requirements of the Local Government Act 2003, and the results of this review will be reported to the February Council meeting.
- 6.4 Through the budget process, Heads of Service have identified a range of new budget issues or pressures for next year that mainly relate to unavoidable cost increases or income reductions. Members will need to carefully consider these proposals (which have not been included in the draft estimates) and determine which items to include in the final budget to meet corporate and service objectives. In line with the approach adopted in the Medium Term Financial Forecast a provision of £125,000 has been allowed for this factor in 2016-17, but its final value will depend on Member decisions.
- 6.5 In looking at finalising the budget for next year consideration will need to be given to a number of different factors including:
- The challenging financial position facing local authorities over the medium term where any budget increases will need to be met by savings elsewhere in the budget
  - The public and stakeholder feedback on the policy options that are currently subject to consultation
  - The acceptance of new budget issues and pressures identified by Heads of Service
  - Changes to fees and charges and the level of the Council Tax
  - The projected favourable variance of £360,000 on the current year's budget identified in the mid year review
  - The scope for additional savings that could be achieved through Management Restructuring, Business Rates pooling, and the Solar PV scheme
  - The Council's Reserves policy
- 6.6 The Group leaders and their financial spokespersons are currently examining in detail various budget options, and the Council meeting in February will provide

an opportunity for each Political Group to put forward proposals that combine both expenditure and the means of funding it and to set the Council Tax.

## **7.0 MEDIUM TERM FINANCIAL POSITION**

- 7.1 Over recent years local authorities in general have met the financial challenges that they have faced due to grant funding reductions. However these challenges are set to increase as financial austerity is expected to continue into the medium term future, and consequently Councils will have to work harder to ensure they stay financially resilient. These ongoing funding reductions are expected to bite harder and deeper in the future, and some authorities may then find that they reach a tipping point in terms of their ability to provide services and meet their statutory duties.
- 7.2 In West Lancashire we are currently in a healthy financial position where there is a projected favourable budget variance in the current year and where proposals are being considered to balance next year's budget. However the medium term financial picture remains very challenging, and 2018-19 in particular looks like it could be an exceptionally difficult year. The Council's Medium Term Financial Forecast will be updated to reflect the details of the finance settlement and other recent developments. This forecast will then inform the Policy Option process, which will set out how these financial challenges will be addressed, including a report to the Council meeting in July 2016.

## **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 consideration and reporting of the budget estimates is part of the budgetary management and control framework that is designed to minimise the financial risks facing the Council. This process is resource intensive for both Members and Officers but ensures that a robust and achievable budget is set.
- 9.2 There are number of financial factors that will influence next year's budget that are unavailable at the time of producing this report. Estimates for these areas will be produced in January in line with statutory requirements, and will be included in the final budget setting report to Council in February.

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### **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. A formal Equality Impact Assessment will be produced when the Council agrees the budget at its meeting in February.

### **Appendices**

Draft GRA Estimates (***TO FOLLOW***)



**AGENDA ITEM: 5(i)**

**CABINET: 12 January 2016**

**EXECUTIVE OVERVIEW &  
SCRUTINY COMMITTEE:  
28 January 2016**

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**Report of: Borough Treasurer**

**Relevant Managing Director: Managing Director (People and Places)**

**Relevant Portfolio Holder: Councillor C Wynn**

**Contact for further information: Liz Fearn (Ext. 5605)  
(E-mail: [liz.fearn@westlancs.gov.uk](mailto:liz.fearn@westlancs.gov.uk))**

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**SUBJECT: MEDIUM TERM GRA CAPITAL PROGRAMME**

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Wards Affected: Borough wide

**1.0 PURPOSE OF THE REPORT**

- 1.1 To set out details on the GRA medium term capital programme position for the next 3 years.

**2.0 RECOMMENDATIONS TO CABINET**

- 2.1 That the medium term financial position be noted, and consideration given to how a balanced capital programme can be achieved.
- 2.2 That the Portfolio Holder for Finance be given delegated authority to submit firm proposals to Council on 24<sup>th</sup> February 2016 to enable the capital programme to be set.
- 2.3 That call in is not appropriate for this item as it is to be submitted to the Executive Overview and Scrutiny Committee on 28<sup>th</sup> January 2016.

**3.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW AND SCRUTINY COMMITTEE**

- 3.1 That consideration be given to how a balanced capital programme can be set and that any comments agreed by the Committee be submitted to the Portfolio Holder for Finance in advance of the Council meeting to be held on 24<sup>th</sup> February 2016.
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## 4.0 BACKGROUND

- 4.1 The Council has a medium term rolling capital programme, which is reviewed and updated on a regular basis. As part of the budget setting process, a programme covering the next three years will need to be agreed by Council at its meeting in February 2016. This report concentrates on the general capital programme and does not consider the HRA capital programme which is determined through a separate process.

## 5.0 CAPITAL RECEIPT FUNDING

- 5.1 The main source of Council funding available to support the general capital programme are receipts from the sale of assets, and at the start of this financial year there were £2.383m of receipts being held for this purpose. The number and value of assets sold each year can vary significantly depending on a range of factors. In particular Council House sales under Right to Buy (RTB) legislation can be volatile depending on the state of the economy and changes in government rules.
- 5.2 Table 1 shows details of sales by number and value in recent years. Part of the proceeds from the sale of Council Houses must be repaid to the Government, and the usable sale proceeds shown below reflect the amount available for new capital spending after taking these payments into account.

<b>Table 1 – Asset Sale Proceeds</b>				
Year	Number of Sales		Usable Sale Proceeds £000	
	Council Houses	Other Assets	Council Houses	Other Assets
2007/08	91	4	1,181	8
2008/09	27	2	326	158
2009/10	12	2	174	43
2010/11	18	2	226	97
2011/12	10	0	123	0
2012/13	25	3	240	102
2013/2014	48	4	307	29
2014/2015	35	4	300	273
2015/2016 (mid year)	15	2	150	27

- 5.3 Taking this position into account and projecting forward on a prudent basis it is anticipated that there will be receipts of £1.080m generated from an estimated average 30 RTB Council House sales per year over the next 4 years, as well as £0.875m of receipts from land sales including the sale of the Westec House site.
- 5.4 In addition to the funding shown above the Council is also able to retain a further share of the proceeds from RTB sales under government regulations in relation to an "Allowable Debt" factor. Part of this funding is set aside for the repayment of Housing debt and the remaining element is then available for new capital spending. It is estimated that this should enable new spending of £0.84m over the next 4 years in addition to the figures shown above.

- 5.5 Taking all of these factors into account, it is anticipated that there will be capital receipts of £2.795m generated over the 4 year period 2015-16 to 2018-19 that will be available to fund new capital expenditure. These projections are potentially subject to significant variation as, for example, a single large asset sale could produce a large receipt and the level of future house sales is difficult to predict. However, in looking at medium term financial plans it is best practice to use a prudent approach when estimating future available resources. The assumptions underlying these projections have been based on discussions with colleagues in Housing and Estates and the estimates will be updated on a regular basis to ensure they take account of new developments.

## **6.0 SPENDING REQUIREMENTS**

- 6.1 The Council's current 3 year programme covers the period 2015/2016 to 2017/2018. Consequently, in addition to current year budgets there are also indicative spending approvals in place for the following two years. It should be recognised, however, that as we operate a medium term capital programme, approvals that have been given for future years are indicative allocations only that are potentially subject to change.
- 6.2 The current value of spending approvals to be funded from capital receipts (based on decisions made at the Council meeting in December 2015) is £4.891m which is analysed in Appendix 1. In addition to the existing scheme approvals it is our normal practice in developing the rolling medium term programme to include provisional allocations for the next year of the programme (in this case 2018/2019). Consequently, Appendix 1 also contains provisional allocations of £0.802m for ongoing capital schemes which typically receive funding each year.

## **7.0 OVERVIEW**

- 7.1 Table 2 overleaf summarises the current position in terms of estimated capital receipt funding and spending requirements, and the bottom line position is that there is an estimated funding shortfall of £515,000 over the programme period. There are a number of reasons for this shortfall including the fact that the level of RTB Council House sales has slowed down over the last 18 months. This funding shortfall is before any consideration is given to potential new capital schemes that have been identified by Heads of Service. Appendix 2 provides a summary of these policy options, which in total comes to £217,000.
- 7.2 Given this position there will be a need to review and realign the programme as has been the case in most recent budget rounds. However this can be done over a medium term time scale as there are sufficient receipts already held by the Council to fund the programme for a considerable period of time. There is though an ongoing problem in that capital spending has continued at historical levels while capital receipts have dropped considerably.

<b>Table 2 –General Capital Receipts Funding Available</b>	<b>£000</b>
Usable capital receipts held in April 2015	2,383
Estimate of receipts that will be generated between April 2015 and the end of the 2018/2019 financial year	2,795
Existing spending approvals covering period 2015/2016 – 2017/2018	-4,891
Provisional spending approvals for 2018/2019	-802
<b>Total Funding Shortfall</b>	<b>-515</b>

## **8.0 WAY FORWARD**

- 8.1 There are a number of options that can be used to realign the programme that essentially involve either reducing the level of current and planned future spending to match the available resources, re-profiling schemes into later years, or finding alternative sources of funding. Members will need to carefully consider what proposals to include in the final budget to meet corporate and service objectives but also to ensure a balanced overall financial position.
- 8.2 There are a number of factors that can be considered or given regard through this process including:
- The Council has been very successful in attracting external capital investment over many years, although opportunities for government grant funding are now more limited than in the past
  - The Local Land Auction Pilot is actively being pursued, which should deliver sufficient funding to enable the Skelmersdale Town Centre Vision project to proceed
  - The priority that is attached to the potential new capital schemes set out in Appendix 2
  - Prudential borrowing could be assessed as a mean of providing additional capital resources. This type of borrowing can be used to finance investment in long term fixed assets where it is prudent, affordable and sustainable. If the Council was to borrow £1m for 25 years, it would increase revenue costs by £75,000 per annum as a result of interest and minimum revenue provision requirements. The costs associated with this borrowing would then need to be factored into the revenue budget, and this could be difficult to achieve given the GRA's challenging medium term financial position.
  - It would also be feasible to consider using part of the current year's projected favourable budget variance on the GRA as a potential funding source for new



capital schemes. This approach would though need to be considered in conjunction with the revenue budget position for next year.

- The review of Council reserves that is currently taking place may enable funding to be reallocated to new or existing capital schemes
- The scope to develop new capital schemes funded through Section 106 Agreements (where there was a balance of £1.865m in April 2015) or Community Infrastructure Levies (where there was a balance of £0.037m in April 2015), which are subject to separate processes
- The draft Leisure Strategy, which is currently subject to public consultation, may result in potential new additional capital spending requirements being identified
- Government proposals that may require local authorities to sell off their high value council house properties when they become empty

8.3 Officers will work with each Political Group during the budget process to review the available options. The Council meeting will then provide an opportunity for each Political Group to put forward proposals to produce a balanced capital programme.

## **9.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY**

9.1 The proper management of the Council's asset base enhances service delivery. Assets consume a high level of resources both in terms of capital investment and revenue maintenance and having a proper strategy in this area ensures that the capital base can shape the future direction of the Council.

## **10.0 RISK ASSESSMENT**

10.1 The level of capital receipts generated by asset sales is a significant risk to the future development of the programme. If receipts exceed the projections contained in this report, it would enable additional schemes to be developed. However, if receipts are below the projections, it would require reductions to be made.

10.2 Some schemes in the Programme are dependent on external partner funding. To minimise the risk of funding not being available, such schemes will only begin once their funding details have been finalised.

