

MEMBERS INTERESTS 2012

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

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

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

Please tick relevant boxes

Notes

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

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

Interest

Employment, office, trade, profession or vocation

Sponsorship

Prescribed description

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

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

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

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

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

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

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

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

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

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

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

'a connected person' means

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

'body exercising functions of a public nature' means

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

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

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

EXECUTIVE OVERVIEW AND SCRUTINY COMMITTEE

HELD: 28 NOVEMBER 2013

Start: 7.30pm

Finish: 8.45pm

PRESENT: Greenall (Chairman)

Councillors: Mrs Atherley Kay
Baldock Ms Melling
Blane Oliver
Mrs R Evans O'Toole
Furey Pendleton
J Hodson Pope

In attendance:

Councillor: L Hodson

Officers: Assistant Director Housing and Regeneration (Mr B Livermore)
Deputy Borough Treasurer (Mr M Kostrzewski)
Assistant Solicitor (Mr M Hynes)
Principal Overview and Scrutiny Officer (Mrs C A Jackson)

27. APOLOGIES

Apologies for absence were submitted on behalf of Councillors Bell, Cheetham and Wilkie.

28. MEMBERSHIP OF THE COMMITTEE

In accordance with Council Procedure Rule 2, Members noted the termination of membership of Councillors Jones, Cropper, Savage and Gagen and the appointment of Councillors Mrs Atherley, Ms Melling, G Hodson and J Hodson, for this meeting only, thereby giving effect to the wishes of the Political Groups.

29. URGENT BUSINESS, IF ANY, INTRODUCED BY THE CHAIRMAN

There were no items of urgent business.

30. DECLARATIONS OF INTEREST

Councillors Mrs Atherley, Baldock, Blane, Mrs R Evans, J Hodson, Kay and Pope declared non-pecuniary interests in relation to item 7 (Revenue Budget Mid Year Review) in relation to Parish Council matters in view of their membership of Parish Councils.

31. DECLARATIONS OF PARTY WHIP

There were no declarations of Party Whip.

32. MINUTES

RESOLVED That the minutes of the meeting held on 3 October 2013 be received as a correct record and signed by the Chairman.

33. RELEVANT MINUTES OF CABINET

Consideration was given to the minutes of Cabinet held on 12 November 2013. Questions and comments were received in respect of the following items:

- Minute 52 (use of S106 Monies for the Skelmersdale & Up Holland Demand Responsive Transport System - cycle routes: maintenance (frequency of cleaning; lighting); cyclists' safety (particularly where cycle path is encased); detail related to routes (Tanhouse to Pimbo estate).
- Minute 53 (Use of Section 106 Monies in Skelmersdale) - 'pilot' Cycle to Work scheme - provision of bikes; retention / reuse; monitoring; contribution / involvement of businesses; widening of scheme.
- Minute 56 (Tenant's Cashback Scheme) - Feedback - training scheme for tenants.
- Minute 58 (Strategic Asset Management Project) - processes related to list of plots identified (liaison; proposals; Member involvement)
- Minute 61 (Liverpool City Region Superport Study and Wider Engagement with the Liverpool LEP) - The importance of the initiative for the region; involvement through the Liverpool City Region LEP; future benefits (employment /business opportunities et al) as part of the City Region.

RESOLVED: That the minutes of the Cabinet held on 12 November 2013 be noted.

34. CALL-IN ITEMS

There were no call-in items.

35. REVENUE BUDGET MID YEAR REVIEW

Consideration was given to the report of the Borough Treasurer, as contained on pages 201 to 210 of the Book of Reports which provided a projection of the financial position on the General and Housing Revenue Accounts to the end of the financial year.

Members raised comments and questions in relation to:

- Impact of Welfare Reform on the HRA.
- Right to Buy and Help to Buy - take-up; disclosure of information.
- Issues that have impacted on void levels.
- District Wide Heating Service - costs associated with the provision of the service; use of cheaper / alternative energy (green energy opportunities; biomass; replacement of storage heaters; funding; take-up of Green Deal)

The Assistant Treasurer attended the meeting and responded to questions. The Assistant Director Housing and Regeneration, in relation to a question on the Rights to Buy legislation and Help to Buy Scheme disclosure of information, undertook to provide clarification.

RESOLVED That the financial position of the Revenue Accounts be noted.

36. REVISED CAPITAL PROGRAMME AND MID YEAR REVIEW 2013/2014

Consideration was given to the report of the Borough Treasurer, as contained on pages 211 to 229 of the Book of Reports, that provided details on the Revised Capital Programme for 2013/14 and an overview on the progress against it at the mid-year point.

Members raised comments and questions in relation to:

- Right to Buy and Land Sales - analysis.
- Funding related to Phase 2 of the Wheelie Bin scheme.
- Right to Buy - processes related to receipts / payments to central government :
“one for one” replacement of houses rules.

RESOLVED That the Revised Capital Programme and progress against it at the mid-year point be noted.

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Chairman

CABINET**HELD: 14 JANUARY 2014**

Start: 7.30pm

Finish: 8.25pm

PRESENT:

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

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

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

There were no apologies for absence.

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

There were no items of special urgency.

67. DECLARATIONS OF INTEREST

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

68. MINUTES

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

69. MATTERS REQUIRING DECISIONS

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

70. FUNDING OF VOLUNTARY & OTHER ORGANISATIONS

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

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

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

71. QUARTERLY PERFORMANCE INDICATORS Q2 2013-2014

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

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

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

72. BUSINESS PLAN 2014-2015 REFRESH

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

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

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

73. DRAFT REVENUE BUDGET 2014 - 2015

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

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

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

74. MEDIUM TERM CAPITAL PROGRAMME

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

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

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

75. HOUSING ACCOUNT - REVENUE AND CAPITAL PROGRAMME

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

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

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

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

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

76. YEW TREE FARM MASTERPLAN SUPPLEMENTARY PLANNING DOCUMENT OPTIONS PAPER

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

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

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

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

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

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

A copy of revised recommendations were circulated at the meeting.

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

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

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

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

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

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

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

79. DRAFT WEST LANCASHIRE HIGHWAYS AND TRANSPORT MASTERPLAN

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

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

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

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

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LEADER



AGENDA ITEM: 9

CABINET: 14 JANUARY 2014

**EXECUTIVE OVERVIEW & SCRUTINY
COMMITTEE: 30 JANUARY 2014**

COUNCIL: 26 FEBRUARY 2014

**Report of: Managing Director (People and Places)
Managing Director (Transformation)**

Relevant Portfolio Holder: Councillor Westley

**Contact for further information: Mrs G Rowe (Extn. 5002)
(E-mail: Gill.Rowe@westlancs.gov.uk)
Ms K Webber (Extn. 5005)
(E-mail: Kim.Webber@westlancs.gov.uk)**

SUBJECT: BUSINESS PLAN – 2014/15 REFRESH

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To seek approval for the “Business Plan 2014/15 Refresh” (Appendix A).

2.0 RECOMMENDATIONS TO CABINET

2.1 That the “Business Plan 2014/15 Refresh” attached as Appendix A to this report be approved and referred to Council for adoption.

2.2 That authority is given to the Managing Directors to make any final amendments to the document, prior to publication.

2.3 That call-in is not appropriate for this item, as the report is being submitted to the next meeting of the Executive Overview and Scrutiny Committee on 30 January 2014.

3.0 RECOMMENDATION TO EXECUTIVE OVERVIEW AND SCRUTINY

3.1 That the “Business Plan 2014/15 Refresh” attached at Appendix A to the report be considered and that agreed comments be referred to Council on 26 February 2014 for consideration.

4.0 RECOMMENDATIONS TO COUNCIL

- 4.1 That the “Business Plan 2014/15 Refresh” attached at Appendix A to the report be adopted.
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5.0 BACKGROUND AND CURRENT POSITION

- 5.1 The Business Plan 2011/15 sets out the Council’s strategy to deliver its priorities and the savings, efficiencies and income required over a four-year period. The purpose of this is to deliver a managed approach to balancing the budget whilst delivering the Council’s aims over the next four years. The Council adopted this Business Plan 2011/15 in April 2011.
- 5.2 Excellent progress has been made in the first three years of the plan and the Business Plan has now been refreshed again. The updated version, “Business Plan 2014/15 Refresh”, is attached as Appendix A to this report.
- 5.3 The Council’s vision, values and priorities have remained providing a consistent, strategic focus. The Joint Managing Directors’ approach to delivering the Business Plan is outlined within it, as is information about the budget and the budget strategy.
- 5.4 Progress against the Business Plan is reported through “Members Updates” and an Annual Report to Council.

6.0 SUSTAINABILITY IMPLICATIONS/COMMUNITY STRATEGY

- 6.1 There are no direct implications arising from this report.

7.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 7.1 The Business Plan Refresh 2014/15 appended to this report will ensure the Council is able to continue to pursue its objectives, within the resources available. It sets out a range of ways in which efficiency savings, income and cost reductions might be achieved in the future.
- 7.2 Officer time will continue to be required throughout the process of refining and delivering the Business Plan.

8.0 RISK ASSESSMENT

- 8.1 The development of the Business Plan and associated processes mitigates against the risks that the Council will not deliver its aspirations within a balanced budget.
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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: "Business Plan 2014-15 Refresh" (version 1.6 dated 23 December 2013)
- Appendix B: Business Plan 2011-15 (Year 3 refresh, February 2013)
- Appendix C: Equality Impact Assessment
- Appendix D: Minute of Cabinet 14 January 2014 (Executive Overview and Scrutiny Committee & Council only)
- Appendix E: Minute of Executive Overview and Scrutiny Committee 30 January 2014 (Council only)



Business Plan 2011-2015

2014/15 Refresh

Council 26th February 2014

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Note:** indicates confirmation pending

Version 1.6 - 23 December 2013

LEADER'S STATEMENT

This remains a challenging time for West Lancashire. The Council's task is to provide the best possible services within the resources available to it. At a time of shrinking public finance and with economic challenges facing the whole country we remain committed to achieving this through efficient and effective service delivery for the residents and businesses of the borough.



**Leader of the Council
Councillor Ian Grant**

We do not underestimate the task. Levels of government grant have diminished and, despite some recent signs of recovery, this position is potentially intensified by a reduced income in a number of areas due to the general economic climate. This has meant that the Council needed to achieve savings of around 30% over the period 2011-2015. To balance the Council's budget in this environment has meant constant, managed change. Doing nothing has not been an option.

The Business Plan sets out how we will deliver the Council's priorities including the savings, efficiencies and income necessary to maintain a balanced budget position and support the effective financial and operational management of the Council. Since its implementation we have made good progress and identified £4.9million** of permanent savings towards the £5.7 million** we anticipate is required.

Our track record of financial management and service performance remains a good one and I am determined we will continue in this direction. We have the **best record in Lancashire** for zero or low Council Tax increases. As a result of the work undertaken as part of this Business Plan over the last 12 months, policy options identifying savings have been developed ready for implementation in 2014/15. This means that, once again, we anticipate being able to deliver our services on budget, whilst minimising the impact on the standard and range of service that customers receive from their Borough Council. Sustaining this beyond 2014/15 will be tough. Our

aspiration is to maintain performance and the range of services that we provide, but reshaping in some areas is going to be necessary.

Our approach is to continue to prioritise spending carefully in line with local needs identified through listening and consulting with residents and stakeholders. Just as importantly, we will need to communicate the outcomes from this process. Innovative working, harnessing technology, and continuing our partnership working will all help maintain the momentum towards achieving the required financial efficiencies.

Where appropriate, we may consider the further use of reserves to allow time to produce results, however simply using reserves without ensuring the sustainability of services is not a viable long-term strategy. Our priorities are therefore to balance our budget and, as guided by our residents and stakeholders, also to care for our borough and work towards sustainable regeneration and growth.

In delivering these priorities, we will apply the following three principles.

- **Lean** – we will continue to look for ways of providing better services at reduced cost. For example, working with partners Lancashire County Council and Wigan Council has brought dividends through economy of scale, expertise and investment power. We will also re-engineer services so that they are customer focussed and as lean as possible.
- **Local** – where services are best provided locally we will work with partners. For example, we deliver grass cutting of verges and hedge trimming on behalf of Lancashire County Council. Where we can, we will continue to place emphasis on supporting the development and enhancement of the voluntary and community sectors since these sectors are often best placed to deliver services and support to local communities. We will also be transparent – clear about what we spend public money on, and why.
- **Fair** – to the tax payer and to staff. We firmly believe that the best response to the reduced finance available is a managed approach to change. Our Business Plan set out a measured approach that has been maintained through its annual refresh. Each service has been studied in

depth through Major Service Reviews to look at the level each service is best delivered at and where there are areas of discretion. We will continue with this successful approach. Since the Business Plan was implemented, we have become a smaller organisation and further contraction is likely. In making these changes, we will unashamedly seek to minimise compulsory redundancy amongst staff where possible as this is better for the tax payer, for staff and for the local economy.

Although this plan provides the direction for the coming year, I would like to give a brief mention to just some of the many achievements of 2013/14, both big and small, that contributed to a successful year.

- The five-year £65 million investment programme in our housing stock, possible as a result of our move to self-financing, saw improvements get underway to modernise and enhance properties with new kitchens, bathrooms and doors.
- The adoption of the West Lancashire Local Plan 2012-2027 in autumn 2013 was the culmination of many years' preparation and extensive public involvement.
- A Sustainable Energy Strategy to help reduce carbon emissions for businesses, residents and communities across the Borough was adopted. The Council has already exceeded its aim of reducing greenhouse emissions associated with its operations by at least 25 per cent by 2020, from 2006/07 levels, achieving a reduction of 27% by 2012/13.
- Our strategic partnership arrangement with LCC/One Connect Limited for Revenues & Benefits and ICT services continued. During the year our highly-rated website was migrated onto a new content management system. This gave us the opportunity to give the website a fresh look and apply newer technologies. We are confident that the new site will improve access to services through streamlined content, simplified navigation, and enhanced access for mobile users.
- In October we began the phased rollout of blue wheelie bins to replace blue recycling boxes for plastic, cans and glass with the programme concluding in the first months of the new year.

- Six community facilities underwent *Community Transfer* achieving required savings for the Council. We were delighted that organisations were able to step in to retain these resources for community use. The transfers progressed at different rates, with some concluded earlier in the year. It is anticipated that all transfers will be completed by the end of 2013/14 and will be operated by the following community organisations: Civic Hall (Engine Rooms); Ashurst Meeting Room (Taekwondo Development Council); and the Community Resource Centres of Birch Green (Ashton Artz), Tanhouse (Tanhouse Enterprise Group), Greenhill (Greenhill Management Committee) and Digmaor (Digmaor Management Committee).
- The *Expanding the coverage of CCTV* project saw thirteen new cameras installed where previously there was no CCTV coverage. A further fourteen were used to enhance existing coverage. All cameras became fully operational in the new year.

The highlights above show that despite the squeeze on our finances, we are still delivering positive outcomes over a wide range of service areas. Our most recent information indicates that residents' satisfaction has been maintained in relation to how the Council is running things and whether our services provide value for money. That is not to say that we do not wish to improve on this, but it is of some re-assurance that given the financially-driven changes we are having to make we are not falling out of step with public expectations.

Since its establishment in 1974, the services provided by the Council have undergone substantial changes spear-headed by the use of technology, public-private or public-public partnerships and the transparency of the organisation. Our 40th anniversary will see us continuing to re-shape services, not out of choice but out of necessity, and this situation will stay with us into the foreseeable future. I, and everyone at West Lancashire Borough Council, look forward to rising to the challenge and continuing to deliver affordable services that meet the needs of West Lancashire.

MANAGING DIRECTORS' REPORT

Local government continues to operate within a period of unprecedented change and public sector spending restraint. Councils across the country have had to make tough and often unpopular decisions in order to balance their budgets whilst, as far as they can, protecting services. The medium-term future financial position facing the Council will inevitably involve further significant reductions in government grant funding, with national commentators anticipating this trend will continue until at least 2020.

We believe that in West Lancashire we are responding as positively as we are able to these testing times. The management team continues to plan for the long term, thereby enabling a proactive, managed approach to dealing with the current issues. That approach first led to the development and implementation of this Business Plan which was aimed at improving efficiency, reducing costs and generating income whilst ensuring that as an organisation we focus resources on our priorities. We remain steadfast in our commitment to this strategy which, for the most part, has so far enabled us to continue to provide levels of service far above those required as a result of our statutory duties.

In the last 12 months our senior management team has provided experienced direction and guidance for the organisation at a time when our staff need to feel as secure, engaged and motivated as possible. We aim to ensure that staff are involved and informed about the context in which we are working, the Council's priorities, and any changes that will impact on them.

As Managing Directors, our approach is to drive the delivery of the Business Plan through the senior team – particularly the Major Service Review process, and other key projects, designed to deliver the Council's priorities within a balanced budget. Throughout the year we have also continued with our programme of meeting and holding discussions with as many staff and Councillors as possible, and also with businesses and organisations in the Borough, to discuss their needs and perspectives.

Despite the need to focus on savings, efficiencies and income streams, we are also very open to exploring new opportunities for the Borough for example through working with the Local Enterprise Partnerships and potential opportunities from the Liverpool Superport.

The final year of this Business Plan does not signal the end to the financial focus. These considerations have been at the forefront of our preliminary work on the 2015-18 strategy. The local government finance settlement, announced in December 2013, confirmed the necessity of this continued emphasis, with further significant net cost reductions having to be found in order to balance the General Revenue Account. **

The Housing Revenue Account (HRA) is the other main funding source for the Council. A self-financing model for housing was implemented in April 2012 with the Council taking on a one-off debt of around £88.2million but retaining all future rental income. Since the debt repayments are less than the Government subsidy payments required under the previous housing financial regime, the HRA is in an improved financial position. This has allowed expanded investment in the Housing Service and is already yielding significant results. It is anticipated that by the close of the 2013/14 financial year 1,414 homes will have received replacement kitchens and 1,220 homes new bathrooms.

We would like to thank staff for their fantastic efforts over the past year, particularly given the continued period of uncertainty within local government. Their drive and commitment is vital when making a difference for our service users. Our strength as a Council is our capacity to work together effectively, as one Council, resulting in "Team West Lancashire - making a difference." As Managing Directors, we will continue to emphasise:

- a strong corporate focus;
- caring about and involving staff;
- giving committed professional leadership; and
- providing the best possible services within the resources available – the wellbeing of West Lancashire is paramount.

We are confident that for the next twelve months we have the right team and the right Plan in place to ensure we remain a Council to be proud of.



Kim Webber



Gill Rowe



Managing Directors

VISION, VALUES AND PRIORITIES

The Council's vision is:

To be a Council to be proud of – delivering services that are lean, local and fair.

The Council's values are:

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.

Our values underpin the way in which we will deliver our priorities and achieve our vision.

Our Corporate Priorities are:

- balancing the budget and providing the best possible services within the resources available;
- focussing upon sustainable regeneration and growth within the borough;
- caring for our borough by delivering the small improvements that can make a big difference.

(We will minimise uncertainty for staff and stakeholders by continuing to implement a managed approach to change and explore innovation as a means to secure further value for money.)

Our services will continue to prioritise the following, subject to affordability:

- Protect and improve the environment and keep our streets clean and tidy;
- Combat crime and the fear of crime;
- Work to create opportunities for and retain good quality jobs in particular for local people;
- To be a top performing landlord;
- Improve housing and deliver housing that meets the needs of local people, including affordable housing; and
- Provide opportunities for leisure and culture that together with other Council services contribute to healthier communities.

FINANCIAL POSITION

[**Borough Treasurer to provide text.
Local Government Finance Settlement expected December**]

ORGANISATIONAL STRUCTURES

The Council's senior management team has remained in place throughout the year providing consistent management stability and focus to deliver this Business Plan. We continue to consider the appropriateness of staffing structures within services. In particular, Sheltered Housing and the Planning service were reviewed during the year, achieving both service improvements and reduction in costs.

Organisational structures are illustrated on the following pages.

CABINET MEMBERS & PORTFOLIOS



Leader of the Council

Councillor Ian Grant

Chairman of the Cabinet; community leadership; shared services/partnership contracts; Customer Relations; ICT & Exchequer Services; Legal & Democratic Services; FOI, Press & Media Strategy; Consultation & Community Engagement Strategy; Sustainable Community Strategy; management issues; corporate procurement; town twinning; liaison with County Council & Parish Councils. Street scene: fleet/garage/depot facilities, street cleansing, grounds maintenance, stores. Waste disposal & recycling: waste management, including through partnership; domestic & trade refuse service, green waste & recyclables collection, farm round.



Housing (Finance), Regeneration & Estates

Councillor Adrian Owens
(Deputy Leader)

Regeneration: external funding & inward investment; marketing the authority & borough; grants & training advice to businesses. Housing finance: self-financing business plan; corporate & commercial property portfolio management/maintenance; Asset Management Plan; Asset Register & Land Tier; acquisition/sale of land; valuation advice; rating appeals; European Objective 2 Priority 2 funding; Investing in Business Regeneration Programme.



Planning & Development

Councillor Martin Forshaw

Planning policy; Local Development Framework; development control; building control & enforcement; Borough town centre development; Skelmersdale Vision; conservation of built & natural environment; arboricultural & landscape services; council-owned unadopted footways, highways & grit bins; liaison with utility companies/Highway Authority for highway works & transportation issues; off-street public car parking & enforcement; Ormskirk market & bus station; land drainage & coastal engineering; 'green' issues including the Council's own activities.



Health, Leisure & Community Safety

Councillor David Sudworth

Commercial safety: health promotion, food safety, health & safety enforcement. Public protection & licensing: licensing taxis, public entertainment, charities etc; dog & pest control; animal welfare. Environmental protection: pollution control, fly-tipping. Emergency planning/business continuity. Leisure Trust & Serco contracts; sports development, swimming pools, sports centres; playgrounds & community centres; arts development, Chapel Gallery; countryside service including golf course, formal parks, open spaces, rights of way & environmental improvements; outdoor recreation; children's services; voluntary sector grants. Community Safety: Community Safety Partnership; CCTV.



Resources & Transformation

Councillor David Westley

Accounting services; capital and revenue estimates and budgeting; annual statement of accounts; treasury management; internal audit; risk management & insurance; data quality; value for money; major service reviews; organisational re-engineering; corporate planning; performance management.

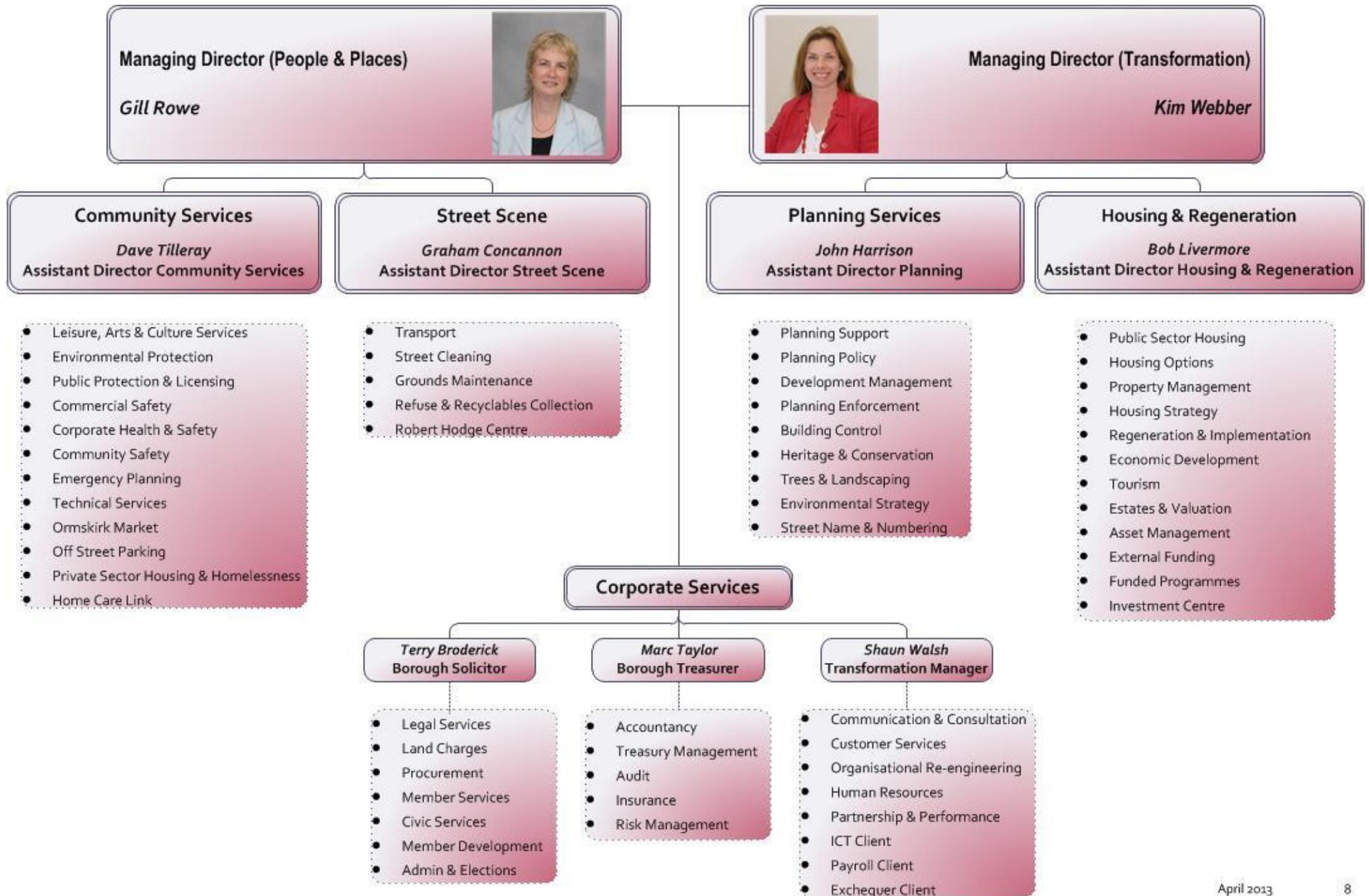


Landlord Services & Human Resources

Councillor Val Hopley

Public sector housing: repairs & maintenance, housing allocations, tenancy management, former tenant arrears, sheltered housing & tenant empowerment/participation. Private sector housing: renovation and disabled facilities grants, home energy efficiency; unfit homes; housing strategy; housing advice service; Supporting People Initiative. HR: corporate & strategic HR issues, strategy, policies & procedures; social inclusion, equality & diversity, cohesive & integrated local communities; council representative at NWLAEO meetings; council JCC; equality champion; employee development champion; health & safety champion.

SENIOR OFFICER MANAGEMENT STRUCTURE



CORE FUNCTIONS

West Lancashire is served by a County Council, Borough Council, 20 Parish Councils and one Parish Meeting.

Main services provided by Lancashire County Council (LCC)

LCC is responsible for providing many of the services in the borough. Around 73% of the council tax collected in West Lancashire is spent on services that the County Council delivers.

Children and Young People

Incorporates the County Council's statutory role as a Children's Services Authority with a duty to promote co-operation and wellbeing of children and young people; make arrangements to safeguard and promote welfare; and prepare and publish a strategic plan setting out how services for children and young people will be provided.

The functions also include the County Council's powers and duties in relation to schools, including: access and school transport; school improvement and tackling failure; special educational needs; school attendance; and educating excluded pupils and pupil welfare.

Adult Services, Health and Wellbeing

Responsible for assessing the needs of vulnerable adults and their carers and securing the provision of social care services to meet these needs in line with the County Council's criteria. Also responsible for public health, adult learning, county libraries, arts development, county museums, record office, welfare rights, coroners' and registrars' services.

Environment

Responsible for the County Council's duties and policies as Highway Authority and Planning Authority; for waste disposal, sustainable development, tourism, countryside services and the Lancashire Highways Service including highway maintenance services to the County Council and providing a grounds maintenance service to County Council property. Also responsible for the Trading Standards Service and the County Analyst's Laboratory.

Lancashire County Commercial Group

Responsible for servicing County Council and other public service vehicles; cleaning County Council buildings; providing a catering service; providing a school crossing patrol service and providing a range of residential care services in County Council homes for the elderly, together with day care and home care services.

Main services provided by West Lancashire Borough Council

Planning Services

Responsible for all planning applications, building regulations and enforcement, as well as conservation, heritage, tree protection, planning policy and street name and numbering.

Housing & Regeneration

Responsible for providing social and affordable housing, and providing housing advice services. The service manages its housing stock, the Council property portfolio and a large commercial portfolio. In addition, the function also undertakes the principle work of the Council in relation to creating jobs and bringing investment into the borough.

Community Services

Responsible for environmental health (including dog and pest control, food safety, health promotion, health and safety, public health and pollution control); Community safety (including CCTV) and funding contributions for Police Community Support Officers; flood defences, shoreline management and methane monitoring; public protection and licensing; private sector housing and homelessness; Ormskirk market and off-street parking.

Also responsible for country parks, the ranger service, sports pitches, playgrounds, parks and Chapel Gallery. Our pools and sports centres are run by West Lancashire Community Leisure Trust.

Street Scene

Responsible for the collection of waste and recycling from homes and cleaning all streets except the major highways. Also responsible for grass cutting and grounds maintenance (of open spaces, parks and roadside verges).

Revenues and Benefits

West Lancashire Borough Council collects council tax and business rates that is spent by the Borough Council, LCC, the Police and Fire Authority and Parish Councils. One Connect Limited manages the collection on behalf of the Council. In addition, housing benefits and council tax benefits are also managed by One Connect Limited on behalf of the Council.

The Council also provides some services on behalf of LCC. These arrangements have been put in place in areas where devolving management and resources locally has provided a more efficient service, for example the Public Realm partnership with LCC whereby we deliver verge cutting and hedge trimming within our borough.

Main services provided by Parish Councils

West Lancashire has 20 Parish Councils and one parish meeting. These cover the entire borough except for Ormskirk and Skelmersdale. Parish Councils are financed by raising a small levy on all residential properties within a parish.

Parish Councils are a key tier of local government and provide a way of making sure services meet the needs of residents by influencing decisions that affect local people.

Parish Councils' powers include: the provision of facilities (such as allotments, leisure, bus shelters, litter bins, car parks, community centres, parks and open spaces); representation (e.g. planning applications); wellbeing (to spend on any activity which adds to the wellbeing of its community).

West Lancashire Borough Council and (signatory) Parish Councils established a Charter setting out how the Borough and Parish Councils will work together, whilst balancing the needs of the wider West Lancashire community and recognising our respective responsibilities as autonomous, democratically elected, statutory bodies.

KEY ACTIVITIES

Workstreams

Actions within the Business Plan are aligned directly to the Council's priorities to provide a framework for the delivery of our vision. Outlines of the actions for the forthcoming year are given below.

Balancing the budget and providing the best possible services within the resources available

Actions 2014-15

-  HRA Self-financing Business Plan
-  Major Service Reviews
-  Organisational Re-engineering
-  Strategic Asset Management Plan

In addition to the projects above, Council agreed further options for savings in 2014/15 with no impact on service delivery, for example changes to internal budgets and organisational arrangements. Additional measures included a reduced level of food safety and health promotion work and the introduction of a charging policy for replacement refuse/recycling receptacles. The majority of the work around community transfer of facilities was concluded during 2013/14 producing the required savings for the Council. Support will be provided to the new owners during a transitional period to help sustain the arrangements.

As part of a planned approach, up to £474,000 will be utilised from the Budget and Efficiency Savings Reserve to support the overall budget position. This is the first time that reserves have been used in this way **during the lifetime of the plan.

The coming year will see significant upgrades to the Council's ICT infrastructure providing opportunities for further service developments.

These improvements will ensure that our systems are both robust and resilient as we move forward and that we are in a position to take advantage of up to date software platforms via the partnership with LCC and One Connect Limited.

The HRA *Self-Financing Business Plan* has facilitated significant investment in our housing assets, to ensure their future viability. The first year of the 30-year plan saw the Council's biggest ever 12-month investment programme in housing stock, with £15.5 million of improvements benefitting more than half the Council's 6,200 properties and work will continue guided by the plan. In addition, there is benefit to the local area through environmental enhancements.

Our successful *Major Service Review Programme* (MSR) examines every aspect of the Council's business to develop options for alternative forms of service delivery to assist in ensuring a balanced budget. It includes streamlining services and prioritising their affordability and desirability. We have now delivered and implemented three years of the Major Service Review process and cumulatively this has achieved savings of £**.

MSR has been the key vehicle for delivering the necessary savings and efficiencies during the lifetime of the Business Plan. It is however increasingly difficult to identify options that offer the level of savings needed without impacting upon service delivery. The effectiveness of MSR coupled with the ongoing financial limitations facing the Council mean that a similar style of review will continue to be put into practice.

Reviewing services also provides the information to form a strategic and targeted approach to *Organisational Re-engineering (OR)*. This is then applied to the parts of our organisation where this programme can deliver savings through efficiencies, whilst also considering improving service delivery and customer accessibility. In 2013/14 an OR review of the Planning Service was completed and a commencement made on implementing the identified project outcomes. A review of Landlord Services and Legal & Democratic Services was begun and this will be

concluded in 2014/15. During the year, initial work on **tbc** will also begin.

Work continues on the strategic review of our asset holding (the *Strategic Asset Management Plan*), with a view to prioritising these assets for retention, improvement or disposal thereby providing a useful income stream and resources for future capital projects. The plan provides a framework to create a focused and sustainable property portfolio for the future. During the forthcoming year, the Council will continue to identify sites and either bring them to market for development or, where appropriate, seek an alternative use to meet local needs.

Focussing upon sustainable regeneration and growth within the Borough

Actions 2014-15

-  Skelmersdale Vision
-  Firbeck Revival
-  Land Auctions Pilot
-  Infrastructure Delivery – Transport
-  Remodelling Industrial Estates
-  Economic Development Strategy
-  Financial Inclusion Strategy

The New Homes Bonus is a grant paid by central government to local councils for increasing the number of homes and includes payment for long-term empty homes brought back into use. Our *Empty Homes Initiative* aimed to reduce the number of empty properties within the borough and thereby generate further bonus for the Council. However, progress stalled when the external partner was unable to continue with the scheme. The matter has consequently been fully reviewed and the significant positive

impact of the changes to Council Tax Rules, whereby the rate for empty homes has increased to 150% of the standard rate, has been welcomed. This change, together with the on-going work between our own officers and local property owners, will continue to reduce the number of empty homes (and thereby generate further New Homes Bonus for the Council). No further partnership arrangements are therefore currently proposed.

The *Skelmersdale Vision* Town Centre Action Plan is a project in partnership with the Homes and Communities Agency, LCC and St Modwen. It seeks to secure regeneration in the form of new commercial, leisure and residential development alongside existing property and environmental enhancements across a large area of land within and surrounding the town centre. Key successes during the year included the successful marketing of two parcels of land for residential development which in the past have not generated developer interest. Additionally, a £2m investment from LCC was secured for the construction of a Youth Zone facility within the town centre. Work on the Youth Zone is scheduled to commence early in 2014 and to be completed by the end of the year. Periodic marketing of the approved retail/leisure scheme site will continue as the economy recovers, whilst other possible options which might deliver the key leisure elements of the approved scheme will be explored. We will also continue to engage with partners such as West Lancashire College and the owners of the Concourse to see how we might assist them in their future investment plans for their sites, both of which are key land uses within the town centre.

The *Firbeck Revival* initiative is a £5.5 million improvement programme for the Firbeck estate (Skelmersdale). The phased scheme broadly covers home improvements to Council properties (kitchens, bathrooms, windows, doors, roofs and external wall insulation), and external improvements to privately owned properties (new roofs and external wall insulation, and new windows/doors if not already done); demolition of flats (excluding Firbeck Court) as well as property construction and redevelopment of the street scene. During 2013/14, extensive work on the scheme included the installation of new kitchens and bathrooms in all houses in Firbeck. Work was completed to re-house residents from the blocks of flats listed for

demolition and these are planned to be brought down towards the end of the financial year. Eight Council owned-properties underwent external improvements to demonstrate what the estate could look like. Key actions for the forthcoming year (2014/15) includes completion of the improvements to housing stock and responding to a consultation with residents by building replacement homes on the sites of the demolished flats. We will also be making improvements to the street scene including communal gardens, garages and parking areas.

A government grant is being used to carry out the works required to progress a *Land Auctions Pilot* involving the Homes & Communities Agency and the Council. The pilot project tests the land disposal elements of a proposed national Community Land Auction model. The pilot was initiated in 2012 and will last for a period of two years, during which time development sites will be brought forward which meet the objectives of the Local Plan. It is anticipated that the sale of at least part of the land will take place in 2014, with remaining sites being sold over several years. Dependant upon which site(s) are selected, there is the potential for a significant sum of money to be raised which can then be used, through the Capital Programme, to invest in the priorities of the Council.

Although not a statutory function of the Council, engaging with partners to improve the infrastructure of the local area means that West Lancashire becomes more appealing to investors and developers. *Infrastructure Delivery* will focus on assisting improvements in transport. We will also benefit from the rollout of the superfast broadband for the area that will ultimately support the wider success of the Council's priorities. Forthcoming work for 2014 will progress the feasibility studies of the Skelmersdale rail link and supporting LCC in the delivery of the West Lancashire Highways and Transport Master Plan.

Some sections of the borough's industrial estates were built 20 - 30 years ago and will therefore benefit from a modernisation programme. The *Remodelling Industrial Estates* plan will support the economy of the borough by enhancing estates and continue to make West Lancashire an attractive option for industry. A staged progression will utilise reserves for

the initial improvement works. Following the successful marketing of them, the income from new businesses will be used for further work on other estates.

Working with key partners, a draft *Economic Development Strategy* will be developed for consultation. The 10-year strategy will guide the Council and partners in the regeneration of our existing urban areas and support general economic wellbeing. It will assist with the provision of sustainable jobs and growth and improve the skills and training development of the borough's workforce thereby helping access to job opportunities. Additionally, the strategy will influence the development of sub regional economic strategy and provide a focus for bids for national and European funding.

With partners, we are working to minimise the impact of Welfare Reform on affected households in the borough through a *Financial Inclusion Strategy*. Some changes have already been implemented, but other reforms are still being rolled out throughout the country. We aim to support residents and tenants affected by the reforms as far as we are able through a range of initiatives including increasing financial inclusion and improving pathways to employment and training.

Caring for our Borough by delivering the small improvements that can make a big difference

Actions 2014-15

-  Housing Asset Management Plan
-  Moor Street
-  Local environmental improvements
-  Public Realm
-  Ormskirk Town Centre Strategy

The *Housing Asset Management Plan* (formerly Housing Improvement Programme) is another significant project being carried out within the Council's housing service. The five-year investment scheme will see through a programme of work to modernise and enhance the Council's housing stock. The first year saw record investment to modernise the stock. An additional £12m of expenditure is planned for year 2 (2014/15). A programme of option appraisals has commenced to ensure the long term sustainability of our stock and a robust business plan.

As part of the circa £700K project to improve Ormskirk's *Moor Street*, which is being carried out in partnership with LCC, re-paving of the existing carriageway surface will take place as well as other environmental improvement works in the street. Initial options appraisals for the scheme were completed and have been discussed with LCC prior to public consultation in advance of the plans being finalised. The scheme remains a priority for the Council, with work now anticipated to begin in June 2014.