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### **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 from this report 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 - Capital Receipt Funding Approvals

Appendix 2 – Potential new capital schemes

## APPENDIX 1 - CAPITAL RECEIPT FUNDING APPROVALS

SERVICE AND SCHEME	Current Allocations				Provisional Allocation
	2015/2016	2016/2017	2017/2018	Total	2018/2019
	£'000	£'000	£'000	£'000	£'000
<b><u>Corporate Services</u></b>					
Enviroment / Town and Village Centre Fund	287	100		<b>387</b>	
Unallocated Funding	384			<b>384</b>	
<b><u>Financial Services</u></b>					
Parish Capital Schemes	35	45	30	<b>110</b>	30
<b><u>Transformation</u></b>					
I C T Infrastructure	50	50	50	<b>150</b>	50
ICT Development Programme	395	100	100	<b>595</b>	100
Website Contract Management System	12	20		<b>32</b>	
<b><u>Community Services</u></b>					
Playground Improvements	129	65	30	<b>224</b>	30
Beacon Park	19			<b>19</b>	
Chapel Gallery	25			<b>25</b>	
Parks and open spaces	11			<b>11</b>	
Works to East Quarry Wall	75			<b>75</b>	
Skelmersdale Allotments	50			<b>50</b>	
Abbey Lane Playing fields	100			<b>100</b>	
Leisure Trust	228	228	228	<b>684</b>	228
CCTV	100	75		<b>175</b>	
Park Pool		150		<b>150</b>	
<b><u>Community Services - Housing</u></b>					
Housing Renewal Grants	65	100	100	<b>265</b>	100
Disabled Facilities Grants	89	100	100	<b>289</b>	100
<b><u>Planning Services</u></b>					
Free Tree Scheme	2			<b>2</b>	
Preservation of Buildings at risk	2			<b>2</b>	
Planning System Upgrade	15			<b>15</b>	
S106 / CIL Database	13			<b>13</b>	
Replacement Scanner	30			<b>30</b>	
Implementation of OR recommendations	29			<b>29</b>	
Skem Town Centre Vision	11			<b>11</b>	
<b><u>Corporate Property</u></b>					
Corporate Property Investment Programme	217	164	164	<b>545</b>	164
Improved facilities at Robert Hodge centre	40			<b>40</b>	
<b><u>Housing and Regeneration</u></b>					
Culvert Debris Screens	14			<b>14</b>	
Affordable Housing	70	395		<b>465</b>	
<b>Total Programme</b>	<b>2,497</b>	<b>1,592</b>	<b>802</b>	<b>4,891</b>	<b>802</b>



## APPENDIX 2

POTENTIAL NEW CAPITAL SCHEMES	2016-17 £000	2017-18 £000	2018-19 £000
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HIGH PRIORITY ITEMS			
<b>Corporate Services</b>			
1 Replacement Customer Relationship Management (CRM) System and Contact Centre telephony system - net funding requirement from capital receipts (with ongoing revenue impact)	130	0	0
<b>Corporate Property / Street Scene</b>			
1 Robert Hodge Centre works	13	0	0
<b>Total</b>	<b>143</b>	<b>0</b>	<b>0</b>

OTHER ITEMS			
<b>Community Services</b>			
1 Chapel Gallery 2nd Phase Improvements - total cost of £85,000 less £60,000 Arts Council grant (with ongoing revenue impact)	25	0	0
2 Beacon Park Footpath	10	0	0
3 Coronation Park Entrance Gates	15	0	0
4 Richmond Park Changing Rooms	15	0	0
<b>Planning</b>			
1 Free tree scheme (continuation of existing provision)	3	3	3
<b>Total</b>	<b>68</b>	<b>3</b>	<b>3</b>

<b>GRAND TOTAL OVER 3 YEARS</b>	<b>217</b>
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## **AGENDA ITEM: 5(k)**

**CABINET: 12<sup>th</sup> January 2016**

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**Report of: Assistant Director Community Services  
Assistant Director Housing and Regeneration**

**Relevant Managing Director: Managing Director (People and Places)  
Managing Director (Transformation)**

**Relevant Portfolio Holders: Councillor Y. Gagen  
Councillor I. Moran**

**Contacts for further information: Mr S. Kent (Extn. 5169)  
(E-mail: [stephen.kent@westlancs.gov.uk](mailto:stephen.kent@westlancs.gov.uk) )  
Mrs R. Kneale (Extn. 2611)  
(E-mail: [rachel.kneale@westlancs.gov.uk](mailto:rachel.kneale@westlancs.gov.uk) )**

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**SUBJECT: RICHMOND PARK**

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Wards affected: Burscough wards.

### **1.0 PURPOSE OF THE REPORT**

- 1.1 To consider a request from Burscough Richmond Football Club for revised arrangements for the club's use of changing rooms and a football pitch at Richmond Park, Burscough.

### **2.0 RECOMMENDATIONS**

- 2.1 That the Assistant Director Community Services be authorised to enter into a new 25 year lease with Burscough Richmond Football Club in relation to the changing pavilion at Richmond Park, Burscough (shown edged red on the plan at Appendix 1 to this report).
- 2.2 That the existing licence with the club on the football pitch at Richmond Park be extended to run concurrently with the new lease.
- 2.3 That a community use agreement for the changing pavilion and pitch area be developed as part of the lease/licence process.

- 2.4 That to give effect to the arrangements at 2.1, 2.2 and 2.3 the Assistant Director Community Services be authorised to conclude the termination of the existing lease and negotiate the terms of, and complete, the grant of a new lease and community use agreement with Burscough Richmond Football Club, subject to any necessary statutory consultations being undertaken and consents being obtained. This authorisation to include the advertising of the disposal of the public open space to enable the licence to proceed.
- 

### **3.0 BACKGROUND**

- 3.1 Burscough Richmond Football Club have played at Richmond Park since just after the park was opened in the 1960's. The Council has supported their development throughout this time which has led to the club having an increasingly successful local team.
- 3.2 In 2009, as part of a programme of park improvements, the Council demolished the old changing rooms on the park and constructed new changing rooms alongside the bowling green. This new changing pavilion also includes a community room for the use of the club and other community groups, including bowling clubs.

### **4.0 CURRENT POSITION**

- 4.1 The Club is currently looking for promotion to a higher league, and are investigating external funding with the Football Foundation for upgrading the changing pavilion before they can move up. During this process they realised that their lease still relates to the old changing rooms. They have now requested that the old lease be replaced and a lease be granted for the new pavilion, and have asked that this new lease be for a term of 25 years to support future funding bids
- 4.2 They have also requested that the licence they have to use the football pitch, which currently has 8 years to run, is extended to run concurrently with the new lease.

### **5.0 PROPOSALS**

- 5.1 This Club has a long history of playing at Richmond Park and the Council has a very good working relationship with them. It is proposed therefore that a new lease is negotiated with the club for the changing pavilion, for a term of 25 years.
- 5.2 It is also proposed that the licence the club holds on the pitch is extended to run concurrently with the building lease.
- 5.3 It is also proposed that as the pavilion has a community room available for wider community use, and the pitch is also part of the public open space that is Richmond Park, that a community use agreement is included as part of the clubs new lease/licence arrangements.



- 5.4 The alternative would be not to grant the lease. That, however, would limit the Club's ability to attract funding and leave the Club without an interest in the new pavilion.

## **6.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY**

- 6.1 The project will support the Council's strategic aims in respect of improving access to quality facilities, providing facilities to improve the health and quality of life of the community.
- 6.2 The community use agreement for the site will allow wider involvement from the local community.

## **7.0 FINANCIAL AND RESOURCE IMPLICATIONS**

- 7.1 Establishing these new or extended agreements will allow the club to access external funding to enable them to undertake the improvement works necessary to satisfy requirements for promotion.
- 7.2 The lease on the pavilion will involve the Club taking on a role of maintaining internal fixtures and fittings, whilst the Council continues to maintain the fabric of the building. The Club will also take on the maintenance of the football pitch during the playing season. Both of these issues will result in budget savings to the Council.
- 7.2 The cost of establishing the new agreements will be borne by the club, including the cost of advertising the disposal of the public open space.

## **8.0 RISK ASSESSMENT**

- 8.1 The main risk associated with this proposal would be the loss of opportunity if the Council wished to use the land and facilities for other purposes. As this land is classified public open space and the pavilion was funded for community recreational purposes this would seem to be an acceptable risk.

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### **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 1 – Plan of new changing pavilion

Appendix 2 – Equality Impact Assessment



Equality Impact Assessment

<b>Equality Impact Assessment Form</b>		
<b>Directorate: Community Services</b>		<b>Service: Leisure, Cultural &amp; Arts</b>
<b>Completed by: Stephen Kent</b>		<b>Date: 23<sup>rd</sup> November 2015</b>
<b>Subject Title: Richmond Park</b>		
<b>1. DESCRIPTION</b>		
Is a policy or strategy being produced or revised:	No	
Is a service being designed, redesigned or cutback:	No	
Is a commissioning plan or contract specification being developed:	No	
Is a budget being set or funding allocated:	No	
Is a programme or project being planned:	No	
Are recommendations being presented to senior managers and/or Councillors:	Yes	
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty ( <b>Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations</b> ):	No	
Details of the matter under consideration:	Request for changes to lease and licence currently held by Burscough Richmond Football Club for Richmond Park, Burscough	
<i>If you answered <b>Yes</b> to any of the above <b>go straight to Section 3</b></i> <i>If you answered <b>No</b> to all the above <b>please complete Section 2</b></i>		
<b>2. RELEVANCE</b>		
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	<i>*delete as appropriate</i>	
If <b>Yes</b> , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered <b>Yes</b> go to <b>Section 3</b></i>		
If you answered <b>No</b> to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>		
<b>3. EVIDENCE COLLECTION</b>		
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	Local football club and local community	
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	Local football club and local community	

Which of the protected characteristics are most relevant to the work being carried out?	
Age	Yes
Gender	No
Disability	No
Race and Culture	No
Sexual Orientation	No
Religion or Belief	No
Gender Reassignment	No
Marriage and Civil Partnership	No
Pregnancy and Maternity	No
<b>4. DATA ANALYSIS</b>	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	Land and changing rooms are currently leased/licenced to Burscough Richmond Football Club, but are also used by the wider community.
What will the impact of the work being carried out be on usage/the stakeholders?	Stakeholders will have greater security of tenure which will be used to release external grant funding.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	Club require improvements to changing facilities. This process will assist their grant bids.
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	None
If any further data/consultation is needed and is to be gathered, please specify:	
<b>5. IMPACT OF DECISIONS</b>	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	None
<b>6. CONSIDERING THE IMPACT</b>	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	Any impacts will be monitored by the Club and Council and dealt with accordingly
What actions do you plan to take to address any other issues above?	Liaison with Club and local community through the Parish Council
<b>7. MONITORING AND REVIEWING</b>	
When will this assessment be reviewed and who will review it?	November 2016. Reviewing officer – Stephen Kent



## **AGENDA ITEM: 5(I)**

**CABINET: 12<sup>th</sup> January 2016**

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**Report of: Assistant Director Housing and Regeneration**

**Relevant Managing Director: Managing Director (Transformation)**

**Relevant Portfolio Holder: Councillor J. Patterson**

**Contact for further information: Mrs L. McGarry (Extn. 5233)**  
**(E-mail: [leigh.mcgarry@westlancs.gov.uk](mailto:leigh.mcgarry@westlancs.gov.uk))**

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**SUBJECT: COUNCIL TENANTS' FINANCIAL INCLUSION STRATEGY (HOUSING & REGENERATION)**

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Wards affected: Borough wide

### **1.0 PURPOSE OF THE REPORT**

1.1 To approve the Council Tenants' Financial Inclusion Strategy.

### **2.0 RECOMMENDATIONS**

- 2.1 That the Council Tenants' Financial Inclusion Strategy at Appendix 1 be approved.
- 2.2 That the results of the consultation exercise and the revisions to the draft Council Tenants' Financial Inclusion Strategy be noted.

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### **3.0 BACKGROUND AND CURRENT POSITION**

- 3.1 Financial Inclusion is a key part of the Council's plan for improving the health and wellbeing of our local communities and will contribute towards our ambitions for a strong local economy. A multi-agency Universal Credit Task Group has been working to minimise the impact of Universal Credit (UC) on affected households within West Lancashire by improving pathways to employment and training and offering personal budgeting support to tenants.
- 3.2 The aim of the Council Tenants' Financial Inclusion Strategy is to support our most vulnerable and financially excluded tenants to manage better financially,

enabling them to play a full part in modern society. It has been found that tenants in social housing are disproportionately affected by financial exclusion and that they make up around 60% of all financially excluded people, and so the Financial Inclusion Strategy is drafted primarily to target West Lancashire Borough Council housing tenants, and much of the research informing the strategy has used this demographic as its base. However, the benefits of implementing the actions within the strategy will be felt by residents borough-wide. The advice services provided by the Council and the opportunities brought about through our work on Economic and Digital development and improvements will be available to all residents. It has also been found that financial exclusion can affect a whole community, rather than just individuals, so it is vital that we support our communities by tackling the problem and investing in solutions to resolve the issues faced by those experiencing financial exclusion.

3.3 A draft Council Tenants' Financial Inclusion Strategy was presented to Cabinet on 15<sup>th</sup> September 2015, for Cabinet to approve the draft for wider consultation. The Council Tenants' Financial Inclusion Strategy is targeted at our most vulnerable and financially excluded tenants to support them to manage better financially, and as such it will help ensure that those affected by financial exclusion receive the right advice and support to retain their home and quality of life without experiencing disproportionate financial pressure. The strategy will also link into any plans the Council develop to assist residents of the Borough, and has specific links with the Digital Inclusion Strategy to target tenants most in need to ensure they have access to channels and advice that will maximise their income.

3.4 Given the multi-faceted nature of the strategy, it was considered essential to allow residents, partner organisations and stakeholders to have the opportunity to comment on the Strategy and provide feedback to us to inform the final draft of the Strategy. We formally invited consultation responses from 69 different organisations. A full list of groups consulted with is attached at Appendix 2. In addition to this we published the draft Strategy on the consultation page of our website to invite further responses. We received detailed responses from two of the organisations we wrote to inviting comment, and a further response from another organisation. We have revised the Strategy in response to the responses received, and officers have also made further improvements in addition to this. The feedback received was very supportive. A summary of responses received and revisions made is listed below:

Organisation	Comment	Amendments made
SW Lancs Independent Community Advice Network	Strategy welcomed. Identified that the strategy is lacking information on fuel poverty and its impact on financial wellbeing.	Included reference to energy efficiency in Strategic Aim 6 (page 8) and included information on fuel poverty initiatives and services the council has in place (page 14). Also added an action relating to optimising funding for fuel poverty initiatives in the action plan (page 19).
West Lancs Ark	Positive feedback noting that the issues raised mirror those experienced by the	Action added to the Action Plan to conduct specific awareness raising and take-up campaigns

	groups' clients, including the impact of welfare reform. Raised issues regarding the complex nature of application forms and the formality of automated letters, the wording of which can be worrying for the recipient. Access to training was raised as an issue, as was access to IT equipment and computer literacy.	for groups on low incomes in response to concerns regarding the impact of welfare reform (page 17). A response was sent to the group giving details of some of the services we provide so that this information can be shared with their clients. This includes assistance with filling in forms, a review of our standard / automated letters, advice and assistance from our financial inclusion officer for tenants looking for work and pre-tenancy work with new tenants and additional support if we are unable to house them. We also directed the group to the computers available at community centres and referenced the digital inclusion strategy including a copy of the strategy.
Lancashire Community Finance	The group were concerned to note that while highlighting other financial solutions such as credit unions, the strategy failed to acknowledge that Lancashire Community Finance have been providing fairly priced loans and free money education to financially excluded tenants and are a not-for-profit community lender.	Redrafted the strategy to read "tenants and applicants will have other financial solutions available to them e.g. credit unions, community finance organisations and other low cost lenders" (page 11)
Additional changes made by officers		
Strategy has been set as a three year strategy, whereas previously the strategy had no end date.		Page 1
The council's vision and values have been updated.		Page 3
Information provided in the strategy regarding how it will be reviewed and monitored to ensure that it is having a positive impact and noting that feedback will be provided to Cabinet as necessary. Performance indicators will be developed to support this process.		Page 16

#### 4.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

- 4.1 Implementation of the Council Tenants' Financial Inclusion Strategy will have significant positive impacts for the sustainability of the Council's housing tenancies.

## **5.0 FINANCIAL AND RESOURCE IMPLICATIONS**

- 5.1 The Council Tenants' Financial Inclusion Strategy will support the Council's ability to collect revenues. This is particularly relevant for the Housing Revenue Account (HRA) and could have a major impact on the HRA Business Plan.

## **6.0 RISK ASSESSMENT**

- 6.1 The development of the Council Tenants' Financial Inclusion Strategy will mitigate against the loss of rental income to the HRA and changes brought about by Welfare Reform. These wider changes have been through a risk assessment process and are reported as a key risk to Cabinet.

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### **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 set out at appendix 3 to this report.

### **Appendices**

Appendix 1 - Council Tenants' Financial Inclusion Strategy  
Appendix 2 – Consultation Groups  
Appendix 3 - Equality Impact Assessment



# Council Tenants' Financial Inclusion Strategy

2015-2018

Author:	Project Support Manager
Owner:	Bob Livermore
Date created:	January 2016
Next review date:	January 2017

## Why do we need a Financial Inclusion Strategy?

Too many of our residents are excluded from, or are unable to engage with, the financial services necessary to play a full part in modern society: managing money, absorbing financial shocks and planning and providing for the future. The Financial Inclusion Commission defines a financially inclusive society as “one in which financial services are accessible to all, easy to use and meet people’s needs over their lifetime. Financial inclusion also means that people have the skills and motivation to use financial services, and to benefit meaningfully from them.”

Financial exclusion is a problem for many households. Financial services are an essential part of everyday life. People need to manage day-to-day financial transactions, such as receiving income, paying bills and buying goods. They may also need to meet one-off expenses, such as family holidays and Christmas expenses or to meet the need of less predictable expenses, such as burglary or white goods breaking down.

If people experience difficulty accessing and using financial services it can mean that they are stopped from fully participating in society and may have to pay a ‘poverty premium’, for example not being able to access cheaper deals on utilities (which are usually linked to direct debit payments which can only be made with a bank account), or experiencing difficulty accessing online deals and comparison tools. Exclusion from affordable loans leaves people who need a loan with no option but to use high-interest credit. Without a bank account, individuals using agencies to cash cheques may be charged 7-9% of the value of the cheque, plus a transaction fee. These individuals would also not be able to obtain contract mobile phones, and would instead have to rely upon pay-as-you-go phones with more expensive usage fees. Financial exclusion might make it difficult for people to move into work, as many employers will only pay wages into a bank account. It may also be the case that those who have accumulated high debts face the risk that their workplace earnings will be pursued by creditors.

This has knock-on effects on a person’s mental wellbeing as the consequences of problem debt can be stress, depression and a sense of insecurity. There are also social costs of feeling excluded from mainstream society. Financial exclusion removes choices and opportunities from families and communities and is known to exacerbate poverty.

Tenants in social housing are disproportionately affected by financial exclusion and it is estimated that they make up around 60% of all financially excluded people. The Chartered Institute for Housing (CIH) has stated that “The housing sector is in a unique position to help financially excluded people. Housing organisations are trusted intermediaries for tenants and have knowledge of and access to a large number of financially excluded households. Therefore the housing sector should tackle financial exclusion; this should be done in a strategic, evidence-based way which is embedded across the whole organisation.”

Financial exclusion is not just an individual problem. A whole community can suffer as a result of under-investment in financial services and the wider issues which are caused or contributed towards by financial exclusion. It is therefore important that, as a local authority and housing provider, we prioritise tackling financial exclusion and invest in solutions to resolve the issues facing our communities.

The Council's vision is:

~~"To be a council to be proud of — delivering services that are lean, local and fair~~which is ambitious for West Lancashire".

The Council's Values:

~~We will deliver our vision by continuing to be an innovative organisation which:~~

- ~~— Prioritises customers and the services that are most important to quality of life~~
- ~~— Works as one council to provide a joined up approach~~
- ~~— Is open and accountable in the way that it makes decisions~~
- ~~— Develops and values employees~~
- ~~— Promotes equality and diversity, and~~
- ~~— Works in partnership to benefit the Borough~~
- Enterprising – being innovative and creative, delivering lasting improvements
- Inclusive – working in partnership to benefit West Lancashire, and being open and involving in the way decisions are made
- Equality – promoting equality and reducing inequality
- One Council – adopting a co-ordinated approach
- Caring – valuing and developing employees

The Housing and Regeneration Service vision is:

"To be a top performing landlord in an economically vibrant West Lancashire".

This is supported by 6 aims:

- Customers first
- Business growth and regeneration
- Driving value for money
- Employee engagement (people)
- Community focus
- Quality homes

The implementation of this Strategy will help us to achieve a number of our aims, and ultimately help us to realise our vision of being a "top performing landlord in an economically vibrant West Lancashire".

## **Tenant Profile – who is this strategy targeted towards?**

One of the fundamental requirements for delivering services to our customers in a more efficient and effective way is to understand more about West Lancashire Borough Council tenants.

The Mosaic Public Sector (socio-demographic segmentation) tool can be used to understand the demographic, financial and lifestyle attributes of our tenants. It combines extensive data sources (e.g. Electoral Role, DVLA, Shareholders Register, PAF, Land Registry, Lifestyle Surveys) with Public and Private sector overlay data, such as British Crime Survey, Hospital Episode Statistics, MORI Financial Survey, and British Market Research Bureau TGI Survey, to improve our understanding of our tenants.

Housing and Regeneration worked with Experian to gather Mosaic data. This was then overlaid with data already held by the service area including demographic data, surveys, feedback from focus groups and consultation exercises, service usage data, and 'complaints, compliments and comments'. This resulted in the creation of ten bespoke segments that share distinguishing characteristics or profiles and provided us with a comprehensive understanding of the tenants making up those segments. This provides the foundation for delivering better and more accessible services to our customers.

Customer segmentation data gives us further insight into the issues causing financial exclusion for WLBC tenants. It allows us to identify groups of tenants who are most susceptible to financial exclusion and the likely key drivers of financial exclusion for those tenants.

Of the 10 segments identified for West Lancashire Borough Council tenants, six have issues which make them susceptible to financial exclusion or to experiencing financial difficulties, and three of these are a particular priority as they are facing such levels of financial difficulty that they are struggling to pay their rent. As well as the negative impact on the individual families concerned, this also has an impact on our wider tenant base as there is less money available for us to deliver services and to make investments in the property portfolio. It also increases the risk of communities becoming less sustainable, as tenants move on from unaffordable properties. These groups are described in more detail below.