Local Environmental Improvements are addressed through a specific budget of £90,000** in 2013/14, and we hope to continue this work** in 2014/15. The budget is used throughout the borough, for example on street furniture, signage and the maintenance and replacement of litter and dog waste bin. We will be developing a prioritised programme of improvements for the year, including the continued cleaning of war memorials to coincide with the outbreak of World War I centenary events. The Council also engages with Network Rail to facilitate the improved appearance of land, for example that covered with brambles.

In addition to the project above, Tenants' groups or individual tenants can propose small improvements for tenant areas, for example parking or gardens, and these are undertaken throughout the year via a dedicated budget.

The *Public Realm* Street Services Agreement with the Highways Authority (LCC) allows us to deliver services such as residents parking schemes, work on the highways relating to grass cutting of verges and roundabouts, weed

control, management and maintenance of trees and leaf removal to agreed standards on their behalf.

An *Ormskirk Town Centre Strategy* will be developed to provide a clear, strategic direction and initiatives that will ensure Ormskirk operates as an attractive and bustling market town into the future. The strategy will have regard to competition from other shopping centres and the internet as well as issues such as car parking, heritage and environment, technology and marketing, the market and the leisure and night time economy. Working with key partners, a draft strategy will be produced for consultation ahead of adoption.

BUDGET STRATEGY

[**Borough Treasurer to provide text.

Local Government Finance Settlement expected December**]

A graphical representation of the budget strategy is shown below:

[*REPRESENTATION OF BUDGET STRATEGY*]

[**Borough Treasurer to provide text.

Local Government Finance Settlement expected December**]

RESOURCE BUDGETING AND STAFFING

The Council's 2013/14 income was made up as follows

[**Borough Treasurer to provide data for income chart**]

In 2013/14, the budget was spent as follows

[**Borough Treasurer to provide data for budget chart**]

Staffing

The Council is committed to ensuring staffing levels are appropriate to deliver services to agreed standards. In the current financial climate it is anticipated that the workforce will continue to reduce in size over the remainder of the current Business Plan period and beyond.

To manage this process effectively and sensitively, the Council will continue to monitor the use of recruitment appropriately. This will ensure there is an adequate balance between maintaining an effective workforce supply and preserving potential redeployment opportunities for staff that may be displaced, through the judicious use of temporary recruitment to coordinate with the requirements of the MSR process. The Council will continue to seek to minimise compulsory redundancies as far as possible and arrive at change through voluntary measures wherever feasible.

A Graduate Recruitment Scheme was established within the Council during 2013 and one graduate was employed on a two year contract. Additional work is being carried out to facilitate work experience placements for University and College students. To accompany the work undertaken by the Regeneration Service in the West Lancashire Challenge and apprenticeships, work is also taking place on the implementation of an apprenticeship scheme.

CONSULTATION AND EQUALITIES

The Council has a duty to consult and involve representatives of local persons and others, where appropriate in the exercise of its functions.

In summary, this covers:

- The common law requirement for fair consultation, e.g. consultation needs to be undertaken when matters are at a formative stage and must be consistent with existing policies on consultation in particular functions.
- Responsibilities in relation to the Equality Act, which requires the Council to demonstrate that it has paid due regard to equality issues across its services and functions.
- The general 'Duty to Consult' (Section 3A of the Local Government Act 1999) which requires that in relation to its duty to secure best value an authority shall where it considers it appropriate consult representatives of people who pay council tax and NNDR, service users and others with an interest in the area. The duty specifies three ways of involving that need to be considered, viz providing information, consulting or involving in another way.
- The Best Value Statutory Guidance (September 2011) sets out expectations for councils in relation to the duty to consult, including where they are considering difficult financial decisions. The guidance, which councils must have regard to, requires councils to give at least three months' notice of funding reductions to voluntary or community organisations or small businesses; to engage organisations and service users as early as possible before making a decision on the future of a service; and make provision for organisations, service users and the wider community to put forward options on how to reshape the service or project.
- Particular statutory duties of consultation for specific matters, e.g. in relation to disposal of open space or highway matters (which supplant the more general Duty to Consult).

MONITORING OF ACTIVITIES

Business Plan Monitoring

Performance and progress against the four-year Business Plan is reported annually to the Council and the public in the form of an Annual Report.

Programme/Project Monitoring

In addition, Members receive regular reports regarding progress against the actions. This enables any issues to be identified at the earliest opportunity.

A Head of Service is identified as the 'lead officer' for each of the projects. Lead officers will regularly monitor progress and performance against their projects, and report any issues to the Senior Management Team by exception.

Risk Management

The actions of the Plan aimed at the delivery of our vision will be entered onto service risk registers with major projects being entered onto the Key Risk Register.

Cabinet receives reports against the Key Risk Register which are available for call-in through the Overview and Scrutiny process.

CONTACT FOR FURTHER INFORMATION

If you require any further information, or copies of this document in alternative formats, please contact:

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Business Plan 2011-2015

2013/14 Refresh

Council 27th February 2013

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LEADER'S STATEMENT

This is an exciting but challenging time for West Lancashire. The Council's task is to provide the best possible services within the resources available to it. At a time of shrinking public finance and with economic challenges facing the whole country we remain committed to achieving this through efficient and effective service delivery for residents and businesses of the borough.



**Leader of the Council
Councillor Ian Grant**

We do not underestimate the task. Levels of government grant have diminished and this position is potentially intensified by a reduced income in a number of areas due to the general economic climate. This has meant that the Council needs to achieve savings of around 30% over the period 2011-2015. To balance the Council's budget in this environment means constant, managed change. Doing nothing is not an option. Since the implementation of this Business Plan to guide the Council through this period of change, we have made significant inroads and identified £4.9 million of permanent savings towards the £5.7 million we anticipate is required.

Good progress on achieving our savings in 2011/12 and 2012/13 has already been made. Our track record of financial management and service performance remains a good one and I am determined we will continue in this direction. We have the best record in Lancashire for zero or low Council Tax increases. As a result of the work undertaken as part of this Business Plan over the last 12 months, policy options identifying savings have been developed ready for implementation in 2013/14 and 2014/15. This means that, once again, we anticipate being able to deliver our services on budget, whilst minimising the impact for customers on the standard and range of service that they receive from their Borough Council. Sustaining this beyond 2013/14 will continue to be tough. Our aspiration is to maintain performance and the range of services that we provide, but reductions in some areas are going to be necessary.

Our approach is to continue to prioritise spending carefully in line with local needs identified through listening and consulting with residents and stakeholders. Just as importantly, we will need to communicate the outcomes from this process. Innovative working, harnessing technology, and continuing our partnership working will all help maintain the momentum towards achieving the required financial efficiencies. Where appropriate, we may consider the use of reserves to allow time to produce results. Our priorities are therefore to balance our budget and, as guided by our residents and stakeholders, also to care for our borough and work towards sustainable regeneration and growth.

In delivering these priorities, we will apply the following three principles.

- **Lean** – we will continue to look for ways of providing better services at reduced cost. For example, working with partners Lancashire County Council and Wigan Council has brought dividends through economy of scale, expertise and investment power. We will also re-engineer services so that they are customer focused and as lean as possible.
- **Local** – where services are best provided locally we will work with partners. For example, we deliver grass cutting of verges and hedge trimming on behalf of Lancashire County Council. Where we can, we will continue to place emphasis on supporting the development and enhancement of the voluntary and community sectors since these sectors are often best placed to deliver services and support to local communities. An example of this is the proposed community transfers for the Civic Hall, Community Resource Centres and Ashurst Meeting Room. We will also be transparent – clear about what we spend public money on, and why.
- **Fair** – to the tax payer and to staff. We firmly believe that the best response to the reduced finance available is a managed approach to change. Our Business Plan set out a measured approach that has been maintained through its annual refresh. Each service has been studied in depth through Major Service Reviews to look at the level each service is best delivered at and where there are areas of discretion. We will continue with this successful approach. Since the Business Plan was implemented, we have become a smaller organisation and further

contraction is likely. In making these changes, we will unashamedly seek to minimise compulsory redundancy amongst staff where possible as this is better for the tax payer, for staff and for the local economy.

Although this document is our plan for the future, I would like to recognise just some of the many achievements of 2012/13, both big and small, that contributed to a successful year.

- The work behind the West Lancashire Local Plan 2012-2027 Development Plan Document concluded in October 2012. The Plan underpins future development within the borough for the next 15 years. Following an extensive consultation process, the Council submitted the Plan to the Secretary of State. It is anticipated that if the plan is considered to be sound it will be adopted in summer 2013.
- Having successfully moved to self-financing for Council housing, we began to invest £8m for 2012/13 in our housing stock, including the replacement of windows and doors in 1,200 homes.
- We continued the successful strategic partnership arrangement with Lancashire County Council and their joint venture company, One Connect Limited. The ten-year contract saves £500,000 per year. It provides fresh thinking, additional expertise and access to technological solutions that have introduced major investment and innovation in the delivery of Revenues & Benefits and ICT services to deliver the best possible service for the people of West Lancashire. In addition it has brought jobs and investment to the area.
- Following receipt of a £100,000 one-off government High Street Innovation Fund, the Council has worked with the Love Ormskirk team and the Skelmersdale Concourse Management to develop schemes to encourage empty shop units to be brought back into use and provide support for the town centres.
- West Lancashire Borough Council and the Environment Agency undertook a £2million flood alleviation project at Calico Brook (Appley Bridge) and Dock Brook (Parbold). The drainage schemes reduced the flood risk for both village communities.

- Council vehicle fleet, plant and equipment is now provided and maintained by May Gurney Ltd, through our existing workshop facilities at the Robert Hodge Centre. This resulted in a new vehicle fleet bearing the refreshed corporate branding taking to our roads from September.
- Refurbishment of the Council's main offices at 52 Derby Street was completed and created a much improved working environment for staff and welcome to visitors and the public.
- Beacon Country Park retained the Green Flag award and we extended our partnership with West Lancashire Leisure Trust to include the operation of Beacon Park Golf Course.
- Environmental works were carried out on 13 benches in Skelmersdale town centre as part of a new commitment to invest £50,000 in 2012/13 in small projects that make a big difference. The benches are in the plaza close to the Concourse, the police station, library and Nye Bevan swimming pool.
- In addition, during the year we entered into an agreement with Wigan Council for the provision of a Managed Payroll Service and restructured our Human Resources service which will save £50,000 per year.

Despite the financial challenges, the highlights above show that we have been able to make improvements over a wide range of service areas. It is clear that these challenges will remain into the foreseeable future. However, I and everyone at West Lancashire Borough Council, look forward to meeting them and continuing to deliver the services that West Lancashire deserves.



Councillor Ian Grant

MANAGING DIRECTORS' REPORT

Local government continues to operate within a period of unprecedented change and public sector spending restraint. Councils across the country have had to make tough and often unpopular decisions in order to balance their budgets whilst, as far as they can, protecting services. The medium-term future financial position facing the Council will inevitably involve further significant reductions in government grant funding, with national commentators anticipating this trend will continue until at least 2018.

We believe that in West Lancashire we are responding positively to these testing times. The management team continues to plan for the long term, thereby enabling a proactive, managed approach to dealing with the current issues. That approach first led to the development and implementation of this Business Plan which was aimed at improving efficiency, reducing costs and generating income whilst ensuring that as an organisation we focus resources on our priorities. We remain steadfast in our commitment to this strategy.

In the last 12 months our senior management team has provided experienced direction and guidance for the organisation at a time when our staff need to feel as secure, engaged and motivated as possible. We aim to ensure that staff are involved and informed about the context in which we are working, the Council's priorities, and any changes that will impact on them.

As Managing Directors, our approach over the last year has been to drive the delivery of the Business Plan through the senior team – particularly the Major Service Review process, and other key projects, designed to deliver the Council's priorities within a balanced budget. Throughout the year we have also focused on meeting and holding discussions with as many staff and Councillors as possible, and on meeting with businesses and organisations in the Borough, to discuss their needs and perspectives.

We would like to thank staff for their fantastic efforts over the past year. Our strength as a council is our capacity to work together effectively, as one council, resulting in a "Team West Lancashire" approach. As Joint Managing Directors, we will continue to emphasise:

- a strong corporate focus;
- caring about and involving staff;
- giving committed professional leadership; and
- providing the best possible services within the resources available – the wellbeing of West Lancashire is paramount.

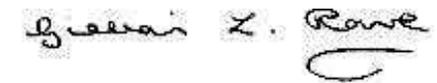
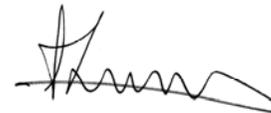
We are confident that for the next twelve months we have the right Team and the right Plan in place to ensure we remain a Council to be proud of.



Joint Managing Directors

Kim Webber

Gill Rowe



VISION, VALUES AND PRIORITIES

The Council's vision is:

To be a Council to be proud of – delivering services that are lean, local and fair.

The Council's values are:

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;
- work 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.

Our values underpin the way in which we will deliver our priorities and achieve our vision.

Our Corporate Priorities are:

- balancing the budget and providing the best possible services within the resources available;
- focussing upon sustainable regeneration and growth within the borough;
- caring for our borough by delivering the small improvements that can make a big difference.

(We will minimise uncertainty for staff and stakeholders by continuing to implement a managed approach to change and explore innovation as a means to secure further value for money.)

Our services will continue to prioritise the following, subject to affordability:

- Protect and improve the environment and keep our streets clean and tidy;
- Combat crime and the fear of crime;
- Work to create opportunities for and retain good quality jobs in particular for local people;
- To be a top performing landlord;
- Improve housing and deliver housing that meets the needs of local people, including affordable housing; and
- Provide opportunities for leisure and culture that together with other council services contribute to healthier communities.

FINANCIAL POSITION

The Council has a good track record of effective financial management and currently has a healthy financial position. Our latest Annual Governance Report from our External Auditors concludes that:

“the leadership team continues to take appropriate action to maintain a stable and sustainable financial position. The medium term financial plan identifies the challenges and articulates a cohesive response. The Council’s recent track record, achieving favourable variances against budget in 2010/11 and 2011/12 indicates that the savings plans and strategies have been proportionate and reasonable.”

This letter also identifies that:

“The Council has a strong financial standing, with a good level of general fund reserves [...] However, the medium term financial plan and underlying service reviews indicate that the Council is not complacent and continues to seek sustainable long term solutions”.

This strong financial position can also be demonstrated by the fact that over the last 11 years we have had the lowest cumulative Council Tax increase of all the Lancashire district authorities.

However, looking to the future, the financial prospects for the Council continue to be challenging. Government grant funding has already reduced significantly and will reduce further in future years. At the same time, income from other sources is also depressed as a result of the difficult economic climate.

This financial position represents a massive challenge for the Council and the business planning process sets out how we will deal with this situation in an effective and well managed manner.

ORGANISATIONAL STRUCTURES

The Council’s senior management team has remained in place throughout the year providing consistent management stability and focus to deliver this Business Plan. We have continued to review structures within services, in particular Human Resources and Housing & Regeneration, to achieve both service improvements and reduction in costs.

The Leader of the Council made refinements to Cabinet portfolios during the year and reduced the number of cabinet members from seven to six.

Organisational structures are illustrated on the following pages.

CABINET MEMBERS & PORTFOLIOS



Leader of the Council

Councillor Ian Grant

Chairman of the Cabinet; community leadership; shared services/partnership contracts; Customer Relations; ICT & Exchequer Services; Legal & Democratic Services; FOI, Press & Media Strategy; Consultation & Community Engagement Strategy; Local Strategic Partnership; Sustainable Community Strategy; management issues; corporate procurement; town twinning; liaison with County Council & Parish Councils. Street scene: fleet/garage/depot facilities, street cleansing, grounds maintenance, stores. Waste disposal & recycling: waste management, including through partnership; domestic & trade refuse service, green waste & recyclables collection, farm round.



Housing (Finance), Regeneration & Estates (and Deputy Leader)

Councillor Adrian Owens

Regeneration: external funding & inward investment; marketing the authority & borough; grants & training advice to businesses. Housing finance: self-financing business plan; corporate & commercial property portfolio management/maintenance; Asset Management Plan; Asset Register & Land Terrier; acquisition/sale of land; valuation advice; rating appeals; European Objective 2 Priority 2 funding; Investing in Business Regeneration Programme.



Planning & Development

Councillor Martin Forshaw

Planning policy; Local Development Framework; development control; building control & enforcement; Borough town centre development; Skelmersdale Vision; conservation of built & natural environment; arboricultural & landscape services; council-owned unadopted footways, highways & grit bins; liaison with utility companies/Highway Authority for highway works & transportation issues; off-street public car parking & enforcement; Ormskirk market & bus station; land drainage & coastal engineering; 'green' issues including the Council's own activities.



Health, Leisure & Community Safety

Councillor David Sudworth

Commercial safety: health promotion, food safety, health & safety enforcement. Public protection & licensing: licensing taxis, public entertainment, charities etc; dog & pest control; animal welfare. Environmental protection: pollution control, fly-tipping. Emergency planning/business continuity. Leisure Trust & Serco contracts; sports development, swimming pools, sports centres; playgrounds & community centres; arts development, Chapel Gallery; countryside service including golf course, formal parks, open spaces, rights of way & environmental improvements; outdoor recreation; children's services; voluntary sector grants. Community Safety: Community Safety Partnership; CCTV.



Resources & Transformation

Councillor David Westley

Accounting services; capital and revenue estimates and budgeting; annual statement of accounts; treasury management; internal audit; risk management & insurance; data quality; value for money; major service reviews; organisational re-engineering; corporate planning; performance management.

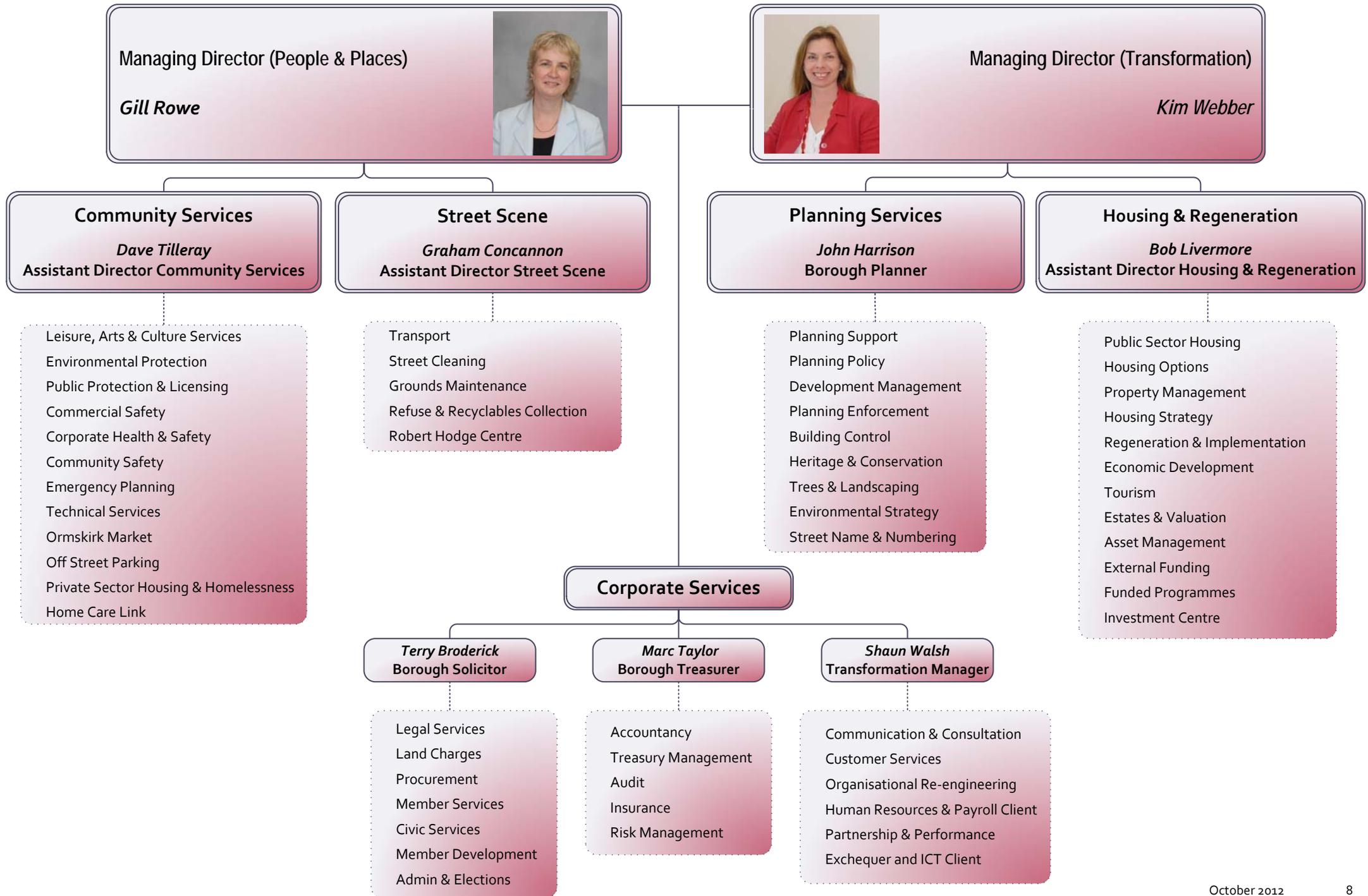


Landlord Services & Human Resources

Councillor Val Hopley

Public sector housing: repairs & maintenance, housing allocations, tenancy management, former tenant arrears, sheltered housing & tenant empowerment/participation. Private sector housing: renovation and disabled facilities grants, home energy efficiency; unfit homes; housing strategy; housing advice service; Supporting People Initiative. HR: corporate & strategic HR issues, strategy, policies & procedures; social inclusion, equality & diversity, cohesive & integrated local communities; council representative at NWLAEO meetings; council JCC; equality champion; employee development champion; health & safety champion.

SENIOR OFFICER MANAGEMENT STRUCTURE



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CORE FUNCTIONS

West Lancashire is served by a County Council, Borough Council, 20 Parish Councils and one Parish Meeting.

Main services provided by Lancashire County Council

Lancashire County Council is responsible for providing many of the services in the borough. Around 73% of the council tax collected in West Lancashire is spent on services that the County Council delivers.

Children and Young People

Incorporates the County Council's statutory role as a Children's Services Authority with a duty to promote co-operation and wellbeing of children and young people; make arrangements to safeguard and promote welfare; and prepare and publish a strategic plan setting out how services for children and young people will be provided.

The functions also include the County Council's powers and duties in relation to schools, including: access and school transport; school improvement and tackling failure; Special Educational Needs; school attendance; and educating excluded pupils and pupil welfare.

Adult and Community Services

Responsible for assessing the needs of vulnerable adults and their carers and securing the provision of social care services to meet these needs in line with the County Council's criteria. Also responsible for adult learning, county libraries, arts development, county museums, record office, welfare rights, coroners' and registrars' services.

Environment

Responsible for the County Council's duties and policies as Highway Authority and Planning Authority; for waste disposal, sustainable development, tourism, countryside services and the Lancashire Highways Service including highway maintenance services to the County Council and providing a grounds maintenance service to County Council property. Also responsible for the Trading Standards Service and the County Analyst's Laboratory.

Lancashire County Commercial Group

Responsible for servicing County Council and other public service vehicles; cleaning County Council buildings; providing a catering service; providing a school crossing patrol service and providing a range of residential care services in County Council homes for the elderly, together with day care and home care services.

Main services provided by West Lancashire Borough Council

Planning Services

Responsible for all planning applications, building regulations and enforcement, as well as conservation, heritage, tree protection and planning policy.

Housing & Regeneration

Responsible for providing affordable housing, and providing housing advice services for people who are homeless. In addition, the function also undertakes the principle work of the Council in relation to creating jobs and bringing investment into the borough.

Community Services

Responsible for environmental health (including dog control, pest control, food safety, health promotion, health and safety, public health and pollution control); Community safety (including CCTV) and funding contributions for Police Community Support Officers; flood defences, shoreline management and methane monitoring.

Also responsible for country parks, the ranger service, sports pitches, playgrounds, parks and Chapel Gallery. Our pools and sports centres are run by West Lancashire Community Leisure Trust.

Street Scene

Responsible for the collection of waste and recycling from homes and cleaning all streets except the major highways. Also responsible for grass cutting and grounds maintenance (of open spaces, parks and roadside verges).

Revenues and Benefits

West Lancashire Borough Council collects council tax and business rates that is spent by the Borough Council, Lancashire County Council, the Police and Fire Authority and Parish Councils. One Connect Limited manages the collection on behalf of the Council. In addition, housing benefits and council tax benefits are also managed by One Connect Limited on behalf of the Council.

The Council also provides some services on behalf of Lancashire County Council. These arrangements have been put in place in areas where devolving management and resources locally has provided a more efficient service, for example the Public Realm partnership with Lancashire County Council whereby we deliver verge cutting and hedge trimming within our borough.

Main services provided by Parish Councils

West Lancashire has 20 Parish Councils and one parish meeting. These cover all of the borough except for Ormskirk and Skelmersdale. Parish Councils are financed by raising a small levy on all residential properties within a parish.

Parish Councils are a key tier of local government and provide a way of making sure services meet the needs of residents by influencing decisions that affect local people.

Parish Councils' powers include: the provision of facilities (such as allotments, leisure, bus shelters, litter bins, car parks, community centres, parks and open spaces); representation (e.g. planning applications); wellbeing (to spend on any activity which adds to the wellbeing of its community).

West Lancashire Borough Council and (signatory) Parish Councils established a Charter setting out how the Borough and Parish Councils will work together, whilst balancing the needs of the wider West Lancashire community and recognising our respective responsibilities as autonomous, democratically elected, statutory bodies.

KEY ACTIVITIES

Workstreams

In refreshing the Business Plan for 2013/14 actions were aligned directly to the Council's priorities to provide a framework for the delivery of our vision. An outline of the actions for the forthcoming year are outlined below.

Balancing the budget and providing the best possible services within the resources available

Actions 2013-14

-  Major Service Reviews
-  Organisational Re-engineering
-  Strategic Asset Management Plan
-  Community Transfer of Facilities

In addition to the projects above, Council agreed further measures for savings in 2013/14 for example through externalising the dog warden service, extending car parking charges and reducing some grants/funding, as well as changes to internal budgets and organisational arrangements with no impact on service delivery.

Our successful *Major Service Review Programme* (MSR) examines every aspect of the Council's business to develop options for alternative forms of service delivery. It includes streamlining services and prioritising their affordability and desirability. We have now delivered and implemented years one and two of the Major Service Review process to assist in ensuring a balanced budget and cumulatively this has achieved savings of £2.55m, with around a further £0.35m already established for 2014/15.

Due to its continuing effectiveness, the method will be used as the key vehicle for delivering the necessary savings and balancing the Council's budget for the lifetime of the Business Plan. It is difficult to accurately

predict the budget gap for future years, but a further MSR round will be conducted in 2013/14 in order to arrive at further policy options to be considered in 2014/15. It is however increasingly difficult to identify options that offer the level of savings needed without impacting upon service delivery.

Reviewing services also provides the information to form a strategic and targeted approach to *Organisational Re-engineering (OR)*. This is then applied to the parts of our organisation where this programme can deliver savings, whilst also considering improving service delivery and customer accessibility. There have been eight successful OR projects to date. In 2012/13 outcomes from projects were implemented in Environmental Health, Private Sector Housing and Sheltered Housing. In addition, a review of Planning Services was undertaken. Landlord Services will be a new area for re-engineering in 2013/14.

The Council aims to save around £200K through introducing a new model of *Community Transfer* for the Civic Hall (Ormskirk), Community Resource Centres (Tanhouse, Birch Green, Digmaor, and Greenhill) and Ashurst Meeting Room.

These facilities play an important role in bringing local communities together, offering a focal point for neighbourhood activities and a base for local groups. Early discussions with community groups around the potential for transfer initially sought transfer of the Community Resource Centres to existing management committees either in partnership with other groups or in an umbrella support arrangement. Notifications for expressions of interest in the community transfer of all the facilities have been published.

We are currently undertaking a strategic review of our asset holding (the *Strategic Asset Management Plan*), with a view to prioritising these assets for retention, improvement or disposal and this will provide a useful income stream and resources for future capital projects. The plan provides a framework to create a focused and sustainable property portfolio for the future. During the year, the Council will continue to identify sites and either bring them to market for development or, where appropriate, seek an alternative use to meet local needs.

Focussing upon sustainable regeneration and growth within the Borough

Actions 2013-14

-  Skelmersdale Vision
-  Firbeck Revival
-  Land Auctions Pilot
-  Empty Homes Initiative
-  Infrastructure Delivery – Transport & Broadband
-  Remodelling Industrial Estates
-  Promoting Apprenticeships

The *Skelmersdale Vision* Town Centre Action Plan has continued to make progress in partnership with the Homes and Community Agency and St Modwen. During the year, the Council resolved to grant outline planning permission for a mixed use development including a foodstore, cinema, restaurants, mixed commercial uses, petrol filling station, car park and youth zone along with new public realm and children's play area. Following this, work around marketing the scheme will be undertaken during 2013/14.

In early 2012, the *Firbeck Revival* initiative was approved and proposals taken forward for consultation with residents. The Skelmersdale-based project will deliver improvement to the Firbeck estate through a phased scheme that broadly covers home improvements, demolition of flats (excluding Firbeck Court) as well as property construction and redevelopment of the street scene. Initial work on this extensive project concentrated on providing energy efficiency measures to homes, as prioritised by residents during the consultation process.

Key actions for 2013/14 include re-housing residents from properties listed for demolition, installing new kitchens and bathrooms on the remaining

council-owned housing, and preparing a redevelopment brief for the construction of new properties. Demolition of the 3 storey flats will be carried out following the re-housing of the occupants. Residents will also be invited to take part in consultation regarding proposals for street scene improvements.

A government grant of £100K has been received and will be used to carry out the works required to progress a *Land Auctions Pilot* involving the Homes and Communities Agency and the Council. The pilot project tests the land disposal elements of a proposed national Community Land Auction model, which could potentially replace the current planning system for the provision of new houses. The pilot was initiated in 2012 and will last for a period of two years, during which time development sites will be brought forward which meet the objectives of the Local Plan. It is anticipated that the sale of at least part of the land will take place by 2014. Dependant upon which site(s) are selected, there is the potential for a significant sum of money to be raised which can then be used, through the Capital Programme, to invest in the priorities of the Council.

The New Homes Bonus is a grant paid by central government to local councils for increasing the number of homes and includes payment for long-term empty homes brought back into use. Proposals will be developed to utilise some of the existing bonus to start housing growth as well as reducing the number of empty properties through our *Empty Homes Initiative*, thereby generating further New Homes Bonus for the Council.

Although not a statutory function of the Council, engaging with partners to improve the infrastructure of the local area means that West Lancashire becomes more appealing to investors and developers. *Infrastructure Delivery* will focus on assisting improvements in transport and broadband for the area and ultimately support the wider success of the Council's priorities.

A lot of the borough's industrial estates were built 20 - 30 years ago and are no longer fit for purpose. The *Remodelling Industrial Estates* plan will improve the prospects of economic recovery for the borough by enhancing estates and making West Lancashire a more attractive option for industry.

A staged progression will utilise reserves for the initial improvement works. Following the successful marketing of them, the income from new businesses will be used for further work on other estates.

Promoting Apprenticeships both within the council and throughout West Lancashire in partnership with Lancashire County Council and others will remain an important area of work.

Caring for our Borough by delivering the small improvements that can make a big difference

Actions 2013-14

-  Housing Asset Management Plan
-  Tenant environment improvement programme
-  Moor Street resurfacing
-  Local environmental improvements
-  Public Realm
-  CCTV: expanding coverage

The *Housing Asset Management Plan* (formerly Housing Improvement Programme) is another significant project being carried out within the Council's housing service. The five-year investment scheme will see through a programme of work to modernise and enhance the Council's housing stock. A programme of option appraisals will be developed for unsustainable properties and a tendering process will select contractors to carry out the work.

A *Tenant Environment Improvement Programme* has been established for small improvements to tenant areas, for example parking or gardens. Tenants' groups or individual tenants are able to propose areas for improvement.

A £700K project to improve Ormskirk's *Moor Street* in partnership with Lancashire County Council would carry out road resurfacing as well as environmental improvement works.

Local Environmental Improvements are being addressed through a budget of £50,000 in 2012/13, and we hope to continue this work in 2013/14. The budget has been used throughout the borough for example on street furniture, signposts, cleaning sculptures etc. The council also engages with Network Rail to facilitate the improved appearance of land, for example that covered with brambles.

The *Public Realm* agreement allows us to deliver services such as grass cutting of verges and hedge trimming on behalf of Lancashire County Council locally.

The Council made £250,000 available for *Expanding the coverage of CCTV* within the borough. In addition, under the terms of an agreement with the Local Strategic Partnership (LSP), £60,000 remaining from Performance Reward Grant funding for a CCTV upgrade project in 2011, was available for the scheme. Thirteen new cameras have been proposed for locations that have previously had no CCTV coverage. A further nine cameras have been proposed for improving and enhancing areas previously covered. Sites were finalised by Cabinet following consultation with Lancashire Constabulary, the Community Safety Partnership, CCTV operators and the LSP, as well as the results of a feasibility study. It is expected that the new cameras will be operational before the second half of 2013/14.

BUDGET STRATEGY

The Council has already implemented permanent ongoing savings of £3.3m over the first two years of the Business Plan process. These savings have had a minimal impact on service quality and have been achieved through partnership working, improved efficiency, reprioritisation of service delivery and targeted increases in fees and charges and other income.

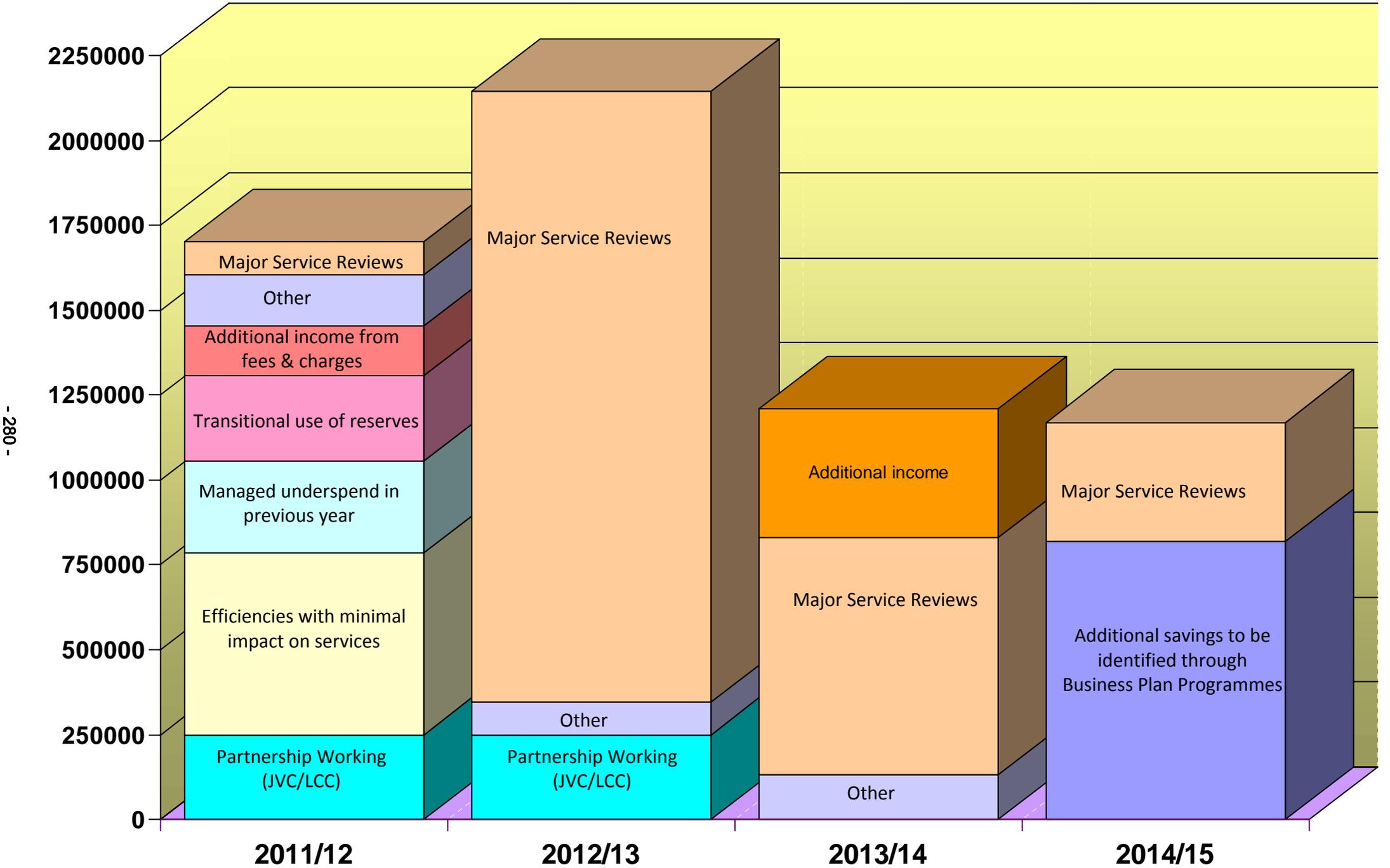
In recent months the Council has also agreed a further set of Major Service Review initiatives and other proposals that will enable it to save the £1.2m required to balance its budget in 2013-14. Once again the savings proposals that have been agreed reflect the Council's lean, local and fair principles.

The financial forecast covering 2014-15, which is the final year of the Business Plan, has recently been updated. This compares the resources that are expected to be available to the Council and the level of spending that would be required to maintain agreed service levels. This forecast projects a budget gap between spending and available resources of £1.17m. However savings of £0.35m have already been identified through the Major Service Review process, which means that there are £0.82m of additional savings required to be identified to achieve a balanced budget.

This financial forecast is based on a number of assumptions and has been calculated on a prudent but not worst case scenario taking into account information that is currently available. It should be noted that due to the inherent uncertainties involved with this type of financial projection there is scope for significant variance. Consequently the forecast will need to be periodically reviewed to ensure that it remains up to date. It does however provide a clear indication of the magnitude of savings that will be required.

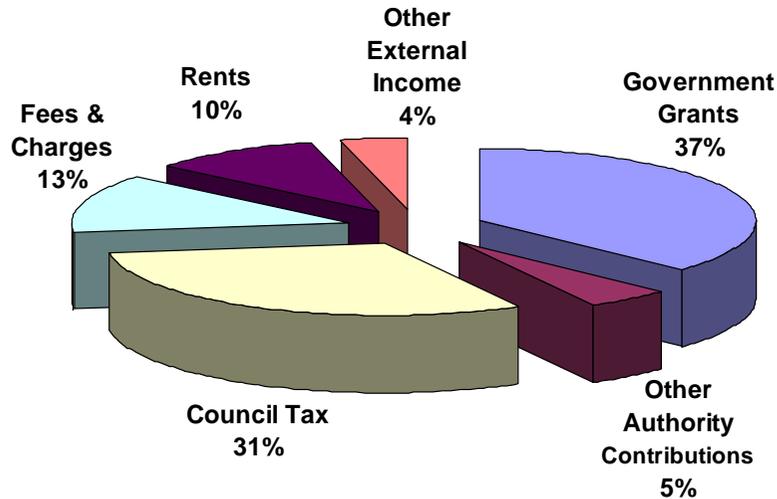
A graphical representation of the budget strategy is shown below:

Representation of Budget Strategy



RESOURCE BUDGETING AND STAFFING

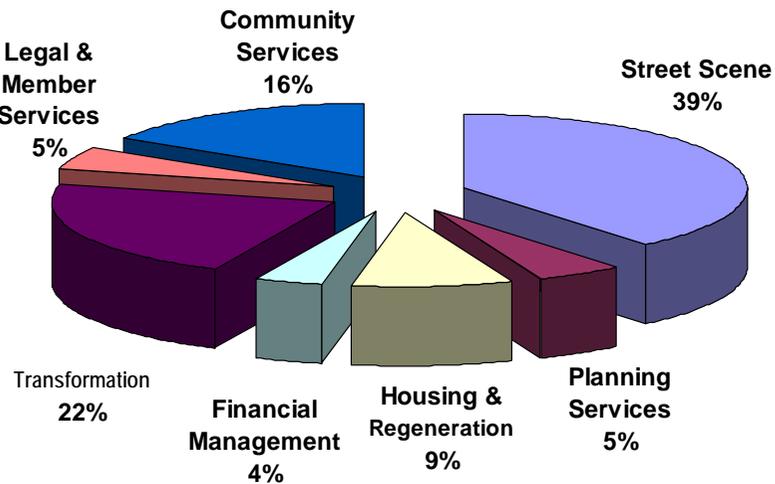
The Council's 2012/13 income was made up as follows



The Council is committed to ensuring staffing levels are appropriate to deliver services to agreed standards. In the current financial climate it is anticipated that the workforce will continue to reduce in size over the remainder of the current Business Plan period.

To manage this process effectively and sensitively, the Council will continue to limit external recruitment appropriately and use short term temporary contracts in particular to ensure potential redeployment opportunities for staff displaced as a result of the continued Major Service Review process. The Council will continue to seek to minimise compulsory redundancies as far as possible.

In 2012/13, the budget was spent as follows



CONSULTATION AND EQUALITIES

The Council has a duty to consult and involve representatives of local persons and others, where appropriate in the exercise of its functions.

In summary, this covers:

- The common law requirement for fair consultation, e.g. consultation needs to be undertaken when matters are at a formative stage and must be consistent with existing policies on consultation in particular functions.
- Responsibilities in relation to the Equality Act, which requires the Council to demonstrate that it has paid due regard to equality issues across its services and functions.
- The general 'Duty to Consult' (Section 3A of the Local Government Act 1999) which requires that in relation to its duty to secure best value an authority shall consult representatives of people who pay council tax and NNDR, service users and others with an interest in the area. The duty specifies three ways of involving that need to be considered, viz providing information, consulting or involving in another way.
- The Best Value Statutory Guidance (September 2011) sets out expectations for councils in relation to the duty to consult, including where they are considering difficult financial decisions. The guidance, which Councils must have regard to, requires councils to give at least three months' notice of funding reductions to voluntary or community organisations or small businesses; to engage organisations and service users as early as possible before making a decision on the future of a service; and make provision for organisations, service users and the wider community to put forward options on how to reshape the service or project.
- Particular statutory duties of consultation for specific matters, e.g. in relation to disposal of open space or highway matters (which supplant the more general Duty to Consult).

MONITORING OF ACTIVITIES

Business Plan Monitoring

Performance and progress against the four-year Business Plan is reported annually to the Council and the public in the form of an Annual Report.

Programme/Project Monitoring

In addition, Members receive regular reports regarding progress against the actions. This enables any issues to be identified at the earliest opportunity.

A Head of Service is identified as the 'Lead Officer' for each of the projects. Lead Officers will regularly monitor progress and performance against their projects, and report any issues to the Senior Management Team by exception.

Risk Management

The actions contained within the Plan aimed at the delivery of our vision will be entered onto service risk registers with major projects being entered onto the Key Risk Register.

Cabinet receives reports against the Key Risk Register which are available for call-in through the Overview and Scrutiny process.

CONTACT FOR FURTHER INFORMATION

If you require any further information, or copies of this document in alternative formats, please contact:

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Appendix C: EIA process for services, policies, projects and strategies

<p>1. Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service / policy / strategy / decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people:</p> <ul style="list-style-type: none"> • <i>People of different ages – including young and older people</i> • <i>People with a disability</i> • <i>People of different races/ethnicities/nationalities</i> • <i>Men</i> • <i>Women</i> • <i>People of different religions/beliefs</i> • <i>People of different sexual orientations</i> • <i>People who are or have identified as transgender</i> • <i>People who are married or in a civil partnership</i> • <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave</i> • <i>People living in areas of deprivation or who are financially disadvantaged</i>
<p>The plan is the final year refresh of a four year plan. It sets the priorities and vision for the Council, summarising the projects to be pursued to this end. There is unlikely to be a disproportionately negative effect on any of the groups listed with impact on all characteristics; the plan as a whole aspires to maintain performance and the range of services provided by the council. All suggested changes which are deemed significant proposals are fully consulted on in line with Major Service Review processes.</p>
<p>2. What sources of information have you used to come to this decision?</p>
<p>The previous pieces of work undertaken to provide the basis for the strategy, eg. MSR Consultation 2013.</p>
<p>3. How have you tried to involve people/groups in developing your service/policy/strategy or in making your decision (including decisions to cut or change a service or policy)?</p>
<p>The original Business Plan underwent public consultation during February to March 2011. The decision is directly related to the refreshed document. The MSR Consultation 2013 (July-September) used results of the Citizen/Stakeholder Survey 2013 to inform its proposals and was subject to an EIA. Individual projects that may impact upon equality groups should be the subject of EIAs themselves with involvement/consultation as appropriate. No specific consultation has taken place against the Business Plan refresh for 2014/2015, however the Council's priorities are informed by the Citizen Survey which gathers views on a range of issues including the Council's budget. The survey results assist the Council in making plans to deliver services and make efficiency improvements.</p>
<p>4. Could your service/policy/strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:</p> <ul style="list-style-type: none"> ▪ Eliminate discrimination, harassment and victimisation ▪ Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people) ▪ Foster good relations between people who share a protected characteristic and those who do not share it
<p>The action around <i>Financial Inclusion Strategy</i>, which is in response to implementation of national policy, could help '<i>advance equality of opportunity</i>'. Other impacts may be determined during the lifetime of the Plan. Any initiatives that may impact upon equality groups should be subject to an individual EIA.</p>
<p>5. What actions will you take to address any issues raised in your answers above?</p>
<p>Again, any initiatives that may impact upon equality groups should be subject to an individual EIA. The Council needs to achieve savings and this will be increasingly difficult to achieve without impacting somehow on service delivery.</p>

MINUTE OF CABINET 14 JANUARY 2014

72. BUSINESS PLAN 2014-2015 REFRESH

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

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

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



AGENDA ITEM: 10

CABINET: 14 JANUARY 2014

**EXECUTIVE OVERVIEW AND
SCRUTINY COMMITTEE: 30
JANUARY 2014**

Report of: Borough Treasurer

Relevant Managing Director: Managing Director (People and Places)

Relevant Portfolio Holder: Councillor D Westley

Contact for further information: Marc Taylor (Extn. 5092)

(E-mail: Marc.Taylor@westlancs.gov.uk)

SUBJECT: DRAFT REVENUE BUDGET 2014-15

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 2014-15 and later years be noted, and consideration given to how a balanced budget can be achieved.

2.2 That the Portfolio Holder for Resources and Transformation be given delegated authority to submit firm proposals to Council on 26th February 2014 to enable the budget to be set.

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 30th January 2014.

3.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW & 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 Resources and Transformation in advance of the Council meeting to be held on 26th February 2014

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 meet statutory and accounting regulations. The Council meeting on the 26th February will provide all Members with the opportunity to debate and agree this budget.

5.0 LOCAL GOVERNMENT FINANCE SETTLEMENT

- 5.1 Just before Christmas, the Government issued the provisional finance settlement for local authorities for 2014-15. This settlement announced that our Funding Assessment (the government's view of the funding that should be available to us through Revenue Support Grant and retained Business Rate income) would reduce by £0.996m to £6.322m. This is a decrease of 13.6%, which is similar to other Lancashire districts whose settlements varied between reductions of 13.3% to 13.8%. This is however significantly worse than the national average reduction which was 9.4%.
- 5.2 The Government will provide Revenue Support Grant of £3.370m towards this Funding Assessment, and expects that the balance of £2.952m to be generated through the Business Rates Retention system. This retained business rate income figure is 1.95% higher than the equivalent figure for the current year, which reflects the proposed increase in the level of business rates for 2014/15. An estimate of the business rates income collectable for next year is currently being prepared, and this will need to be taken into account in considering the final budget position.
- 5.3 In addition to the Funding Assessment, the Government provides a number of other grants to the Council including New Homes Bonus (NHB) funding. The Council should receive an additional £437,000 NHB next year, which is the third highest figure in Lancashire. This grant funding is based on a net increase in the housing stock of 291 properties (of which 81 were assessed as being affordable homes), together with 64 long term empty properties being brought back into use. When added to our current NHB allocation for this year, this will mean total funding from this source of £1.049m next year.
- 5.4 In overall terms the Settlement will result in a significant reduction in funding for the Council. However this reduction had been expected and has been taken into account in our Medium Term Financial Forecast and Business Plan. The figures now published by the Government show an overall reduction in grant funding of £666,000, which is £147,000 lower than the projected reduction of £813,000

included in the Medium Term Financial Forecast. The main reason for this improvement is a higher than expected level of NHB grant.

- 5.5 In recent years the Government has operated a scheme where it has provided grant funding to compensate those local authorities that have not increased their Council tax. This scheme has had a high take up rate and as a result many authorities have frozen their council tax levels. However more recently the take up rate for this scheme has reduced as it provides less funding than increasing the council tax, particularly when considered on a cumulative, long term basis.
- 5.6 The Government is running a similar scheme for 2014-15, where if we freeze our council tax next year then we will receive a grant equivalent to a 1% increase in council tax (around £60,000), which will then be built into our Funding Assessment in future years. In making a decision on whether to accept this grant, Members will need to consider the difficult financial situation facing many West Lancashire tax payers and weigh this against the need to maintain the real value of council tax income when inflation is running in excess of 2%. There is also no guarantee that this grant funding would continue to be provided in the future and consequently accepting the grant may not help to address the Council's challenging medium term financial position.
- 5.7 For Councils that do decide to increase their Council tax, the Government have introduced powers for residents to veto any council tax increases over a certain level through a local referendum. The referendum limits have not yet been announced, but if a local authority wanted to raise its Council tax by more than this level it would have to consult the public in a referendum in order to obtain approval for this course of action.

6.0 BUDGET POSITION FOR 2014-15

- 6.1 Draft estimates have now been prepared for next year 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, including continuation of the existing Council Tax Support Scheme. These estimates include a number of increases to cover standard budget factors including an assumed 1% pay award in 2014-15, increases as a result of the actuarial revaluation of the pension fund, and contract inflation in line with contractual agreements. These estimates do not however contain any additional spending for service improvements. These estimates will now 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.
- 6.2 The Council is facing a very challenging medium term financial environment primarily as a result of reductions in government grant funding. Details on this financial position were set out in the Major Service Review (MSR) report in October, and a number of proposals on efficiencies, savings and income were

agreed at that time. This report then identified a potential funding requirement of £474,000 to balance up the budget for 2014-15, which could be taken from the Budget and Efficiency Savings Reserve. This funding requirement has now reduced by £147,000 to £327,000 as a result of the better than expected settlement figures.

6.3 Heads of Service have identified a range of budget pressures for next year that mainly relate to unavoidable cost increases or income reductions. 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. In line with the approach adopted in the Medium Term Financial Forecast a provision of £150,000 has been allowed for this factor in 2014-15, but its final value will depend on the political acceptability of these issues.

6.4 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
- The acceptance of budget issues identified by Heads of Service
- Changes to fees and charges and the level of the Council tax
- The projected favourable variance on the current year's budget identified in the mid year review
- The identification of further efficiency and budget savings
- The Business Plan process
- The Council's reserve strategy

6.5 The Group leaders and their financial spokespersons are currently examining in detail various budget options. A more detailed set of budget papers will be reported to the Executive Overview and Scrutiny Committee to enable a more in depth consideration of the budget position. The Council meeting will then 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 A recent report from Grant Thornton, our external auditors, entitled "2016 Tipping Point? Challenging the Current" highlights that local authorities in general have met the challenges they face to date as pressures mount on their services and finances. However these challenges are set to increase, as financial austerity is expected to continue until at least 2017, 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 after 2015, 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 the budget position for next year can be balanced through a relatively small use of reserves. However the medium term financial picture remains very challenging. The recently published settlement includes provisional figures for 2015-16 which indicate a further £0.990m (15.7%) reduction in our Funding Assessment. This means that further efficiencies, savings and income proposals will need to be agreed to maintain our financial position.
- 7.3 The Council's Medium Term Financial Forecast will now be updated to reflect the details of the finance settlement and other recent developments. This forecast will then inform the Business Plan process for 2015-18, which will set out how these financial challenges will be addressed.

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 including the council tax base, the deficit or surplus on this year's council tax collection, and business rate income projections for both this year and next year. 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.

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

1. General Revenue Account Estimates
2. Minute of Cabinet – 14 January 2014 (Executive Overview and Scrutiny Committee only)

APPENDIX 1

**WEST LANCASHIRE BOROUGH COUNCIL
GENERAL REVENUE ACCOUNT ESTIMATES**

NET EXPENDITURE BUDGETS	2013/2014 BUDGET £	2014/2015 ESTIMATE £
SERVICE		
Community Services	4,589,220	
Corporate Services		
- Borough Solicitor	1,197,520	
- Borough Treasurer	1,104,350	
- Transformation Manager	1,696,860	
Housing and Regeneration	223,390	
Planning	1,525,270	
Street Scene	5,016,910	
GENERAL AND UNALLOCATED ITEMS	21,750	
Total Service Budgets	15,375,270	
NON SERVICE ITEMS		
Treasury Management	-49,070	
Capital Charges	-1,620,230	
Minimum Revenue Provision	88,000	
Transfer from / to Balances and Reserves	-43,000	
Revenue Contribution to Capital	220,600	
Total Non Service Items	-1,403,700	
Total Requirement excluding Parish Precepts	13,971,570	

NOTE – THE DRAFT ESTIMATES FOR 2014/15 ARE TO FOLLOW

MINUTE OF CABINET 14 JANUARY 2014

73. DRAFT REVENUE BUDGET 2014 - 2015

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

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

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



AGENDA ITEM:

CABINET: 14 January 2014

**EXECUTIVE OVERVIEW &
SCRUTINY COMMITTEE:
30 January 2014**

Report of: Borough Treasurer

Relevant Managing Director: Managing Director (People and Places)

Relevant Portfolio Holder: Councillor D Westley

**Contact for further information: Mrs K Samosa (Ext. 5038)
(E-mail: karen.samosa@westlancs.gov.uk)**

SUBJECT: MEDIUM TERM CAPITAL PROGRAMME

Wards Affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To set out a number of options for determining the medium term capital programme.

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 Resources and Transformation be given delegated authority to submit firm proposals to Council on 26th February 2014 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 30th January 2014.

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 Resources and Transformation in advance of the Council meeting to be held on 26th February 2014.

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 2014. 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 capital programme are receipts from the sale of assets. At the start of this financial year there were £3.330m of capital receipts being held for this purpose. In previous years, the proceeds from sales of Council Houses and Land provided a significant and reliable income stream. However, in recent years funding from this source has been at an historically low level reflecting the depressed economic climate. Levels of Council House sales have however now started to increase due to a number of factors including the increased discount rate offered to tenants who want to buy their home following a change in government regulations and an improvement in the general availability of mortgages.

5.2 Table 1 shows details of sales by number and value in recent years. The usable sale proceeds reflect the amount available for new capital spending after payments made to the government under a pooling system:

Year	Number of sales		Usable sale proceeds, £000	
	Council houses	Land sales	Council houses	Land sales
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 (mid year)	25	2	151	15

5.3 The government's changes in right to buy capital receipt regulations have led to an increase in the number of sales but a reduction in the average sales value (primarily as a result of the maximum discount offered to tenants increasing from £26,000 to £75,000). Taking this into account along with an anticipated increase in demand has provided an estimate of future receipts from council house sales of £1.235m over the 4 year period 2013/14 to 2016/17.

5.4 A significant amount of work has now been completed on the Strategic Asset Management Project and this provides an opportunity to supply a stream of receipts for future capital spending. It has been estimated that receipts of £1,000,000 could be generated from a range of land sales in the period 2013/14

to 2016/17, including the disposal of the Westec House site and the sale of a house next to the Civic Hall.

- 5.5 These estimates of capital receipt funding 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 also 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 2013/14 to 2015/16. 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 is £4.498m. A breakdown of these approvals by scheme is provided in the Appendix. In addition to the existing scheme approvals it has become normal practice in developing the rolling medium term programme to include provisional allocations for the next year of the programme (in this case 2016/17). Consequently, the Appendix also contains provisional allocations of £0.802m, for ongoing capital schemes which typically receive funding each year.

7.0 OVERVIEW

- 7.1 Table 2 summarises the current position in terms of capital receipt funding and spending requirements, and identifies a small initial surplus of £0.320m before new spending requirements are taken into account.

Table 2 – Capital Receipts Available	£000
Usable capital receipts held in April 2013	3,330
Estimate of receipts that will be generated between April 2013 and the end of the 2016/17 financial year	
- Council house sales	1,235
- Land sales	1,000
- Other sales	55
Existing spending approvals covering period to 2015/16	-4,498
Provisional spending approvals for 2016/17	-802
Net position	320

- 7.2 This surplus will provide resources to develop a limited number of new capital schemes, which is a significant improvement on the financial position in recent years. However it is unlikely to be sufficient to meet all of the potential new and additional spending requirements that may be identified and consequently there will be a need to prioritise resources through the budget process.

8.0 WAY FORWARD

- 8.1 The budget process provides Members with the opportunity to realign and reshape the capital programme, for example through amending the spending approvals for specific schemes, re-profiling schemes into later years, or finding alternative sources of funding. Members will need to 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 The Council has been successful in attracting external capital investment over many years. Recent examples of this include grant funding supplied by the Environment Agency to carry out flood defence schemes, and working jointly with the Homes and Communities Agency on the purchase of land as part of the Skelmersdale Vision. The Local Land Auction Pilot is being actively pursued and could potentially deliver significant additional funding, as could the proposed introduction of a Community Infrastructure Levy, which is currently being developed. However while external funding avenues will continue to be pursued, such funding can have some considerable lead in times before issues are concluded, and may not be guaranteed.
- 8.3 A further option that could be considered to provide additional resources is prudential borrowing. 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 £86,000 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.
- 8.4 In recent years funding from favourable revenue budget performance has played an important part in financing new schemes, and the use of the projected surplus arising from this year's mid year review was considered in a Budget update report to Council in December. At this meeting funding was agreed for a couple of new IT capital schemes and financing was also set aside for the Moor Street project and Skelmersdale Town Centre Environmental Improvements.
- 8.5 Officers will work with each Political Group throughout the budget process to review all of 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 key 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.

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. A full Equality Impact Assessment, however, will be included in the Council report when substantive decisions on expenditure are considered.

Appendix

1. Capital Receipt Funding Approvals
2. Minute of Cabinet 14 January 2014 (Executive Overview and Scrutiny Committee only)

APPENDIX - CAPITAL RECEIPT FUNDING FOR INDIVIDUAL SCHEMES

SERVICE AND SCHEME	Current Allocations				Provisional Allocation
	2013/2014	2014/2015	2015/2016	Total	2016/2017
	£'000	£'000	£'000	£'000	£'000
<u>Corporate Services</u>					
Parish Capital Schemes	60	45	30	135	30
I C T Infrastructure	37	50	50	137	50
Electronic Document Managing & Workflow	19			19	
ICT Development Programme	176	100	100	376	100
Website Contract Management System	99	20		119	
<u>Community Services</u>					
Contaminated Land Works	0	10		10	
Playground Improvements	30	84	30	144	30
Children's Play Areas	56			56	
Leisure Trust	228	228	228	684	228
CCTV (Camera Upgrade)	70			70	
Abbey Lane Playing fields	25	75		100	
Empty Homes Initiative	0	100		100	
Housing Renewal Grant	85	115	100	300	100
Disabled Facilities Grants	0	215	100	315	100
Clearance Programme, Skelmersdale	45			45	
<u>Planning Services</u>					
Free Tree Scheme	3	3	2	8	
Preservation of Buildings at risk	2			2	
Planning System Upgrade	37			37	
Skem Town Centre Vision	0	11		11	
<u>Corporate Property</u>					
Corporate Property Investment Programme	283	164	164	611	164
Skelmersdale War Memorial	24			24	
<u>Housing and Regeneration</u>					
Culvert Debris Screens	4	18	7	29	
Affordable Housing	657			657	
Firbeck Revival	252			252	
<u>Street Scene</u>					
Blue Bin Scheme	257			257	
Total Programme	2,449	1,238	811	4,498	802

MINUTE OF CABINET 14 JANUARY 2014

74. MEDIUM TERM CAPITAL PROGRAMME

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

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

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



AGENDA ITEM: 12

CABINET: 14th January 2014

**EXECUTIVE OVERVIEW &
SCRUTINY COMMITTEE:
30th January 2014**

Report of: Assistant Director Housing and Regeneration

Relevant Managing Director: Managing Director (Transformation)

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

**Contact for further information: Mr D McCulloch (Extn. 5203)
(E-mail: Darroll.mcculloch@westlancs.gov.uk)
Mr W Berkley (Extn. 5259)
(E-mail: william.berkley@westlancs.gov.uk)**

SUBJECT: HOUSING ACCOUNT – REVENUE AND CAPITAL PROGRAMME

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To provide a summary of the budget position for the Housing Account for the next financial year.

2.0 RECOMMENDATIONS TO CABINET

2.1 That the financial position for 2014-15 be noted, and consideration given to the budget issues set out in this report.

2.2 That the Assistant Director Housing and Regeneration be given delegated Authority to set garage rents at a level to maximise income for the HRA.

2.3 That the Assistant Director Housing and Regeneration be given delegated Authority to set service charges at levels that recover the costs of service provision.

2.4 That this report be used for consultation purposes prior to the Council considering this matter in February 2014.

- 2.5 That the Housing Finance Portfolio Holder be given delegated authority to submit firm proposals to Council on 26 February 2014 to enable the budget to be set.
- 2.6 That call in is not appropriate for this item as it is to be submitted to the next meeting of the Executive Overview and Scrutiny Committee on 30 January 2014.

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 Housing Finance Portfolio Holder in advance of the Council meeting to be held on 26 February 2014.

4.0 BACKGROUND

- 4.1 The HRA moved to a new self financing system at the end of March 2012. This involved making a payment to Government of £88.212m, which was financed by a range of fixed maturity loans with repayment periods ranging between 15 and 50 years, and an average interest rate of 3.47%. This new system has led to an improved financial position for the Housing Account as the debt costs of the borrowing are less than the subsidy payments of over £6m per year that had to be made to the Government under the previous system.
- 4.2 The experience of self financing to date has been one of clarity in respect of the financial arrangements, as the housing subsidy system was complex and unpredictable. This is enabling a longer term outlook in stock management issues and asset management to be developed with a better informed capital investment needs profile.

5.0 RENTAL INCOME AND SERVICE CHARGES

5.1 RENTAL INCOME

- 5.1.1 The Government has had a policy that authorities should aim to achieve what is known as target rents by 2015. Target rents were set to broadly bring Local Authority rent in line with Housing Associations so that Tenants were paying a similar rent for similar properties within each locality. The target rent is based on the value of the property, the size of the property and the average regional earnings.
- 5.1.2 The Government's Self-Financing debt settlement was based on rent convergence taking place in 2015 based on rental growth of RPI +0.5% plus £2.
- 5.1.3 However, the Government has recently announced that rent convergence will be achieved by April 2015 and that from April 2015 the rent increase formula will be Consumer Price Index (CPI) +1.0%. During the economic downturn CPI has

been around 0.5% below RPI but this will be compensated by a real increase of 0.5% in the formula uplift.

- 5.1.4 In the final year of convergence, I propose to use my delegated authority to increase rents in accordance with the Government target rents formula, which is equivalent to Retail Price Index (3.2%) plus 0.5% plus £2 a week. This will mean that the overall average rent increase will be 4.31% next year.
- 5.1.5 The change in the government's timetable and removal of the £2 addition from the formula in 2015 will mean that not all properties will achieve convergence by April 2015 and will reduce future income to the Authority by around £300,000 pa.
- 5.1.6 Two factors that heavily influence the level of income to the authority are Right to Buy's (RTB's) and Void levels and relet times. The government's increase in RTB discount in 2012-13 has meant that sales are expected to double. This has the benefit of making more receipts available for capital investment but has the adverse effect of reducing HRA rent and service charge income. Increased RTB sales have been factored into our HRA estimates. Void levels and the time it takes to relet can have an adverse impact on income levels. In 2012-13 a number of factors contributed to increased void loss. However, management action has been taken and this is less likely to be a problem in 2014-15.
- 5.1.7 From April 2015, the Council will need to determine its own rent policy considering a range of different factors including government guidance and the impact of Universal Credits.

5.2 SERVICE CHARGES IN RESPECT OF LEASEHOLD FLAT, COUNCIL FLATS WITH COMMUNAL AREAS AND SHELTERED ACCOMMODATION

- 5.2.1 Overall, service charges should cover the cost of services provided to tenants. Having reviewed this area it is proposed that charges are increased by RPI + 0.5% (3.7%) to maximise income in line with the policy framework.
- 5.2.2 Work was commissioned in 2013-14 to look at the individual cost of service charges for leasehold flats, council flats with communal areas, and sheltered accommodation. This work has identified a need to regularise income and expenditure to meet actual cost of service provision which I propose to commence in 2014-15. Accordingly, I am seeking a new delegated authority to amend service charge levels, as appropriate, to realign actual costs of service provision with service charge income received.
- 5.2.3 In respect of Hall Green Close I intend to undertake an option appraisal in 2014/15 to determine the scope for site wide improvements as this scheme is significantly underutilised and is no longer fit for purpose in terms of some of the units for rent. I will report back on any developments options in due course.

5.3 GOVERNMENT POLICY CONSIDERATIONS

- 5.3.1 In considering the above recommendations Members should be aware that the Council can determine its own rent and service charge policy and strategy. However, Members should remember that the majority of our tenants are in

receipt of some form of housing benefit, and that the Government can limit the increases in benefit that tenants may receive. Additionally, Members are also reminded that Government decisions may adversely affect the Council's Business Plan causing difficulty for some tenants meeting these increases and the Council in collecting income.

6.0 HEATING CHARGES

- 6.1 District heating charges have recently been reviewed during 2013-14 and I used my delegation to increase some charges where I deemed it appropriate by 10%.
- 6.2 A fundamental review of the District Heating Service is currently underway looking at amongst other things consumption patterns, tenant practices, and investment needs.
- 6.3 I propose to regularise the charges for district heating upon completion of the review and will implement these changes in accordance with my delegation.

7.0 GARAGES

- 7.1 Currently, we let 71.7% of garages which produces an income which benefits the HRA to around £359,000. Garage charges have not been increased for several years and void levels are largely attributable to factors other than the rate being charged. A pilot scheme is currently underway to look at how we should manage and maintain our portfolio of garages. As part of this pilot scheme I propose to move to a flexible approach to garage rental charges and I therefore seek authority to set garage charges on a site by site basis. Because of this I am seeking delegation to set garage charges on the basis of setting these at market levels to maximise the benefits for the HRA.
- 7.2 Additionally a sum of £50,000 has been included within the HRA budget Issues at Appendix C to continue with the implementation of a Garage Strategy to maximise the utilisation of current garages and develop alternative proposals for low demand units within the context of the Asset Management arrangements and professional input from the Estates and Regeneration Team within the Division.

8.0 REVENUE EXPENDITURE AND SAVINGS

- 8.1 The base assumptions used in the HRA Business Plan and for the HRA Estimates are detailed in appendix A. The HRA business Plan sets out projections of expenditure and income over a 30 year period to enable forward planning and long term investment decisions to be made. The HRA Estimates for 2014-15 provide more detailed information that set out the financial basis for how the HRA service objectives will be achieved.
- 8.2 The Draft HRA Estimates set out at Appendix B provide a provisional budget for the Housing Revenue Account covering all areas of expenditure and income for 2014-15. Those estimates include increases in the base budget required to roll

forward agreed service levels but do not allow for any service improvements. Those figures also allow for the increase in rents and other charges as set out above. Those 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. Subject to the review of estimates, the latest figures will be presented to Council at its meeting on 26 February 2014.

- 8.2 In addition to the roll over budget in continuing services, it is also important to consider new budget issues and areas for development. Appendix C comprises a list of issues that Officers have identified that should be considered as part of the budget process.
- 8.3 Members will need to carefully consider those options, and any others that emerge through the budget process, and determine which proposals to include in the final budget to meet service objectives.

9.0 CAPITAL INVESTMENT

- 9.1 Savills produced a report detailing capital investment required to the housing stock. This was used in 2013-14 to form the basis of a draft plan over 5 years which was approved by Council in February 2013.
- 9.2 The first year of the investment plan has been reviewed in November 2013 and amended in the light of tenders achieved. The estimates attached at appendix D detail the revised plan in the light of the above review and incorporate a number of changes to reflect the latest available information...
- 9.3 Members will recall that earlier in the year we were approached by the kitchen contractors to consider a three year programme as opposed to a contract of 5 years duration. Officers are currently in discussion with the two kitchen contractors (Lovell's & Wates) to see whether significant savings can be achieved by them accelerating the replacement kitchen programme. The contractors will be confirming their stance by early 2014.
- 9.4 There is a need to link the rent policy into the investment strategy in order to develop a robust business plan. This is because the investment strategy can only be delivered if the rental income levels that are projected are actually achieved. Agreeing the investment strategy will therefore effectively produce a commitment to the rental policy. Members need to understand the strong link between rents and investment.
- 9.5 We need to ensure our properties are sustainable and have a positive effect on the business plan. Therefore investments in properties that have a negative effect on the business plan need careful consideration. Work on some of these properties is included within the investment plan in years 3 and 4. These properties will undergo an option appraisal prior to this investment being carried out. This will involve working with tenants and Members in these areas bringing reports back to Council at appropriate times.

- 9.6 A fully worked up set up of budget proposals will be brought back to Council in February highlighting all the financial and resource implications both in terms of revenue and capital which will support the Housing Revenue Account Business Plan. These proposals will take into account the consultation with residents that will take place as part of the budget process.

10.0 SUSTAINABILITY IMPLICATIONS / COMMUNITY STRATEGY

- 10.1 Clearly the Council with its Tenants will want to ensure that the future business plan ensures that properties are brought up to a reasonable standard and that appropriate investment is able to be made at the appropriate time. The further modelling of the business plan will enable a well informed investment plan to be developed that takes into account the priorities of Tenants, the investment needs in the stock which have been considered as part of a well thought out asset management strategy. It will ensure that the rent levels reflect the needs and requirements of the stock and meet Tenant priorities.

11.0 RISK ASSESSMENT

- 11.1 The formal consideration and reporting of the budget estimates is part of the overall 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.

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

A formal Equality Impact Assessment will be produced when the Council agrees the budget at its meeting in February.

Appendices

Appendix A – Key Assumptions

Appendix B – Draft HRA Estimates

Appendix C – Budget Issues

Appendix D – Draft 4 Year Investment Plan

Appendix E – Minute of Landlord Services Committee (Cabinet Working Group) held on 9 January 2014

Appendix F – Minute of Cabinet – 14 January 2014 (Executive Overview and Scrutiny Committee only)

KEY ASSUMPTIONS UNDERPINNING THE HRA DRAFT ESTIMATES AND HRA BUSINESS PLAN

	<u>Year</u>		<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
	<u>Financial Year</u>		<u>2014.15</u>	<u>2015.16</u>	<u>2016.17</u>	<u>2017.18</u>	<u>2018.19</u>
1.00	DWELLING STOCK						
1.10	RTBs (2013.14 assumption in brackets)		50	50	50	50	50
1.20	Demolitions		0	0	0	0	0
1.30	Additions		0	0	0	0	0
2.00	INFLATION AND GROWTH						
2.10	CPI		2.70%	2.70%	2.70%	2.70%	2.70%
2.20	RPI		3.20%	3.20%	3.20%	3.20%	3.20%
2.30	<i>Real Growth above RPI</i>						
2.31	Rents		0.50%				
2.32	Non-dwelling Rents (Garages)		-3.20%	-3.20%	-3.20%	-3.20%	-3.20%
2.33	Service Charges		0.50%	0.50%	0.50%	0.50%	0.50%
2.34	Employee Related Pay		-2.20%	-2.20%	-2.20%	-2.20%	-2.20%
2.35	Premises Related Expenditure		0.00%	0.00%	0.00%	0.00%	0.00%
2.36	Other Management & Supervision Costs		0.00%	0.00%	0.00%	0.00%	0.00%
2.37	<i>Real Growth above CPI</i>						
2.38	Rents			1.00%	1.00%	1.00%	1.00%
2.39	Service Charges			1.00%	1.00%	1.00%	1.00%
2.40	<i>Superannuation</i>						
2.41	Increase in employers Contribution		1.00%	0.00%	0.00%	0.00%	0.00%
3.00	VOIDS		2.00%	2.00%	2.00%	2.00%	2.00%
4.00	BAD DEBTS		1.00%	1.00%	1.00%	1.00%	1.00%
5.00	INTEREST EARNED / PAID						
5.10	Interest on SF Debt with PWLB		3.47%	3.47%	3.47%	3.47%	3.47%
5.20	Interest on New External Borrowing		4.45%	4.45%	4.45%	4.45%	4.45%
5.30	Interest Earned on Working Balances etc		0.35%	0.35%	0.35%	0.35%	0.35%
6.00	VOLUNTARY DEBT REPAYMENT SET ASIDE REQUIRED						
6.10	Amount of Voluntary Set Aside agreed by Council in 2012		£0.27m	£0.27m	£0.28m	£0.29m	£0.29m
7.00	PROFESSIONAL FEES		8.00%	8.00%	8.00%	8.00%	8.00%

Notes:

- 2.31 Additional uplift in rents to achieve convergence with Government rent formula
6.1 This area will be reviewed during the budget setting process to consider change in capital receipt regulations

2014.15 2015.16 2016.17 2017.18 2018.19
£2 £0 £0 £0 £0

WEST LANCASHIRE BOROUGH COUNCIL
DRAFT REVENUE ESTIMATES 2014/15
HOUSING REVENUE ACCOUNT

ITEM			2013.14	2014.15
			BUDGET	BUDGET
			1	2
	SUMMARY		£	£
	EXPENDITURE			
1	General Expenses	HRA 2.7	12,268,600	3,565,613
2	Supervision, Management & Housing Repairs & Maintenance	HRA 3.8	11,163,120	11,159,533
3	Total HRA Expenditure		23,431,720	14,725,146
	INCOME			
4	General Income	HRA 2.10	23,431,720	24,171,770
5	Transfer from Unused Reserves		0	
6	Total Income		23,431,720	24,171,770
7	HRA Resource Shortfall / (Available)	HRA 1.6 plus HRA 1.7	-	(9,446,624)
8	Add: Headroom borrowing not already committed	(potentially £12.4m TBC)		
9	Add: Savings in capital programme 2013-14	(potentially £700k TBC)		
10	Less Interest on external borrowing	(Policy already agreed last year and £266k included in estimates)		
11	Less Additional Voluntary Repayment of Debt	(potentially around £0.824m TBC)		-
12	Less: Budget issues Appendix C	(potentially around £12.218m yet To be decided)		-
13	Less: Capital Investment Programme Appendix D	(to be agreed)		-
14	Add Transfer from / (to) working Balance		0	-
15	HRA net of Income and Expenditure		-	(9,446,624)
16	Working Balance			
17	Opening Balance		657,953	657,953
18	Add / (deduct): Transfer from HRA			-
19	Less: Transfer to HRA			
20	Closing balance		657,953	657,953

WEST LANCASHIRE BOROUGH COUNCIL
DRAFT REVENUE ESTIMATES 2014/15
HOUSING REVENUE ACCOUNT

ITEM		2013.14	2014.15
		BUDGET	BUDGET
	GENERAL EXPENSES	1	2
		£	£
1	Premises Related Expenses	117,190	117,190
2	Contributions to Provisions for Bad Debts	125,000	125,000
3	Contingency Sum - Unavoidable Employee Related expenditure		
4	Contribution to Capital Outlay	8,709,740	
5	Capital financing costs	3,056,990	3,056,990
6	Voluntary debt set aside for redemption of debt as loans mature (see also note 6 of Appendix A key assumptions)	259,680	266,433
7	Total Expenditure to Summary To HRA 1.1	12,268,600	3,565,613
	GENERAL INCOME		
8	Customer & Client Receipts (see Note 3 Page HRA 7)	23,333,410	24,102,950
9	Interest receivable	98,310	68,820
10	Total Income to Summary To HRA 1.4	23,431,720	24,171,770

WEST LANCASHIRE BOROUGH COUNCIL
DRAFT REVENUE ESTIMATES 2014/15
HOUSING REVENUE ACCOUNT

ITEM			2013.14	2014.15
			BUDGET	BUDGET
			1	2
	<i>SUPERVISION, MANAGEMENT & HOUSING REPAIRS & MAINTENANCE</i>			
	SUMMARY			
1	Central Administration	HRA 4.8	2,105,980	2,163,441
2	Performance Improvement Team	HRA 4.15	605,690	607,774
3	Rent & Money Advice	HRA 4.20	717,120	682,967
4	Voids & Allocations	HRA 5.8	2,087,920	2,045,974
5	Estate Management & Tenant Participation	HRA 5.16	789,410	787,348
6	Property Services	HRA 6.9	4,245,980	4,305,208
7	Elderly & Disabled Support	HRA 6.18	611,020	566,821
8	Total Expenditure to summary	To HRA 1.2	11,163,120	11,159,533

WEST LANCASHIRE BOROUGH COUNCIL
DRAFT REVENUE ESTIMATES 2014/15
HOUSING REVENUE ACCOUNT

ITEM		2013.14	2014.15
		BUDGET	BUDGET
		1	2
	SUPERVISION, MANAGEMENT & HOUSING REPAIRS & MAINTENANCE		
	- CENTRAL ADMINISTRATION		
	EXPENDITURE		
1	Employee Expenses	467,980	520,040
2	Premises Related Expenses	21,190	21,868
3	Transport Related Expenses	8,170	8,170
4	Supplies and Services	147,590	152,313
5	Support Services	1,660,230	1,660,230
6	<u>Total Expenditure</u>	2,305,160	2,362,621
7	INCOME	199,180	199,180
8	Net Expenditure to Summary to HRA 3.1	2,105,980	2,163,441
	- PERFORMANCE IMPROVEMENT		
	EXPENDITURE		
9	Employee Expenses	278,610	271,500
10	Transport Related Expenses	5,610	5,610
11	Supplies and Services	287,320	296,514
12	Support Services	34,150	34,150
13	<u>Total Expenditure</u>	605,690	607,774
14	INCOME	-	-
15	Net Expenditure to Summary to HRA 3.2	605,690	607,774
	- RENT & MONEY ADVICE		
	EXPENDITURE		
16	Employee Expenses	500,780	447,440
17	Transport Related Expenses	14,930	14,930
18	Supplies and Services	37,080	38,267
19	Support Services	164,330	182,330
20	Net Expenditure to Summary to HRA 3.3	717,120	682,967