#### *High Priority Tenant Segments:*

##### **Segment 7: Vulnerable Young Families Reliant on Benefits**

Segment 7 is comprised of vulnerable young families on low incomes. They are found living in semi-detached houses or terraces, and are often single parent households. Unemployment is high and many are reliant on benefits. Segment 7 households are the second most likely to be in arrears. This group is one of the most deprived in West Lancashire, and the most likely to have a CCJ. Incomes are low, unemployment is an issue and many residents are struggling to manage financially. Many people are recipients of benefits, such as Job Seekers Allowance and Lone Parent Benefit. Of all the West Lancashire segments, residents of Segment 7 are the least likely to have a direct payment account, and as a result are the least likely to pay their rent by direct debit.

##### **Segment 5: Ethnically Diverse Young Tenants**

Segment 5 is comprised of very young singles and families living in terraced houses. Although residents in this segment are often struggling financially, they are more typically found renting privately rather than relying on the council for accommodation. Segment 5 tends to be quite ethnically diverse, and tenants are unlikely to have lived in their homes for very long. Adults in this segment are likely to be in employment, although some are full-time students. Those who are in employment tend to be at the beginning of their careers and so they are on only average salaries at present. However, this group are unlikely to be in receipt of benefits, which may explain why these households are the most likely of all segments to be in rent arrears. Tenants in this group are more likely to have a direct payment account, so do not adhere to the definition "financially excluded". However, large numbers of individuals within this group will have no access to such an account, and due to this the other difficulties experienced by them are likely to be exacerbated.

#### Segment 6: Very Young Singles on Low Incomes

Segment 6 is the youngest of all West Lancashire segments, and consists of ethnically diverse singles on very low incomes. Households in this segment are unlikely to have children and the majority of residents live in flats. Tenants in this segment are the most transient of any segment. Segment 6 is one of the poorest segments, with notable levels of unemployment. As a result benefit uptake is above average in this segment, in particular Housing Benefits and Job Seekers Allowance. Those that are in employment are likely to be in routine occupations. These are people who are unlikely to have any savings and are struggling on their income. Of all West Lancashire segments, segment 6 tenants are one of the least likely to pay their rent by direct debit. Tenants in this group are as likely as other tenants to have access to a direct payment account, so are not technically “financially excluded” in that sense, but as above, there will be large numbers of individuals within this group who have no access to such an account, and therefore their other difficulties are likely to be intensified.

#### *Lower Priority Tenant Segments:*

#### Segment 4: Elderly Singles in Sheltered Accommodation

Segment 4 is the oldest of all West Lancashire segments, containing elderly singles on very low incomes. Residents of this segment typically have very poor health and commonly live in sheltered accommodation, often in flats or bungalows. Residents in this segment are retired and generally on very low incomes. This segment is far more traditionally found to be dependent on social housing. Most are reliant on state pensions and may also be in receipt of benefits such as Pension Credit. However, residents are likely to have accrued some savings in the form of ISAs and so are typically only entitled to partial benefits. Tenants are unlikely to be in household arrears and are the most likely of all segments to pay their rent by direct debit, and more than the average number have access to a direct payment account so this group are not technically “financially excluded”. However, large numbers of individuals within this group will have no access to such an account, and due to this the other difficulties experienced by them are likely to be exacerbated.

#### Segment 8: Blue Collar Couples Approaching Retirement

This segment consists of older families and couples approaching retirement age, living in terraced housing. Households have average incomes and are commonly in right-to-buy areas. Residents in this segment are careful with money and some are recipients of housing benefits. As this group is approaching retirement age, some have already given up work. Those that are still in employment often have occupations in the manufacturing industry. Whilst incomes are only average, residents are careful with their money, so the majority are just about getting by on what they earn. However, some in this segment have CCJs issued against them. They are unlikely to choose to pay their rent by direct debit and are more likely to not have a direct payment account, so are technically within the definition of “financially excluded”.

#### Segment 9: Low Income Older People on Benefits

Segment 9 is comprised of older people who are retired or approaching retirement age. A majority of people live in single person households and have low incomes. Residents typically live in low value housing, often in semi-detached houses or occasionally terraces.

Poor health can be a problem in this segment, with some residents having a long-term sickness or disability. Household income tends to be low within these segments, with some people finding it difficult to cope on their earnings. Whilst some residents have already retired, the number of working age people who are unemployed or are permanently sick or disabled is above average. As a result, there are a high number of benefit recipients.

The evidence above highlights that some of our tenants are experiencing severe financial difficulties, high levels of financial stress and financial exclusion. The data collected to inform the Economic Development Strategy provides us with insight into some of the factors influencing this:

### **Income/Financial struggle**

West Lancashire is divided into a number of Local Super Output Areas (LSOAs). 17 of the LSOAs in the Borough are within the top 30% most deprived nationally, 19 are within the top 20% and 7 are within the top 10%. The major concentrations of deprivation are in Skelmersdale.

The number of benefits claimants in West Lancashire has fallen considerably in recent years, with Job Seekers Allowance (JSA) claimants now below national averages. However, Skelmersdale has the highest levels of JSA claimants and unemployment in the Borough, due to some wards with significant levels of deprivation. Around 70% of claimants in the Borough are from one of the eight Skelmersdale and Up Holland wards.

Although the public sector and manufacturing sector account for the largest employment sectors in the Borough, there is also a high concentration of employment across lower value sectors, such as transport and storage.

As such, West Lancashire has the lowest workplace median gross weekly earnings (£440.60) when compared to the comparator districts, even though it has the highest resident median gross weekly earnings (£505.80). This is likely to be due to a high proportion of residents travelling out of the Borough for work, typically to well-paid jobs in the city regions of Liverpool, Manchester and Preston.

### **Skills/Jobs mix**

Only 25% of working age West Lancashire residents are qualified to degree level, compared to 34% across Great Britain. This is reflected in the higher concentration of lower value sector employment across the borough and the relatively low workplace weekly earnings. This is highlighted further in Skelmersdale, where 16% of residents (age 16 and above) are qualified to level 4 and above, compared to 25% across West Lancashire and 27% nationally. There are also a particularly high proportion of residents with no qualifications, representing around 30% of the Skelmersdale population. Again, this closely reflects Skelmersdale's occupational structure amongst resident jobs which is more concentrated in lower value occupations such as process plant, machinery and elementary occupations. Just 8% of all jobs in Skelmersdale are in manager, director and senior official positions, compared to an

11% England average, and 20% of all jobs are in professional, associate professional and technical positions compared to 30% nationally.

The proximity of West Lancashire to the City Regions of Liverpool, Manchester and Preston, which have larger, growing and successful economies and employment opportunities; the borough's narrow employment base, which offers fewer opportunities and a lower wage economy; and the Borough's good road and motorway infrastructure and the train links in some parts of the borough, which enables easy commuting, all contribute to around 22,000 West Lancashire residents travelling outside the Borough for work. With the inflow of 19,800 workers from other areas, the borough experiences a net outflow of around 2,200 workers. This points to opportunities to better retain our resident labour force by creating more highly skilled employment opportunities. It also highlights a need to better develop our resident workforce by improving skills levels and improving opportunities for employment in higher skilled roles.

## Transport

Although the borough has strong road and motorway networks and train links in some areas, the lack of public transport in other areas of the borough may be contributing to the lack of viable employment opportunities. This is particularly evident in Skelmersdale, where there are low levels of car ownership and no train links to the neighbouring City Regions. Public bus services do serve the town, however, connecting to other towns within and outside of the Borough is often mentioned as one of the key challenges facing potential employees due to the costs and frequency of services. The Economic Development Strategy cites plans to develop a rail station in Skelmersdale town centre which would serve both Liverpool and Manchester, providing direct access to employment opportunities in both Merseyside and Greater Manchester.

The lack of public transport may also impact upon an individual's financial circumstances as some consequently spend more money on taxis to navigate the borough for socialising/training/work.

The lack of accessible transport links for large portions of the community also highlights the importance of digital connectivity, particularly given the rural nature of large areas within the borough.



## Strategic Aims

The following strategic aims have been drawn from the needs analysis conducted using the customer insight data relating to our tenants and the economic data relating to the borough.

Issue	Strategic Aim
<ul style="list-style-type: none"> <li>• High levels of financial stress and many finding it very difficult financially</li> <li>• Reliance on state pension</li> <li>• Some with no access to bank accounts</li> <li>• Low household incomes</li> <li>• In rent arrears and high levels of debt</li> </ul>	<p>Tenants and applicants able to access financial support</p>
<ul style="list-style-type: none"> <li>• High levels of financial stress</li> <li>• Changes in payments and claim procedures under Universal Credit</li> <li>• Low household incomes</li> <li>• Reliance on benefits</li> </ul>	<p>Help tenants and applicants to understand and prepare for financial changes</p>
<ul style="list-style-type: none"> <li>• Low and high level debts</li> <li>• No access to bank accounts</li> <li>• Reliance on illegal lenders</li> </ul>	<p>Other financial solutions available <u>e.g. credit unions</u></p>
<ul style="list-style-type: none"> <li>• Some employed and some in more skilled jobs</li> <li>• Some well-educated, some students</li> <li>• Higher car ownership in some areas</li> <li>• Low levels of household income</li> <li>• Some in low level occupations</li> <li>• Some using public transport for work</li> <li>• Some areas with very high unemployment</li> <li>• Some areas with high levels of benefit dependency</li> </ul>	<p>Better access to jobs/training – skills and transport solutions</p>
<ul style="list-style-type: none"> <li>• Some have no car access and use public transport for work</li> <li>• Some employed full time, but many in routine / low-level occupations</li> <li>• Many qualified to a high level</li> <li>• High unemployment in some areas</li> </ul>	<p>Better job opportunities for tenants and applicants</p>
<ul style="list-style-type: none"> <li>• High unemployment in some areas</li> <li>• Drugs, alcohol and mental illness issues</li> <li>• Some permanently sick or disabled</li> <li>• Crime problems</li> <li>• School-age children</li> <li>• Mobility problems and poor health</li> </ul>	<p>Access to other advice e.g. health, childcare, <u>energy efficiency</u></p>
<ul style="list-style-type: none"> <li>• Some on waiting list are already struggling financially</li> <li>• Evictions can add to financial stress and levels of indebtedness</li> <li>• Lack of governmental assistance to singles under 35</li> </ul>	<p>Applicants are “tenancy ready”</p>
<ul style="list-style-type: none"> <li>• Mobility problems and poor health</li> <li>• Low levels of car ownership</li> <li>• High use of internet for purchasing /communications in some areas</li> <li>• Social networking users</li> <li>• Low household incomes</li> <li>• High debts</li> <li>• Some areas with low levels of internet use</li> <li>• Preferences for SMS communication in some groups</li> <li>• Some groups likely to be in rent arrears</li> </ul>	<p>Tackle digital exclusion and provide technical solutions</p>



## **FIS1: Tenants and applicants will be able to access financial support including advice on benefits and debts**

What the issue is:

Many tenants are finding things very difficult financially and experiencing high levels of financial stress. A large number of households have an income of less than £20,000. Many are reliant on benefits or are on very low incomes. Some are in rent arrears or have other low or high level debts. Some have no access to bank accounts so are technically financially excluded.

Current situation:

We currently have a Rent and Money Advice service offering support and assistance to new and existing tenants and applicants regarding finances, personal budgeting, benefits, debts, help with applications in relation to urgent needs, food banks and disabilities. The team present tenants and applicants with a range of options and advice regarding financial products available to them, and encourage tenants and applicants to set up a bank account. Some of the groups most affected by financial exclusion are our younger tenants, and this group are potentially going to be further affected with welfare reform proposals.

### **Case Study A:**

“John has learning difficulties and attended our customer service point requiring assistance. He was being pressured from a utility company for outstanding payments and was struggling to pay his rent. After a number of calls to the company it was established that they had the incorrect dates of occupation and John received a refund for the difference.