WEST LANCASHIRE BOROUGH COUNCIL
DRAFT REVENUE ESTIMATES 2014/15
HOUSING REVENUE ACCOUNT

ITEM		2013.14	2014.15
		BUDGET	BUDGET
	- VOIDS & ALLOCATIONS	2	2
		£	£
	EXPENDITURE		
1	Employee Expenses	411,260	411,260
2	Premises Related Expenses	1,803,780	1,765,525
3	Transport Related Expenses	26,040	26,040
4	Supplies and Services	65,910	68,019
5	Support Services	27,820	27,820
6	<u>Total Expenditure</u>	2,334,810	2,298,664
7	INCOME	246,890	252,690
8	Net Expenditure to Summary to HRA 3.4	2,087,920	2,045,974
	- ESTATE MANAGEMENT & TENANT PARTICIPATION		
	EXPENDITURE		
9	Employee Expenses	389,610	376,620
10	Premises Related Expenses	210,790	217,535
11	Transport Related Expenses	20,050	20,050
12	Supplies and Services	130,720	134,903
13	Support Services	50,600	50,600
14	<u>Total Expenditure</u>	801,770	799,708
15	INCOME	12,360	12,360
16	Net Expenditure to Summary to HRA 3.5	789,410	787,348

WEST LANCASHIRE BOROUGH COUNCIL
DRAFT REVENUE ESTIMATES 2014/15
HOUSING REVENUE ACCOUNT

ITEM		2013.14	2014.15
		BUDGET	BUDGET
	- PROPERTY SERVICES	2	2
	ADMINISTRATION	£	£
1	Employee Expenses	1,415,820	1,738,293
2	Premises Related Expenses	3,328,350	3,383,257
3	Transport Related Expenses	82,320	82,320
4	Supplies & Services	135,010	139,330
5	Agency & contracted Services	340	340
6	Support Services	89,490	89,490
7	<u>Total Expenditure</u>	5,051,330	5,433,031
8	INCOME	805,350	1,127,823
9	Net Expenditure to Summary to HRA 3.6	4,245,980	4,305,208
	- ELDERLY & DISABLED SUPPORT		
10	Employee Expenses	783,520	783,520
11	Premises Related Expenses	669,510	669,510
12	Transport Related Expenses	42,460	42,460
13	Supplies & Services	88,860	88,860
14	Agency & contracted Services	950	950
15	Support Services	220,280	220,280
16	<u>Total Expenditure</u>	1,805,580	1,805,580
17	INCOME	1,194,560	1,238,759
18	Net Expenditure to Summary to HRA 3.7	611,020	566,821

Appendix C

HRA BUDGET ISSUES	2014.15 £000	2015.16 £000	2016.17 £000
Capital Expenditure			
1 Installation of heat meters to service charge properties	91		
2 Investment in Egerton Enstone stub blocks returned from Stonham	250		
3 Boxing in of ranch style balustrades to landings	100	100	100
4 Ferndale External insulation and Roofing	189		
Revenue Expenditure			
1 Commission consultants for signage audit	15		
2 Commission insulation survey including energy advice to tenants	37		
3 Welfare Reform	45	45	45
4 Appointment of a Communications Officer social Media	37	37	37
5 Survey of Tenants and Residents (STAR)	10		10
6 Implementation of Garage Strategy	50		
Total	824	182	192

Estimated budget of items that are reoccurring in nature	182	182	82
One off temporary budget increases	642	-	110

CAPITAL INVESTMENT

Year Financial Year	TOTAL £	1 2014.15 £	2 2015.16 £	3 2016.17 £	4 2017.18 £	5 2018.19 £
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Figures include assumed inflationary increases and stock changes

Asset Management Plan	Programme total £	Year 1 £	Year 2 £	Year 3 £	Year 4 £	Year 5 £
Bathroom	7,575,378	1,863,663	1,805,683	1,817,640	1,869,849	218,543
Communal Doors Electrics	475,087	0	0	0	172,173	302,914
Communal Heating	120,088	0	0	0	113,968	6,120
Electrical Work	693,213	151,108	87,167	123,643	111,882	219,413
Fencing and Paving	5,450,927	0	1,438,326	1,373,050	1,430,985	1,208,566
Heating	5,829,699	1,530,025	1,490,534	1,518,013	565,871	725,256
Kitchen	8,299,996	2,438,250	2,146,725	2,222,906	899,914	592,201
Lifts	566,556	412,529	0	0	0	154,027
Mains Water	1,526,408	0	0	763,230	763,178	0
Minor works	27,949	0	6,513	0	2,748	18,688
Roofing	5,171,662	222,053	1,310,883	1,492,058	1,182,229	964,439
Walls	2,732,205	41,401	727,456	809,792	764,546	389,010
Window and Door	2,597,666	1,628,751	647,466	0	0	321,449
Void Kitchens	1,299,669	642,093	657,576	0	0	0
Disabled Adaptations	3,247,571	635,753	651,638	668,996	686,352	604,832
Capital Contingency (Repairs)	702,640	134,454	137,391	141,452	144,495	144,848
General sheltered upgrades	562,111	106,952	109,912	112,958	116,003	116,286
Communal areas (CAT Budget)	562,111	106,952	109,912	112,958	116,003	116,286
Laundry equipment	84,518	16,297	16,284	17,299	17,298	17,340
General Structural	843,166	160,937	164,869	168,928	174,004	174,428
Gutters	56,008	11,205	11,195	11,194	11,194	11,220
Gulleys	56,008	11,205	11,195	11,194	11,194	11,220
Grand Total	48,480,636	10,113,628	11,530,725	11,365,311	9,153,886	6,317,086
Findon & Firbeck	Programme total	Year 1	Year 2	Year 3	Year 4	Year 5
Findon & Firbeck	4,354,000	1,199,000	3,155,000			
Grand Total	4,354,000	1,199,000	3,155,000	-	-	-
Professional Fees	Programme total	Year 1	Year 2	Year 3	Year 4	Year 5
Professional Fees	3,721,404	905,010	1,174,858	909,225	732,311	505,367
Grand Total	3,721,404	905,010	1,174,858	909,225	732,311	505,367
Total Capital Investment	56,556,040	12,217,638	15,860,583	12,274,536	9,886,197	6,822,453

**LANDLORD SERVICES COMMITTEE (CABINET WORKING GROUP) 9 JANUARY 2014
CONSULTATION ON RELEVANT CABINET REPORT**

30. HOUSING ACCOUNT - REVENUE AND CAPITAL PROGRAMME

Members considered the draft report of the Assistant Director Housing and Regeneration that provided a summary of the budget position for the Housing Account for the next financial year. It was explained that this was the start of the budget process.

The Assistant Director Housing and Regeneration explained that this was the start of the budget process and that the report set down a range of options prior to firm proposals to Council on 26 February 2014.

RESOLVED That the report be noted.

MINUTE OF CABINET 14 JANUARY 2014

75. HOUSING ACCOUNT - REVENUE AND CAPITAL PROGRAMME

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

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

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

- RESOLVED
- A. That the financial position for 2014-15 be noted.
 - B. That the Assistant Director Housing and Regeneration be given delegated Authority to set garage rents at a level to maximise income for the HRA.
 - C. That the Assistant Director Housing and Regeneration be given delegated Authority to set service charges at levels that recover the costs of service provision.
 - D. That this report be used for consultation purposes prior to the Council considering this matter in February 2014.
 - E. That the Housing Finance Portfolio Holder be given delegated authority to submit firm proposals to Council on 26 February 2014 to enable the budget to be set.
 - F. That call-in is not appropriate for this item as it is to be submitted to the next meeting of the Executive Overview and Scrutiny Committee on 30 January 2014.



AGENDA ITEM: 13

CABINET:
14 January 2014

PLANNING COMMITTEE:
16 January 2014

**EXECUTIVE OVERVIEW & SCRUTINY
COMMITTEE: 30 January 2014**

Report of: Assistant Director Planning

Relevant Managing Director: Managing Director (Transformation)

Relevant Portfolio Holder: Councillor M Forshaw

Contact for further information: Miss G Whitfield (Extn. 5393)
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**SUBJECT: YEW TREE FARM MASTERPLAN SUPPLEMENTARY PLANNING
DOCUMENT – OPTIONS DOCUMENT**

Wards affected: Borough Wide

1.0 PURPOSE OF THE REPORT

1.1 To update Members on the progress of the Yew Tree Farm Masterplan Supplementary Planning Document (SPD) and to recommend the “Options” version of the document for a period of public consultation 6 February – 21 March 2014.

2.0 RECOMMENDATIONS TO CABINET

2.1 That the Yew Tree Farm Masterplan Options document (Appendix A to this report) be approved for public consultation from 6 February to 21 March 2014, subject to any minor amendments made by the Assistant Director Planning in consultation with the Portfolio Holder, following consideration of the Options Document by Planning Committee and Executive Overview and Scrutiny Committee, as per recommendation 2.2 below.

2.2 That the Assistant Director Planning, be authorised, in consultation with the Portfolio Holder, to make any necessary minor amendments to the Yew Tree Farm Masterplan Options document, in the light of agreed comments from

Planning Committee and Executive Overview and Scrutiny Committee, before the document is published for consultation.

2.3 That Cabinet have regard to the Sustainability Appraisal provided in Appendix B in their decision on the recommendation at 2.1, which will also be publicly available for comment as part of the consultation on the Yew Tree Farm Masterplan Options document.

2.4 That call in is not appropriate for this item as this report is being submitted to Executive Overview and Scrutiny Committee on 30 January 2014.

3.0 RECOMMENDATIONS TO PLANNING COMMITTEE

3.1 That the content of this report and the Yew Tree Farm Masterplan Options document be considered and that agreed comments be referred to the Assistant Director Planning.

4.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW & SCRUTINY COMMITTEE

4.1 That the content of this report and the Yew Tree Farm Masterplan Options document be considered and that agreed comments be referred to the Assistant Director Planning.

5.0 BACKGROUND

5.1 The West Lancashire Local Plan 2012-2027 (Local Plan) was adopted by Council on 16 October 2013. Policy SP3 of the Local Plan allocates land between the Burscough residential settlement area and the industrial estate for development to meet the needs of the Borough during this plan period (2012-2027) and beyond.

5.2 The site is approximately 74 hectares in size and will be required to deliver both housing (500 dwellings) and employment (10ha) along with associated infrastructure and improvements in this Local Plan period. The remainder of the site not required to deliver this element will be safeguarded from development to meet future needs. Policy SP3 in the Local Plan provides a strategic framework to help shape the development and requires that a masterplan be produced in consultation with the local community. The policy also states that planning permission shall not be granted until the comprehensive masterplanning exercise has taken place.

5.3 The masterplan will set out the broad requirements of the site including where housing and employment development should go on the site, surface water drainage infrastructure, highways improvements and other community infrastructure like open space and education provision. All of these things,

should, if required, be delivered with the site to ensure that the final development becomes a sustainable part of the Burscough settlement. The masterplan will also set out which parts of the site should be safeguarded for future use, i.e. should not be brought forward for development use to meet the needs of the Borough during this Local Plan period (2012-2027).

6.0 CURRENT POSITION

Process and Timescales

- 6.1 Officers have now started work on the detailed masterplan in order to provide this additional policy basis, above and beyond the Local Plan, that will guide developers as to how the Council will expect the site to be brought forward for development. The masterplan will therefore facilitate the creation of a well planned and vibrant development that will contribute to the Burscough community and economy.
- 6.2 In terms of timescales, given the Yew Tree Farm site is expected to start contributing to the Council's housing land supply in the year 2015/16, it is important that the masterplan is developed over the next 6 to 12 months. This will ensure the masterplan is adopted as a Supplementary Planning Document (SPD) by the end of 2014 so that it may form part of the planning decision-making framework. The timetable below gives an indication of how the document should progress over this period:

Baseline and Evidence Review	September – October 2013
Options Drafting	November – December 2013
Options Consultation	February – March 2014
Consideration of Consultation Feedback	March 2014
Draft Masterplan	April – May 2014
Draft Masterplan Consultation	July – August 2014
Prepare Final Masterplan	September 2014
Adoption of Final Masterplan	October 2014

Stakeholder Group

- 6.3 In order to help shape the masterplan, the Council has engaged a group of Stakeholders which is made up of local residents, businesses, land owners, ward councillors and portfolio holders, infrastructure providers and other organisations such as the West Lancashire Council for Voluntary Service and the Environment Agency. The Stakeholder group will help guide the preparation of the masterplan through feedback along every step of the process.
- 6.4 The Stakeholder Group have attended four meetings between October and December 2013 to help form the group, consider the evidence associated with Yew Tree Farm, discuss options and design concepts for the site and to inform the up coming consultation exercise. Given the allocation of this site was quite an emotive subject with significant local interest, it was hoped that the use of such a group would help to engage with the community at a ground level and to use their local understanding to help guide the document. Therefore, whilst the

purpose of the group was not to make decisions on the masterplan, it has so far been useful and successful in feeding into the production of the document.

Options

- 6.5 The masterplan process has raised a number of questions relating to the site in terms of development location and infrastructure provision. Some of these decisions will be informed by the site specifics whilst others are more open to discussion and community input. For example, the sustainable drainage which is required for the site is likely to be determined by the scale and topography of the site and the natural outfall in terms of the general location and size of the drainage network. However, the nature and location of the open space provision is very much open to debate. Whilst the Council has existing evidence to suggest what is likely to be required based on existing provision in the local area, it is important that what is delivered is something which will genuinely be used and appreciated by the local community.
- 6.6 In addition, requirements proposed within the masterplan must be realistically deliverable and achievable. For example, it may be a desire to deliver an alternative highway route through the development of this site that removes some traffic off Liverpool Road South (A59) but if it isn't required or feasible then it is an unreasonable requirement within the masterplan. It is also important that the final approach to the Yew Tree Farm site seeks to create a development that is functional, durable and that creates a high quality design with a true sense of place.
- 6.7 The options process has resulted in the main infrastructure providers engaging with the Council to update the Council on issues such as surface and waste water treatment and education and health requirements. As a result, the latest position has been established in relation to all of these matters. This information has helped to inform the Yew Tree Farm Masterplan Options Document (Appendix A).
- 6.8 The Options Document sets out four options for the development of the site, each with a different design concept and each showing varying responses to the sites constraints and development and infrastructure requirements. In addition, the document provides an overview of the key issues associated with the site along with the proposed responses to these issues and the pros and cons of each response. The document is attached in Appendix A.
- 6.9 Through consultation, responses will be encouraged from the public and other stakeholders, including infrastructure providers, land owners and businesses that will assist in collating a final proposed option for the masterplan.
- 6.10 Both the options and final masterplan stages must be subject to Sustainability Appraisal (SA) which will inform and assess the outcomes of the masterplan process. The SA for the Options Document is included at Appendix B.

7.0 NEXT STEPS

- 7.1 If Cabinet Members (and, subsequently the Assistant Director Planning, in consultation with the Portfolio Holder, as per recommendation 2.2 above) endorse the Options Document for a period of public consultation, the consultation will take place for six weeks, from Thursday 6 February to Friday 21 March 2014.
- 7.2 Following the consultation period, all comments submitted to the Council will be processed, responses will be made where necessary, and the feedback will be used to guide the formulation of the draft final masterplan. This feedback will also be shared with the stakeholder group to ensure they remain fully engaged in the process. It is anticipated that the draft final masterplan will be brought to Cabinet in July 2014, before undergoing a further round of public consultation and review in July and August 2014. Subject to any minor amendments being undertaken, the masterplan will then be taken to full Council in October 2014 in order to be adopted as a formal SPD and form part of the planning framework to assist in guiding development at Yew Tree Farm and planning decision making.

8.0 SUSTAINABILITY IMPLICATIONS / COMMUNITY STRATEGY

- 8.1 The options for the Yew Tree Farm masterplan have been subject to Sustainability Appraisal throughout the preparation process for the West Lancashire Local Plan. One of the purposes behind the preparation of masterplan for the site is to facilitate the development of the land in a sustainable manner.
- 8.2 The provision of market housing, affordable housing, accommodation for older people, open space and other community benefits, plus the anticipated application of the Community Infrastructure Levy to the sites, is consistent with the principal aims and objectives of the West Lancashire Sustainable Community Strategy.

9.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 9.1 All resources required to prepare and consult on the Yew Tree Farm Masterplan are covered by the existing Planning Service revenue budget. Delivery of the Yew Tree Farm site will have considerable potential for positive financial implications in the form of income through the Community Infrastructure Levy, New Homes Bonus and Council Tax.

10.0 RISK ASSESSMENT

- 10.1 A failure to set out clearly the expectations of the Council in relation to the development of the Yew Tree Farm site in Burscough could result in a missed opportunity on the part of the Council to secure the maximum benefit from the site's development. By preparing a Masterplan SPD, and by consulting the

public and other interested parties throughout the preparation of that Masterplan SPD, the optimal development of the site can be achieved.

- 10.2 If the document is not subject to thorough consultation it may risk being undeliverable or creating a development that does not truly integrate with the existing Burscough community.
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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.

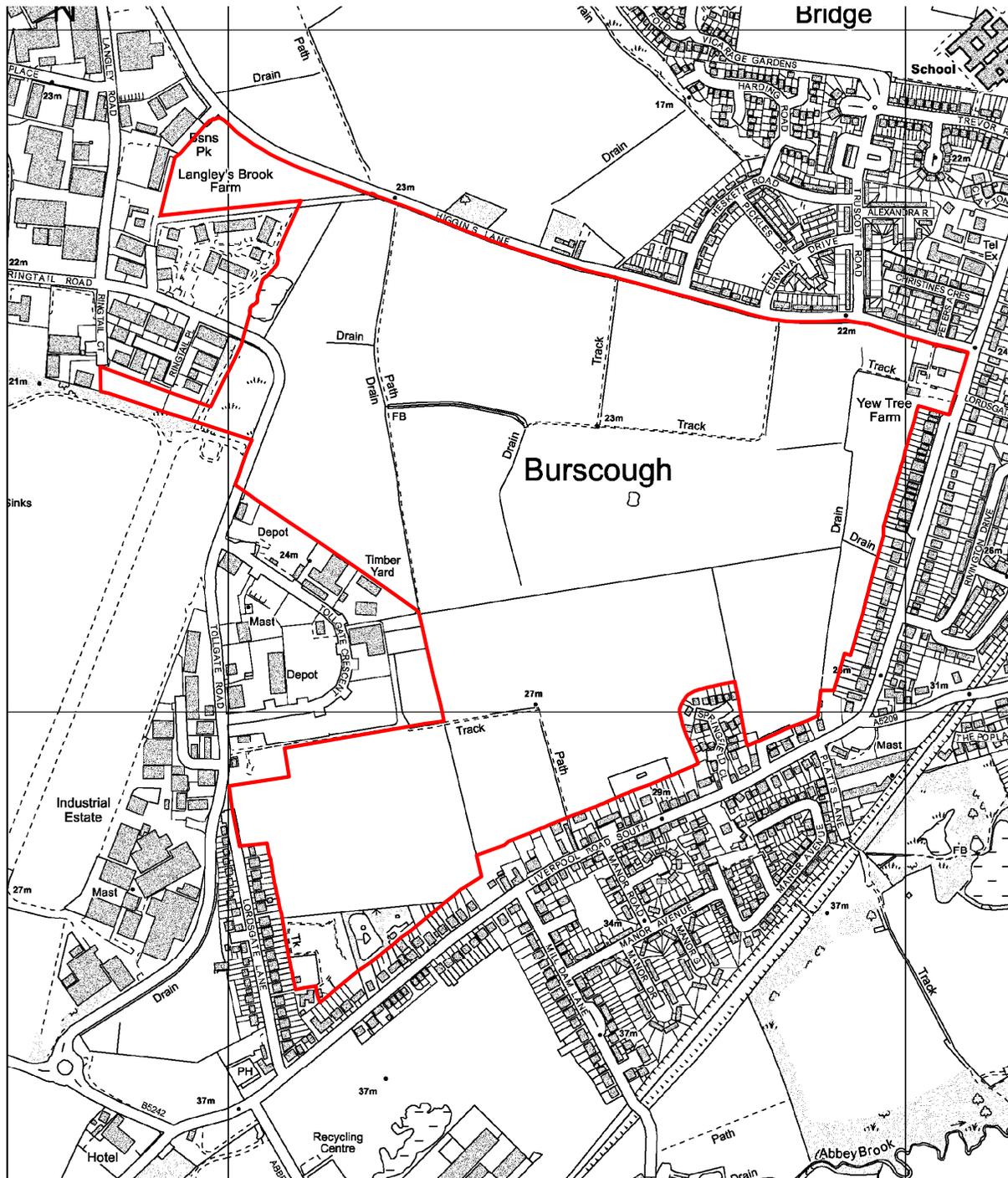
<u>Date</u>	<u>Document</u>
October 2013	West Lancashire Local Plan – 2012 – 2027 (Policy SP3)
January 2014	Habitat Regulations Assessment for the Yew Tree Farm Masterplan Options

Equality Impact Assessment

There is a direct impact on members of the public. 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

- A. Yew Tree Farm Options Document – January 2014
- B. Sustainability Appraisal Report
- C. Equality Impact Assessment
- D. Minute of Cabinet 14 January 2014 (Planning Committee & Executive Overview & Scrutiny Committee only)
- E. Minute of Planning Committee 16 January 2014 (Executive Overview and Scrutiny Committee only)



West Lancashire Borough Council
Yew Tree Farm Masterplan
Supplementary Planning Document
Options Report

February 2014

WEST LANCASHIRE



LOCAL PLAN

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Introduction

Introduction

West Lancashire Borough Council adopted the Local Plan 2012-2027 on 16th October 2013. The Local Plan sets out a vision and policies to help shape the development of the Borough and to form the basis on which planning decisions are made.

Local Plan Policy SP3 identifies land to the west of Burscough, known as Yew Tree Farm, to meet some of the Borough's housing and employment needs over the period to 2027. The policy also requires a masterplan to be produced to help shape the delivery of this site and to ensure the development is sustainable and well thought out.

This document is the first stage in the development of this masterplan and is known as the "Options" stage. It has been published for consultation in order to seek the views of the community, stakeholders and other interested parties. The Council welcomes comments on all aspects of the document and in particular the options, main issues and the responses to these issues.

Following consultation, all views will be considered and a "Preferred Option" selected for inclusion in the final masterplan before a further round of consultation before adoption later in 2014. Figure 1 sets out the process and timescales for the development of the Yew Tree Farm Masterplan.

The final document will be a Supplementary Planning Document (SPD) which means that it will form part of the planning decision making framework when applications for development are submitted to the Council in respect of this site.

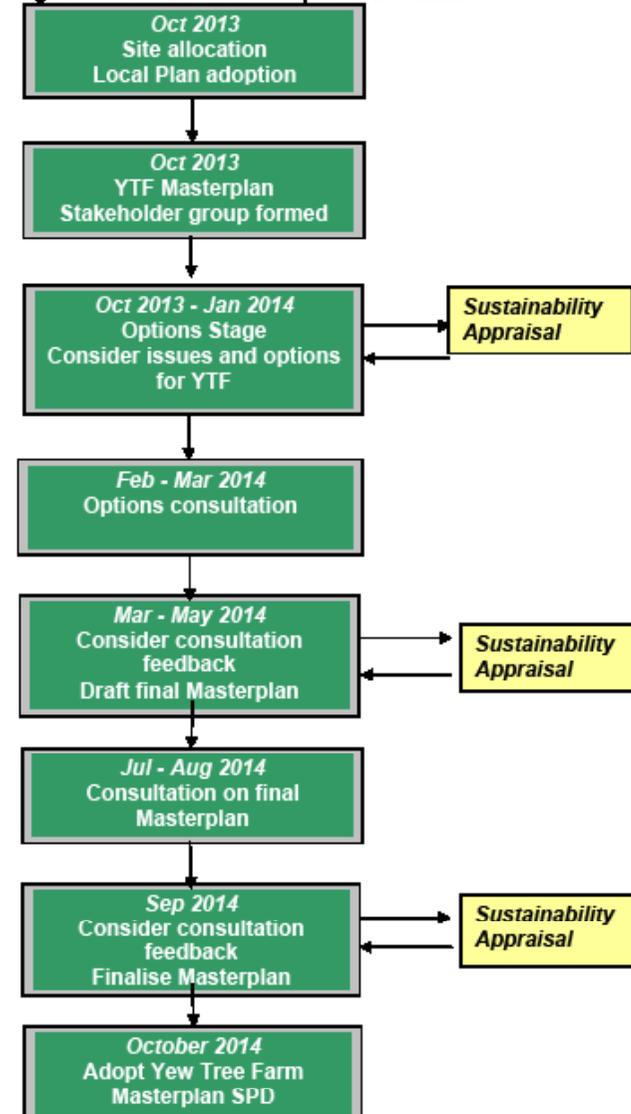
How To Get Involved

How to get involved

The Yew Tree Farm Options Document will be out for consultation from 6th February to 21st March 2014. During this time the Council will be engaging with the public face to face through exhibitions and providing publicity material to help to raise awareness of the consultation. In addition, officers will also be available during office hours to answer questions and queries. We would encourage anyone with an interest to come along to the exhibitions to have a chat with the Council Officers about what the options mean for Burscough and how your views can help shape the site.

Comments made throughout the options consultation will help to inform and shape the final masterplan, which will be subject to further public consultation and refinement as necessary before adoption in October 2014.

Figure 1: Yew Tree Farm Masterplan SPD Process



What are the 'options' and how can you influence them?

The Council is seeking views on the proposed 'options' set out within this document. When we refer to 'options' this means two things.

Firstly, we have identified all of the delivery requirements and constraints associated with the site such as how much housing is required and what this might include e.g. elderly accommodation, affordable housing. These are opportunities for the site to deliver well planned and needed local development. We have also considered issues such as highway access and impact of traffic on the network. These are considered to be constraints to the development which must be managed through the masterplan and subsequent planning applications. In considering how each of the opportunities and constraints could be managed through this development, in many circumstances a number of 'options' are presented as a response. Each option then includes an analysis of the possible advantages and disadvantages to this response.

Secondly, it is also important that the development, when completed, has a true sense of place, integrates well with Burscough and is a place that people will want to live and work. Therefore, the Council welcomes views on the 4 different design concepts for the site set out as plans in Section 8 of this document. Each design concept sets out why it may be an appropriate approach to the Yew Tree Farm site and includes a plan to show how the site may look.

Influencing the Final Masterplan

The Council is seeking views on all of the individual aspects of the options in addition to the individual design concepts themselves. It may be that the "Preferred Option" for the site is a hybrid of more than one concept. Therefore, it is important that views are expressed regarding individual matters just as much as each option as a whole.

A number of questions are included to help guide and focus your response but feedback is welcome on all points of interest.

It should be noted that some matters, such as highways and transport, will need to be balanced with technical information from the Highways Authority when moving forward towards the final masterplan. Also, some of the issues such as drainage will also be largely driven by technical assessments. Therefore, proposed questions relating to these topics are fairly limited. However, where issues such as open space can be delivered fairly flexibly, consultation views are particularly valuable as this will help the Council to understand what may be of most benefit to the community.

Community Engagement

Although the Council is responsible for producing the Yew Tree Farm Masterplan, it must be a document that addresses the requirements of the site and the wider settlement area and meets the needs of the site users and the Burscough community. Therefore, central to the production of this document is the involvement of those who have a stake in the site and the Burscough community.

Stakeholder Group

To assist this process a Stakeholder Group has been established and is made up of infrastructure providers, landowners, residents, local businesses, ward and local councillors, the parish council, third sector voluntary groups and other agencies such as the Environment Agency. Whilst the group is not a decision making body they will be engaged in each step of the development of the masterplan and their feedback as helped to shape the consultation process and the options identified.

Public Consultation

Wider public consultation to inform the preparation of the masterplan is required alongside the preparation of the document. The Council has programmed this in as follows:

Stage	Function	Date	Duration
Options	Non-statutory	6 February – 21 March 2014	6 weeks
Draft Masterplan	Statutory	July – August 2014	8 weeks
Final Masterplan	Statutory	November 2014	Notice only

Through the consultation, the following groups will be engaged:

- All Burscough residents
- All Burscough businesses / commercial properties
- Wider West Lancashire residents / businesses
- Councillors
- Parish Councils
- Community groups
- Burscough Schools
- Stakeholders, landowners, developers
- Infrastructure providers
- Statutory consultees Third Sector and hard to reach groups

The Council's Statement of Community Involvement stipulates the methods that should be used at each stage of preparation of an SPD and these will be borne in mind through the preparation and consultation of the masterplan. In addition, engagement with the Yew Tree Farm Stakeholder Group will also help to shape the specific approach to consultation on the masterplan. This will include the following methods:

Publicity	Engagement	Feedback
Leaflets	Burscough Schools	Following each consultation exercise, the comments received will be considered and fed into the production of the next stage. A feedback report will be produced after each consultation to summarise the comments received and state how the comments have informed development of the Masterplan. These feedback reports will be published on line, and made available at public libraries and council offices.
Press – advert/ release/ briefing	Exhibition / drop in sessions	
Website – Friendly URL Westlancs.gov.uk/YTF	Written representations / questionnaire	
Posters	Surveys / questionnaire	
Mail out	Engagement with the third sector and hard to reach groups	
Newsletter		

Vision & Objectives

The Local Plan Policy SP3 identifies a number of objectives required to be delivered through the development of the Yew Tree Farm site. This masterplan will reflect National Planning Policy Framework (NPPF) Guidance on extending settlements in order to deliver housing land supply and will seek to address these issues through development principles and requirements of any subsequent planning applications.

Vision

The Local Plan establishes a 'Vision' for Burscough:

Burscough in 2027 will have retained its role as an attractive Key Service Centre, providing a range of facilities for local people. The town's role as a local employment hub for surrounding rural areas will be reinforced with sustainable growth of the industrial and business areas linked to the town centre. Also, Burscough's access to public transport will be enhanced.

Working with utilities providers and developers, the Council will ensure that appropriate infrastructure improvements will be in place for necessary new development. Burscough's tourism and recreational potential will be maximised by drawing on attractive features such as the Leeds-Liverpool Canal heritage, the surrounding countryside and Martin Mere.

The Council has considered the vision for Burscough along with the existing information that is available about the site and the wider settlement in producing a vision for the Yew Tree Farm site. In addition, work with the Stakeholder Group has enabled the Council to build up a picture of how the Yew Tree Farm site might develop and what is important to local people and those with a stake in the site and Burscough as a whole.

The Stakeholder Group were asked to share views about where Burscough may be going as a result of this development to help identify both the positive benefits and the threats of this development. The responses included the following:

- Threat of more congestion – need for development to assist in alleviating any increased pressures on the highway network.
- The need to strengthen what is already here to continue to make Burscough a good place to live for existing and new people.
- Fragile village centre needs protecting.
- Parking issues and access to services in the town centre – need to provide more parking and / or need to get people out of cars e.g. through cycleways, footpaths and public transport.

The proposed 'Vision' for Yew Tree Farm:

Yew Tree Farm will be delivered over the plan period having regard to the natural environment and the relationship between the mixed uses, the existing settlement and the site as a whole, even where land is safeguarded for future development needs.

The site in 2027 will have been developed to meet local needs, providing a good range of high quality housing and employment opportunities for all whilst ensuring any traffic issues and increases in traffic flows have been successfully managed through consistent Travel Planning and ongoing monitoring.

New local services on the site will complement Burscough's existing town centre which will continue to thrive. Access routes from Yew Tree Farm will be clear and defined, encouraging cycling and walking and increasing connectivity between the site, the centre and all transport links.

Objectives

In order to deliver the site to its maximum potential, the following objectives were outlined within policy SP3 of the Local Plan:

- Residential development for at least 500 new dwellings and safeguard land for up to 500 more dwellings in the future (post 2027);
- 10 ha of new employment land as an extension to the existing employment area and safeguard land for up to 10 ha more in the future (post 2027);

- Deliver a new town park for Burscough, with a Management Trust to co-ordinate and fund the maintenance of the park, alongside other Green Infrastructure improvements;
- A linear park/cycle route across the site to link with a wider Ormskirk to Burscough Linear Park/cycle route;
- A new Primary School and other local community facilities that cannot be appropriately accommodated elsewhere in the town;
- A decentralised energy network facility, including district heat and energy infrastructure, which will provide heat and electricity for the entire site and possibly beyond the site boundary;
- Appropriate highway access for the site on Liverpool road South and tollgate road together with a suitable internal road network;
- Traffic mitigation measures to improve traffic flow on Liverpool Road South and protect other local roads;
- A robust and implementable Travel plan for the entire site to address the provision of, and accessibility to, frequent public transport services and to improve pedestrian and cycling links with Burscough Town Centre, rail stations and Ormskirk;
- Measures to address the surface water drainage issues of the Yew Tree Farm site and in Burscough generally to the satisfaction of the Environment Agency, united Utilities and the Lead Local Flood Authority. For the development of Yew Tree Farm no surface water should be discharged into the public sewerage system;
- Financial contributions to improve health care facilities and other existing community facilities in the town; and
- Financial contributions to improve public transport services/facilities and to improve cycling and walking facilities.

The Yew Tree Farm Masterplan Options have been prepared through early engagement with key stakeholders and will be subject to wider consultation with the community. Details can be found on: www.westlancs.gov.uk/YTF

Approach

Although this site lies between the existing settlement area and employment area, its openness and location on the periphery of the urban settlement area suggests that a sensible approach to the site would be to consider the existing landscape and landscape features such as drainage features, trees and ponds and open aspects to the north through Higgins Lane, and use these as a starting point to development of the site. This will assist in creating a synergy between the existing town scape and the countryside and landscape beyond. Consideration should also be given to the characteristics of Burscough and the local urban fabric in order to create a development with a sense of place.

Furthermore, although only part of the site will be required to meet development needs in this plan period, it is important that the entire site is considered through the masterplanning process. This will ensure that, as each phase comes forward, regard is had to the entire site in order to avoid piece meal development or insufficient infrastructure provision in future years. Therefore the entire site must be masterplanned before the land to be safeguarded is identified.

Finally, it is vital that the sustainability impacts of this masterplan are fully considered and therefore a Sustainability Appraisal (SA) will be carried out for the 'options' stage and 'final' stage of the masterplan. The document will also be subject to Habitat Regulations Assessment given the proximity of the site to Martin Mere and the populations of feeding birds in the locality.

Opportunities & Constraints

Development requirements

The allocation of the Yew Tree Farm site to meet development needs within the current Local Plan period to 2027 and beyond presents an opportunity to create a high quality and sustainable development that sits well within the existing settlement area of Burscough. The development requirements include land for 500 dwellings, 10ha of employment, with the remainder of the site to be safeguarded for future housing and employment needs.

Employment

The site is required, through planning policy SP3, to deliver 10ha of employment land as an extension of the existing employment area. This gives an indication where the most appropriate location for employment uses would be and this was supported by the views of the Stakeholder Group who generally agreed that the most logical location for employment would be towards the north-west corner of the site.

In terms of employment types, policy SP3 does not stipulate a particular type of employment use that would be appropriate. However, there may be potential for some of the land to be designated for live / work units to encourage flexible working practices. This means the development that would be delivered in these areas of the site could include dual use residential and commercial buildings and could potentially be delivered within a buffer zone which acts as an interface between the employment and residential uses.

The live / work approach is in line with the requirements of the NPPF, paragraph 21 which requires that councils should 'facilitate flexible working practices, such as the integration of residential and commercial uses within the same unit'.

The Council considers that it should remain flexible towards the type of employment uses on the site to ensure delivery of this land takes place. However, there is scope for the masterplan to encourage certain types of uses if it is considered that these could boost the employment mix and act as a catalyst to development.

Where on the site could the employment uses be delivered and why is this the best location for this use?

Could the masterplan identify land to be delivered for live / work units and if so, where could this be located?

Are there any particular types of business that the masterplan should encourage on the site?

Residential Mix

The housing aspect of the development will need to include a good mix of housing types to meet all local needs, including 35% affordable and up to 20% to meet the needs of older persons. Cross over between the two types of provision may be acceptable subject to the needs at the time of development i.e. some of the affordable housing element may also count toward meeting the provision for the elderly. These requirements are in accordance with policies SP3, RS1 and RS2 of the Local Plan.

The precise make up of how the affordable housing element will be delivered is likely to be determined at the time of a planning application due to the changing nature of affordable housing and the fluctuations in local need. However, it is envisaged that the masterplan will give a clear direction about where the elderly accommodation could be delivered on the site so that it is located in the most convenient position within the site. This is likely to be close to the A59 to ensure that access to the main facilities and key transport links are well within reach.

Feedback from the Stakeholder Group regarding location and type of housing mix included some of the following views:

- Housing for older people should as far as possible be provided through Lifetime Homes, i.e. housing capable of being adapted to meet needs of older people rather than housing for specific levels of care needs
- Housing for older people should be within one area of the site and in different formats such as bungalows or apartments and an extra care facility so that as older persons needs change they do not need to move away from an area to have these needs met.
- Some affordable housing should be provided in early phases of the development to meet existing need

- The tenure mix should avoid both segregation of tenures and pepper-potting. An innovative mix between these extremes should be found

Other uses

The site is also required to deliver, potentially a new primary school and any other community facilities such as a local retail store, library or health centre that cannot be delivered in the existing town centre. Other infrastructure required includes highways network improvements, sustainable transport and access improvements, open space and Linear Park and a Sustainable Drainage System (SuDS).

How should elderly and affordable housing provision be delivered within the site and why is this the best approach?

Topography

The sites topography is broadly flat with the land slightly falling away to the north where the land naturally drains to. The sites topography is typical of the West Lancashire landscape which is characterised by flat, low-lying areas intercepted by a network of drains which ensure the land can be farmed. There are no areas of the site where the existing topography will preclude development.

Existing Land Uses and Buildings

The site is predominantly open land, the majority of which is or has been in agricultural use. The main built development on the site is a collection of redundant and derelict buildings to the north east of the site, just set back from the Liverpool Road frontage.

The public right of way which runs from the south east to the north west of the site, connecting Liverpool Road with Higgins Lane, has encouraged public use of parts of the site for access and recreation.

Context and Character

Yew Tree Farm is located to the west of Burscough, one of West Lancashire's Key Service Centres. The site lies between the Burscough Industrial Estate and the residential settlement area and is currently characterised by open fields, mainly used for agricultural purposes, with the only built development being the derelict buildings on the site.