An 'entitled to' calculation was also completed which resulted in an application for Housing Benefit and Council Tax Support being made along with an application to backdate his claim six months. The backdate request was successful which resulted in a large credit being applied to his rent account. This not only cleared his housing arrears but put his rent account into credit.”

What more needs to be done:

- More widely promote the services available to tenants and applicants and ensure access for all in need, including the development of a brand identity for Financial Inclusion communications to improve accessibility.
- Provide advice and guidance in areas where those in need feel comfortable or where they regularly visit e.g. The Zone, schools/colleges, children's centres, community centres and faith groups.
- Explore the use of advertising for financial support services in a more coherent manner across the borough, e.g. customer service points, college TV screens, internet and with third sector organisations.
- Provide early support to prospective tenants who are on the waiting list prior to them beginning their tenancy, including encouraging the take-up of bank accounts and financial support and assistance.
- Undertake a cost/benefit analysis of the provision of this service to provide a business case to support its future direction
- Strategically plan to ensure funding is available for the continued provision of this service if necessary.

- Develop a system to easily identify those who are at risk of financial exclusion and financial vulnerability and to base any targeted work on these findings.
- Strategically plan for the next generation of school leavers through the provision of financial education, particularly in local schools and colleges, with likely further-reaching benefits for their families and peers as messages are taken from the session and communicated to others.

## **FIS2: Tenants and applicants will understand and be able to prepare for welfare reform, benefit changes and other factors influencing their financial position**

What the issue is:

Welfare reform has brought significant changes to the benefits system, including the way in which benefits are paid under Universal Credit and the stipulation that the claim must be made online. The housing element of the benefit being paid directly to the tenant is expected to impact on our collection rates, as tenants may not be skilled or experienced in managing their income in this way. Many of our tenants are reliant on benefits and have low household incomes and high levels of financial stress. Many have also accrued rent arrears.

Current situation:

There are certain groups of people who are not eligible to access financial support in relation to housing, such as single people under 35 years old. For these people it is important to ensure that by offering them a tenancy in one of our properties we are not increasing any financial pressures they may be experiencing. It is also important to ensure that we are issuing timely communications regarding any changes brought about by initiatives such as welfare reform, to enable our tenants to adequately prepare. There is currently limited information on the council's website regarding the changes to the benefits system and it might be that customers are nervous of engaging with the information which is there due to the 'official' look and feel of it. We currently offer only two dates on which a direct debit payment may be processed. This means that a tenant may receive their benefit at one point in the month and then be in a position where this money needs to be retained in their account until their rent is paid by direct debit, possibly weeks later.

What more needs to be done?

- Planned, targeted and ongoing communication regarding welfare reform and benefit changes including the promotion of information on the website and consistent branding/marketing.
- Better information provision on the website to improve financial inclusion for our residents, including signposting to other agencies and organisations who may be able to provide support.
- Review arrears procedures to ensure we can anticipate payments and issue timely reminders.
- Promote rent payment methods available.

- Increase the number of payment dates available for direct debit to ensure ease of payment
- Implement digital inclusion strategy, specifically the promotion of online services and digital engagement with tenants.

**FIS3: Tenants and applicants will have other financial solutions available to them e.g. credit unions and other low cost lenders**

What the issue is:

Many tenants have low or high levels of debt, often with high interest rates due to a lack of products available to them. Many tenants do not have access to a bank account, so are unable to access other financial products, but may need access to credit for one off purchases. They may also require access to safe savings solutions.

Current Situation:

Our research suggests that a large number of tenants have no access to a bank account, yet they report having high levels of debt. This suggests that there could be issues with illegal lending. Advice is currently being provided to tenants regarding payday and other high interest lenders and illegal lending, but tenants are nervous to discuss and tackle the subject of illegal lending. Tenants paying rent without a bank account will struggle to build a credit history, and will therefore have only limited access to other banking products. Now that a credit union is operating in the district we need to maximise opportunities to work with them and consider the potential to financially support their establishment, enabling tenants to benefit from their savings accounts and low cost loans.

What more needs to be done?

- Support and provide funding for the provision of a credit union for West Lancashire
- Approach other housing associations to understand whether this provision meets a joint need and identify any potential funding contributions.
- Explore other community organisations who might provide financial services and affordable credit to tenants, applicants and residents.
- Explore the use of Experian to develop a better understanding and to enable tenants and applicants to build a credit history.
- Investigate and develop a business case to support other purchasing options for tenants and applicants in relation to furniture/household items e.g. Smarterbuys
- Identify ways to promote the council's contents insurance scheme and options for the use of this.
- Continue to provide advice to tenants regarding payday and other high interest lenders and information regarding alternative financial support for short term or urgent assistance.
- Promote awareness of payday and illegal lenders on the website

#### **FIS4: Tenants and applicants will have better access to jobs/training – skills/transport**

What the issue is:

There are a large number of tenants who are employed full time, and many who are well educated to further education and degree levels, but there are large numbers in low level/routine occupations with very low incomes and who are struggling financially. There is very low level car ownership within some groups and people rely upon public transport for work. Much has been done to support workless residents in West Lancashire, particularly through the West Lancashire Challenge Project, and there are now only 225 residents on Job Seekers Allowance. This means that those remaining without work often have very complex, wide-ranging issues which are acting as barriers to employment. It could also mean that some residents are in employment which is not best suited to their level of skill/education.

Current situation:

We currently work closely with partners and local businesses to create pathways to work for workless residents in the borough. The Financial Inclusion team are developing links with the West Lancashire College who provide courses for those who are out of work, including CV workshops and confidence building sessions. At present we are unable to refer to this service directly and must advise the tenant of its availability should they wish to request the service from JobCentre Plus. However, the eligibility criteria for this assistance is strict and could act as a barrier to aiding some of our tenants in need. It would be worthwhile exploring other organisations which we may be able to signpost to for these services and building up a database of organisations offering services of this kind. The Economic Development Strategy identifies plans for a railway station in Skelmersdale, which although a long-term plan, would help address some of the issues associated with residents in the most deprived wards in the borough accessing employment elsewhere.

What more needs to be done?

- The Demand Transport service is not sustainable without funding. The use of Section 106 monies to support its continuance where appropriate should be promoted.
- Signpost tenants and applicants to transport initiatives which may already be in place via the Skills, Training and Employment Partnership e.g. public transport and cycling schemes.
- Explore ways to promote better paid jobs to those already in work.

#### **FIS5: Tenants and applicants will have better job opportunities available to them (more skilled and better paid jobs in local area)**

What the issue is:

Many tenants are well educated but are currently employed in low level jobs. Large numbers of residents travel outside the borough for work and workers from other areas travel in. There is a mismatch of skills for the jobs in the local area, although there is the

educational potential for these to be filled. There is also a need to improve employment opportunities in higher skilled roles for our residents to retain our resident labour force and improve local incomes.

Current situation:

The Economic Development Strategy includes plans to improve the employment opportunities in the borough, particularly around the Skelmersdale wards where tenants and applicants have low level car ownership, through creating the right environment for growth in the area. Initiatives such as the Skelmersdale Town Centre scheme focus on meeting the economic needs of the borough by encouraging local recruitment. We are continuing to work with partners to up-skill residents ready for job opportunities coming to the area e.g. job fairs and work closely with businesses to encourage them to take on local labour and apprentices.

What more needs to be done?

- Continue to link up economic redevelopment approaches with financial inclusion initiatives to ensure options are available for our tenants in finding appropriate work opportunities.

**FIS6: Tenants and applicants will be able to access advice on wider areas e.g. health, childcare, energy efficiency**

What the issue is:

Many tenants have mobility problems and poor health and some have drugs, alcohol and mental health issues. This can act as a barrier to work and can exacerbate financial stress experienced. In some areas of the borough there are high levels of unemployment and large numbers of families with school-age children. Many of these tenants and residents are educated to a high level and some have a degree. Childcare may therefore be posing a barrier to working and increasing household incomes.

Current situation:

Advice is provided through the Rent and Money Advice service regarding a wide range of issues from signposting to agencies who deal with mental health and disability issues, to providing advice and assistance in regard to wider health issues, such as alcohol and drugs where relevant. It would be beneficial to develop our links with these agencies further to

Case Study B:

“Lynsey and Paul had two small children and rented their home from the local authority, but due to Paul being made redundant and losing their main income, they had fallen into arrears with their rent.

We supported them in prioritising and reducing non priority debts to more manageable payments to creditors and by maximising their income ensuring they gained their full benefit entitlement. Paul received support with his job searches, updating his CV, and assistance applying for local jobs. Paul was eventually successful in obtaining a job.

With our support Lynsey and Paul were able to understand how to prioritise their budgets according to their income as well as accessing employment support which in turn increased their household income. This enabled them to pay their rent and reduce their arrears on a weekly basis preventing further recovery action.”

enable us to more effectively assist a larger number of tenants. Health issues are also addressed in the pathway to work provided by the Challenge Project. Free childcare is available to children of those meeting particular criteria. Some parents are unaware of the childcare options available to them.

We understand that fuel poverty can have a significant impact on tenants, and to combat this we have a dedicated Energy Efficiency Officer and advice service that aims to promote energy efficiency within the home and help reduce the cost to tenants of heating and lighting our properties. We offer a completely impartial service carried out through a home energy advice visit that is tailor-made to suit individual energy requirements, providing advice on how to use heating controls effectively and efficiently, fuel debt and fuel poverty, understanding energy bills, advice on tariffs, comparison services and switching energy suppliers, 'no cost' and 'low cost' energy saving tips, grants and assistance with bills such as the 'Warm Home Discount' and other energy related services.

What we need to do to address it:

- Make links with partners to strengthen partnership working in this area.
- Provide signposting and work with organisations who can assist with regards to a wide range of health issues, including mental health, disability, or drugs and alcohol.
- Optimising sources of funding to provide tenancy support/floating support for complex needs.
- Provide advice on free childcare places to tenants, applicants and residents.
- Promote known childcare solutions on the website.
- Provide advice to promote energy efficiency within the home and help reduce the cost to tenants of heating and lighting.

### **FIS7: Applicants will be “tenancy ready”**

What the issue is:

There are some groups of tenants who may be struggling financially but who are not entitled to government assistance. Some of those on our housing waiting list are already finding it difficult to manage their finances. Evictions on the basis of non-payment of rent can add to financial stress and levels of indebtedness and so as a housing provider, we could be worsening someone's financial position by providing a tenancy they will be unable to financially sustain.

Current situation:

Our allocations policy sets out an upper income threshold and a savings threshold for those wishing to rent our properties. In addition to this, increased priority for housing is given to applicants who demonstrate a commitment to contribute to the Borough's economic growth as working households or who make a contribution within communities through the award of a 'plus' status within each band, enabling them to appear above other applicants with the same level of housing need. We also stipulate that tenants may not be qualified to rent our properties due to “unacceptable behaviour, and one of the examples of this would



be the accrual of rent arrears which could lead to the seeking of a possession order. We need to better understand the reasons for tenancy failure and to take these into account when developing tenancy management and sustainability solutions for these groups.

Tenants wishing to let a property can be offered rent and money advice at the start of their tenancy, and are signposted to other agencies who may be able to provide further assistance.

What more needs to be done?

- Use Experian data to segment the waiting list.
- Review reasons for tenancy failure and measures to address/prepare for this.
- Improve pre-tenancy affordability checks with applicants prior to acceptance onto the waiting list.
- Strengthen and develop links with other service providers, linked to the client groups which are identified as at risk of failure.
- Improve links with youth projects, children's centres and early years support providers.
- Explore training and development for staff to promote understanding of the specific needs of particular groups such as younger tenants, highlighting the need to keep in regular contact and developing relationships with them to enhance tenancy sustainability, helping them to live independently, budget efficiently and manage their relationships with their neighbours.