Burscough itself is historically an agricultural area which is visible from the vast areas of agricultural land that surround the settlement and the collections of farmsteads which appear as small clusters across the landscape. Burscough began as agricultural village and then developed as an industrial centre as a result of the construction of the Leeds to Liverpool Canal, and the two rail lines during the mid 19th Century, all of which pass through the settlement.

The residential development, which was primarily clustered around the centre, has radiated out and travelled mainly south in a linear pattern along Liverpool Road due to the presence of the Southport – Manchester rail line. This characteristic ribbon residential development bounds the site to the east and south and fronts onto Liverpool Road. Burscough is also characterised by clusters of development which have been built at varying times over the course of Burscough's history

When asked what makes Burscough distinctive, the response from local stakeholders cited the following:

- Transport links, although lack of investment in infrastructure has led to capacity issues
- Post-war housing opportunities and population increase
- Industrial estate – employment opportunity
- Military heritage – former airfield to the west of the Yew Tree Farm Site
- Semi-rural character
- Village centre feel – friendly neighbourhoods
- Leisure opportunities - Canal, Martin Mere, rail, cycle
- Drainage infrastructure issues
- Incremental development without strategic overview or masterplan
- Railway and canal act as physical constraints to development

New development provides an opportunity to support the existing town centre and to contribute to creating a built environment that reflects the Burscough context.

Highway Network

Current Position

Burscough is located on the A59 which connects Liverpool through to Preston and beyond. The road generally serves local traffic movements between the Borough's settlements but does accommodate some strategic traffic movement. However, the majority of the strategic traffic flows on the motorway network which frames the Borough and includes the M58 to the south and the M6 to the east. The A59 is, in parts, dual and single carriageway and suffers from congestion as it passes through the Borough's main settlements (Ormskirk and Burscough).

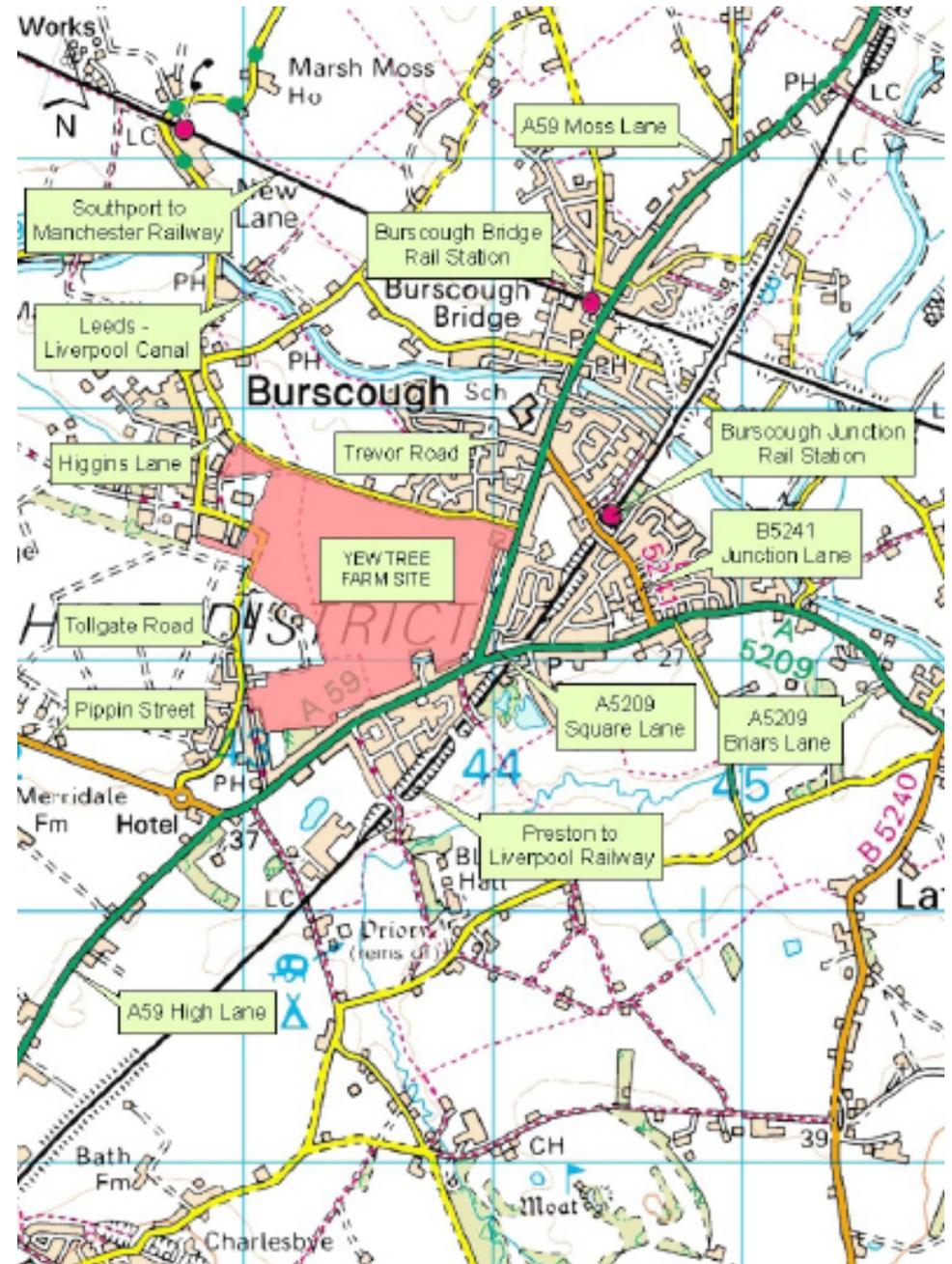


Figure 2: Burscough Road Network. Extract from CBO Ltd Transport Report Jan 2013

Other key roads connecting Burscough are the A5209, which links the settlement to the east and junction 27 of the M6 and the B5242 which connects Burscough with Southport to the west. Both roads are single carriageway routes with lower capacity than the A59.

Within the settlement, Junction Lane provides a link between the A59 and the A5209. This link is narrow with one way traffic operation over the rail line (Liverpool – Preston). To the north of the Yew Tree Farm site is Higgins Lane, a single carriageway which is heavily traffic calmed in order to restrict HGVs accessing Burscough Industrial Estate from this route. Tollgate Road is the final route bounding the site (along with the A59 and Higgins Lane) and primarily serves the Industrial Estate. Tollgate Road is linked to the A59 via Pippin Street (B5242) and a 3 arm roundabout.

Traffic in Burscough suffers, like many small towns, from congestion at peak times and where pinch points occur on the network. Peak time congestion results in queuing along the A59 at the junctions with Junction Lane (B5241), Square Lane (A5209) and Pippin Street (B5242). Most pinch points are due to badly functioning junctions resulting in unnecessary delay or blockages caused by parked vehicles. However, the existing evidence supporting the Yew Tree Farm site allocation confirms that the flow of traffic along the A59 is acceptable and that the afore mentioned pinch points should be the focus of improvement to ensure that the development at Yew Tree Farm does not worsen and, where possible, alleviates the highway conditions. In particular, the following junctions should be considered:

- Pippin Street and the A59 – Priority controlled T-Junction (soon to be upgraded to a roundabout).
- The A59 and Square Lane – Priority controlled T-junction
- The A59 and Higgins Lane – Priority controlled T-junction
- The A59, Junction Lane, Trevor Road – Signalled junction
- Burscough Town Centre – Two mini roundabouts

In addition to possible improvements to the above junctions, other pinch points include parked vehicles along the A59. These can include cars during the school drop off at Lordsgate Lane Primary School, buses or service vehicles.

The Stakeholder Group discussed a number of concerns associated with the Yew Tree Farm site development and the impacts on highways and raised the following points that should be addressed through the masterplanning:

- Some considered that no new traffic access to the A59 should be allowed, given existing problems of congestion. However, others suggested this was not possible but that accesses onto the A59 could be limited.
- Improvements would need to be made to the pinch point junctions along the A59.
- It was considered important by some to keep the employment and residential development separate so that the traffic for each may be kept separate.
- A through road would need to be carefully designed to avoid ‘rat running’.

What will the masterplan include?

Whilst the masterplan is unlikely to establish all of the finer detail relating to the highways improvements such as specific drawings of junction layouts, it will indicate the following principles:

- The number of primary access points to the site and locations
- The strategic road layout but not the detailed road network within the site
- Which junctions and other points must be addressed and improved through the planning application stage
- Any other specific travel planning requirements that must be borne in mind from the outset of the development

Traffic congestion can occur on the A59, for a number of reasons. What measures could help to keep the flow of traffic going?

Access – Vehicular

The site is bounded by an existing road network which suggests it can be accessed from a number of points. This is beneficial to the site and allows permeability and through routes to be easily incorporated into the site. The below table sets out the main routes around the site where access could be taken from and key point.

Road and features	Options	Possible advantages	Possible disadvantages
Liverpool Road (A59). Key route through the Borough, runs along the east and south of the site. Provides main links to other settlements, surrounding regional towns and cities and the motorway network.	1. Access point to be taken from Liverpool Road at the north east point of the site near to Higgins Lane (where existing Yew Tree Farm buildings are)	Allows traffic to and from the site to quickly join the main highway network.	Increases the amount of traffic on the A59 which already suffers congestion at pinch points
		Provides a focal access point to the development on the main route assisting with the integration of Bur-scough.	

	2. Main access into the site to be taken through Meadowbrook by the removal of the property at Number 1 Meadowbrook.	Provides for additional accesses to the site as a whole. Increases the sites permeability. Reduces the reliance on a single primary access to the site which may cause queuing at peak times.	Junction size may not be capable of supporting traffic flows from entire site i.e. 500+ units
		Allows for more than one parcel of land to be developed in the first instance due to access.	Traffic will need to pass through the remainder of Meadowbrook to access the site and this is currently a quiet cul-de-sac. Increased traffic movements may lead to noise and other nuisance.
	3. Access into the site to be taken through Meadowbrook (as above) but only to allow vehicular access to a portion of the site i.e. the level of development that could be accommodated at a junction of this size.	Reduces reliance on one key access to the site for some of the development.	Significant traffic will still need to pass through the currently quiet cul-de-sac.
		Allows for more than one parcel of land to be developed in the first instance due to access.	

Higgins Lane bounds the north of the site and connects Liverpool Road (A59) with New Lane and Southport and the Northern Parishes. Former country lane which has been heavily traffic calmed to prevent use by HGV traffic accessing the employment area.	1. Create one or more accesses into the site along the lane to serve small parcels of development.	Allows for frontage onto Higgins Lane so the development does not become entirely inward looking.	Increased cul-de-sac development does not lend itself to a particularly well planned overall development with good permeability and legibility. Multiple accesses could increase collision risk.
	2. Block through access for vehicular traffic to Higgins Lane from Liverpool Road and divert traffic through the site.	Encourages HGV and other through traffic away from Higgins Lane and returns it to its more rural country lane status.	May cause delay for existing Higgins Lane residents, dependent upon the location of the new access points
	3. No vehicular access to Higgins Lane and existing access remains as is.	Limited impact on residents of Higgins lane as the position remains the same.	No connectivity between the new development and Higgins Lane and permeability to the north becomes limited.
	4. Vehicular access to the site from Higgins Lane but no closure of Higgins Lane for through traffic	Maximises permeability of the site for vehicular traffic from the north	Could result in rat running via Higgins Lane.

Tollgate Road is a single carriageway access route to the industrial estate. It connects with Pippin Street to the south and bounds the west of the site.	1. One access to the site taken furthest north on Tollgate Road and north of Tollgate Crescent.	Provides a good through route from A59 and HGV access to the northern portion of the industrial area.	HGV traffic through the site could be an issue for the new development in terms of route management and negative impacts.
	2. One access to the site south of Tollgate Crescent and just north of Lordsgate Lane.	Could potentially encourage traffic to travel through the site rather than south on the A59 where vehicles are heading towards Southport. Thus reducing traffic on the A59.	As above.
	3. Two accesses to the site as set out above.	Provides the greatest permeability to the site for traffic moving through the employment area.	Costly to deliver and may not be required.
	4. No through access to the site, only access to localised uses e.g. further employment development on this side of the site.	Keeps employment and residential traffic separate.	Creates a large cul-de-sac feel to development types and uses on the east of the site. Is not permeable.

Accessibility – Walking and Cycling

The Yew Tree Farm site is located adjacent to one of the Borough's Key Service Centres and the topography of the site and surrounding area is broadly flat. These characteristics are conducive to encouraging walking and cycling.

One of the main requirements for the development is to deliver the Linear Park which will link Ormskirk (via Grove Farm) to the south and the Burscough Town Centre to the north. There are also a number of opportunities for cycling and walking links within the site to connect to broader leisure opportunities such as existing and planned cycle links to the canal and Martin Mere.

The site has one existing public right of way which enters the development area from the A59 to the south east, passes through the site before travelling north across Higgins Lane and to the land beyond.

Through discussion with the Stakeholder Group the Council considers it important to support improvements to the existing public realm which links the site to the centre of Burscough. This would encourage greater usage of cycling and walking over the car, in order to access the local facilities. This is essential to ensure the development is sustainable and to overcome the current issues associated with the existing parking provision in the town centre.

Equally there is support from the Council and the Stakeholder Group to deliver a Linear Park link with Ormskirk to the south of the site and Burscough and that the Yew tree farm development would be instrumental in carrying this link through to Burscough's Town Centre.

It is proposed that both the requirement and broad route of the Linear Park should be established within the masterplan and that the improvement of the public realm links from the north east of the site along Liverpool Road to the centre of Burscough, should be secured as a key principle within the masterplan.

A number of options for the Linear Park route have been presented in the various options in Section 8.

Is there a favourable route for the Linear Park and cycleways to travel through the site and beyond to ensure the best connectivity with the centre of Burscough, transport links, Ormskirk and leisure opportunities?

How can we improve walking and cycling facilities in the rest of Burscough, to help encourage people to walk and cycle?

Accessibility - Public Transport

Rail

The Yew Tree Farm site is within walking distance (approximately 15-20 minutes dependent on part of the site) of two train stations linking the settlement with Ormskirk (Liverpool), Preston, Southport and Manchester. Frequency of service on the Southport – Manchester line is generally every 30 minutes. However, the frequency of the service to Ormskirk and Preston is less than hourly.

The Borough Council, Lancashire County Council and Merseytravel are working together to investigate the potential to extend the electrification of the Ormskirk line to Burscough, thus increasing the frequency of services that connect to Burscough. Whilst it is unlikely that this development will directly deliver this improvement, the site allocation and increased population supports the business case for such a proposal.

However, through the Stakeholder Group, the issue with the capacity of the parking facilities at both Burscough Bridge and Bruscoug Junction stations was raised. Therefore, links for walking and cycling to both stations from the site must be maximised and made as short and safe as possible.

Bus

A number of bus routes, approximately 5 in total excluding school bus services, run from Burscough to other areas of the Borough and outlying areas such as Preston. The frequency of the services run from every 30 minutes on the 2a to only market day services operating on a Thursday and Saturday. There are four bus stops located along Liverpool Road South as it bounds the site and two on Higgins Lane to the north of the site.

Currently no bus routes service the industrial estate which would be beneficial in terms of sustainable transport links to employment.

Feedback from Lancashire County Council through the Stakeholder Group was that it would be likely that there would not be enough demand to take public transport through the residential area and to the employment area beyond. Therefore, in the first instance, whilst the site is developed and populated, it would be necessary to make walking links to the bus stops on the periphery of the site as short and attractive as possible. This includes making them safe and well lit. This will ensure the sustainability of existing bus services and may lead to demand for increased provision at some point in the future.

Drainage

The drainage network in Burscough suffers capacity issues as does the Waste Water Treatment Works at New Lane which treats the waste water for Burscough, most of Ormskirk and some of the outlying areas.

United Utilities have confirmed that they are in the process of presenting a business case to make improvements to the waste water treatment works in order to secure funding for this. However, until this is confirmed, both United Utilities and the key land promoter of Yew Tree Farm have confirmed that the development of the Yew Tree Farm site can include measures to manage additional waste water flows to the treatment works by offsetting them through removal of surface water from the system which currently causes issues during periods of heavy rainfall. A solution for this has been proposed and includes removing the surface water from the system which serves the dwellings on Lordgate Lane (37 properties) and treating this onsite through SuDS. In addition, the site must also manage and deal with its own surface water through the onsite SuDS.

This is likely to consist of a network of drains and culverts, including some of those in existence and new ones to connect to the newly developed parcels of land within the site. Attenuation ponds and swales would be used to move water through the network, holding it back where required, ensuring that the surface water runoff from the site when developed, is equivalent to the site before development has taken place.

The Stakeholder Group have expressed a number of concerns regarding drainage, most notably, the impact the site may have on the local culverts and drains downstream which are already at capacity, particularly where pinch points occur under the rail line

Lancashire County Council (LCC) is the Lead Local Flood Authority (LLFA) and as such is responsible for managing flood risk in the County. From April 2014 they will need to approve all drainage systems and then adopt them. Therefore, they will need to ensure schemes meet their standards and are effective and efficient. As the LLFA they are currently working on some baseline evidence which will help to inform the amount of land take required within the site in order to provide enough storage capacity for the sites surface water drainage needs and to meet the needs of the solution required to take existing surface water out of the system.

This evidence will be fed into the final masterplan but broadly indicates that the existing network should be improved and maintained as recent site visits have shown that there are a number of unmanaged and blocked drains on site. The evidence also concluded that it would be sensible to make use of the existing topography of the site and concentrate the key drainages features in the north west corner of the site where the land naturally drains too.

The masterplan is likely to require that a SuDS scheme is designed for the entire site along side the initial phase of development and that each subsequent phase must link into this scheme to ensure the impact of the site as a whole is planned for. It is likely that this will be the most efficient and economic solution.

Energy and Carbon Reduction

Policy SP3 encourages a decentralised energy network on the site due to the carbon reduction and future cost and energy security benefits this could potentially offer.

At this stage of the masterplanning process there remains no clear mechanism regarding delivery of such a network. However, as this technology and practices gathers momentum it is hoped that, ahead of any planning application, further support is available from the Department of Climate Change to assist in securing the delivery of a decentralised energy network.

Policy EN1 of the Local Plan requires development to be designed with carbon reduction in mind. In order to provide a measurable target for the reduction required, the Code for Sustainable Homes is used as the national described standard for residential dwellings and BREEAM (Building Research Establishment Environmental Assessment Method) is referenced in relation to the standards required for commercial development. These standards will be incorporated into the final masterplan as a requirement for the development on the Yew Tree Farm site.

Landscape and Trees

The most prominent landscape features within the site boundary are the drainage network, the hedgerows, a couple of small pond / drainage features and some limited patches of trees. It would be beneficial to work with the existing features and to incorporate these, where possible, into the new site layout to ensure there is a strong synergy between the existing natural landscape and the new development.

Given the topography of the site is fairly flat and low lying and the site is surrounded by residential and industrial development to the south east and west, the main area which offers views into the site is the northern boundary along Higgins Lane. Therefore, this should be factored into the development of the masterplan and treatment of this aspect should be given careful thought.

The existing built development at Yew Tree Farm in the north east corner of the site offers an opportunity as a gateway to the site given it is the only portion of the site exposed at Liverpool Road. The treatment of this aspect of the site should be factored into the final masterplan.

Although the site is likely to come forward in phases within this plan period and beyond (after 2027), it would be helpful if a masterplan could be delivered to ensure the approach to landscaping is holistic and inclusive and includes a strategic approach to planting to ensure it is sustainable.

Ecology

Martin Mere at Burscough is one of the largest and most important of the biodiversity sites in West Lancashire and is a Site of Specific Scientific Interest (SSSI), a Special Protection Area (SPA), and a Ramsar site. Other small sites of local importance can also be found in and around Burscough including, Abbey Lane Brick Pits and Platts Lane Pits.

The RSPB identifies a large area to the north and west within 1km of the proposed site as sensitive habitat for pink-footed geese and whooper swans. The site currently supports arable farmland which appears to meet the basic habitat requirements of wintering pink-footed geese and whooper swans. The existing industrial area does not meet the basic habitat requirements for qualifying bird species. However, redevelopment of the existing site could result in noise and/ or visual disturbance to wintering birds using the adjacent sensitive area.

Whilst Yew Tree Farm is not currently identified as supporting habitat for the SPA/ Ramsar sites, this will need to be monitored to ensure that appropriate mitigation can be put in place in the event the site does become supporting habitat.

There is also a single pond within the site which was identified as having average potential for Great Crested Newts and the remnant farm buildings may offer some minor potential for bats, albeit that their presence has so far not been identified through existing survey work.

Given the dynamic nature of ecology and ecological issues, the masterplan is unable to identify exact and current ecological matters and specific mitigation measures. This would be inappropriate given the likely timeframe for the delivery of this development.

A Habitats Regulation Assessment is being carried out alongside the masterplan, the findings of which will be included within the masterplan and will establish the principles that all planning applications must adhere to as development comes forward.

Heritage

The impact of development on the setting of the two Grade II Listed Buildings, located on the boundary of the site, must be considered through the masterplanning process. Both are 2 storey former farmhouses which have now been converted into residential dwellings. Mill Dam Lane End Farmhouse is an early to mid eighteenth century, brown brick construction with a slate roof. Yew Tree House was constructed circa 1800's of a brown brick Flemish bond again under a slate roof.

Creating a Sustainable Community

Feedback through the Stakeholder Group and the vision for the Yew Tree Farm site indicates a requirement for this development to support and encourage the existing town centre to ensure it remains a viable place for shopping, leisure and services. This could be achieved through ensuring that links and routes for pedestrians and cyclists are clearly defined and that public transport links to the centre are available for those who require transport.

However, where there is a need for some onsite facilities it is important that they are required to meet that local need and do not undermine the existing facilities already located in Burscough. Through consultation with the Stakeholder Group and in considering the existing site evidence, the following uses must be considered for both on and off site delivery as a result of this development:

- Education

- Community facilities such as library and information services, possible youth services
- Health facilities
- Local convenience retail

Education

LCC as the Education Authority have provided a high level analysis of the impacts of the site on both primary and secondary education provision. The analysis is clear that the assessment is a snapshot in time and may not be accurate as time progresses given the fairly lengthy life span of the delivery of the site (2015-2027). Therefore, whilst the comments and assumptions have been made at this stage to give an indication, this may change in future.

Primary Provision

The assessment focussed on the area of Burscough and included the following schools:

Burscough Lordsgate Township C of E Primary School

St John's Catholic Primary School

Burscough Village Primary School

Burscough Bridge St John's C of E Primary School

Burscough Bridge Methodist Voluntary Controlled Primary School

Ormskirk Lathom Park C of E Primary School

The findings showed the following headlines:

Projections to 2018 – 45 surplus places

Projections to 2023 – 19 surplus places

Projections to 2028 – shortfall of 37 places.

Given the trigger for a primary provision shortfall is relatively minor and unlikely to occur until later in the plan period, LCC have indicated that it would be preferable to meet this demand to improvement of existing provision through a developer contribution to the sum of approximately £440,000.

Beyond 2027 the projections must be treated with extreme caution. However, they indicate that there may be a requirement at this stage for approximately 190 school places. If this was to occur then it is likely that LCC would seek a school site for a 210 place 1 form entry primary school in addition to the financial contributions detailed in the LCC Education Contribution Methodology.

Therefore, the latest available evidence suggests that a new primary school will not be needed within the site and that if it is needed to support future growth, this land could be set aside within the part of the development that is to be safeguarded for future use.

Secondary Provision

There is only one secondary school in Burscough (Burscough Priory Science College) and the findings of the education projections showed the following headlines:

Projections to 2018 – shortfall of 5 places

Projections to 2023 – shortfall of 57 places

Projections to 2028 – shortfall of 6 places

Therefore, this shortfall must be met through improved facilities at the existing school and developer contributions would need to support this to the amount of approximately £770,000.

Given the uncertainty and the potential for these requirements to change through birth and migration rate fluctuations, this will need to be assessed at the time of planning applications and then secured through planning obligations.

Community Facilities

Through the infrastructure planning work that supported the Local Plan and further discussion with the Stakeholder Group, it remains apparent that the main need for new community facilities is an improved library and potentially additional youth services.

The existing library on Mill Lane is considered inadequate due to its size. However, it would be preferable for such a facility to remain within the town centre rather than relocating to the Yew Tree Farm site. Therefore, at this time, whilst this is an identified need that could be improved through the delivery of development and planning contributions such as Community Infrastructure Levy (CIL) or Section 106 Obligations, there is no identified solution in terms of a vacant building or location. This will require further investigation as the masterplan progresses to the “Preferred Option” stage.

A new and improved library could be supported through new development. Where and how should this be delivered?

In terms of youth facilities, the Grove Centre located next to the train station in the town centre provides a number of services and activities for children aged 8-13 years. Given the distance from the Yew Tree Farm site to the centre and the size of the site, there could be a genuine demand for some onsite facilities to meet the needs of youth engagement. This could be located in a multifunctional building that may be used for other activities during various times, for example a building that could be used by the older population within the site and locality.

Is there demand locally for additional youth community facilities?

Health

The main health provision for Burscough is located in the town centre at the Burscough Health Centre and Lathom House Surgery and are currently at capacity in terms of patient lists. The impact of the development at Yew Tree Farm and subsequent population increase is likely to lead to the requirement of 1 additional GP to serve the settlement area.

There are currently 2 options presented as possible solutions to meet this need:

Option 1 – Expansion of existing practice / health centre.

In order to accommodate the additional GP, both the premises must be capable of expansion and the practice itself must be willing to expand. There is no scope for expansion physically at Lathom House Surgery although there may be potential at the Burscough Health Centre. This is currently being investigated by the health authorities.

Option 2 – Operation of a branch surgery on the site or existing building in Burscough.

This would involve an existing GP, either in Burscough or elsewhere in the Borough, expanding their practice and operating a surgery out of either an existing premises in Burscough or a new building located on the Yew Tree Farm site. The main benefits of this option are that the branch surgery could be built up gradually alongside the increase in population. In addition there is potential for this option to make use of a multifunctional building that may be developed within the site to serve other community uses.

Other Uses

Whilst there are no explicit guidelines relating to other uses required on the site, either through Policy SP3 or evidence base work to support the Local Plan, it is likely that a local convenience retail store would be needed to serve a site of this size, particularly

Open space

Emerging guidance on open space and the most up to date evidence suggests that approximately 7ha of open space would be required on a site the size of Yew Tree Farm. Current best practice and support from the Stakeholder Holder group suggests that the open space provision should be as multi functional as possible. This means that any semi natural open space could have a multi use for SuDS, Linear Park or possible play facilities.

The site is required to deliver open space to meet local needs which were identified in the last Open Space Study (2008). At this time, a short fall in formal parks, sports and play provision was identified. In addition, the Yew Tree Farm site must ensure the link with Ormskirk and on to Burscough Town Centre is secured through the delivery of a Linear Park.

The Council wishes to ensure that the site delivers open space that is genuinely required for the area and welcomes views and feedback on this matter as the options stage of the masterplan.

Should the site deliver new sports facilities or should the development contribute financially to the improvement of existing offsite sports facilities within Burscough?

What type of open space provision should be delivered onsite?

Design Layout and Principles

The design concepts set out in Section 8 of this options document are effectively a starting point for the principle of the site. The masterplan is unlikely to set out specific design requirements which could potentially prove to be un-flexible given the long period of time the site will be delivered over.

However, it will be important for the masterplan to refer to established design guides such as Building for Life 12 which could provide a useful framework to ensure the overall design and finish of the site is to a high quality and standard.

In addition, the final masterplan could include a Design Code that all development, regardless of phase, must have regard to. This will assist in providing continuity on the site and ensuring that matters such as safety and security, public realm and the creation of strong neighbourhoods is central to the development

Residential Density

The density of the residential development will need to be at least 30 dwellings per hectare, in accordance with Policy RS1 of the Local Plan and in order to ensure that the development makes the most sustainable use of the land.

Residential Amenity

The Yew Tree Farm site is surrounded on the south and east (Liverpool Road) and partially to the north (Higgins Lane) by existing residential development. The masterplan will need to consider the residential amenity of both existing and new residents through the impacts of noise, vibration (mainly through construction), air quality and missed uses.

How should the residential amenity of the existing Burscough residents and those in the new development be protected? E.g. noise concerns during construction, buffer zones between conflicting uses.

Phasing and Safeguarding

The Local Plan requires that enough land be brought forward within this Local Plan period (2012-2027) to deliver 500 homes and 10ha of employment land, plus associated infrastructure. The delivery of this land is likely to be over phased periods with established milestones. These milestones are could link to the requirement of key infrastructure delivery such as the onsite SuDS or strategic road layout. Such milestones will need to be identified within the next draft of the masterplan once the “Preferred Option” has been identified.

In addition, the remaining safeguarded portion of the site i.e. the land which will be set aside for future development needs, will need to be established once the “Preferred Option” has been identified and the broad strategic layout of the site becomes clearer.

A number of views regarding the safeguarding of land on the site have been expressed through the Stakeholder Group, including the need to consider the ongoing use of land which is safeguarded for agricultural purposes.

How should the site be phased and in which part of the site should development start?

The entire site is not required within this plan period. Which part of the site should be safeguarded for future use?

Design Concepts

The following four options have been based on the requirements and objectives of Policy SP3 and reflect a number of design concepts that have been used to model the site. They also reflect the evidence about the Yew Tree Farm site and the feedback from the Stakeholder Group about how the site might develop to resolve issues and make the most of the site's opportunities.

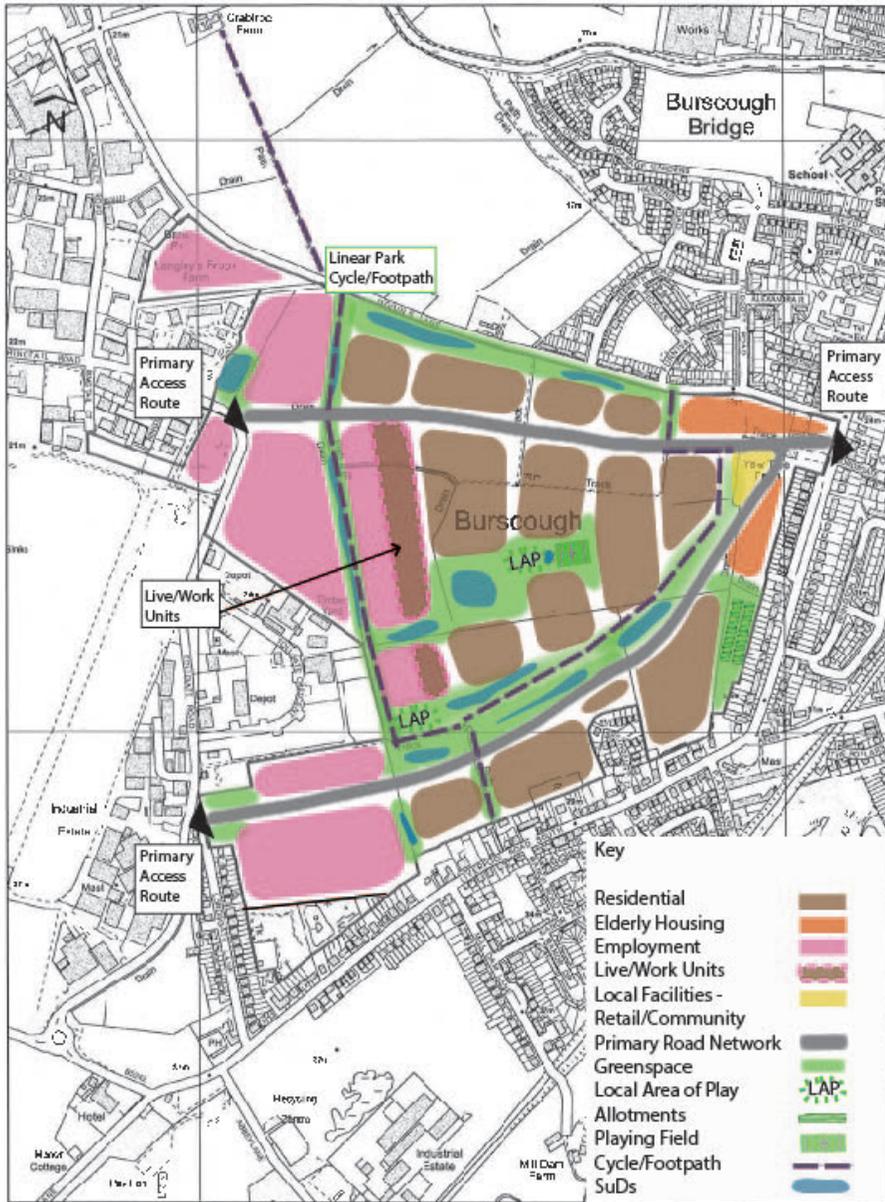
Option 1 - Radial

This allows for the site to be developed in a radial pattern, starting with the focus in the north east corner of the site closest to the town centre and radiating out towards the western side of the site.

The following features are included in this option:

- Development density is highest in the north east corner to reflect the existing urban residential development along Liverpool Road and the Truscott Estate, picking up on the immediate existing local character.
- The development gradually radiates out towards the centre of the site, reducing in density as it draws closer to the urban edge and the countryside buffer between the employment and housing uses.
- Elderly housing needs would be met closest to the existing settlement where some facilities can support independent living and access to the town centre and transport links is most convenient.
- Sustainable drainage features are most prominent in the north-west corner of the site where the site naturally drains to.

- The road network and layout includes 3 primary access points from Liverpool Road in the north east corner of the site and out to Tollgate road north and south on the western perimeter of the site.
- No access through to Higgins Lane from the site is incorporated in this concept and the primary internal road layout curves through the site to help define the radial design.
- The provision of open space includes a buffer zone with pedestrian and cycle access, a large semi natural Linear Park which sweeps through the site along the curve of the spine road, local play area and sports pitches in the centre of the site and allotments provision.
- The existing footpath is retained through the site.
- Live / Work units are encouraged as a buffer zone between the employment and housing areas to limit any impacts between the two.
- Local facilities including retail and potential community uses are concentrated in the north east corner of the site where development density is highest.



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Potential Pros	Potential Cons
<ul style="list-style-type: none"> Allows phasing of development to occur naturally through the site, east to west Good accessibility for public transport for the highest concentration of development Reflects the local context and maintains urban development on the east with lower density development towards the buffer and beyond the employment area, the countryside 	<ul style="list-style-type: none"> Uncertainty for residents about later phases Make take longer to deliver some key objectives (eg through road, Linear Park) Initial additional traffic congestion from employment land may not be taken account of is through road not delivered Potentially could delay linkages to the south west of the site

Option 2 – Central Focus

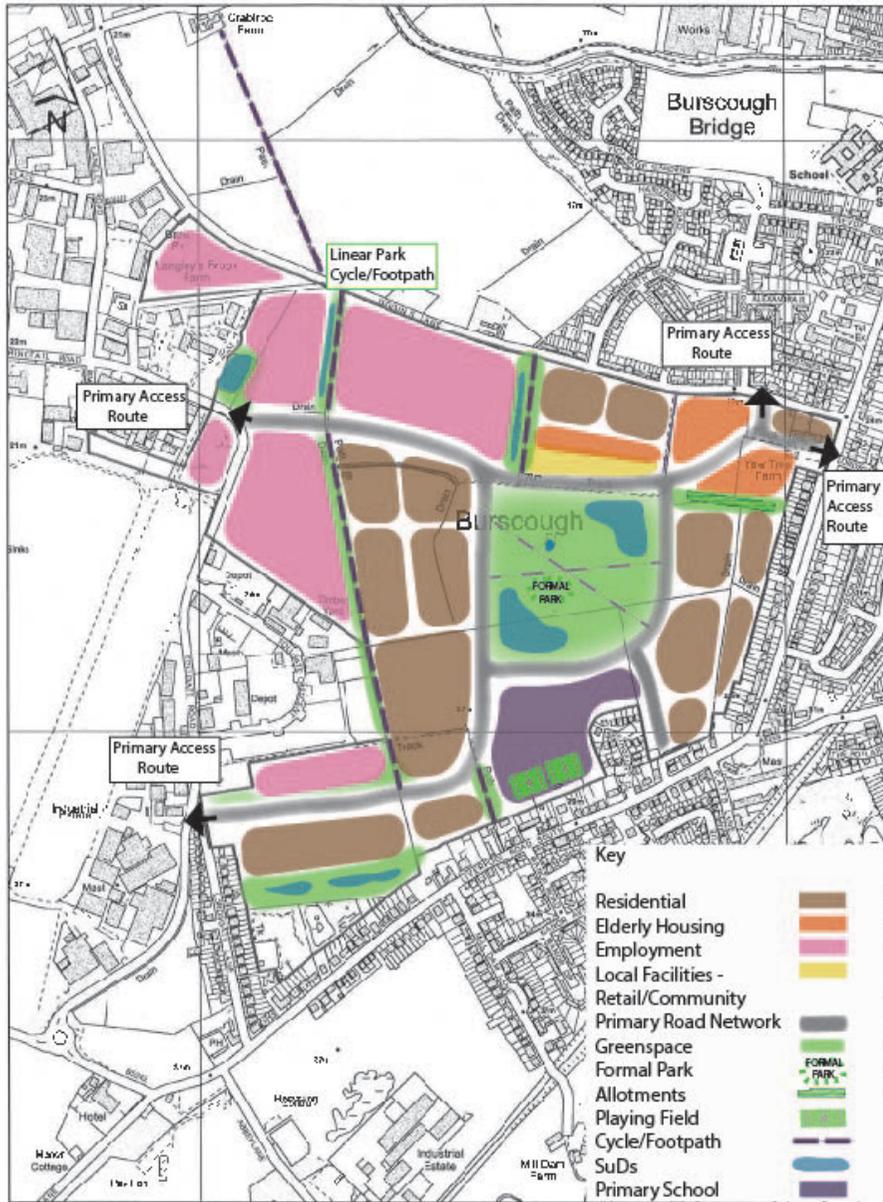
Identifies a central focus within the site so that the development creates a true sense of place within itself and the primary road infrastructure is drawn towards a central feature which can include open space such as a formal park or village green or local facilities.

The following features are including in this option:

- Central focus consisting of a large open space with public access, local play facilities and sustainable drainage features such as attenuation ponds.
- Reflects the central focus developed around Burscough's transport links and draws on how Burscough has evolved as a settlement itself.
- Local facilities including retail and potential community uses are concentrated around the central focal point providing a further draw to this area for occupiers of the site.
- Higher density development is typically encouraged around the central feature so 3 or 4 storey buildings would be most appropriate here than anywhere else on site.
- From the central focal point, development would decrease in density to the sites edges, particularly on the northern perimeter where the site meets Higgins Lane and the open countryside beyond and where the green buffer zone separates the employment and housing uses to the west of the site.
- The position of the Linear Park allows for a connection north/south. Connectivity is encouraged to pass through the central focal point whilst maintaining connections to the existing and potential future proposed cycle paths
- The existing footpath is retained through the site.
- The development of a Primary school could be accommodated in land to be released in the future.
- The provision of open space includes a buffer zone with pedestrian and cycle access, a large formal park in the centre of the development, local play area, sports pitches and allotments.

- Elderly housing needs would be met closest to the existing settlement and near to the focal point of development where some facilities can support independent living
- Sustainable drainage features are most prominent in the central focus area and the northwest corner of the site where the site naturally drains to.
- The road network and layout includes 3 primary access points from Liverpool Road in the north east corner of the site and out to Tollgate road north and south. There are 2 secondary access points onto Higgins Lane and Liverpool road through Meadowbrook. All routes pass through the central focus.

The overleaf pros and cons relate to the proposed design concept as the pros and cons for the responses to each opportunity or constraint are discussed in detail above.



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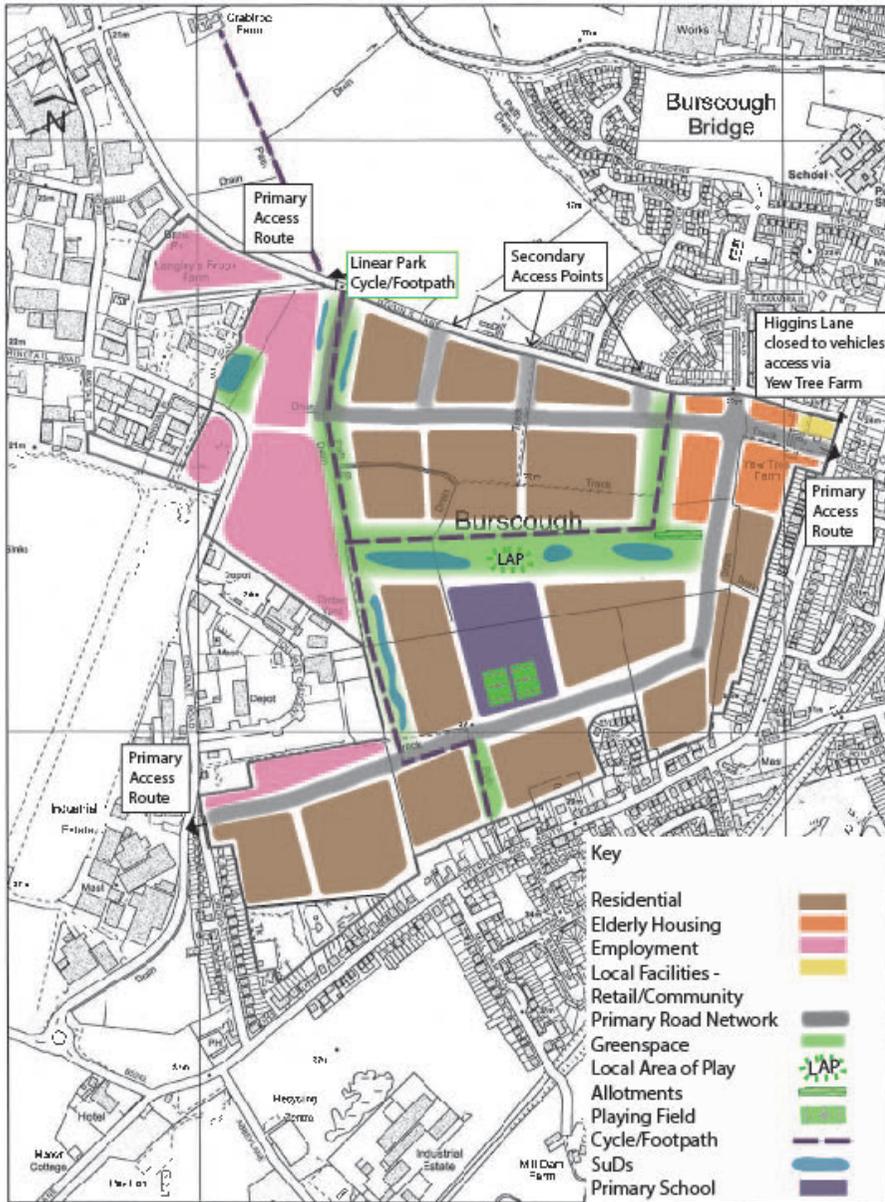
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Potential Pros	Potential Cons
<ul style="list-style-type: none"> • Central focal point for the site provides good legibility and makes it easy for people to navigate around the site • Still allows for the separation of housing and employment uses • Encourages community focus in the centre • May encourage less car use as services more accessible to entire site. • Strong public transport links could be key to linking the site with existing settlement which could otherwise suffer from segregation • Design would enable discrete clusters of use and design to come forward at various points around the central focus and so supports phased development 	<ul style="list-style-type: none"> • The inward looking draw of this design concept will create separation from the Burscough Town Centre and reduce the potential for integration of the new development with existing • A community within a community would be developed • Phasing of development – how could it be funded and delivered when the central focus is likely to be required early on in order to assist with the site design

Option 3 - Linear

The main feature in this design concept are the avenues which run through the site creating strong links through the site to the employment area and acting as linear focal points.

- Development density is highest along the main avenues due to the width of the road way which lends itself to 3 or 4 storey development
- Linear transport infrastructure is a key characteristic of Burscough including the rail lines, the A59 and the Canal. This design concept seeks to reflect this important local distinction.
- Local facilities including retail and potential community uses are concentrated in the north east corner closest to the existing settlement and elderly accommodation.
- The broad avenues provide excellent transport links through the site and encourage HGVs away from the surrounding road network.
- The position of the Linear Park allows for a connection north/south and also east to west through the site.
- The existing footpath is retained through the site.
- The development of a Primary school could be accommodated in land to be released in the future.
- The provision of open space includes a buffer zone with pedestrian and cycle access, a semi natural Linear Park through the centre of the development, local play area, sports pitches (potentially linked with the future Primary School) and allotments.
- Elderly housing needs would be met closest to the existing settlement where some facilities can support independent living and access to Burscough Town Centre and transport links are greatest
- Sustainable drainage features are most prominent through the Linear Park and in the northwest corner of the site where the site naturally drains to.
- Swales (drainage features) could be easily accommodated along the avenue features.
- The road network and layout includes 3 primary access points from Liverpool Road in the north east corner of the site and out to Tollgate road north and south. There are 2 secondary access points onto Higgins Lane and Liverpool road through Meadowbrook. All routes pass through the central focus.
- A clear hierarchy of roads feed of the main avenues into a grid pattern producing defined blocks for development which can be used for the phasing of the site.
- These defined blocks for development also allow for street frontages to be created.
- The road network includes 3 primary access points onto Liverpool Road and Tollgate Road north and south. It also includes secondary access points onto Higgins Lane for residential traffic and in order to increase the permeability of the site.



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Potential Pros	Potential Cons
<ul style="list-style-type: none"> Useful and functional design for managing volumes of traffic Links through to Higgins lane with road frontage development creates and outward looking design 	<ul style="list-style-type: none"> Difficult to create a sense of place, large wide road, no character, no frontage from buildings on main avenues Open space along the avenue would be unusable due to traffic Reference to Skelmersdale and the difficulties faced by pedestrians due to the large road network layout The roads will be of significant cost and this will impact on phasing i.e. more development needed up front to deliver the roads

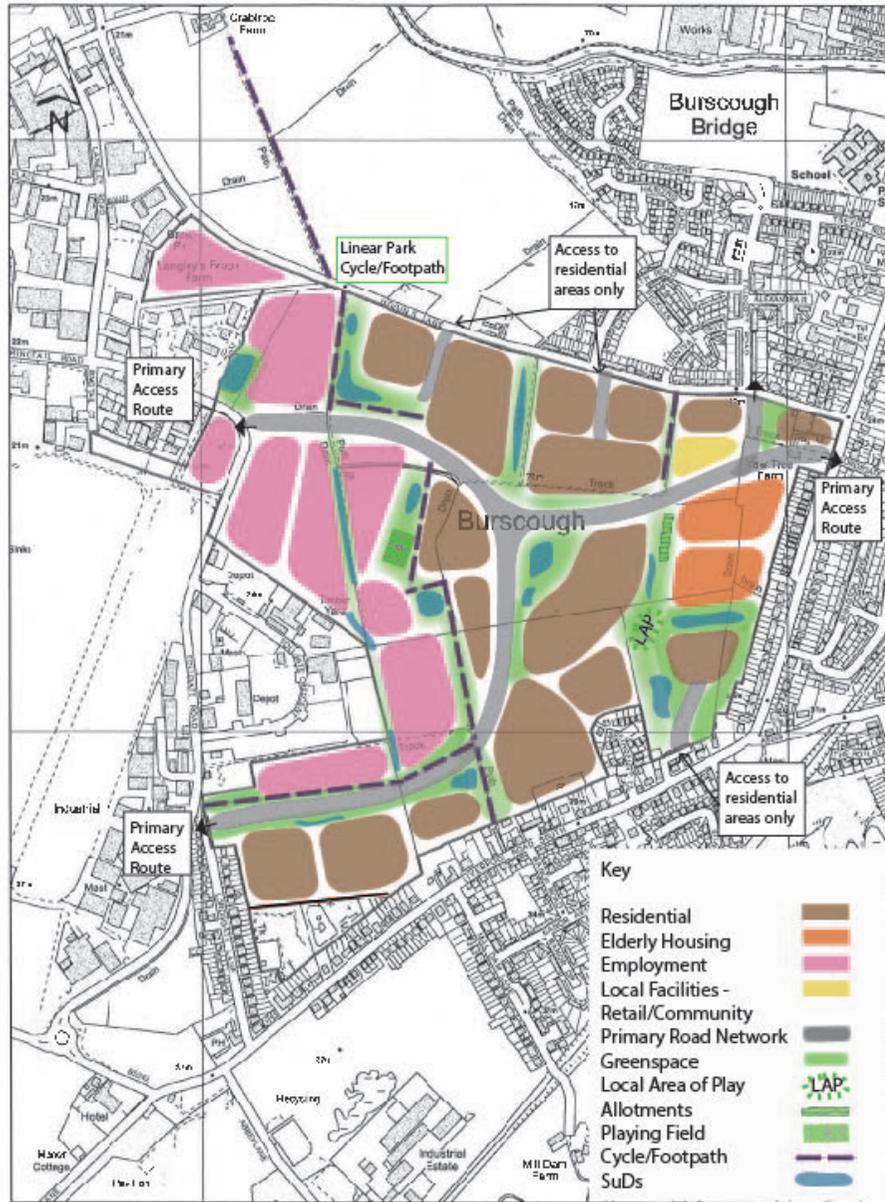
Option 4 – Clusters

This approach delivers clusters or pockets of development throughout the site interspersed with areas of greenspace. Each cluster of development has the potential to be phased appropriately and to be developed with its own character.

The following features are including in this option:

- Development density is spread fairly evenly across the site.
- High amount of open space between each cluster leading to an overall perception of a green and pleasant development.
- Burscough and the surrounding area were predominantly agricultural open fields with clusters of farmsteads across the landscape. This approach attempts to reflect this historical context and local characteristic.
- Elderly housing needs could be met closest to the existing settlement where some facilities can support independent living and access to the Burscough Town Centre and transport links is most convenient.
- Sustainable drainage features are most prominent in the north-west corner of the site where the site naturally drains to. However, increased amount of open space lends itself well to accommodating surface water drainage features.
- The road network and layout includes 3 primary access points from Liverpool Road in the north east corner of the site and out to Tollgate road north and south on the western perimeter of the site.
- The road network is more organic and curved to help connect each cluster and the clusters themselves would include shared surface streets.
- Secondary access points are available along Higgins Lane and through Meadowbrook off Liverpool Road, although these are access points to only parts of the site and do not connect to the main internal highways network.

- The provision of open space includes a multifunctional Linear Park with pedestrian and cycle access and sports facilities which also acts as a buffer zone between the housing and employment areas. Local play area and allotments provision is also included.
- The existing footpath is retained through the site.
- Local facilities including retail and potential community uses are concentrated in the north east corner of the site.



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Potential Pros	Potential Cons
<ul style="list-style-type: none"> • Opportunities for more open space/ Linear Parks, footpaths • Allows clear separation of employment from housing • Consistent with how Burscough has already formed i.e. clusters of development over time • Separation of footpaths and cycleway / green space from roads and development 	<ul style="list-style-type: none"> • Road network difficult for HGV traffic to traverse • Separation of elderly / those who need public transport from links and other uses

Next Steps

Views are sought on all aspects of these options and the issues identified and opportunities and constraints. Once the consultation period is over, the views and comments collected will be considered by the Council and the Stakeholder Group before a “Preferred Option” is drafted for inclusion in the final masterplan SPD.

The next consultation is expected in the summer of 2014 when the feedback from this consultation and the “Preferred Option” will be published. Following this final stage of consultation, it is anticipated that the final masterplan will be adopted by the Council in October 2014.

**West Lancashire Borough Council
Yew Tree Farm Masterplan SPD
Options**

**Sustainability Appraisal Report
October 2013**

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West Lancashire Borough Council**

www.westlancs.gov.uk

WEST LANCASHIRE



LOCAL PLAN

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1. Meeting the requirements of the SEA Directive

This sustainability appraisal meets the requirements of a Strategic Environmental Assessment. We have outlined where these requirements have been met in table 1 below.

Further details about West Lancashire Borough Councils approach can be found in the Local Plan scoping report on the council's web pages at www.westlancs.gov.uk

Information required in the Environmental Report.	Evidence of information.
Contents, objectives and relationship with other plans and programmes.	Summarised in Appendix 1 of this report. Full details can be found within the Local Plan Scoping Report.
Current state of the environment and implications without the supporting SPD.	Baseline data and appendix 2.
Characteristics likely to be affected.	Baseline data and appendix 2.
Existing environmental problems.	Baseline data and appendix 2.
Environmental protection objectives that are relevant to the SPDs.	Appendix 1 key policy documents
Likely significant effects on the environment	Options Appraisal Section 9.
Measures to offset significant adverse effects on the environment	Appendix 3.
Reasons for selecting the alternatives, describing how the assessment was undertaken.	Section 8.
Measures envisaged concerning monitoring.	To be addressed in SA Report for Final SPD

2. Purpose of the sustainability appraisal

It is a requirement that SA is undertaken in-line with the procedures prescribed by the Environmental Assessment of Plans and Programmes Regulations 2004, which were prepared in order to transpose the EU Strategic Environmental Assessment (SEA) Directive. The Regulations require that a report is published for consultation alongside the options document that 'identifies, describes and evaluates' the likely significant effects of implementing 'the masterplan, and reasonable alternatives'. The report must then be taken into account, alongside consultation responses, when finalising the plan.

In-line with the Regulations the report - which for the purposes of SA is known as the 'SA Report' – must essentially answer **four questions**:

1. What's the scope of the SA?
2. What has Plan-making / SA involved up to this point?
– Preparation of the draft plan must have been informed by at least one earlier planmaking / SA iteration at which point 'alternatives' are appraised.
3. What are the appraisal findings at this current stage?
– i.e. in relation to the options for the masterplan.
4. What happens next?

Sustainable development is central to the reformed planning system. The purpose of a SA is to promote sustainable development through the integration of social, environmental and economic considerations into the preparations of new or revised Supplementary Planning Documents (SPDs) and Development Plan Documents (DPDs).

This is confirmed within Para 165 of the National Planning Policy Framework (NPPF). A sustainability appraisal ensures that sustainability and sustainable development is achieved within plans, policies and programmes. It provides a methodology of assessing strategy and policy, in this case the Yew Tree Farm Masterplan. Investigating which such documents are likely to promote a sustainable pattern of development, and where possible, avoid or mitigate any negative social, environmental and economic affects of plans, policies or programmes by enhancing the integration of sustainability considerations throughout the preparation and adoption of the SPDs.

In order to establish the most important sustainability issues, we draw upon the Local Plan Sustainability Appraisal for the whole Borough and review evidence and baseline data to inform and back up our decisions.

A range of options for site the parameters and principles for the Yew Tree Farm Masterplan SPD have been taken addressing the environmental social and economic impacts.

In summary Sustainability Appraisal Report does the following:

- Describes the purpose of the SPD, and the policy context within which they sit.
- Outline the approach to sustainability methods.
- Provide signposts to the evidence supporting the SPD.
- Outline and evaluate the Local plan objectives with those in the SPD.
- Outline the environmental, economic and social impacts.
- Set out monitoring arrangements
- Explain how the Sustainability Appraisal has influenced the SPD.

3. Planning Policy Context

The Localism Act 2011 reformed the planning system with the introduction of the NPPF. At the heart of the National Planning Policy Framework is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan making and decision taking.

West Lancashire Borough Council adopted their Local Plan on 16th October 2013, this included a site allocation for at least 500 dwellings and 10ha of employment land at Yew Tree Farm through policy SP1 and SP3 which are planned to be delivered within the plan period (2027); with a further 500 dwellings and 10ha of land safeguarded for beyond 2027.

The Sustainability Appraisal that was undertaken for the Local Plan summarised the impacts for Policy SP3 as follows:

“Policy SP3 (Yew Tree Farm, Burscough – A Strategic Development Site) sets out the need to ensure that any development on the Yew Tree Farm site considers its impact on nearby heritage assets and implements appropriate measures to mitigate any negative impacts. This will contribute towards ensuring that heritage assets in the area are protected.

The policy proposes significant growth towards the south of the town. The policy highlights how a new primary school, local convenience shops and a new youth and community centre will be developed as part of the strategic development site. The inclusion of these services will reduce the need for people moving to the area to travel in order to access key services. This will have a less significant impact on reducing CO2 emissions from new development within Burscough.

A linear park / cycle route across the site to link in with a wider Ormskirk to Burscough linear park / cycle route will be delivered as part of new development on the site. This will encourage walking and cycling between Ormskirk and Burscough and will contribute towards a positive impact on the air quality and transportation topic area.

Support for the construction of local convenience shops and a new youth and community centre, will help to promote social inclusion.

The policy supports improvements to education provision in Burscough through the creation of a new primary school, which will benefit children through offering a better quality learning environment, although it is recognised that a new primary school will only be required because of the increased demand that development of the strategic site would generate.

Policy SP3 will deliver an extended employment area (10ha during the Plan period and 10ha post 2027) which would provide opportunities for new businesses and existing businesses from neighbouring areas to relocate. Improving the rail service facilities between Ormskirk and Burscough will facilitate access to wider employment opportunities for the people of West Lancashire. The development of the Yew Tree Farm site fills the spatial gap between the town and the existing employment area.

The policy involves the release of 74ha Green Belt land for residential and employment development, although 30ha of this would be safeguarded from development until at least 2027. Policy EC1 indicates that a further 10ha of land will be extended into the Green Belt at the Burscough industrial estates. Importantly the West Lancashire Green Belt Study (May 2011) found that Yew Tree Farm which is the subject of Policy SP3 does not hold any high

biodiversity or landscape value, therefore adverse impacts on biodiversity and landscape are unlikely at this site.”

Local Plan Policy SP3 identifies land to the west of Burscough, known as Yew Tree Farm, to meet some of the Borough’s housing and employment needs over the period to 2027. The policy also requires a masterplan to be produced to help shape the delivery of this site and to ensure the development is sustainable and well thought out. This document is the first stage in the development of this masterplan and is known as the “Options” stage. It has been published for consultation in order to seek the views of the community, stakeholders and other interested parties. The Council welcomes comments on all aspects of the document and in particular the options, main issues and the responses to these issues.

Following consultation, all views will be considered and a “Preferred Option” selected for inclusion in the final masterplan before a further round of consultation before adoption later in 2014. Figure 1 sets out the process and timescales for the development of the Yew Tree Farm Masterplan. The final document will be a Supplementary Planning Document (SPD) which means that it will form part of the planning decision making framework when applications for development are submitted to the Council in respect of this site.

This Sustainability Appraisal Report covers the forthcoming Supplementary Planning Document. Supplementary Planning documents are more informal documents that provide supplementary detail and guidance in respect of policies in Development Plan Documents. Masterplans and site development briefs identify the themes and issues facing the borough.

4. Our approach to the Sustainability Appraisal

Sustainability Appraisals are produced in five clear tasks which are outlined within Government guidance, although this is out of date it is still common practice to follow these stages; these include:

Stages of the Sustainability Appraisal Process

Further stages of the Sustainability Appraisal Process	
Stage A	Scoping Report
Stage B	Developing and refining options and assessing effects
Stage C	Preparing the Sustainability Report
Stage D	Consulting on the preferred options of the SPD and SA
Stage E	Monitoring the significant effect of implementing the SPD

This Sustainability Appraisal Report draws from Stage A of the Local Plan Sustainability Appraisal Scoping report and the evidence study that was undertaken during the site options stage of the Local Plan and continues to and includes Stage B, developing and refining options and assessing affects.

Stage B involves:

B1: Testing the SPD objectives against the SA Framework

B2: Developing the options

B3/B4: Predicting and evaluating the effects of the SPD

B5: Considering ways of mitigating adverse effects and maximising beneficial effects.

B6: Proposing measures to monitor the significant effects of implementing the SPD.

5. Evidence from the Local Plan Scoping Report

The first stage of the appraisal process involved reviewing the Local Plan Scoping Report and considering objectives and key issues in relation to the SPD. We also took this opportunity to review some of the baseline data that was applicable to the background evidence of the SPD that was out of date.

In accordance with Task A1 a review of update key documents and policy context was undertaken which can be found in Appendix 1. A number of key issues and messages were identified as part of a 'contextual review' of key plans, strategies and other evidence. These have been used for consideration when establishing the key suitability issues and the appraisal frameworks.

Task A2 Baseline information, can be found in Appendix 2, much of the original data is still evident from the original Local Plan Scoping report. However a review of census data and population statistic to name a few areas has been update to reflect the most up to date information available. This doesn't affect the issues or the framework but provides an up to date picture for the site.

Task A3, Sustainability Issues facing each of the SPD were identified in more detail from the original Local Plan. These are tabled below for each of the documents:

Yew Tree Farm Masterplan SPD issues:

Sustainability Issues for Yew Tree Farm Masterplan SPD
Surface and Waste Water Treatment
Decentralised Energy Network
Access, Highways & Public Transport
Linear Park and Public open Space
Protection of Ecology/Biodiversity
Education
Health
Elderly housing
Affordable housing

The Baseline Evidence Report detailed a thorough analysis of pertinent documents and data that was collated for and during the site allocation of Yew Tree Farm in the Local Plan. The key issues identified above have been drawn out of the baseline report; based on the available evidence and raised a number of issues that must answered through the preparation of the masterplan.

6. Consultation on the Local Plan Scoping Report

The initial Scoping Report for the (then) Core Strategy (which later became the Local Plan) was consulted upon for a period of 6 weeks in 2009. The evidence behind the Scoping Report has been constantly reviewed throughout the preparation of the Local Plan and of this SPD but no significant changes to the evidence base have been identified resulting in any change to the SA Framework and Objectives.

The Local Plan Scoping Report was sent to:

- Environment Agency
- Natural England
- English Heritage

We also invited comments from a wide-range of community groups and other stakeholders. This was to ensure that the appraisal was transparent, comprehensive and addressed the relevant issues.

7. Task B1: Testing the Core Strategy objectives against the sustainability appraisal framework

The Sustainability Objectives established in the Local Plan Scoping Report cover a full cross section of sustainability issues, including environmental, social and economic factors.

Sustainability Appraisal Objectives	Environmental	Social	Economic
To reduce the disparities in economic performance within the Borough		✓	✓
To secure economic inclusion		✓	✓
To develop and maintain a healthy labour market		✓	✓
To encourage sustainable economic growth	✓	✓	✓
To deliver urban renaissance	✓	✓	✓
To deliver rural renaissance	✓		✓
To develop and market the borough's image	✓	✓	
To improve access to basic goods and services	✓		✓
To improve access to good quality affordable and resource efficient housing		✓	✓
To reduce crime and disorder and the fear of crime		✓	
To reduce the need to travel, improve the choice and use of sustainable transport modes		✓	
To improve physical and mental health and reduce health inequalities	✓	✓	
To protect places, landscapes and buildings of historical, cultural and archaeological value	✓		
To restore and protect land and soil quality	✓		
To protect and enhance biodiversity	✓		
To protect and improve the quality of both inland and costal waters and protect against flood risk	✓		
To protect and improve noise air quality	✓		
To ensure the prudent use of natural resources, including the use of renewable energies and the sustainable management of existing resources	✓		

8. Methodology - Developing and appraising options

The Local Plan Scoping report and the evidence gathering assisted in the identification of the key issues for the SPD.

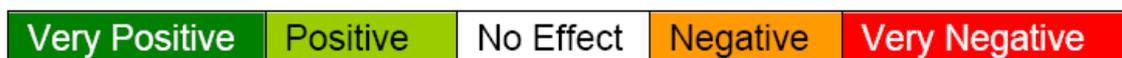
There are a number of ways in which the key issues could be addressed for the SPD, and so it would not be appropriate for us to simply choose an approach that we assumed would work best. Instead, in line with the requirements of national and EU SEA guidance the reasonable alternatives have been assessed and compared, to justify which approaches are likely to be most sustainable and deliver the best outcome overall for stakeholders.

In considering what is a reasonable alternative, the SPD must first be placed in the context of Local Plan Policy SP3, which requires any development of the site to deliver certain elements. Therefore, it would not be reasonable to consider an alternative that does not deliver those elements unless more recent evidence has identified why a particular element is no longer required or deliverable. As such, any alternative seeking to reduce the level of development on the site (particularly in relation to housing and / or employment development) or to develop it elsewhere would not be reasonable. With regard to infrastructure, there was a degree of flexibility in the scope of what should be delivered on-site and so the alternatives considered included different elements of infrastructure as relevant (and where evidence identifies it as potentially necessary or deliverable) to allow all reasonable alternatives to be assessed.

The formulation and testing of the reasonable alternatives is a key requirement of the SEA (Strategic Environmental Assessment) process, allowing for the consideration of options and various stakeholder groups and debate about the issues, ideas and ways of going forward.

This appraisal helps to assess the effects that each reasonable alternative would be likely to have on the issues covered by each Sustainability Objective. It does not reach any conclusions on which approach / option should be followed, but it will help as we develop a Preferred Option for our SPD in seeing which are the most sustainable options and alternatives.

The sustainability of each presented option was appraised against the social, economic and environmental objectives by members of the Councils 'Sustainability Appraisal' team, led by the Principal Planning Officer. The objective was to highlight the positive and negative effects on sustainability of each given option by assigning a score. Remedial scores that could be achieved through mitigation were also assigned. Scores were recorded using the following colours:



The sustainability appraisal framework tests the economic, environmental and social 'performance' of each option and the significance of the effects.

At this early stage it would not be accurate to fully determine all of the effects for each option, as they could differ depending upon the type of development and how it was implemented. Therefore, when considering the assumptions about the type, location and quantity of development, the assessment has generally adopted the overall principles when determining the likely outcomes.

Table of sub questions

SA Objective	Locally Distinctive Sub Criteria
<p>Objective 1: To reduce the disparities in economic performance within the Borough.</p>	<ul style="list-style-type: none"> • Will the plan / policy provide job opportunities in areas with residents most at need? • Will the plan / policy reduce economic disparities within the Borough and at the Regional level? • Will the plan / policy maximise local benefit from investment? • Will the plan / policy meet local needs for employment? • Will the plan / policy improve the quality of employment opportunities within the Borough?
<p>Objective 2: To secure economic inclusion</p>	<ul style="list-style-type: none"> • Will the plan / policy meet the employment needs of all local people? • Will the plan / policy encourage business start-up, especially from under represented groups? • Will the plan / policy improve physical accessibility to jobs through the location of employment sites and / or public transport links being close to areas of high unemployment? • Will the plan / policy reduce poverty in those areas and communities most affected?
<p>Objective 3: To develop and maintain a healthy labour market</p>	<ul style="list-style-type: none"> • Will the plan / policy address the skills gap and enable skills progression? • Will the plan / policy provide higher skilled jobs? • Will the plan / policy increase the levels of participation and attainment in education? • Will the plan / policy provide a broad range of jobs and employment opportunities?

SA Objective	Locally Distinctive Sub Criteria
Objective 4: To encourage sustainable economic growth	<ul style="list-style-type: none"> • Will the plan / policy help to diversify the Borough's economy? • Will the plan / policy promote growth in the key sectors of the Borough's economy? • Will the plan / policy attract new businesses to the Borough? • Will the plan / policy help develop the Borough's knowledge base? • Will the plan / policy improve the range of sustainable employment sites?
Objective 5: To deliver urban renaissance	<ul style="list-style-type: none"> • Will the plan / policy improve economic, environmental and social conditions in deprived urban areas and for deprived groups? • Will the plan / policy improve the quality of the built and historic environment? • Will the plan / policy improve the quantity and quality of open space? • Will the plan / policy improve the vitality and viability of Town Centres? • Will the plan / policy deliver Sustainable Communities? • Will the plan / policy deliver regeneration to urban areas and Market Towns
Objective 6: To deliver rural renaissance	<ul style="list-style-type: none"> • Will the plan / policy support sustainable rural diversification? • Will the plan / policy to encourage and support the growth of sustainable rural businesses? • Will the plan / policy promote the economic growth of market towns? • Will the plan / policy retain or promote access to and provision of services?

SA Objective	Locally Distinctive Sub Criteria
Objective 7: To develop and market the Borough's image	<ul style="list-style-type: none"> • Will the plan / policy support the preservation and/or enhancement of high quality built, natural and historic environments within the Borough? • Will the plan / policy promote the Borough as a destination for short and long term visitors, for residents and investors? • Will the plan / policy promote the use of locally produced goods and materials? • Will the plan / policy increase the economic benefit derived from the Borough's natural environment?
Objective 8: To improve access to basic goods and services	<ul style="list-style-type: none"> • Will the plan / policy improve the access, range and quality of cultural, recreational and leisure facilities including natural green spaces? • Will the plan / policy improve the access, range and quality of essential services and amenities? • Will the plan / policy improve the access to basic goods, promoting the use of those which are locally sourced?
Objective 9: To improve access to good quality, affordable and resource efficient housing	<ul style="list-style-type: none"> • Will the plan / policy provide for an appropriate mix of housing to meet all needs including affordable? • Will the plan / policy reduce the number of unfit empty homes? • Will the plan / policy support the development and operation of resource efficient housing?
Objective 10: To reduce crime and disorder and the fear of crime	<ul style="list-style-type: none"> • Will the plan / policy support community development? • Will the plan / policy improve relations between all members of the community? • Will the plan / policy reduce levels of crime? • Will the plan / policy reduce the fear of crime? • Will the plan / policy identify and engage with hard to reach groups?

SA Objective	Locally Distinctive Sub Criteria
Objective 11: To reduce the need to travel, improve the choice and use of sustainable transport modes	<ul style="list-style-type: none"> • To reduce the need to travel, and improve the choice and use of sustainable transport modes. • Will the plan / policy reduce vehicular traffic and congestion? • Will the plan / policy increase access to and opportunities for walking, cycling and use of public transport? • Will the plan / policy reduce freight movement? • Will the plan / policy improve access to and encourage the use of ICT? • Will the plan / policy improve the efficiency of the transport network?
Objective 12: To improve physical and mental health and reduce health inequalities	<ul style="list-style-type: none"> • Will the plan / policy improve physical and mental health? • Will the plan / policy reduce deaths in key vulnerable groups? • Will the plan / policy promote healthier lifestyles? • Will the plan / policy reduce health inequalities among different groups in the community? • Will the plan / policy reduce isolation for vulnerable groups in the community? • Will the plan / policy promote a better quality of life? • Will the plan / policy reduce poverty in those areas and communities most affected?
Objective 13: To protect places, landscapes and buildings of historical, cultural and archaeological value	<ul style="list-style-type: none"> • Will the plan / policy protect and enhance the character and appearance of the Borough's landscape strengthening local distinctiveness and sense of place? • Will the plan / policy improve access to buildings of historic and cultural value? • Will the plan / policy protect and enhance the accessibility of the landscape across the Borough? • Will the plan / policy protect Scheduled Ancient Monuments?

SA Objective	Locally Distinctive Sub Criteria
Objective 14: To restore and protect land and soil quality	<ul style="list-style-type: none"> • Will the plan / policy reduce the amount of derelict, contaminated, degraded and vacant / underused land? • Will the plan / policy encourage the development of brownfield land in preference to Greenfield? • Will the plan / policy reduce the loss of high quality Agricultural land to development? • Will the plan / policy maintain and enhance soil quality? • Will the plan / policy achieve the efficient use of land via appropriate density of development?
Objective 15: To protect and enhance biodiversity	<ul style="list-style-type: none"> • Will the plan / policy protect and enhance the biodiversity of the Borough? • Will the plan / policy protect and enhance habitats, species and damaged sites? • Will the plan / policy provide opportunities for new habitat creation? • Will the plan / policy protect and extend habitat connectivity and landscape permeability, suitable for species migration?
Objective 16: To protect and improve the quality of both inland and coastal waters and protect against flood risk	<ul style="list-style-type: none"> • Will the plan / policy reduce or manage flood risk? • Will the plan / policy maintain and enhance ground water quality? • Will the plan / policy improve the quality of coastal waters? • Will the plan / policy improve the quality of rivers and inland waters?
Objective 17: To protect and improve noise air quality	<ul style="list-style-type: none"> • Will the plan / policy maintain or, where possible, improve local air quality? • Will the plan / policy reduce noise and light pollution?

SA Objective	Locally Distinctive Sub Criteria
<p>Objective 18: To ensure the prudent use of natural resources, including the use of renewable energies and the sustainable management of existing resources</p>	<ul style="list-style-type: none"> • Will the plan / policy minimise demand for raw materials? • Will the plan / policy support the repair and re-use of existing buildings? • Will the plan / policy reduce the amount of waste generated by development? • Will the plan / policy promote the use of recycled, reclaimed and secondary materials? • Will the plan / policy promote the use of locally sourced materials? • Will the plan / policy minimise the need for energy? • Will the plan / policy maximise the production / proportion of renewable energy? • Will the plan / policy increase energy efficiency (e.g. energy efficiency in buildings, transport modes, etc) • Will the plan / policy minimise the use of fossil fuels?