#### Case Study C:

"Rebecca was a 19 year old renting her flat through a housing association. She had TV licence arrears, Council tax arrears, Water arrears, and an eviction notice from her landlord (for arrears of £1800). We discovered an entitlement to a housing benefit backdate and successfully applied for this, which credited £312 back to her landlord. We then helped her suspend the eviction, and set up a payment arrangement with her landlord, reducing her arrears by £1500.

We also set up a payment plan for her TV licence and water arrears. We helped her to apply for council tax support and negotiated with the bailiffs pursuing her debts to pass it back to the welfare team."

**FIS8: Fewer tenants and applicants will experience digital exclusion and all tenants and applicants will have the opportunity to access technical and digital solutions in relation to paying their rent**

What the issue is:

Many tenants have mobility problems and poor health. There is low level car use/ownership across the borough. Large numbers of tenants are likely to be in rent arrears, have high levels of other debt and are experiencing difficulties managing their finances on low household incomes. Universal Credit has been introduced as an online only application process, and large numbers of our tenants do not currently use the internet. Some tenants do use the internet, and prefer to transact and interact online and through SMS. There is a need to develop more efficient ways of delivering services as local government strives to become more and more lean and as a council we are conscious of making the most effective use of the rent and service charge money paid to us by our tenants.

Current situation:

We are developing a Digital Inclusion Strategy which will identify the needs of our residents, and recommend developing opportunities for them to engage and transact with the council online. It also recommends projects to extend wifi access across the borough including community wifi and wifi in public spaces and working with partners to provide IT support to some of our digitally excluded tenants and applicants and to provide programmes aimed at promoting digital job searches and applications. We also have in place arrangements with community centres to promote getting online for benefits/online access. We have begun to use social media for promoting properties which are "To Let".

What more needs to be done?

- Develop the use of Social Media to promote properties and expand it to include information on sustainability e.g. key things to consider prior to agreeing to a tenancy. Also explore the use of advertising financial support services on other community social media pages.
- Consider the development of a mobile application to engage with tenants and applicants with regards to financial support and signposting and for personal budgeting.
- Develop a mobile application for tenants' rent accounts, similar to a banking mobile application, to provide balances, information regarding when rent is due and the ability to pay through the application.
- Identify particular areas of support required e.g. most people able to use smartphones but need support with application forms, online banking etc and work to address these.
- Develop and promote solutions to engage with us via a range of channels including SMS/Online/applications.
- Use specific user groups for consultation on the development of services.

The following action plan aims to bring together a number of services and actions to address the issues raised and achieve a co-ordinated approach to financial inclusion, making a difference to our most vulnerable tenants.

The action plan covers a three year period, but will be reviewed locally by officers within the Housing and Regeneration Service on an annual basis as part of the Service Planning process. Any issues arising will be reported to Cabinet as necessary.

A number of performance indicators will be developed to enable us to measure and monitor the planned improvements and to accurately assess whether the plan is successfully meeting its stated aims. These will be reported and monitored within the Housing and Regeneration Service.



## Financial Inclusion Strategy: Action Plan

Strategic Aim	Action	Managed By	Assigned To	Due Date	Priority
FIS1: Tenants and applicants will be able to access financial support including advice on benefits and debts	More widely promote the services available to tenants and applicants and ensure access for all in need, including the development of a brand identity for Financial Inclusion communications to improve accessibility.	Jane Maguire	Carl Wallace / Pamela Holstein	31/ <del>0901</del> /16	Med
	Provide advice and guidance in areas where those in need feel comfortable or where they regularly visit e.g. The Zone, schools/colleges, children's centres, community centres and faith groups.	Jane Maguire	Carl Wallace / Cliff Talbot	<del>31/03/17</del> Ongoing	Med
	Provide early support to prospective tenants who are on the waiting list prior to them beginning their tenancy, including encouraging the take-up of bank accounts and financial support and assistance.	Jane Maguire	Carl Wallace / Cliff Talbot	<del>31/03/16</del> Ongoing	High
	Strategically plan to ensure funding is available for the continued provision of this service if necessary, including undertaking a cost/benefit analysis of the provision of this service to provide a business case to support its future direction.	Jane Maguire	Jane Maguire / Carl Wallace	31/ <del>03</del> 12/1 <del>65</del>	High
	Develop a system to easily identify those who are at risk of financial exclusion and financial vulnerability and to base any targeted work on these findings.	Peter Morrison	Peter Morrison	31/03/16	High
	<u>Conduct awareness raising and take-up campaigns for specific groups of people on low incomes e.g. the elderly</u>	<u>TBC</u>	<u>TBC</u>	<u>31/01/2017</u>	<u>Med</u>
FIS2: Tenants and applicants will understand and be able to prepare for welfare reform, benefit changes and other factors influencing their financial position	Planned, targeted and ongoing communication regarding welfare reform and benefit changes including the promotion of information on the website and consistent branding/marketing.	Carl Wallace	Carl Wallace / Pamela Holstein	Ongoing	High
	Review arrears procedures to ensure we can anticipate payments and issue timely reminders.	Jane Maguire	Donna Ager	30/06/15	High
	Promote rent payment methods available.	Jane Maguire	Leigh McGarry / Jane Maguire /	Ongoing <u>campaign before</u>	High

Strategic Aim	Action	Managed By	Assigned To	Due Date	Priority
			Donna Ager / BTLS / Peter Morrison / Andy Bryan / Craig Round	<u>each year end</u>	
	Increase the number of payment dates available for direct debit to ensure ease of payment	Jane Maguire	Leigh McGarry / Jane Maguire / Donna Ager / BTLS / Peter Morrison / Andy Bryan / Craig Round	31/12/2015	High
	Implement digital inclusion strategy, specifically the promotion of online services and digital engagement with tenants	Peter Morrison	Pamela Holstein / Jane Maguire	Ongoing	High
FIS3: Tenants and applicants will have other financial solutions available to them e.g. credit unions	Support and provide funding for the provision of a credit union offer for Council tenants' in West Lancashire.	Leigh McGarry	Jane Maguire/Carl Wallace	31/03/12/165	High
	Promote other community organisations who might provide financial services and affordable credit to tenants.	Jane Maguire	Carl Wallace	31/12/03/176	Med
	Explore the use of Experian to develop a better understanding and to enable tenants and applicants to build a credit history.	Peter Morrison	Peter Morrison	31/03/176	Med
	Investigate and develop a business case to support other purchasing options for tenants and applicants in relation to furniture/household items.	Jane Maguire	Carl Wallace / Donna Ager	31/12/165	Med
	Identify ways to promote the council's contents insurance scheme and options for the use of this.	Jane Maguire	Pamela Holstein	31/03/16	Low
	Continue to provide advice to tenants regarding payday and other high interest lenders and information regarding alternative financial support for short term or urgent assistance including the website.	Carl Wallace	Carl Wallace	30/06/15	High
FIS4: Tenants and applicants will have better access to jobs/training –	Signpost tenants and applicants to transport initiatives which may already be in place via the Skills, Training and Employment Partnership e.g. public transport and cycling schemes	Jane Maguire	Carl Wallace / Cliff Talbot	Ongoing	Med

Strategic Aim	Action	Managed By	Assigned To	Due Date	Priority
skills/transport	Continue to link up economic redevelopment approaches with financial inclusion initiatives to ensure options are available for our tenants in finding appropriate work opportunities.	Jane Maguire	Paula Huber / Sarah Blackhall	Ongoing	High
	Provide information regarding free childcare places to tenants, applicants and residents.	Jane Maguire	Sarah Blackhall / Pamela Holstein	30/06/15	Med
FIS5: Tenants and applicants will have better job opportunities available to them (more skilled and better paid jobs in local area)	Promote known childcare solutions on the website.	Jane Maguire	Pamela Holstein	<del>31/10/15</del> <del>12/06/15</del>	Med
FIS6: Tenants and applicants will be able to access advice on wider areas e.g. health, childcare	Provide signposting and work with organisations who can assist with regards to a wide range of health issues, including mental health, disability, or drugs and alcohol.	Jane Maguire	Pamela Holstein / Sarah Blackhall / Carl Wallace	30/06/15	Med
	Optimising sources of funding to provide tenancy support/floating support for complex needs.	Leigh McGarry	Leigh McGarry	<del>31/10/15</del> <del>03/11/15</del>	Med
	Review reasons for tenancy failure and measures to address/prepare for this.	Leigh McGarry	Nicola Bradley / Jane Maguire	31/07/15	High
	Improve pre-tenancy affordability checks with applicants prior to acceptance onto the waiting list.	Leigh McGarry	Nicola Bradley/ Jane Maguire/ Carl Wallace	<del>01/11/15</del> Ongoing	High
	<u>Optimise external funding for those struggling with energy bills to reduce fuel poverty and continue to provide advice to promote energy efficiency within the home and help reduce the cost to tenants of heating and lighting.</u>	<u>Phil Holland</u>	<u>Alex Forman</u>	<u>TBC</u>	<u>TBC</u>
FIS7: Applicants will be "tenancy ready"	Strengthen and develop links with other service providers, linked to the client groups which are identified at risk of failure.	Leigh McGarry	Nicola Bradley/Jane Maguire	Ongoing	High
	Improve links with youth projects, children's centres and early years' support providers.	Leigh McGarry	Nicola Bradley/ Jane Maguire/	31/6/17	Med

Strategic Aim	Action	Managed By	Assigned To	Due Date	Priority
			Lorraine Ney		
	Explore training and development for staff to promote understanding of the specific needs of particular groups such as younger tenants. (highlighting the need to keep in regular contact and developing relationships with them to enhance tenancy sustainability, helping them to live independently, budget effectively and manage their relationships with their neighbours)	Leigh McGarry	Nicola Bradley/ Diane Evans/Jane Maguire/ Donna Ager/ Lorraine Ney	Ongoing	High
	Develop the use of social media to promote properties and expand it to include information on sustainability e.g. key things to consider prior to agreeing to a tenancy. Also explore the use of advertising financial support services on other community social media pages.	Jane Maguire / Peter Morrison	Pamela Holstein	30/11/16	MedHigh
	Develop an 'app' for tenants' rent accounts, similar to a banking mobile app to provide balances, information regarding when rent is due, ability to pay and provide signposting for financial support.	Leigh McGarry	Andy Bryan/ Peter Morrison/Jane Maguire	31/03/16	High
	Identify particular areas of support required e.g. most people able to use smartphones but need support with application forms, online banking etc and work to address these.	Jane Maguire / Peter Morrison	Pamela Holstein	31/03/16	High
FIS8: Fewer tenants and applicants will experience digital exclusion and all tenants and applicants will have the opportunity to access technical and digital solutions in relation to paying their rent	Develop and promote solutions for engagement via a range of channels including SMS/Online/apps. Use specific user groups for consultation on the development of these services.	Jane Maguire / Peter Morrison	Pamela Holstein	Ongoing	High