9. Appraisal of the options -Yew Tree Farm Masterplan SPD options

					Option			
	Objective	Economic	Social	Environment	1 - Radial	2 – Central Focus	3 - Linear	4 - Cluster
1.	To reduce the disparities in economic performance within the Borough	Y	Y		The option allows for the provision of 10ha of employment land to come forward immediately for development and the safeguarding of 10 ha of employment land for development post 2027. This will assist in the delivery of meeting the local employment needs and improve employment opportunities within the Borough.	The option allows for the provision of 10ha of employment land to come forward immediately for development and the safeguarding of 10 ha of employment land for development post 2027. This will assist in the delivery of meeting the local employment needs and improve employment opportunities within the Borough.	The option allows for the provision of 10ha of employment land to come forward immediately for development and the safeguarding of 10 ha of employment land for development post 2027. This will assist in the delivery of meeting the local employment needs and improve employment opportunities within the Borough.	The option allows for the provision of 10ha of employment land to come forward immediately for development and the safeguarding of 10 ha of employment land for development post 2027. This will assist in the delivery of meeting the local employment needs and improve employment opportunities within the Borough.
2.	To secure economic inclusion	Y	Y		The Radial option assists in the delivery of employment opportunities to the local area. Although the employment allocation is	The Central Focus option will assist in meeting the needs of the local population. The central hub of the site would offer opportunities for	The Linear option will create a central boulevard leading to the employment area. The liner park will also allow for connections with	The Cluster option assists in the delivery of employment opportunities for local people through the allocation of

					located to the western part of the site which is furthest away from the town centre and main existing transport links.	public transport to alight at this location rather than the A59.	Ormskirk and wider transport routes, thus assisting in the delivery of employment needs for the local area.	employment land.
3.	To develop and maintain a healthy labour market	Y	Y		The allocation of employment land within this option will provide an opportunity to create a wider range of employment opportunities and higher skilled jobs within the local area. There will be provision made to assist in the delivery of educational facilities if they are required.	The allocation of employment land within this option will provide an opportunity to create a wider range of employment opportunities and higher skilled jobs within the local area. There will be provision made to assist in the delivery of educational facilities if they are required.	The allocation of employment land within this option will provide an opportunity to create a wider range of employment opportunities and higher skilled jobs within the local area. There will be provision made to assist in the delivery of educational facilities if they are required.	The allocation of employment land within this option will provide an opportunity to create a wider range of employment opportunities and higher skilled jobs within the local area. There will be provision made to assist in the delivery of educational facilities if they are required.
4.	To encourage sustainable economic growth	Y	Y	Y	The allocation of employment provision on the site would improve the range of sites on offer in the Borough. The 10 ha for employment use would encourage new Business and the additional population within the Burscough settlement	The allocation of employment provision on the site would improve the range of sites on offer in the Borough. The 10 ha for employment use would encourage new Business and the additional population within the Burscough settlement will assist in	The allocation of employment provision on the site would improve the range of sites on offer in the Borough. The 10 ha for employment use would encourage new Business and the additional population within the Burscough settlement	The allocation of employment provision on the site would improve the range of sites on offer in the Borough. The 10 ha for employment use would encourage new Business and the additional population within the Burscough settlement

					<p>will assist in diversifying the Borough's economy.</p> <p>The focus of this option looks to support the existing town centre by encouraging site occupiers to use services here.</p>	<p>diversifying the Borough's economy.</p> <p>The focus of service use within the site may slightly undermine the reliance on Burscough's main existing services in the centre. Whilst this impact is unlikely to be negative it would not be as positive as the other options which do not attempt to create a secondary central focus away from Burscough Town Centre</p>	<p>will assist in diversifying the Borough's economy.</p>	<p>will assist in diversifying the Borough's economy.</p>
5.	To deliver urban renaissance	Y	Y	Y	<p>The option will assist in the delivery of social and elderly housing provision within the local area. The site will deliver various open space uses, including Local Areas of Play, Allotments, formal and informal open space and a linear park. Due to the layout of the option there is a natural gravitational drift for any</p>	<p>Whilst this option will provide a large area of open space within the centre of the site, the design of this layout almost creates a new sense of place which potentially could affect the vitality and viability of Burscough town centre; this could detract from delivering regeneration to the</p>	<p>The option will assist in the delivery of social and elderly housing provision within the local area. The site will deliver various open space uses, including Local Areas of Play, Allotments, formal and informal open space and a linear park.</p> <p>The boulevard effect will create a legible route towards the A59 and</p>	<p>The option will assist in the delivery of social and elderly housing provision within the local area. The site will deliver various open space uses, including Local Areas of Play, Allotments, formal and informal open space and a linear park.</p> <p>The theory of clusters of development is that they are surrounded by open</p>

					retail provision to be located in the eastern corner closest to the existing town centre, this is to minimise the impact upon the vitality and viability of the town centre.	existing town. The option will assist in the delivery of social and elderly housing provision within the local area.	further on towards Burscough town centre.	spaces which can take the form of formal and informal uses.
6.	To deliver rural renaissance	Y		Y	The principle of the radial option is to draw the new site towards the existing town centre of Burscough. With higher density development to the north eastern tip of the site fanning out to lower density development and employment uses. This also having a lesser impact upon the openness of the Green Belt. The provision of services within the existing town centre will be maintained and links from the site will be direct to the nearest sustainable transport	The Central focus option draws the activity of the site into the centre, by locating any retail elderly provision and large areas of open space in this nuclear hub of the site. The site could be well served by the new services and facilities; however the existing town centre will not be the focus of the layout. This option essentially seeks to create a development with its own sense of place rather than supporting	The Linear option creates a green space cutting across the site, improving access to the wider area and increase the access to and provision of services serving the development site from Burscough.	The Cluster option will only contain the minimal amount of ancillary retail development required to service the site. Sustainable routes (footpaths/cycle ways) will be located around the site assisting the Linear park in connecting Burscough with Ormskirk and promoting the provision of existing services and economic growth of the surrounding towns.

					modes.			
7.	To develop and market the Borough's image		Y	Y	Development on Yew Tree Farm will be to a high standard as set out in policy SP3 of the Local Plan, in adhering to the Code for Sustainable Homes and BREEAM the use of locally produced materials is encouraged. The delivery of the Linear Park will assist in improving the Borough's natural environment.	Development on Yew Tree Farm will be to a high standard as set out in policy SP3 of the Local Plan, in adhering to the Code for Sustainable Homes and BREEAM the use of locally produced materials is encouraged. The delivery of the Linear Park will assist in improving the Borough's natural environment.	Development on Yew Tree Farm will be to a high standard as set out in policy SP3 of the Local Plan, in adhering to the Code for Sustainable Homes and BREEAM the use of locally produced materials is encouraged. The delivery of the Linear Park will assist in improving the Borough's natural environment.	Development on Yew Tree Farm will be to a high standard as set out in policy SP3 of the Local Plan, in adhering to the Code for Sustainable Homes and BREEAM the use of locally produced materials is encouraged. The delivery of the Linear Park will assist in improving the Borough's natural environment.
8.	To improve access to basic goods and services	Y		Y	The Radial option allows for the provision of essential services and amenities to be located within the existing town centre with the higher density development drawn in this direction . The creation of natural spaces and the linear park increases access to services not only in Burscough but also the wider Borough. Provision will be made through	The Central Focus option offers the opportunity to improve access to a range of quality recreational and leisure facilities for the habitants of Yew Tree Farm and wider Burscough, the provision of footpaths and cycle ways will assist in this delivery. Provision will be made through on site or financial contributions	The Linear option offers the opportunity for the delivery of quality recreational and leisure facilities on the site. The Linear boulevard will act as a multifunctional space offering a foot and cycle path, whilst the site could potentially deliver a new primary school if the Local Education Authority evidence requires the extra population	The Cluster option allows for the provision of open space located throughout the site in small areas. Provision will be made through financial contributions for improvements to education and healthcare if services are required by the infrastructure providers.

					financial contributions for improvements to education and healthcare if services are required by the infrastructure providers.	for improvements to education and healthcare if services are required by the infrastructure providers.	generated by the site to do so.	
9.	To improve access to good quality, affordable and resource efficient housing		Y		The site will deliver a mix of housing to meet the local needs, whilst delivering 35% affordable housing and a 20% elderly housing provision.	The site will deliver a mix of housing to meet the local needs, whilst delivering 35% affordable housing and a 20% elderly housing provision.	The site will deliver a mix of housing to meet the local needs, whilst delivering 35% affordable housing and a 20% elderly housing provision.	The site will deliver a mix of housing to meet the local needs, whilst delivering 35% affordable housing and a 20% elderly housing provision.
10.	To reduce crime and disorder and the fear of crime		Y		No effect	No effect	No effect	No effect
11.	To reduce the need to travel, improve the choice and use of sustainable transport modes		Y		The Access point on Liverpool Road at the north east point of the site near to Higgins Lane allows for traffic to quickly join the main highway network, this option provides a focal access point to the site on the main route into Burscough, assisting with the integration of the	The main access into the site is shown to be taken through Meadowbrook by the removal of the property at Number 1 Meadowbrook. The Radial option provides for additional accesses to the site, increasing permeability and reducing the reliance on a single primary access	The Linear Option provides a clear through route for HGVs away from traffic from Higgins Lane, allowing for the road to be returned to its existing rural country lane status. This however could have an impact upon existing residents who currently access their properties	The Cluster option offers the opportunity to keep employment vehicles out of the residential areas and off the A59. Small access roads to the pockets of development off Higgins Lane reduce the need to travel through the site by residents; however this could create a rat run as

					site into the existing settlement.	and queuing along the A59 at peak times.	via Higgins Lane who would have to use the main Yew Tree Farm Access and move through the site before moving north into existing residential areas.	Higgins Lane would be open to traffic.
12.	To improve physical and mental health and reduce inequalities		Y	Y	The elderly provision of housing will assist in the reducing health inequalities and promoting healthier lifestyles through the provision of open space.	The elderly provision of housing will assist in the reducing health inequalities and promoting healthier lifestyles through the provision of open space.	The elderly provision of housing will assist in the reducing health inequalities and promoting healthier lifestyles through the provision of open space.	The elderly provision of housing will assist in the reducing health inequalities and promoting healthier lifestyles through the provision of open space.
13.	To protect places, landscapes and buildings of historical, cultural and archaeological value			Y	The provision of the linear park will assist in enhancing the accessibility of the landscape across Burscough and Borough wide.	The provision of the linear park will assist in enhancing the accessibility of the landscape across Burscough and Borough wide.	The provision of the linear park will assist in enhancing the accessibility of the landscape across Burscough and Borough wide.	The provision of the linear park will assist in enhancing the accessibility of the landscape across Burscough and Borough wide.
14.	To restore and protect land and soil quality			Y	The development of Yew Tree Farm will result in the loss of previous agricultural land.	The development of Yew Tree Farm will result in the loss of previous agricultural land; however there will be opportunities for	The development of Yew Tree Farm will result in the loss of previous agricultural land; however there will be opportunities for	The development of Yew Tree Farm will result in the loss of previous agricultural land.

						landscape permeability through the linear park and the central green space will provide a focal point for the site.	landscape permeability through the linear park and central boulevard throughout the site.	
15.	To protect and enhance biodiversity			Y	There will be opportunities for landscape permeability through the linear park and green spaces suitable for species migration.	Green spaces suitable for species migration will be provided if they are required.	Green spaces suitable for species migration will be provided if they are required.	There will be opportunities for landscape permeability through the linear park and green spaces suitable for species migration.
16.	To protect and improve the quality of both inland costal waters and protect against flood risk			Y	All surface water generated through the development of this site can be managed on site and discharged to the local watercourse attenuated at a greenfield run off rate. In addition, the site promoters have confirmed that it will be possible to remove a volume of water from the existing surface water network, equivalent to the volume of foul water flows	All surface water generated through the development of this site can be managed on site and discharged to the local watercourse attenuated at a greenfield run off rate. In addition, the site promoters have confirmed that it will be possible to remove a volume of water from the existing surface water network, equivalent to the volume of foul water flows	All surface water generated through the development of this site can be managed on site and discharged to the local watercourse attenuated at a greenfield run off rate. In addition, the site promoters have confirmed that it will be possible to remove a volume of water from the existing surface water network, equivalent to the volume of foul water flows	All surface water generated through the development of this site can be managed on site and discharged to the local watercourse attenuated at a greenfield run off rate. In addition, the site promoters have confirmed that it will be possible to remove a volume of water from the existing surface water network, equivalent to the volume of foul water

					produced by the housing development. This is to assist in managing overall flows to the WWTW until improvements have been made by United Utilities. This approach will result in a net betterment in flows entering the system during periods of peak rainfall.	produced by the housing development. This is to assist in managing overall flows to the WWTW until improvements have been made by United Utilities. This approach will result in a net betterment in flows entering the system during periods of peak rainfall.	produced by the housing development. This is to assist in managing overall flows to the WWTW until improvements have been made by United Utilities. This approach will result in a net betterment in flows entering the system during periods of peak rainfall.	flows produced by the housing development. This is to assist in managing overall flows to the WWTW until improvements have been made by United Utilities. This approach will result in a net betterment in flows entering the system during periods of peak rainfall.
17.	To protect and improve noise air quality			y	The Radial option allows for a buffer of development separating the employment from residential uses, this will assist in reducing the noise from the existing and proposed development. The provision of formal and informal open space with landscaping will assist in mitigating the impact of the development upon local air quality. However the	The Central Focus option allows for a buffer of development separating the employment from residential uses through the implementation of the linear park connecting Burscough and the Yew tree Farm site to Ormskirk; this will assist in reducing the noise from the existing and proposed development. The provision of formal and informal open space with	The Linear option allows for a buffer of development separating the employment from residential uses through the implementation of the linear park connecting Burscough and the Yew tree Farm site to Ormskirk; this will assist in reducing the noise from the existing and proposed development. The provision of formal and informal open space	The Clusters option allows for a buffer of development separating the employment from residential uses through the implementation of the linear park connecting Burscough and the Yew tree Farm site to Ormskirk; this will assist in reducing the noise from the existing and proposed development. The provision of formal and informal open space

					overall impact on light, noise and air quality may be increased as this was previously a greenbelt site.	landscaping located throughout the site will assist in mitigating the impact of the development upon local air quality. However the overall impact on light, noise and air quality may be increased as this was previously a greenbelt site.	with landscaping located throughout the site will assist in mitigating the impact of the development upon local air quality. However the overall impact on light, noise and air quality may be increased as this was previously a greenbelt site.	with landscaping located throughout the site will assist in mitigating the impact of the development upon local air quality. However the overall impact on light, noise and air quality may be increased as this was previously a greenbelt site.
18.	To ensure the prudent use of natural resources, including the use of renewable energies and the sustainable management of existing resources			Y	Policy SP3 of the Local Plan sets the criteria for what is required to be delivered by the site and the Local Plan contains policies requiring that the Yew Tree Farm site delivers a minimum Standard for Code for Sustainable Homes and BREEAM. The Council actively promote the use of locally sourced materials, minimise the need for energy and maximising renewable energy opportunities, the site is encouraged to	Policy SP3 of the Local Plan sets the criteria for what is required to be delivered by the site and the Local Plan contains policies requiring that the Yew Tree Farm site delivers a minimum Standard for Code for Sustainable Homes and BREEAM. The Council actively promote the use of locally sourced materials, minimise the need for energy and maximising renewable energy opportunities, the site is encouraged to	Policy SP3 of the Local Plan sets the criteria for what is required to be delivered by the site and the Local Plan contains policies requiring that the Yew Tree Farm site delivers a minimum Standard for Code for Sustainable Homes and BREEAM. The Council actively promote the use of locally sourced materials, minimise the need for energy and maximising renewable energy opportunities, the site is encouraged to	Policy SP3 of the Local Plan sets the criteria for what is required to be delivered by the site and the Local Plan contains policies requiring that the Yew Tree Farm site delivers a minimum Standard for Code for Sustainable Homes and BREEAM. The Council actively promote the use of locally sourced materials, minimise the need for energy and maximising renewable energy opportunities, the site is encouraged to

					provide a decentralised energy network.			
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10. Summary and recommendations

Option 1 – The Radial layout option for Yew Tree Farm would allow for the delivery of the requirements of policy SP3 of the Local Plan. The layout allows for the creation of the linear park which acts as a buffer between the employment and residential areas. A second corridor of greenspace flows from the eastern corner of the site out to less dense development. The focus for development is to be drawn up to the eastern corner with the principle being that there is minimal detracting from the existing town centre. The negative impacts include the loss of agricultural land which was justified during the Local Plan Examination in order for the site to be allocated. The Access point on Liverpool Road at the north east point of the site near to Higgins Lane allows for traffic to quickly join the main highway network, this option provides a focal access point to the site on the main route into Burscough, assisting with the integration of the site into the existing settlement.

Option 2 – The Central Focus option again allows for the delivery of the requirements of policy SP3 of the Local Plan. The layout draws all development in towards the centre of the site as a focal point, almost creating a new sense of identity for the site, as a separate development from Burscough. The negative impacts include the loss of agricultural land which was justified during the Local Plan Examination in order for the site to be allocated. The main access into the site is shown to be taken through Meadowbrook by the removal of the property at Number 1 Meadowbrook. This option provides for additional accesses to the site, increasing permeability and reducing the reliance on a single primary access and queuing along the A59 at peak times.

Option 3 – The Linear option also allows for the delivery of the requirements of policy SP3 of the Local Plan. The Linear grid like design provides a clear through route for HGVs away from traffic from Higgins Lane, allowing for the road to be returned to its existing rural country lane status. The negative impacts include the loss of agricultural land which was justified during the Local Plan Examination in order for the site to be allocated. This design score equally in sustainability terms to that of the Radial and Cluster option.

Option 4 – The Cluster options like those mentioned previously also allows for the delivery of the requirements of policy SP3 of the Local Plan. The Cluster option offers the opportunity to keep employment vehicles out of the residential areas and off the A59. Small access roads to the pockets of development off Higgins Lane reduce the need to travel through the site by residents. This option has the same negative impact as the previous options, which is the loss of agricultural land which was justified during the Local Plan Examination in order for the site to be allocated. The Cluster design scored equal to that of the Linear and Radial option.

The summary findings in the tables above show that, overall, Options for Yew Tree Farm have a positive effect on the sustainability of the development site. The lower scoring option was the Central Focus, mainly through the option creating a new focus for Burscough disjoining it from the main town and, whilst it is unlikely it will have a very negative impact on the vitality and viability of Burscough Town Centre, its positive impacts will be less than with the other options.

11. Who was involved in the appraisal of the spatial options?

The Planning Policy and Implementation Team coordinated and completed the appraisal. However a number of people were involved in the undertaking of the appraisal of the options for both the SPD and DPD. We gathered the thoughts of a number of Council Officers and Partner Organisations which have significant experience in specific aspects of sustainability.

An assessment of baseline information and professional knowledge assisted in determining the impacts and significance for each option.

APPENDIX 1: REVIEW OF RELEVANT PLANS AND PROGRAMMES

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
INTERNATIONAL				
Johannesburg Declaration on Sustainable Development	<ul style="list-style-type: none"> • Commitment to building a humane equitable global community for all. • Renewable energy and efficiency • Sustainable construction. • Reducing impacts on biodiversity. 	<ul style="list-style-type: none"> • Greater resource energy efficiency. • Renewable energy. • Increase energy efficiency. 	<ul style="list-style-type: none"> • The Masterplan should encourage the use of energy efficiency resource and the use of renewables where possible. 	<ul style="list-style-type: none"> • The SA will be required to provide objectives relating to the environment and the use of natural resources and renewable energy.
Kyoto Protocol (1997)	<ul style="list-style-type: none"> • To prevent greenhouses gases and climate change. 	<ul style="list-style-type: none"> • Reduce emission levels 	<ul style="list-style-type: none"> • Encourage renewable energy 	<ul style="list-style-type: none"> • The SA will be required to provide objectives relating to the environment and the use of natural resources and renewable energy.
European Spatial Development Perspective	<ul style="list-style-type: none"> • Economic/Social cohesion. • Conservation of natural and cultural heritage. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Consider the Directive within the SA.
Directive 2001/42/EC on the assessment of the affects of certain plans on the	<ul style="list-style-type: none"> • Protection of the environment. 	<ul style="list-style-type: none"> • Must apply to plans after 21/07/2006. 	<ul style="list-style-type: none"> • Develop a Masterplan taking account of Directives 	<ul style="list-style-type: none"> • Requirements of the Directive must be met within the SA.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
environment			requirements	
EU Air Quality Framework Directive 1996/62/EC and 1999/30/EC, 2000/3/EC	<ul style="list-style-type: none"> • Maintain good air quality and improve where possible. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Develop Masterplan to take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • Should include objectives to consider air quality.
EU Water Framework Directive 2000/60/EC	<ul style="list-style-type: none"> • Prevents deterioration of aquatic water systems. • Promotes sustainable water use. • Reduce underground pollution • Mitigate effects of flooding and droughts. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Develop Masterplan to take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • Should include objectives to consider water quality.
Drinking Water Directive	<ul style="list-style-type: none"> • Quality of drinking water 	<ul style="list-style-type: none"> • Standards are legally binding 	<ul style="list-style-type: none"> • Develop Masterplan to take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • The SA should consider water quality.
Bern Convention on the Conservation of European Wildlife and Natural Habitats (1979)	<ul style="list-style-type: none"> • To ensure conservation of wild flora and fauna species and habitats. Special attention should be given to 	<ul style="list-style-type: none"> • No targets identified 	<ul style="list-style-type: none"> • Develop Masterplan to take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • The SA should consider the natural environment and biodiversity issues.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	<p>endangered and vulnerable species, included endangered and vulnerable migratory species.</p> <p>There are three main aims:</p> <ol style="list-style-type: none"> 1. Conserve wild flora, fauna and Natural Habitats. 2. To promote co-operation between states. 3. To give particular attention to vulnerable/endangered species. 			
EU Directive on the Conservation of Wild Birds 79/409/EEC	<ul style="list-style-type: none"> • Identification of endangered species for which Member States are required to designate Special Protection Areas. 	<ul style="list-style-type: none"> • Creation of protected areas; • Upkeep and Management; • Re-establishment of destroyed biotopes. 	<ul style="list-style-type: none"> • Develop Masterplan to take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • The SA should consider biodiversity issues.
EU Directive on the Conservation of Natural Habitats and Wild Flora and Fauna 92/43/EEC	<ul style="list-style-type: none"> • To conserve natural habitats; • Identification of areas of conservation and maintain landscape 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Develop Masterplan to take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • The SA should consider the protection of landscape benefit for ecological issues.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	features; <ul style="list-style-type: none"> • Protection of Species. • The consideration of Appropriate Assessments. 			
RAMSAR Convention on Wetlands of International Importance (1971)	<ul style="list-style-type: none"> • The conventions mission statement is 'the conservation and wise use of all wetlands through local, regional and national actions and international co-operation, as a contribution to sustainable development throughout the world'. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Develop Masterplan to take account of the requirements of the Directive. 	<ul style="list-style-type: none"> • The SA should consider the protection of the environment.
EU Framework Waste Directive 75/442/EEC (as amended)	<ul style="list-style-type: none"> • Seeks to prevent and reduce the production of waste and its impacts; • Where necessary waste should be 	<ul style="list-style-type: none"> • Promoting of the development of clean technologies to process waste; • Promote re-cycling and re-use 	To develop policies and programmes which take account of the Directive's requirements and consider recycling and treatment of	<ul style="list-style-type: none"> • The SA should include the minimisation of waste.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	disposed of with creating environmental problems.		waste?	
Aarhus Convention (1998)	<ul style="list-style-type: none"> Contribute to the protection of the right of every person and future generations to live in an environment adequate to his / her health and well being by: <ol style="list-style-type: none"> Access to Information; Public Participation in Decision Making; Access to Justice. 	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Ensure public are consulted at relevant stages. 	<ul style="list-style-type: none"> Ensure the public are consulted at the relevant stages.
NATIONAL				
NPPF	<ul style="list-style-type: none"> An economic role – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the 	<ul style="list-style-type: none"> Making it easier for jobs to be created in cities, towns and villages; Moving from a net loss of bio-diversity to achieving net gains for nature;6 	<ul style="list-style-type: none"> To develop the Masterplan to take account of the NPPF. 	<ul style="list-style-type: none"> Ensure that the Masterplan is economically, socially and environmentally sustainable.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	<p>right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure;</p> <ul style="list-style-type: none"> • A social role – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality built environment, with accessible local services that reflect the community's 	<ul style="list-style-type: none"> • Replacing poor design with better design; • Improving the conditions in which people live, work, travel and take leisure; and • Widening the choice of high quality homes. 		

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	<p>needs and support its health, social and cultural well-being; and</p> <ul style="list-style-type: none"> • An environmental role – contributing to protecting and enhancing our natural, built and historic environment; and, as part of this, helping to improve biodiversity, use natural resources prudently, minimise waste and pollution, and mitigate and adapt to climate change including moving to a low carbon economy. 			
SUB REGIONAL				
Lancashire Minerals and Waste Local Plan	<ul style="list-style-type: none"> • To resist minerals or waste developments where they could cause unacceptable 	<ul style="list-style-type: none"> • A variety of targets and indicators are referred to relating to a minerals 	<ul style="list-style-type: none"> • The Masterplan should take into account the key objectives of the 	<ul style="list-style-type: none"> • The SA should consider, where appropriate, the need for objectives

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	<p>impact on people and the environment;</p> <ul style="list-style-type: none"> • To minimise the adverse impact of minerals or waste developments and seek where appropriate environmental and social benefits; • To identify the requirements for, and ensure a supply of land to meet necessary local, regional and national supplies of minerals; • To safeguard minerals resources for the future; • Increased emphasis on waste minimisation, re-use and recycling whilst ensuring that adequate provision 	<p>production, waste minimisation and recycling relates.</p>	<p>Minerals and Waste Local Plan where relevant.</p>	<p>relating to minerals and waste.</p>

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	<p>is made for the treatment and disposal of waste;</p> <ul style="list-style-type: none"> • To ensure that minerals and waste development are reclaimed to a high standard, to enable an acceptable after the use to be implemented; • To encourage the use of secondary materials; • To minimise the adverse impacts from the transport of minerals and waste; and • To facilitate the establishment of installations and sites needed to minimise waste requiring final disposal. 			

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
A landscape strategy for Lancashire – Landscape Character Assessment (2000)	<ul style="list-style-type: none"> • To outline how the landscape of Lancashire has evolved in terms of physical forces and human influences; • To classify the landscapes in district landscape types identifying key characteristics and sensitivities and providing principles to guide landscape change; • To describe the current appearance of the landscape, classifying it into district zones of homogenous character, summarising the key features of each landscape character area; • To describe the 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • To incorporate landscape enhancement into the Masterplan. 	<ul style="list-style-type: none"> • To include protection of landscapes in the Masterplan.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	principal urban landscape types across the County, highlighting their historical development.			
Lancashire County Council Local Transport Plan	<ul style="list-style-type: none"> • Reduce road casualties; • Improve access to jobs and services; • Improve air quality; • Improve the condition of transport infrastructure; • Reduce delays on journeys; • Increase journeys by bus and rail; and • Increase active travel. 	<ul style="list-style-type: none"> • The Plan includes a wide range of targets and indicators relating to areas such as traffic growth, air quality and public transport use, cycling and walking rates, congestion and accessibility. 	<ul style="list-style-type: none"> • Develop the Masterplan in relation to improving the accessibility to services, encouraging the provision and use of public transport and cycling and walking. 	<ul style="list-style-type: none"> • Include sustainability objectives in relation to improving traffic issues.
LOCAL				
West Lancs Local Plan 2012-2027	<ul style="list-style-type: none"> • Stronger and safer communities • Education, training and the economy • Health 	<ul style="list-style-type: none"> • The Plan includes a wide range of targets and indicators. 	<ul style="list-style-type: none"> • Develop the Masterplan in relation to the objectives of the Local Plan. 	<ul style="list-style-type: none"> • To include objectives in the Masterplan.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	<ul style="list-style-type: none"> • Natural Environment • Housing • Services and Accessibility • Location of development and built environment • Climate Change 			
West Lancashire District Council Statement of Community Involvement	<ul style="list-style-type: none"> • Describes the various stages in document preparation when the Council will involve the community, the different groups to be contacted at each stage and for each type of document, and the different ways in which groups will be involved at each stage. • Explains how the Council will provide 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • The Masterplan consultation must comply with the SCI. 	<ul style="list-style-type: none"> • Ensure the consultation on the SA is undertaken in accordance with the SCI.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	<p>feedback on any comments received.</p> <ul style="list-style-type: none"> • Provides a list of organisations and community groups that the Council will consult, both formally and informally. 			
Housing Needs Survey	<ul style="list-style-type: none"> • Provide accurate and robust information about the housing need requirements • Help support the Council's strategic housing role; • Help inform the Housing Strategy for the Masterplan; • Identify key priorities to creating a balanced housing market in the District, particularly addressing issues of affordability; • Provide an 	<ul style="list-style-type: none"> • 20% elderly provision and 35% affordable housing provision. 	<ul style="list-style-type: none"> • The Masterplan must address the issues of the Housing Needs Survey. 	<ul style="list-style-type: none"> • SA Framework should include for the development of affordable and elderly housing.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	<p>assessment of housing markets in the District;</p> <ul style="list-style-type: none"> • Assess the specific housing needs of ethnic minorities, older people and key workers in the District; • Provide projections on future housing need. 			
West Lancashire Open Space Strategy	<ul style="list-style-type: none"> • To prioritise strategic sites for enhancement and development of open space and non-sports pitch facilities. • Provide quality targets and management targets for general open space and individual typologies. • Provide information that can be used within the LDF 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Masterplan must consider open space. 	<ul style="list-style-type: none"> • SA should take account of open space in the Masterplan.

Strategy/Plan/Programme	Key Objectives relevant to Yew Tree Farm Masterplan	Key targets and indicators relevant to Yew Tree Farm Masterplan	Implications for Yew Tree Farm Masterplan	Implications for Sustainability Appraisal
	process and supplementary planning documents. <ul style="list-style-type: none"> • Protect sites, which increase nature conservation and biodiversity, from over use. 			
West Lancashire Playing Pitch Assessment	<ul style="list-style-type: none"> • Analyse the current level of pitch provision in the District • Review the quantity and quality of pitches in the District • Identify how facilities can be improved • Identify the levels of demand • Set a local standard for playing pitches within the District. 	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Masterplan must consider open space 	<ul style="list-style-type: none"> • SA should take account of open space in the Masterplan.

APPENDIX 2: COLLECTION OF RELEVANT ECONOMIC, SOCIAL AND ENVIRONMENTAL BASELINE DATA

Indicator - 1. Encourage sustainable economic growth and performance.

Indicator	Data Source	Data recent at	Locality	West Lancs	North West	England	Comments
All Economically Active	2011 Census	2011	N/A	81,601	5,184,216	3,881,374	
% claiming JSA	2010 Nomis	2010	4.4%	4.1%	4.5%	4.1%	

Indicator – 2. Secure Economic Inclusion

Indicator	Data Source	Data recent	Locality	West Lancs	North West	England	Comments
All Economically Active	2011 Census	2011	N/A	81,601	5,184,216	3,881,374	
% Claiming JSA	2010 Nomis	2010	4.4%	4.1%	4.5%	4.1%	
Higher Occupation workers	2009 Economic Study	2009	37	38.6	N/A	N/A	
Intermediate Occupation Workers	2009 Economic Study	2009	40.6	38.3	N/A	N/A	
Lower Occupation Workers	2009 Economic Study	2009	23.1	22.4	N/A	N/A	

Indicator – 3. To deliver Urban Renaissance

Indicator	Data Source	Data recent	Locality	West Lancs	North West	England	Comments
Burscough Town Centre Vacancy Numbers							No Data Available
Number of	2001 census	2001	3,383				

dwelling.							
Deficiency of public open space	Playing pitch strategy	2004	2.8 playing field pitches				Needs reviewing as may have changed over time.

Indicator – 4. To deliver Rural Renaissance

Indicator	Data Source	Data recent	Locality	West Lancs	North West	England	Comment
% of population within 5km of 5 basic services	LCC	2005		55.93%			
Proportion of new housing granted consent and completed within 400m of an existing / proposed bus stop	LCC	2007		78.9%			

Indicator - 5. To protect and improve the quality of inland and costal waters, and manage flood risk

Indicator	Data Source	Data recent	Locality	West Lancs	North West	England	Comment
Number of Planning Permissions permitted against	2012 AMR Environment Agency	2012		0			

Environment Agency Advice							
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Indicator – 6. To reduce the need to travel and improve the choice and use of sustainable transport modes.

Indicator	Data Source	Data recent	Locality	West Lancs	North West	England	Comment
Proportion of new housing granted consent and completed within 400m of an existing / proposed bus stop	WLDC Housing Land Database	2011/2012		65%			
Average distance (km) travelled to a fixed place of work..							Question not asked in 2011 census.
Length of Public Footpaths within the District	LCC GIS	2007		144km			
Length of cycle ways within the District	LCC GIS	2007		6km			
Number of people travelling to work within the borough	West Lancs AMR	2011		63%			

Indicator – 7. To minimise the requirement for energy, promote efficient energy use and increase the proportion of energy from renewable sources

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Daily domestic use of the water supply.	Audit commission	2004		148 Litres		154.14 Litres	
Average annual consumption of gas in Kwh.	Audit commission	2004		22971	20828	20496 (GB)	
Average Annual Consumption of electricity in Kwh.	Audit commission	2004		4919	4393	4628 (GB)	

Indicator – 8. To protect, enhance and manage West Lancashire’s rich and diverse culture and built environment and archaeological assets.

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Number of Conservation Areas	Council Heritage List	2013	1	28			(Junction Lane CA)
Listed Buildings	English Heritage	2013	1	600			
Building of Local Importance	Council Heritage List	2013	6	120			

Indicator – 9. To protect and restore land and soil

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Proportion of land stock that is neglected,	AMR 2012	2012		29	680	4080	

underused or derelict.							
Proportion of land stock that is classified as contaminated land							No data
Amount of Contaminated land that has been remediated.	West Lancs			0			

Indicator – 10. To protect and enhance biodiversity and sites of geological importance

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Number of RAMSAR sites within the District.	West Lancs AMR	2012		2			
Number of SSSI's within the District.	West Lancs AMR	2012		6			
Number of TPOs	West Lancs AMR	2012		557			
Green Flag Awards	West Lancs AMR	2012	0	3			

Biological Heritage sites				5,111			
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Indicator – 11. To improve health and well-being and reduce health inequalities.

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Life expectancy males	West Lancs	2003-2005		77.7	76.0	77.7	
Life expectancy Female	West Lancs	2003-2005		80.6	80.4	81.8	

Indicator – 12. To protect and improve air, light and noise quality

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Numbers of Air Quality Management Zones	West Lancs	2009		1			Moor Street Ormskirk
% of moderate / higher pollutant days	West Lancs						Not recorded by West Lancs

Indicator – 13. To improve access to and the provision of basic goods, services and amenities.

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Amount of new residential development (completions) within 30	West Lancs			65%			

minutes public transport time of essential basic services (GP, Hospital, Primary, Secondary, Retail, Employment)							
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Indicator – 14. To develop strong and vibrant communities and reduce the fear of crime.

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Recorded Crime	Lancashire Profile – West Lancs	2008		38.3	58.4	53.7	
Violence Against the Person	Lancashire Profile – West Lancs	2008		1423			
Robbery	Lancashire Profile – West Lancs	2008		33			
Burglary Dwelling	Lancashire Profile – West Lancs	2008		329			
Theft of a Motor Vehicle	Lancashire Profile – West Lancs	2008		276			
Theft from a Motor Vehicle	Lancashire Profile – West Lancs	2008		497			

	Lancs						
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Indicator – 15. To improve access to a range of good quality affordable and resource efficient homes.

Indicator	Data Source	Data relevant	Locality	West Lancs	North West	England	Comments
Number of affordable housing units granted permission	West Lancs AMR	2012	15	330			
Brownfield conversions sites				233			
Greenfield agricultural conversion sites				17			

APPENDIX 3: IDENTIFYING SUSTAINABILITY ISSUES

Yew Tree Farm Masterplan SPD

Issue	Description of the Issue	Discussion on the relationship with other issues/plans and the reliance of action from other bodies	How can the issue be addressed?
Sustainable Drainage (waste water management strategy)	<p>Although the site is not located within the flood zone at risk from fluvial flooding (Flood Zone 2 and 3), due to network capacity issues, surface water flooding can occur in Burscough at times of extreme rainfall. The general capacity issue is worsened by pinch points in the network such as narrowing under the railway line and canal.</p> <p>In addition, waste (foul) water from the Burscough, Ormskirk, Scarisbrick and Rufford areas is treated at the New Lane Waste Water Treatment Works (WWTW) before discharging to BoatHouse Sluice where abstraction to the water course at Martin Mere takes place. Given the sensitivity of the area, discharge consent limits are tight and nearing capacity which limits how much foul water can be treated here in the future.</p>	<p>Careful consideration is needed in protecting areas from surface water flooding.</p> <p>The Council, along with Lancashire County Council and the Environment Agency will be required to work together to ensure new development and the existing area is protected.</p>	<p>United Utilities and the site promoters have confirmed (through the examination in public for the Local Plan) that all surface water generated through the development of this site can be managed on site and discharged to the local watercourse attenuated at a Greenfield run off rate. In addition, the site promoters have confirmed that it will be possible to remove a volume of water from the existing surface water network, equivalent to the volume of foul water flows produced by the housing development. This is to assist in managing overall flows to the WWTW until improvements have been made by United Utilities. This approach will result in a net betterment in flows entering the system during periods of peak rainfall.</p>
Energy Provision	The 'primary' electricity substation for the Yew Tree Farm site is located	Energy is a topical issue at the moment with increasing energy cost	In terms of on site infrastructure required, approximately three or

	<p>approximately 1.5km away and currently has enough capacity for the connection of the proposed development at Yew Tree Farm.</p>	<p>the, provision of a decentralised energy network is an option to be considered, with other renewable options.</p> <p>The Council will be required to fully engage with Electricity North West to establish what options would be suitable for the site.</p>	<p>four distribution substations would need to be installed at a cost to the developer. Given the rising cost of grid connected energy and possible future energy security, along with the policy requirement for the site to consider decentralised energy provision</p>
Highways, Access and Public Transport	<p>One of the main concerns for Burscough in terms of infrastructure is the impact of congestion. The road network through Burscough generally flows well unless a pinch point occurs as a result of a parked vehicle or school drop off, or around certain junctions during peak times. Opportunities for by-pass routes are limited due to funding and physical barriers such as the canal and rail lines. Further more, the current cycle facilities around the area are to some extent disjointed with no link between Ormskirk and Burscough.</p> <p>In terms of public transport, Burscough has 2 rail stations and 2 rail lines, although they are disconnected.</p>	<p>Congestion and the lack of inter connective public transport is an issue in Burscough. There are two train stations however these are located some distance apart and offer a sparse service. There are also a number of prime locations for congestions, for example at peak times around Lordsgate School and at pinch points in the town centre.</p> <p>The Council and Lancashire County Council must work in partnership, ensuring that the issue of congestion is addressed through assessing problem junctions and ensuring a sustainable public transport network functions to its full potential.</p>	<p>Studies have been undertaken to examine options to link the Southport to Manchester line with the Ormskirk to Preston line. Options are also being reviewed to extend the electrified Merseyrail line to Burscough.</p>
Public Open Space and the Linear	<p>Many of the residents of Burscough</p>	<p>There is an identified playing pitch</p>	<p>To support connectivity of the Yew</p>

Park	are beyond the recommended 10 minute walking distance to Formal park provision and Burscough, like many other settlements in the borough, has a deficiency in sports facilities.	<p>deficiency in the Burscough area, the updated Open Space Study will establish what requirement of formal and informal public open space will need to be delivered with the development of the site.</p> <p>Engagement with Leisure Services is key to the delivery of this and the Linear Park which will enhance sustainable networks to Ormskirk for walking and cycling.</p>	Tree Farm site and Burscough in general, a Linear Park between Ormskirk and Burscough would allow for the movement of people between both settlements and facilities, and access to the Leeds-Liverpool Canal at Burscough.
Ecology Issues	Yew Tree Farm is in close proximity to Martin Mere which is feeding habitat for pink-footed geese and whooper swans. Although the site is not currently identified as supporting habitat for the SPA/Ramsar site, it does have the potential to be and will need to be closely monitored. A pond within the site was identified as having potential for Great Crested Newts and the existing farm buildings may offer potential for bats, although a recent survey suggests this is currently not the case.	<p>The potential of the site as a feeding area for protected species will be assessed through the HRA.</p> <p>Liaison with Lancashire County Council and RSPB/Natural England will identify areas to be protected; these could be doubled up as areas of public open space.</p>	Habitat Regulations Assessment (HRA) to identify species on the site and any mitigation/provision for ecology on the site.
Education	The nearest educational facilities are Burscough Priory Science College. Secondary School and Lordsgate	The Council will have to liaise with Lancashire county Council in order to establish if a need for additional	Should the requirement be met - an extension to an existing facility or a new school? Implications for other

	Township Primary School. The Education Authority (LCC) has indicated that the development of Yew Tree Farm is likely to trigger the need for additional Primary School places although secondary provision is acceptable. Furthermore, existing highway issues on the A59 as a result of the “school runs” at Lordsgate School.	primary /secondary school places is required. If a new school is required on the Yew Tree Farm site this could assist in elevating the highways issues associated with pinch points at school drop off/pick up times.	schools. Review the educational requirements with Lancashire County Council. If a new school is required provide drop off facilities.
Health	Capacity within Burscough’s health centres is likely to be exceeded as a result of cumulative future growth. There are 3 health practices within Burscough, 2 of which operate out of the Burscough Health Centre.	Engagement with the Health providers will establish what requirements are needed.	Liaise with the healthcare providers to establish what provision if any is required and provide through planning obligations.
Other Infrastructure	The library in Burscough is considered inadequate due to the size and facilities available. In addition, Burscough Leisure Centre could benefit from improvement to meet the growth in population.	Engagement with the community and infrastructure providers is key to the delivery of associated community facilities/benefits such as the library and leisure centre.	Liaise with providers to establish the required need and either provide a facility onsite or within the town centre, through a planning obligation.
Allocation of Housing/Employment Land	Yew Tree Farm is required to deliver 500 dwellings and 10 ha of employment within the Plan period. The remainder of the site is to be safeguarded from development until 2027 when it may be required to deliver a further 500 dwellings and 10ha of employment land	The location of housing and employment land for development in this plan period and that which is to be safeguarded for development post 2027, will required engagement with all of the providers in each of the issues mentioned above.	Discussions with elderly care at West Lancs assessment of the needs and what type of elderly and affordable housing is required. Allocating of parameters of development for housing, employment and associated

	safeguarded for beyond 2027. Additional policy requirements include a need for 20% of all housing to be suitable for the elderly and for a minimum of 35% to be affordable housing provision.	It is essential to have the correct infrastructure in place for the development of residential and employment land.	infrastructure.
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Appendix C - Equality Impact Assessment

Equality Impact Assessment - process for services, policies, projects and strategies

<p>1. Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service/policy/strategy/decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people:</p> <p><i>People of different ages – including young and older people</i> <i>People with a disability;</i> <i>People of different races / ethnicities / nationalities;</i> <i>Men;</i> <i>Women;</i> <i>People of different religions/beliefs;</i> <i>People of different sexual orientations;</i> <i>People who are or have identified as transgender;</i> <i>People who are married or in a civil partnership;</i> <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave;</i> <i>People living in areas of deprivation or who are financially disadvantaged.</i></p>	<p>No</p>
<p>2. What sources of information have you used to come to this decision?</p>	<p>The masterplan seek to provide a policy framework to deliver sustainable development for all including affordable housing and infrastructure provision. Consultation feedback through the Local Plan has helped inform this understanding.</p>
<p>3. How have you tried to involve people / groups in developing your service / policy / strategy or in making your decision (including decisions to cut or change a service or policy)?</p>	<p>Engagement relating to the allocation of the Yew Tree Farm site took place through the Local Plan consultation and examination. The Stakeholder Group has provided feedback to directly inform the options presented. This report is seeking authority to further consult on the document to ensure broad public involvement.</p>
<p>4. Could your service / policy / strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:</p> <p><i>Eliminate discrimination, harassment and victimisation;</i> <i>Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people); and</i> <i>Foster good relations between people who share a protected characteristic and those who do not share it.</i></p>	<p>Could help as it will seek to provide a policy framework that will, amongst other things, deliver affordable housing and housing for elderly (minimising disadvantage).</p>
<p>5. What actions will you take to address any issues raised in your answers above?</p>	<p>N/A</p>

MINUTE OF CABINET 14 JANUARY 2014

76. YEW TREE FARM MASTERPLAN SUPPLEMENTARY PLANNING DOCUMENT OPTIONS PAPER

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

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

- RESOLVED
- A. That the Yew Tree Farm Masterplan Options document (Appendix A to this report) be approved for public consultation from 6 February to 21 March 2014, subject to any minor amendments made by the Assistant Director Planning in consultation with the Portfolio Holder, following consideration of the Options Document by Planning Committee and Executive Overview and Scrutiny Committee, as per recommendation B below.
 - B. That the Assistant Director Planning, be authorised, in consultation with the Portfolio Holder, to make any necessary minor amendments to the Yew Tree Farm Masterplan Options document, in the light of agreed comments from Planning Committee and Executive Overview and Scrutiny Committee, before the document is published for consultation.
 - C. That Cabinet have regard to the Sustainability Appraisal provided in Appendix B in their decision on recommendation B above, which will also be publicly available for comment as part of the consultation on the Yew Tree Farm Masterplan Options document
 - D. That call-in is not appropriate for this item as this report is being submitted to Executive Overview and Scrutiny Committee on 30 January 2014.