### Consultation for Draft Council Tenants' Financial Inclusion Strategy

Group Name	Group Name
Access Matters	Lancashire County Council
Action for Blind People	Lancashire County Council - Lancashire Youth Council
Age Concern Central Lancashire	Lancashire Deaf Service
Age UK Lancashire	Lancashire GRT Practitioners Network
Alzheimers Society	Lancashire Learning Disability Consortium
Barnardo's - Young Carers Service	Lancashire LGBT Centre Group
Carers UK	Lancashire Secular Humanists
Children's Centre - First Steps	Lancashire West Citizens Advice Bureau
Children's Centre - Hesketh with Beconsall	Lancashire Wide Network for Minority Ethnic Women
Children's Centre - Moorgate	Learning Stars
Children's Centre - Park	Making Space Lancashire
Children's Centre - St John's Children's Centre and Extended School	Moving On Lancashire
Children's Centre - The Grove Youth, Community & Children's Centre	Navajo Consultative Partnership - Diversity Unit
Children's Centre - Upholland	Ormskirk Hard of Hearing Association
Churches Together in Lancashire	Preston & Western Lancs Racial Equality Council
Churches Together in Ormskirk	Rainbow Generation
Crane Education Foundation	Rosie Cooper
Deafway	Sefton and West Lancashire Deaf Childrens' Society
Disability Advice West Lancs	Skelmersdale Action for Youth Forum
Disability Equality (NW) Ltd	Stonham Housing Association
Disability First	SW Lancs Independent Community Advice Network
Edge Hill University	The Birchwood Centre
Endeva	The Zone
Enterprise4All (NW) Ltd	Twinkle House
Faith Network	West Lancashire Carers Centre
Galloway's Society for the Blind	West Lancashire College
Help Direct	West Lancashire Debt Advice
ICANN (Independent Community Advocacy Network North)	West Lancashire Shopmobility Limited
Information Centre for Young People	West Lancs Ark
Jobcentre Plus	West Lancs Council for Voluntary Service (CVS)
Lancashire BME Pact	West Lancs Pensioners' Forum
Lancashire Constabulary	West Lancs Positive Living
Lancashire Council of Mosques	Young Lancashire



# Equality Impact Assessment Form



<b>Directorate: Housing and Regeneration</b>		<b>Service: Housing</b>	
<b>Completed by: Siân White</b>		<b>Date: 25/03/2015</b>	
<b>Subject Title: Financial Inclusion Strategy</b>			
<b>1. DESCRIPTION</b>			
Is a policy or strategy being produced or revised:	Yes		
Is a service being designed, redesigned or cutback:	No		
Is a commissioning plan or contract specification being developed:	No		
Is a budget being set or funding allocated:	No		
Is a programme or project being planned:	Yes		
Are recommendations being presented to senior managers and/or Councillors:	Yes		
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty ( <b>Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations</b> ):	Yes		
Details of the matter under consideration:	The Financial Inclusion Strategy aims to address the issues contributing to the financial exclusion of tenants and residents in West Lancashire, to enable them to play a full part in modern society. The Strategy is evidence-based and needs driven. It sets out 8 Strategic Aims which will help to achieve Financial Inclusion across the borough. It is accompanied by an action plan detailing how the aims will be met.		
<i>If you answered <b>Yes</b> to any of the above go straight to Section 3</i> <i>If you answered <b>No</b> to all the above please complete Section 2</i>			
<b>2. RELEVANCE</b>			
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	N/A		
If <b>Yes</b> , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered <b>Yes</b> go to Section 3</i>	N/A		
If you answered <b>No</b> to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	N/A		
<b>3. EVIDENCE COLLECTION</b>			
Who does the work being carried out impact on,	Financially excluded tenants and residents		

i.e. who is/are the stakeholder(s)?	in West Lancashire.
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	Although the strategy puts in place a number of measures which will be available and will provide assistance to all residents of West Lancashire, we have identified that the three groups of tenants who are the most financially excluded tend to be young. There is also a focus on some ethnic minority groups as members of one of the most financially excluded groups are likely to be from ethnically diverse backgrounds. In addition to this, the strategy has particular relevance for the disabled and for women as disability and childcare have been identified as potential barriers to financial inclusion.
Which of the protected characteristics are most relevant to the work being carried out?	
Age	Yes
Gender	Yes
Disability	Yes
Race and Culture	Yes
Sexual Orientation	No
Religion or Belief	No
Gender Reassignment	No
Marriage and Civil Partnership	No
Pregnancy and Maternity	No
<b>4. DATA ANALYSIS</b>	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	New tenants, existing tenants, residents on Jobseekers Allowance, tenants who are struggling financially. Use of the service is based on financial need.
What will the impact of the work being carried out be on usage/the stakeholders?	One of the strategic aims is that the assistance available will be marketed more widely so that more tenants are able to access the service. The impact of the service will be that tenants and residents will be less likely to be financially excluded and will be better off financially. The council will also be able to make more effective use of available resources through a higher level of rent collection and reduced rent recovery costs. This will have a positive impact on all tenants and residents.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	We will be undertaking some work to collect information regarding residents' satisfaction with the service.



What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	The strategy has been based on needs analysis which used Experian customer segmentation data and evidence from the Economic Regeneration Strategy to identify financial exclusion drivers and trends, and make recommendations regarding the needs to be addressed.
If any further data/consultation is needed and is to be gathered, please specify:	<p>Having identified that the three groups who are most likely to be the most financially excluded include the young and those from minority ethnic groups, further work was undertaken to understand whether there are any particular reasons that these groups are more susceptible to financial exclusion and to building up rent arrears, or whether there are any particular approaches which may be helpful in addressing their needs which should be included in the strategy. The strategy has been updated to reflect this. Analysis of whether these groups are proportionately using the service currently has also been undertaken and it has been found that young tenants in financial arrears are using the service proportionately with tenants in other age groups who are in financial arrears.</p> <p>Following approval of the draft strategy, a wider consultation exercise is recommended with a number of agencies involved in supporting the financially excluded, including Age UK, the Citizens Advice Bureau, and Help Direct.</p>
<b>5. IMPACT OF DECISIONS</b>	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	The implementation of the strategy will have a positive impact for the groups identified.
<b>6. CONSIDERING THE IMPACT</b>	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	No negative impact has been found. If any negative impact is identified, the strategy will be revised to include actions to mitigate this where possible.
What actions do you plan to take to address any other issues above?	The EIA will be refreshed as the strategy is refreshed, to ensure that any negative impacts are able to be addressed.
<b>7. MONITORING AND REVIEWING</b>	
When will this assessment be reviewed and who will review it?	The EIA will be refreshed when the strategy is reviewed and updated.





## **AGENDA ITEM: 5(m)**

**CABINET: 12<sup>th</sup> January 2016**

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**Report of: Assistant Director Community Services  
Assistant Director Housing and Regeneration**

**Relevant Managing Director: Managing Director (People and Places)  
Managing Director (Transformation)**

**Relevant Portfolio Holders: Councillor Y. Gagen  
Councillor I. Moran**

**Contacts for further information: Mr S. Kent (Extn. 5169)  
(E-mail: [stephen.kent@westlancs.gov.uk](mailto:stephen.kent@westlancs.gov.uk) )  
Mrs R. Kneale (Extn. 2611)  
(E-mail: [rachel.kneale@westlancs.gov.uk](mailto:rachel.kneale@westlancs.gov.uk) )**

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**SUBJECT: LAND TRANSFERS IN HESKETH BANK**

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Wards affected: Hesketh-with-Becconsall

### **1.0 PURPOSE OF THE REPORT**

- 1.1 To consider a request from Hesketh-with-Becconsall Parish Council for the transfer of three areas of Borough Council owned open space land to their ownership, together with a potential fourth area should this be adopted by the Borough Council in due course, and to transfer any commuted sums negotiated from developers for the management of these sites. Also to consider sub-contracting maintenance works on a further piece of land to the Parish Council.

### **2.0 RECOMMENDATIONS**

- 2.1 That the transfer of land at Ashbrook Close, Becconsall Gardens (when negotiations with the developer are completed) and Glen Park Drive in Hesketh Bank be approved as shown on the plans attached, to Hesketh-with-Becconsall Parish Council subject to any necessary statutory consultations being undertaken and considered.
- 2.2 That negotiations be completed with the developers for the commuted sums of £35,000 for Ashbrook Close and £3,500 for Becconsall Gardens and these sums be transferred to the Parish Council subject to completion of the land transfers.

- 2.3 That negotiations continue with Morris Homes as developer of the Poppyfields site regarding the adoption of the open space and play area, and upon conclusion to our satisfaction the Council subsequently approve the transfer of the facilities and commuted sum to the Parish Council subject to any necessary statutory consultations being undertaken and considered.
- 2.4 That the request from the Parish Council for them to be sub-contracted to maintain land at Sydney Avenue be refused.
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### **3.0 BACKGROUND**

- 3.1 Hesketh-with-Becconsall Parish Council is keen to improve the quality of public open space available to its local community. For open space they manage they have a planned programme of maintenance including mowing and litter picking every fortnight, and weekly during the summer, weekly inspections of open space, and play equipment inspected quarterly by specialists, and a further programme of non-essential maintenance including painting of railings.
- 3.2 They also feel that local management of public open space and facilities will support their aspirations to improve quality whilst also promoting public engagement. To support these aspirations they are keen to own and/or manage the public open space and recreational facilities in the parish, and have put in a request for some areas of land currently owned and managed by the Borough Council to be transferred to them, plus a further area of land which will ultimately be transferred from a developer to the Borough Council.

### **4.0 CURRENT POSITION**

- 4.1 The following areas of land are the subject of this request from the Parish Council (Location plans attached as appendix 1):
- 4.1.1 Ashbrook Close – A piece of public open space of approx. 2242 sq m. consisting of a grassed area, trees and a small centre feature. The land has within the last month been transferred to the Borough Council along with a commuted cash sum, specifically for its maintenance. It is now requested that ownership and monies are now transferred to the Parish Council. The Parish Council have been maintaining this land voluntarily since May 2015.
- 4.1.2 Becconsall Gardens – A small, narrow parcel of land of approx. 1328 sq m which abuts the Parish Councils existing play area to the west and north sides. Similarly the Parish Council now requests transfer of the land and commuted sum received to maintain it. This land is in the process of being transferred from the developer to the Borough Council, subject to some small scale remediation works. The Parish Council have been maintaining this land voluntarily since April 2015.
- 4.1.3 Glen Park Drive – Two rectangular parcels of grassed land of approx. 702 sq m on both sides of Glen Park Drive. This is currently owned and maintained by the Borough Council. The Parish Council have requested that the maintenance of this land is also carried out by the Parish Council as contractor.

- 4.1.4 Poppyfields - A large expanse of public open space which runs between Poppyfields and The Green incorporating a play area, open ditches and a United Utilities Foul Sewer pumping station and storage tank. The pumping station, storage tank and access routes have been adopted by United Utilities and Lancashire County Council. However, the public open space and play area, together measuring approx. 5462 sq m have yet to be adopted by the Borough Council. The Parish Council would wish to take over the open space and play area along with a suitable commuted sum to be agreed.
- 4.1.5 Sidney Avenue – A small triangular grassed parcel of land of approx. 287 sq m at the junction of Sidney Avenue and Norwood Avenue. This highway land is currently maintained by the Borough Council on behalf of Lancashire County Council. The Parish Council have requested that the maintenance of this land is transferred to the Parish Council as contractor.

## **5.0 PROPOSALS**

- 5.1 It is proposed that the Borough Council transfers ownership of the sites at Ashbrook Close and Beconsall Gardens along with the commuted sums received for their maintenance, as requested.
- 5.2 In respect of Glen Park Drive the Borough Council would not consider sub-contracting the Parish Council to undertake contract maintenance works, however, would be agreeable to a transfer of ownership on the basis that the Parish Council also accepted maintenance responsibilities at their own cost.
- 5.3 In respect of Poppyfields the developer, Morris Homes, took the option to maintain the public open space and play area themselves for the first 7 years until it could be adopted by the Borough Council. However, this adoption has not yet taken place and could only proceed if the facilities in question were up to adoptable standard. Further negotiations are required with the developer to complete the adoption procedure.
- 5.4 It is proposed therefore that these negotiations with the developer proceed and if successfully concluded the Borough Council take ownership of this land along with a commuted sum for its maintenance, which, subject to consultation, it would subsequently transfer to the Parish Council. The Council would seek to recover the cost of any statutory advertising from the Parish.
- 5.5 In respect of Sidney Avenue the land is classified as highway land and the Borough Council is therefore contracted to LCC to carry out this work. This land is part of a much larger contract and therefore the Council would not see any benefit in sub-contracting this small parcel of land to the Parish Council to undertake maintenance works.

## **6.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY**

- 6.1 Local ownership and management of public open space would promote community involvement and local management whilst improved and increased areas of outdoor recreation would promote healthy communities.

## **7.0 FINANCIAL AND RESOURCE IMPLICATIONS**

- 7.1 Ashbrook Close, Beconsall Gardens and Glen Park Drive would be transferred to the Parish Council for a nominal sum. The combined value of these parcels of land is under £5,000 therefore this undervalue transaction would be permitted as it would not exceed £2 million, and the local ownership and management of the Parish would allow greater community input and liaison so benefitting the social and environmental well-being of the area. The Council would impose suitable covenants on the Parish to ensure that use was restricted to open space.
- 7.2 The commuted sums of £35,000 for Ashbrook Close and £3,500 for Beconsall Gardens will be received from the developers specifically for the maintenance of these areas. These sums would be transferred to the Parish Council along with the land transfer. There would be no transfer of funds in relation to Glen Park Drive, the Borough Council would, therefore make a small saving on the cost of maintaining this land. The cost of maintenance of Sydney Avenue would remain unaltered.
- 7.3 The costs of bringing Poppyfields to adoptable standard, and a commuted sum for the maintenance thereafter, would be the responsibility of the developer. It is proposed that, upon adoption, the Borough would transfer the land and commuted sum to the Parish Council. This parcel of land is valued at under £5,000 therefore, as in 7.1 a nominal sum transfer would be permissible as the land value would not exceed £2 million and transfer to local ownership would improve social and environmental well-being in the area.
- 7.4 The Council would seek to include within the disposal documents obligations upon the Parish Council to maintain the sites to specific standards. By these standards the grassed areas would be maintained as amenity grassland and mown 10 times during the growing season; shrub beds would be thinned annually and weeded twice during the growing season; hard standing would be kept clean and damage repaired as required; and standard trees would be monitored and tree ties replaced if damaged.

## **8.0 RISK ASSESSMENT**

- 8.1 Whilst these areas remain in the ownership of the Borough Council the liability for them as areas of public open space will be retained.
- 8.2 The transfer of the commuted sums would be on exchange of an agreement, as with all S106 sums, which would stipulate how the funds are to be spent, and would detail forfeiture upon non-compliance.
- 8.3 Should the Council agree to this land transfer request and the Parish Council not accept the land transfer, the maintenance responsibility would then fall back upon the Borough Council. A proportion of the commuted sum would then become repayable to the Borough Council to cover their costs.
- 8.4 All S106 funds need to be spent as stipulated in the S106 agreement and within a set timescale, usually 10 years from payment. Transferring these funds to the Parish Council would fulfil the timescale for use by the Borough Council.

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### **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 1 – Location plans of land in Hesketh Bank  
Appendix 2 – Equality Impact Assessment

**1. Ashbrook Close**

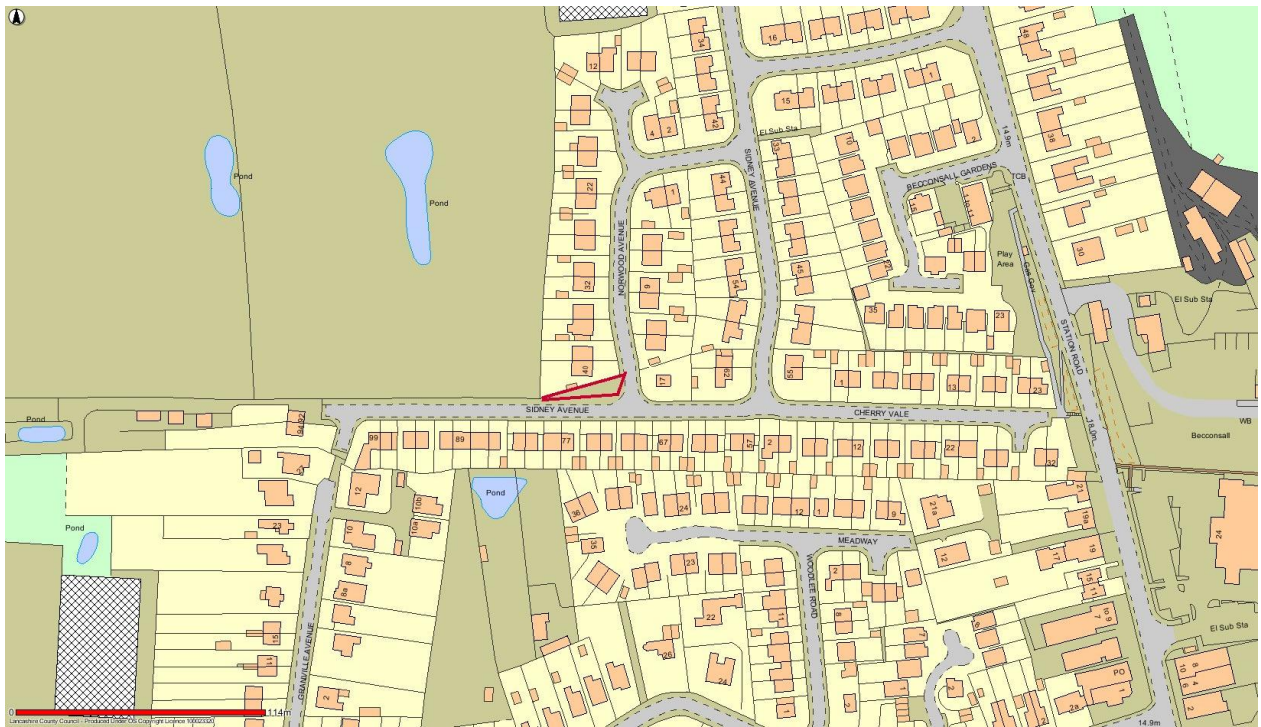


**2. Beaconsall Gardens**





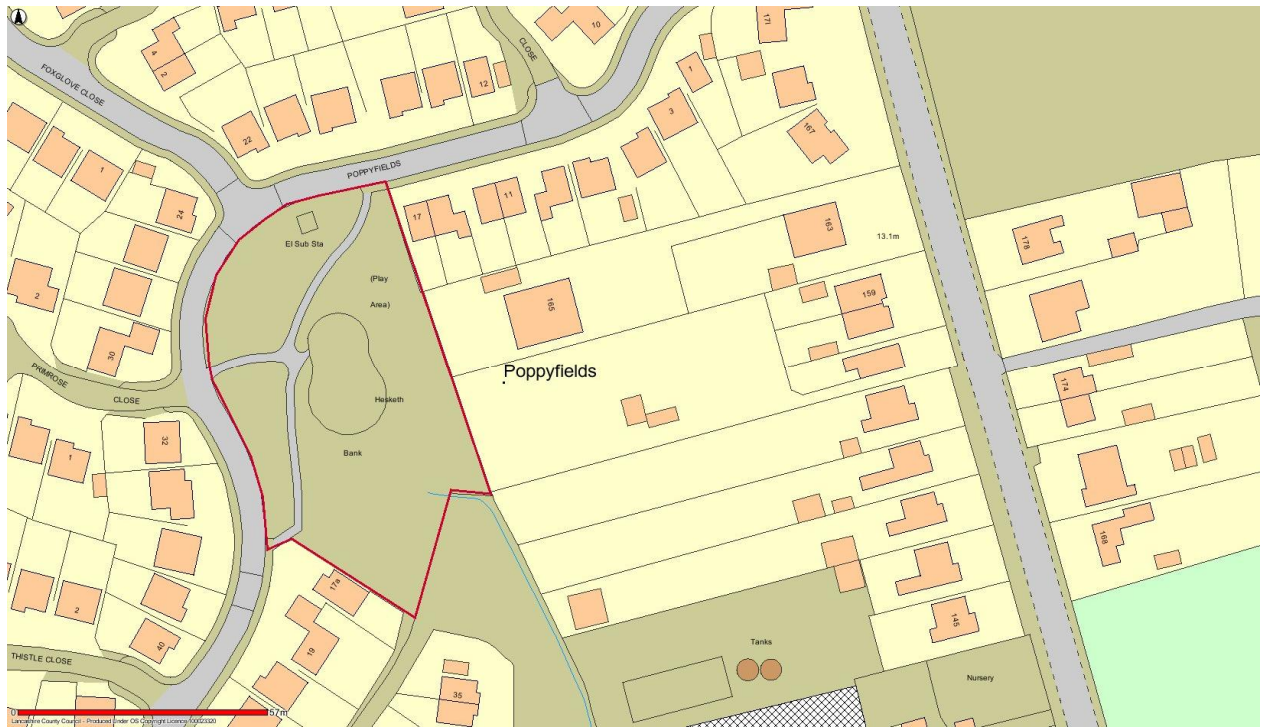
### 3. Sidney Avenue




### 4. Glen Park Drive



## 5. Poppyfields



<h1 style="color: red;">Equality Impact Assessment Form</h1>		
Directorate: Community Services		Service: Leisure, Cultural & Arts
Completed by: Stephen Kent		Date: 30/07/2015
Subject Title: Land Transfers in Hesketh Bank		
<b>1. DESCRIPTION</b>		
Is a policy or strategy being produced or revised:	No	
Is a service being designed, redesigned or cutback:	Yes	
Is a commissioning plan or contract specification being developed:	No	
Is a budget being set or funding allocated:	No	
Is a programme or project being planned:	No	
Are recommendations being presented to senior managers and/or Councillors:	Yes	
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty ( <b>Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations</b> ):	No	
Details of the matter under consideration:	Request from Parish Council to take on ownership and/or maintenance responsibilities for 5 areas of public open space in Hesketh Bank	
<p><i>If you answered <b>Yes</b> to any of the above go straight to Section 3</i></p> <p><i>If you answered <b>No</b> to all the above please complete Section 2</i></p>		
<b>2. RELEVANCE</b>		
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	<i>*delete as appropriate</i>	
If <b>Yes</b> , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered <b>Yes</b> go to Section 3</i>		
If you answered <b>No</b> to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>		
<b>3. EVIDENCE COLLECTION</b>		
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	Local Community/Parish Council	
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	All community	

Which of the protected characteristics are most relevant to the work being carried out?	
Age	Yes
Gender	No
Disability	No
Race and Culture	No
Sexual Orientation	No
Religion or Belief	No
Gender Reassignment	No
Marriage and Civil Partnership	No
Pregnancy and Maternity	No
<b>4. DATA ANALYSIS</b>	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	Local community for outdoor recreation
What will the impact of the work being carried out be on usage/the stakeholders?	Improved maintenance should increase useage
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	Parish Council wishes to improve maintenance of public open space
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	Feedback from Parish Council
If any further data/consultation is needed and is to be gathered, please specify:	N/A
<b>5. IMPACT OF DECISIONS</b>	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	Improved public open space, including play areas will help all ages, but particularly younger age group
<b>6. CONSIDERING THE IMPACT</b>	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	N/A
What actions do you plan to take to address any other issues above?	On-going monitoring.
<b>7. MONITORING AND REVIEWING</b>	
When will this assessment be reviewed and who will review it?	September 2016. Reviewing officer – Stephen Kent