MINUTE OF PLANNING COMMITTEE: 16 JANUARY 2014

68. YEW TREE FARM MASTERPLAN SUPPLEMENTARY PLANNING DOCUMENT OPTIONS PAPER

Consideration was given to the report of the Assistant Director Planning as contained on pages 1301 to 1406 of the Book of Reports and on page 1477 giving details of additional late information, the purpose of which was to update Members on the progress of the Yew Tree Farm Masterplan Supplementary Planning Document (DPD) and to recommend the "Options" version of the document for a period of public consultation 6 February – 21 March 2014.

That the following agreed comments be referred to the Assistant Director Planning:-

- RESOLVED
- A. That the consultation documents be reviewed to ensure that it provides clarity to all consultees.
 - B. That any documentation is made clear to the public in its presentation as a positive opportunity for residents to contribute to the development of Burscough.

(Note:

1. Councillor Dereli had declared a pecuniary interest in respect of Agenda Item 9 relating to the Yew Tree Farm Masterplan Supplementary Planning Document Options Paper and therefore took no part in the decision making process in this item and was not present for the remainder of the meeting.
2. Councillor McKay left the Chamber during consideration of Agenda Item 9, Yew Tree Farm Masterplan Supplementary Planning Document Options Paper and therefore took no part in the debate or decision making process.
3. Councillor Bell left the Chamber during consideration of Agenda Item 9, Yew Tree Farm Masterplan Supplementary Planning Document Options Paper and was not present for the remainder of the meeting.)



AGENDA ITEM: 14

CABINET:
14 January 2014

PLANNING COMMITTEE:
16 January 2014

**EXECUTIVE OVERVIEW & SCRUTINY
COMMITTEE: 30 January 2014**

Report of: Assistant Director Planning

Relevant Managing Director: Managing Director (Transformation)

Relevant Portfolio Holder: Councillor M Forshaw

Contact for further information: Mr P Richards (Extn. 5046)
(Email: peter.richards@westlancs.gov.uk)

**SUBJECT: DEVELOPMENT BRIEFS FOR HOUSING SITES AT GROVE FARM,
ORMSKIRK AND FIRSWOOD ROAD, LATHOM / SKELMERSDALE**

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To recommend the draft development briefs for the allocated housing sites at Grove Farm, Ormskirk and Firwood Road, Lathom / Skelmersdale for public consultation 6 February – 21 March 2014.

2.0 RECOMMENDATIONS TO CABINET

2.1 That Cabinet approve the draft Grove Farm and Firwood Road Development Briefs (Appendices A and B to this report) for six weeks of public consultation from 20 February to 4 April 2014, subject to any minor amendments made by the Assistant Director Planning in consultation with the Portfolio Holder, following consideration of the draft Briefs by Planning Committee and Executive Overview and Scrutiny Committee, as per recommendation 2.2 below.

2.2 That the Assistant Director Planning, be authorised, in consultation with the Portfolio Holder, to make any necessary minor amendments to the draft Grove Farm and Firwood Road Development Briefs, in the light of agreed comments

from Planning Committee and Executive Overview and Scrutiny Committee, before the document is published for consultation.

- 2.3 That Call In is not appropriate for this item as this report is being submitted to Executive Overview and Scrutiny Committee on 30 January 2014.

3.0 RECOMMENDATIONS TO PLANNING COMMITTEE

- 3.1 That the content of this report be considered and that agreed comments be referred to the Assistant Director Planning.

4.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW & SCRUTINY COMMITTEE

- 4.1 That the content of this report be considered and that agreed comments be referred to the Assistant Director Planning.
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5.0 BACKGROUND

- 5.1 The West Lancashire Local Plan 2012-2027 (WLLP) was adopted by Council on 16 October 2013. Policy RS1 of the WLLP allocates nine sites for residential development, and specifies that the development of three of these sites must be in accordance with development briefs / masterplans to be prepared for the sites. The three sites in question are Yew Tree Farm, Burscough, Grove Farm, Ormskirk, and land at Firwood Road, Lathom / Skelmersdale.
- 5.2 The masterplan for Yew Tree Farm will take the form of a supplementary planning document, and is the subject of a separate Cabinet report. For the Grove Farm and Firwood Road sites, development briefs are being prepared.
- 5.3 The purpose of a development brief is to inform developers and other interested parties of the site's constraints and opportunities, and to outline the type and amount of development expected or encouraged by local planning policy. In addition, the development brief can provide detail relating to expected infrastructure required to deliver a sustainable development, based on the most up to date evidence.

Grove Farm, Ormskirk

- 5.4 The development site at Grove Farm, Ormskirk, is currently being promoted by housing developer Taylor Wimpey. The Council is aware that the developer has already undertaken work with regard to the site's development, for example soil and ground condition surveys. This information, along with other desktop-based information available to officers, has been useful background material during the drafting stage of the development brief.

- 5.5 The site is expected to deliver 300 new homes over the period 2012-2027, with delivery expected to commence from 2015/16. Given the site is under the control of a single land owner and Taylor Wimpey have been active in promoting it, this timescale is reasonable and development is likely to come forward in a timely manner.
- 5.6 The development brief will provide greater certainty to the developer and other interested parties regarding the sites constraints and opportunities and the local planning expectations which will help manage some of the key issues associated with the site. These include the site's former designation as Green Belt, management of waste and surface water flows that will be generated by the development of the site, and access to the site from the A59.

Firwood Road, Lathom / Skelmersdale

- 5.7 The Firwood Road site will be expected to accommodate 400 dwellings. The site comprises several distinct parcels of land under separate ownership. The majority of the landowners have formed a consortium and are represented by a local professional agent. There are a number of existing residential properties on the site (several of whose occupants are part of the consortium, or are represented by consortium members), as well as a former railway line (which is intended to form part of a Linear Park between Skelmersdale and Ormskirk), two roads, a pond and some woodland.
- 5.8 Whilst there has been significant interest in the site from a number of volume housebuilders, no housebuilder is at present signed up to develop the site. Information from the Coal Authority shows that there are issues arising from the historic mining activity undertaken in the area. These issues do not necessarily preclude the development of any particular area of the site. A detailed ground condition survey will be necessary to determine exactly what could be built on which parts of the site. Given such a survey has yet been undertaken, the draft development brief for the site is less detailed than the brief for the Grove Farm site. It is expected that the landowner consortium will await the results of the forthcoming Community Infrastructure Levy (CIL) examination in public, regarding the applicability of CIL to the site, before any detailed ground condition survey is commissioned and undertaken. Notwithstanding the above constraints, it is anticipated that the delivery of the first housing units on the site can be achieved in the 2015/16 financial year.

6.0 CURRENT POSITION

- 6.1 A number of meetings have been held with the promoters of the Grove Farm site, and with the consortium of landowners and their agent in respect of the Firwood Road site. This has allowed discussions to take place in relation to the known constraints on the sites and to establish respective parties' development intentions in relation to the deliverability of the sites.
- 6.2 These discussions, along with a desktop analysis of the sites' opportunities and constraints have informed the formulation of the draft development briefs attached at Appendix A and B of this report.

- 6.3 The draft briefs set out a vision for each of the sites and establish key principles that should be borne in mind by developers and other interested parties through the development management process. They also note specific circumstances in relation to the sites that the Council would wish to see addressed through a planning proposal.
- 6.4 For Grove Farm these include treatment of surface water generated by the site and the management of foul flows generated from the site, in light of the constraints issues associated with the New Lane waste water treatment works. The draft brief also places great emphasis on the treatment of the Green Belt transitional zone to the northern boundary of the site, in order to ensure a robust buffer is incorporated to limit the impact of the development on the expanse of Green Belt beyond the site.
- 6.5 In terms of Firwood Road, the draft brief seeks to integrate the site with the surrounding residential area to support community cohesion, linking new homes with existing neighbourhoods to the east and south of the site. The document also guides development to take advantage of the topography and landscape around the site, and to assist in the delivery of the proposed Linear Park connecting Ormskirk to Skelmersdale.
- 6.6 Whilst the Council is satisfied that the draft briefs are truly reflective of the context, constraints and opportunities for both sites, a period of public consultation will allow views to be collected and a process of review and refinement to take place.

7.0 NEXT STEPS

- 7.1 Assuming that Cabinet (and, subsequently the Assistant Director Planning, in consultation with the Portfolio Holder, as per recommendation 2.2 above) endorse the briefs for consultation, the consultation will take place for six weeks, from Thursday 6 February to Friday 21 March 2014.
- 7.2 Following the consultation period, all comments submitted to the Council will be processed, responses will be prepared where necessary, and the development brief(s) amended as appropriate. It is anticipated that a final version of the development briefs will be brought to Cabinet in July 2014, and that the documents can be published for use in development management from that date.

8.0 SUSTAINABILITY IMPLICATIONS / COMMUNITY STRATEGY

- 8.1 The allocation of the two development sites has been subject to sustainability appraisal throughout the preparation process for the West Lancashire Local Plan. One of the purposes behind the preparation of development briefs for the site is to facilitate the development of the land in a sustainable manner.
- 8.2 The provision of market housing, affordable housing, accommodation for older people, open space and other community benefits, plus the anticipated application of the Community Infrastructure Levy to the sites, is consistent with

the principal aims and objectives of the West Lancashire Sustainable Community Strategy.

9.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 9.1 All resources required to prepare and consult on the Development Briefs are covered by the existing Planning Service revenue budget. Delivery of the Grove Farm and Firswood Road sites will have considerable potential for positive financial implications in the form of income through the Community Infrastructure Levy, New Homes Bonus and Council Tax.

10.0 RISK ASSESSMENT

- 10.1 A failure to set out clearly the expectations of the Council in relation to the development of the two major sites at Grove Farm, Ormskirk and Firswood Road, Lathom / Skelmersdale, could result in a missed opportunity on the part of the Council to secure the maximum benefit from the sites' development. By preparing development briefs, and by consulting the public and other interested parties on the said development briefs, the optimal development of the sites can be achieved.

Background Documents

West Lancashire Local Plan 2012-2027 Development Plan Document

Equality Impact Assessment

There is a direct impact on members of the public. 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

- A. Grove Farm, Ormskirk – Draft Development Brief
- B. Firswood Road, Lathom / Skelmersdale – Draft Development Brief
- C. Equality Impact Assessment
- D. Minute of Cabinet 14 January 2014 (Planning Committee & Executive Overview & Scrutiny Committee only)
- E. Minute of Planning Committee 16 January 2014 (Executive Overview and Scrutiny Committee only)

Agenda Item 5(h)

Subject: Development briefs for housing sites at Grove Farm, Ormskirk and Firswood Road, Lathom/Skelmersdale

REVISED RECOMMENDATIONS

- 2.1 That Cabinet approve the draft Grove Farm and Firswood Road Development Briefs (Appendices A and B to this report) for six weeks of public consultation from 6 February to 21 March 2014, subject to any minor amendments made by the Assistant Director Planning in consultation with the Portfolio Holder, following consideration of the draft Briefs by Planning Committee and Executive Overview and Scrutiny Committee, as per recommendation 2.2 below.
- 2.2 That the Assistant Director Planning, be authorised, in consultation with the Portfolio Holder, to make any necessary minor amendments to the draft Grove Farm and Firswood Road Development Briefs, in the light of agreed comments from Planning Committee and Executive Overview and Scrutiny Committee, before the document is published for consultation.
- 2.3 That Call In is not appropriate for this item as this report is being submitted to Executive Overview and Scrutiny Committee on 30 January 2014.

West Lancashire Borough Council

**Grove Farm
Draft Development Brief**

December 2013



**John Harrison, DipEnvP, MRTPI
Assistant Director Planning
West Lancashire Borough Council**

www.westlancs.gov.uk

WEST LANCASHIRE



LOCAL PLAN

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Executive Summary

Introduction & Purpose

This development brief has been produced to guide developers and investors in their proposals and planning applications for the development of Grove Farm. It is not a blueprint development, but a set of principles that, when applied, will significantly contribute to the aim of creating a high quality sustainable development for the site.

Vision

The Vision for Grove Farm is to develop land at High Lane to complement the existing residential areas and diversify the choice and range of housing to meet local needs.

Existing Site

The site comprises of approximately 13.2 ha of allocated land for residential use and a linear park. The topography of the site is relatively flat with a slight change in level towards the eastern boundary. The site is currently accessed via High Lane (A59).

Opportunity

The site will deliver at least 300 new residential dwellings along with an associated linear park and open space/ landscaping, assisting in meeting the Borough's 4,860 Borough housing requirement over the plan period.

Sustainability, in all its aspects, will sit at the core of all that is developed on the site.

Phasing

It is anticipated that the site will be brought forward in a complementary not competing fashion, and this should be reflected in a more detailed phasing programme for the site.

Next Steps

This brief will inform the form and content of outline and reserved matters / full applications that come forward involving this site, and once adopted it will be a material consideration in the determination of such applications.

Introduction

Background

Grove Farm was identified as a site to assist in the delivery of housing supply for West Lancashire; the site was released from the Green Belt and allocated as a housing location in the Local Plan which was adopted on 16th October 2013.

As part of policy RS1 Residential Development, several allocated housing sites are noted to require a masterplan/development brief to be produced to assist in the delivery of the site, of which Grove Farm is one.

Purpose of the brief

This document sets the agenda for the development of Grove Farm as a residential development site. It promotes high quality design and a contextually sensitive approach to architecture and place-making. Development at Grove Farm will have a lasting impact on the surrounding area, incorporating a high quality residential development in Ormskirk. The landowners and developers will role out the future development of the site. The purpose of the brief is to help achieve a vision for the site by establishing appropriate design principles for the site.

The Local Plan 2012-2027 envisages the delivery of Grove Farm for at least 300 residential dwellings along with access and associated landscaping and the provision of a linear park. This Development Brief therefore provides a design framework with principles and guidance, which should inform detailed design solutions, but it also recognises the importance of retaining flexibility to respond to changing market conditions and social and technical demands. The Development Brief includes illustrations to indicate the how future development might look but these are not intended as prescriptive blueprints for the site, but as an indication of how the principles might be achieved.

By preparing the brief, the Council is establishing a strategic approach to site develop

The brief will provide guidance and a basis for review whereby future development proposals can be assessed against the brief.

Using the brief

The brief is intended to be instructive, assisting any developers interested in the development of Grove Farm. It sets out an understanding of what is required and what is acceptable. The brief acts as a reference document and a platform for further detailed design in a single or suite of successful planning applications. It does not however provide all the information necessary to inform a successful development proposal. Consultation with West Lancashire Borough Council, the local planning authority, will therefore be essential to develop a full and detailed appreciation of the planning position and expectations for the site.

Vision & Key Principles

The Vision for Grove Farm is to develop land at High Lane to complement the existing residential areas and diversify the choice and range of housing to meet local needs.

The following principles set the expectations at a strategic level:

A range of high quality, well designed, low carbon homes will be encouraged;

- The housing aspect of the development will need to include a good mix of housing types to meet all local needs, including 35% affordable and up to 20% to meet the needs of older persons. Cross over between the two types of provision may be acceptable subject to the needs at the time of development i.e. some of the affordable housing element may also count toward meeting the provision for the elderly. These requirements are in accordance with policies SP3, RS1 and RS2 of the Local Plan.
- Any new development to meet Code for Sustainable Homes Level 3 as a minimum standard for new residential development, rising to Level 4 and Level 6 in line with the increases to Part L of the Building Regulations;
- Access to public transport and walking and cycling provision will be improved within the development site and the surrounding areas;
- Sustainable Drainage Schemes (SuDS) will be provided to deal with existing and the future increase in surface water discharge and along with a solution to manage waste water flows to the waste water treatment works.
- Biodiversity - development will incorporate biodiversity and safeguard protected sites (species / habitats). Natural 'green' spaces and routes throughout the site will be provided for people and wildlife.

The Site & Context

The site

Grove Farm comprises of 13.2ha of greenbelt land which has been released through the Local Plan 2012-2027 for residential development. The site is enclosed by residential development to the south and west, with the railway embankment to the east. The existing agricultural access to the land is via High Lane approximately 65 metres away from the bus stop.

Site context

The site is situated on the northern edge of the built up area of Ormskirk and is sited on the eastern side of High Lane (A59). The site is located approximately 900metres to the north of Ormskirk town centre.

The site is bounded to the north by an established line of trees, hedgerows and a ditch. Beyond the site boundary to the north lies agricultural land and a working agricultural holding.

To the south is an established residential neighbourhood comprising of properties fronting Pine Grove and Pine Avenue. The general styles of these dwellings are 20th century detached properties.

The land bounded to the west of Grove Farm comprises of Grove Farm House, farm shop and ancillary stone built and pre-fabricated agricultural buildings along with the curtilage of the properties fronting onto High Lane and Burscough Road.

To the east of the site lies the Ormskirk – Preston railway line which is elevated by an embankment. Further to the east outside of the boundary of the proposal site lies the Grade II* Listed Bath Lodge, Bath Farm and associated agricultural land.

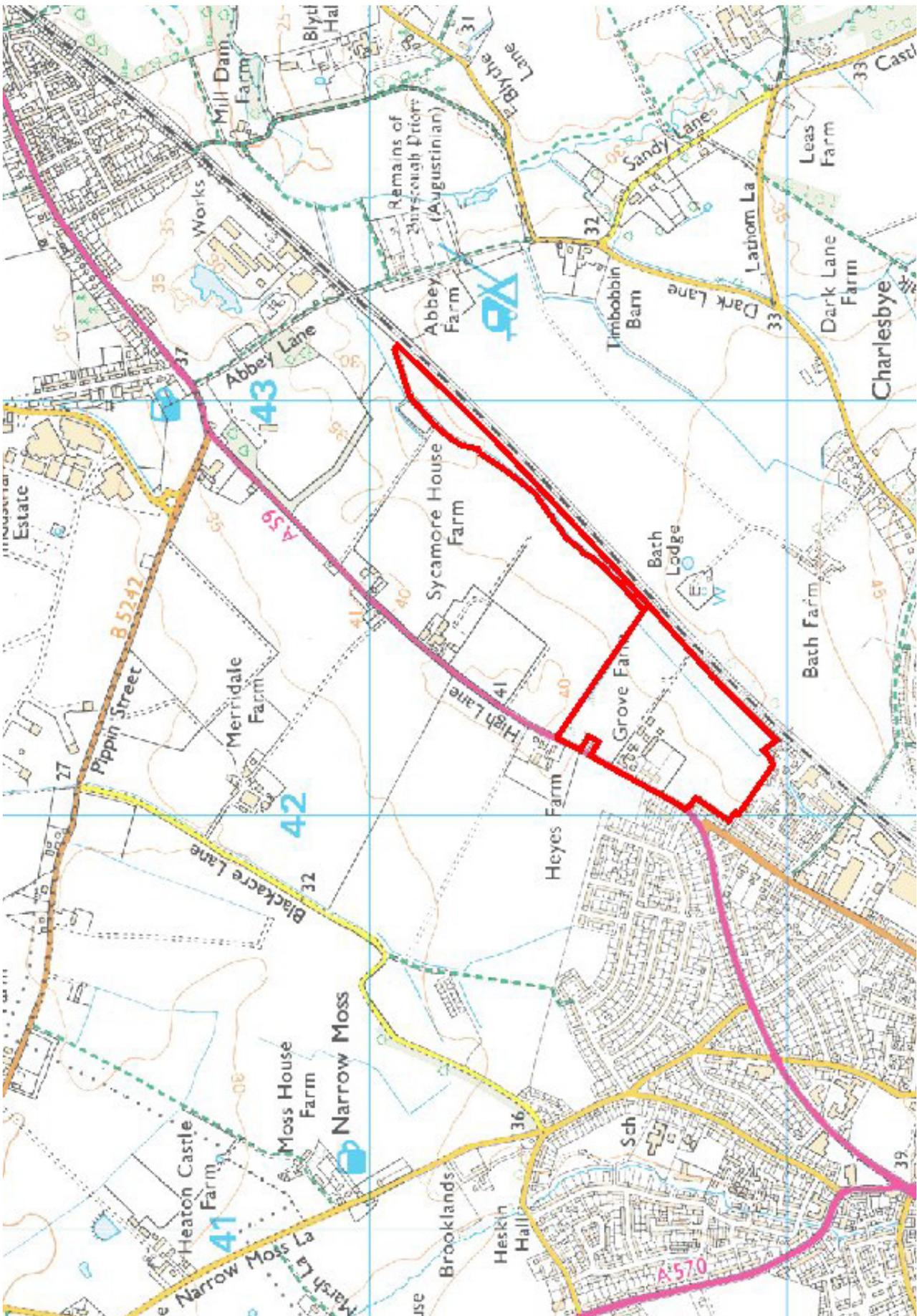
Wider Site Context

With regards to open space the nearest facilities are located at Pine Avenue with a larger recreation ground off Grimshaw Lane. The nearest primary schools are Ormskirk West End and Ormskirk Church of England Primary Schools, slightly further away from the site is St Bedes Catholic High School and Ormskirk High School. Located approximately 750 metres away (as the crow flies) on County Road is a local centre offering convenience stores post office and hot food takeaway.

Existing uses and topography

The site consists of fields used as arable and pasture for poultry. The topography of the land slopes gently away from High Lane towards the watercourse which passes through the site on the eastern boundary.

Context Plan



Technical Constraints

Historic Environment

Bath Lodge, a Grade II * listed Building is the nearest building of historical importance which is located outside of the development site, and is screened from the majority of the site by the railway line.

As far as West Lancashire Borough Council is aware, there are no archaeological constraints which would preclude the development at Grove Farm.

Ecology

Grove Farm holds the potential for a variety of breeding birds; however this would not constrain the development of the site. The Habitats Regulation Assessment (HRA) will determine the species native to the site.

Grove Farm maintains a habitat relatively typical of that of the surrounding farmland area with low species diversity, some of which may potentially be priority species due to the proximity to Martin Mere.

Located on the site are an English Oak tree and an Ash tree which potentially could provide natural habitat for roosting bats. These trees are located in the small block of broad-leaved woodland in the north-west corner of the site. The adjacent brick barn building and Grove Farmhouse also hold potential for the roosting of bats.

Three potential locations for badger sets were identified just outside of the eastern site boundary on the railway sidings.

The site is not currently home to any water vole, however there could be potential for such habitat on the site and suitable mitigation measures would be required if evidence of such species is identified.

No records of Great Crested Newts have been identified on the site and none have been recorded within a 2km radius of the site.

Flooding

Grove Farm is primarily located within Flood Zone 1, which indicates that the site is at a low risk of flooding; however a small section of land is located within Flood Zone 3, deemed to be high risk. This can be seen on the Constraints Plan (page 8). This area of land will be required to remain open and areas of flooding will need to be addressed in this area.

Noise

Due to the proximity of the site in relation to the Ormskirk-Preston railway line, it is important to consider the noise and vibration measurements. The site falls mainly within Noise Exposure Category B during both daytime and night time periods. A small narrow band of the site which runs adjacent to High Lane falls within Noise Exposure Category C this is due to the traffic noise from High Lane. No noise or vibration constraints are evident from the railway line. The frequency of the train line is minimal; the results of ground borne vibration measurements during each pass-by have been assessed in accordance with BS6472-1:2008.

Noise mitigation for the properties which fall within Category C along High Lane will need to be considered in the design layout of the site and incorporate appropriate building fabrication and installation of localised acoustic fences where required.

Contamination

Ground conditions at Grove Farm comprise of sandstone overlying Glacial Till. A number of potentially contaminated land issues have been identified in the site, associated with the operation of the farmstead; however it is considered that the environmental risk for redevelopment is low.

Drainage and Sewerage

At present there are currently no public surface water sewers serving the Grove Farm site. Consultation with the Environment Agency has concluded that, in principle, they would allow the use of the designated watercourse which crosses the site for receiving restricted surface water flows from the development. This in principle will allow for attenuation to be provided within the site boundary to store surface water up to 100 year storm event including allowance for climate change.

Foul water drainage within Ormskirk and Burscough is constrained due to the network hydraulic problems and available capacity at the receiving waste water treatment works, located on New Lane, Burscough. It is acknowledged by United Utilities that to accommodate future development of the Grove Farm and nearby Yew Tree Farm sites there is a need to improve the sewage network and increase sewage treatment capacity to accommodate new demand; thus ensuring that there is no deterioration on existing service levels.

Prior to the commencement of development, a solution is required to ensure that all surface water generated from the site must be managed on site through a sustainable drainage system and attenuated at greenfield run off rate so as not to increase the risk of flooding in the surrounding drainage network. In addition, a volume of surface water, equal to or greater than the amount of foul water generated from the development of the site, is required to be removed from the existing public sewerage system network and attenuated on site. The development of this site could, therefore, result in a net betterment in overall flows to the waste water treatment works, or, at least no additional flow to the Waste Water Treatment Works.

Agricultural Classification

Grove Farm comprises of 25% Grade 2, 20% Subgrade 3a and 55% Subgrade 3b agricultural land. Due to the strongly contrasting drainage of the soils it is likely that this will hamper agricultural operation and it is unlikely that the better parts of the fields can be farmed to any greater classification.

Landscape

Grove Farm is located within Landscape Character Area 2D (Landscape SPG) and there are no tree constraints located on the site. Vegetation runs along the northern boundary which adds character to the defensible landscape of the site boundary.

Transport

There is capacity within the highway network to accommodate the proposed 300 dwellings, with limited highway improvements.

Access to the Grove Farm development site can be taken off High Lane at two locations one serving the southern portion of the site, opposite Priory Mount and the second access serving the northern portion of the site, to the north of Grove Farm. These vehicular access points are in accordance with Manual for Streets 2 guidance. However discussion will need to be undertaken with Lancashire County Council before an application is submitted.

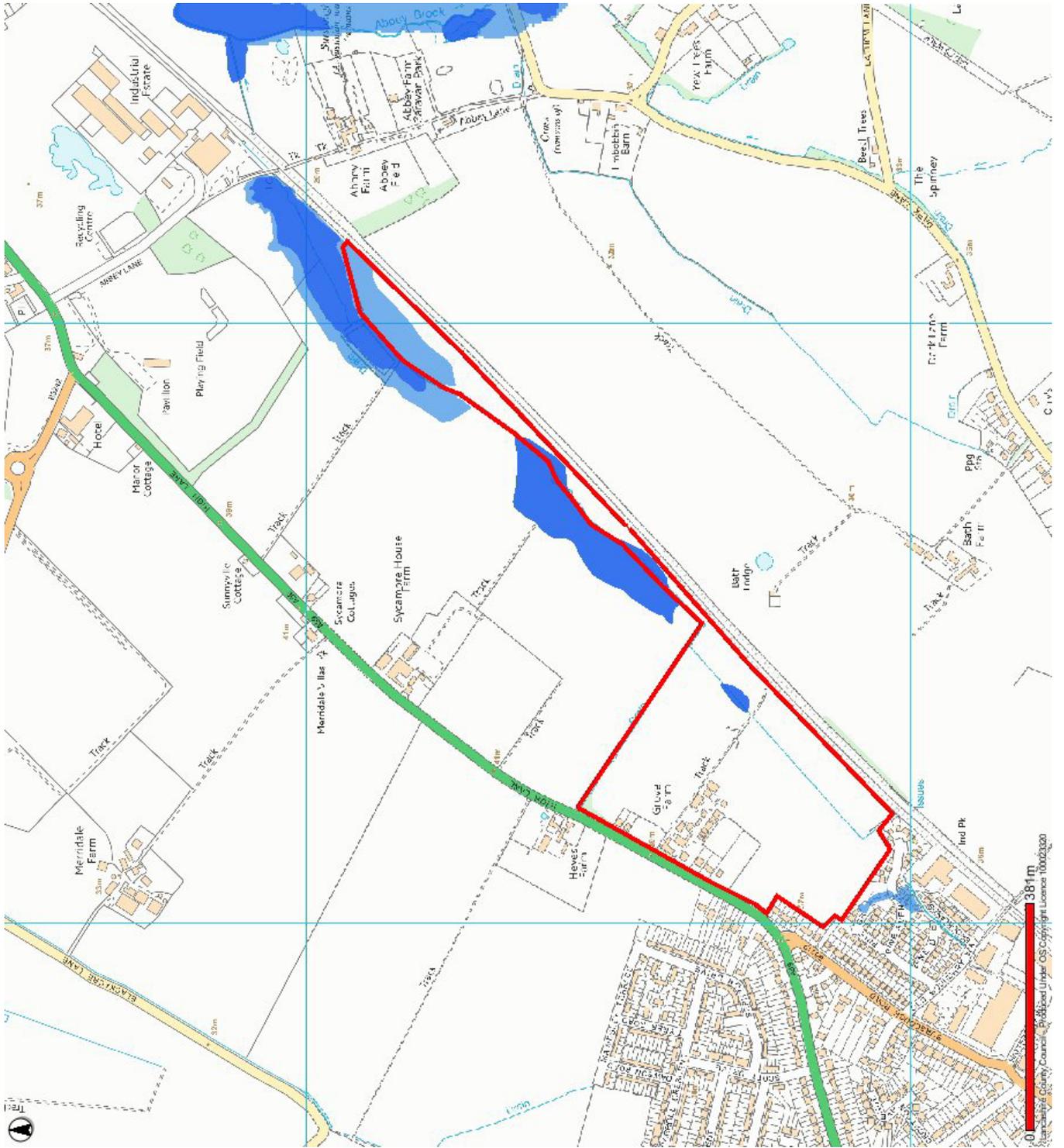
Bus stops are located along High Lane with services to Ormskirk, Burscough, Tarleton, Hesketh Bank, Skelmersdale, Chorley and Preston.

Utilities

Located on the site is an existing 11kV overhead line that crosses the site; however it is thought that this can be diverted underground. Gas services are located on the site and can be accommodated within the development.

Gas, water, electricity and telecommunications can be provided to the development site, without adversely impacting on the provision of services to the wider community.

Constraints Plan



Policy Context

Policy Context

Planning policy should be referred to in respect to the future of the development of the site; however it is not appropriate for this brief to repeat the content of guidance and policies; but to guide developers, investors and their design teams to operate within the context of appropriate national and local policy guidance. There is an obligation on design teams to establish the policy context and the elements of their proposal in addition to the requirements of this brief. The main policies are summarised below:

National Planning Policy Framework

At the heart of the National Planning Policy Framework is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision taking.

The NPPF supports growth of areas to supply new homes, stating that this can be best achieved through planning for larger scale development, such as new settlements or extensions to existing villages and towns.

Good design is a key aspect of sustainable development, is indivisible from good planning, and should contribute positively to making places better for people. Development should:

- Function well and add to the overall quality of the area,
- Have a strong sense of place, using streetscapes and buildings to create attractive and comfortable places to live, work and visit,
- Accommodate development whilst creating and sustaining an appropriate mix of uses (including incorporation of green and other public space as part of developments) and support local facilities and transport networks,

- Respond to the local character and history, whilst reflecting the identity of the local surroundings and materials, and not preventing or discouraging appropriate innovation,
- Create safe and accessible environments where crime, disorder, and the fear of crime, do not undermine quality of life or community cohesion; and
- Be visually attractive as a result of good architecture and appropriate landscaping.

Local Planning Policy

The West Lancashire Local Plan 2012-2027 was adopted by Council on 16th October 2013, following receipt of the Inspector's Report in late September 2013. Policy RS1 allocates Firwood Road for residential development to assist in the delivery of 4,860 homes across the Borough over the period 2012-2027.

The following policies of the Local Plan are the most relevant to development at Firwood Road:

- GN3 Criteria for Sustainable Development
- RS1 Residential Development
- RS2 Affordable Housing
- IF2 Enhancing Sustainable Transport Choice
- IF3 Service Accessibility and Infrastructure for Growth
- IF4 Developer Contributions
- EN1 Low Carbon Development and Energy Infrastructure
- EN2 Preserving and Enhancing West Lancashire's Natural Environment
- EN3 Provision of Green Infrastructure and Open Recreation Space
- EN4 Preserving and Enhancing West Lancashire's Built Environment, Cultural and Heritage Assets

Design Guidance

Developers, investors and their design teams should also be aware of design best practice and this should be referred to in the preparation of proposals for this site.

Particular attention should be paid to the Design Guide SPD 2008 and national guidance such as Building for Life 12 (Design Council CABE 2012) should also be referred to.

Open Space SPD

The Open Space SPD is designed to provide more detailed guidance on the District Council's approach to the protection and enhancement of existing open space and the provision of additional open space and associated facilities as part of new housing developments, this document should be referred to in the production of any planning application for the site.

Design Principles & Objectives

Design Principles

The following design principles underpin the proposals:

- To integrate development and support community cohesion, new development on the site should become a link to the existing residential neighbourhood south of the site;
- A transitional zone should mediate between the residential development and the Green Belt to the north and eastern boundaries; and
- The existing landscape including topography and tree areas suggest an opportunity for a linear park and public open space, each with its own distinctive character responding to the landscape.

Character Areas

The Character Area Plan illustrates that the site is located within an existing arable farming area, displaying typical characteristics of field margins, tree and hedge planting and ponds. The hedging provides an opportunity as a framework for development. Typical of this character area are the meandering roads which have served the settlements through the development of the town.

Character areas draw on the unique landscape and physical form of the existing site.

The northern site boundary features existing vegetation and a ditch which together create a strong and defensible boundary to the site. As a result of the tree belt, ditch line and the buildings at Heyes Farm opposite, this point along High Lane provides a marked change in character upon the approach to Ormskirk from a completely open rural landscape to an 'edge of town' landscape. Appropriate landscape treatments within the development can be used to strengthen the existing boundary and to create a strong defensible boundary to the urban area.

A variety of housing styles and densities of development can be found in the area immediately surrounding the Grove Farm site. The proposals for Grove Farm should complement and reflect the most successful elements of building character and distinctiveness, including building scale, massing and height. Building density should be lower towards to the northern boundary and the western boundary to respect the Green Belt.

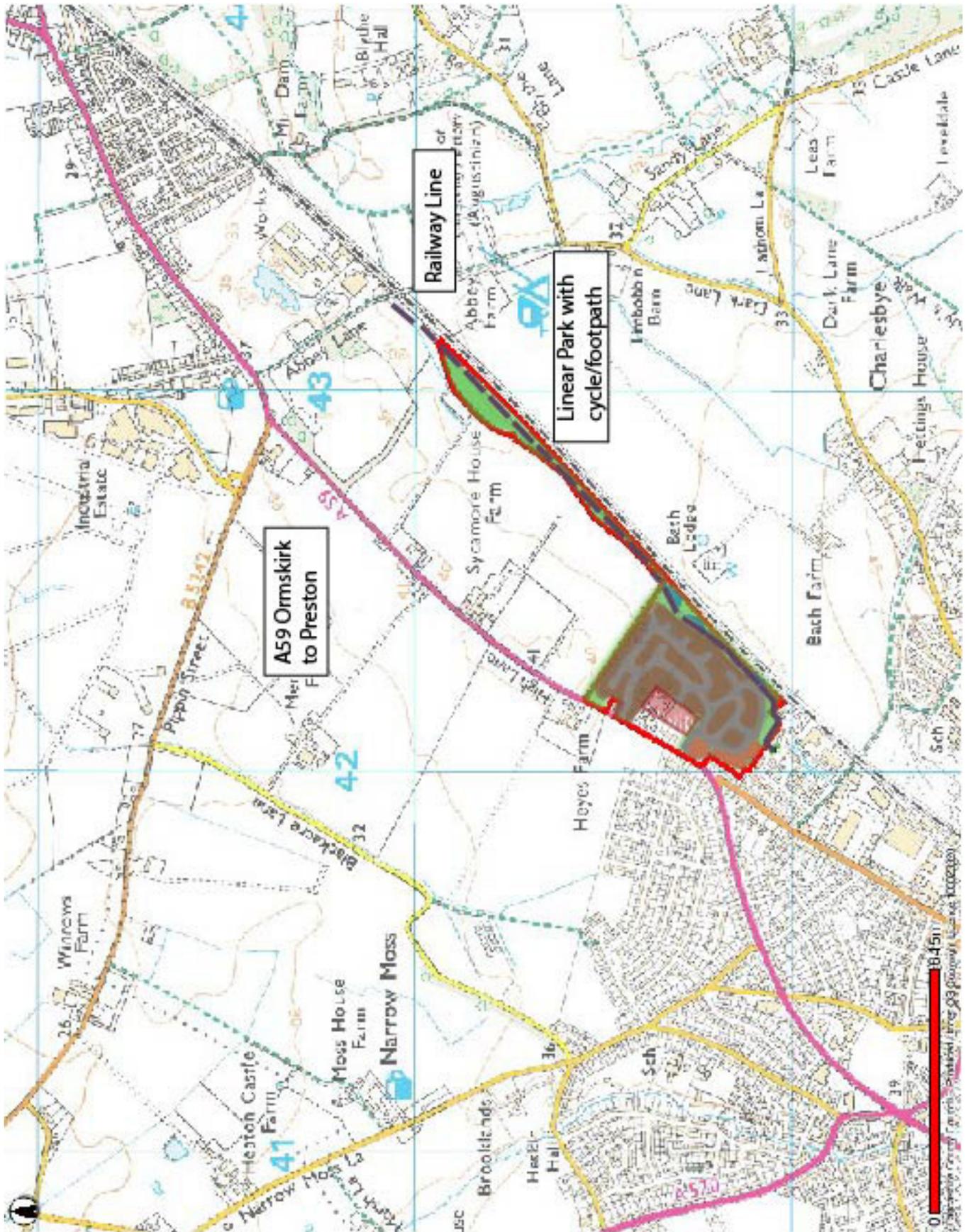
Movement

The Movement Plan (overleaf) addresses movement around the site, including provision for pedestrians, cycle and public transport, and motorists in presenting a hierarchy of street types prioritising different movements. It presents an opportunity, opening this site to public access and linking it into the existing residential community to the south.

The cohesive connection of existing and new communities will aid access to public transport and increase and support opportunities for walking and cycling in particular accessing the established existing links to Pine Grove.

There are no existing footpaths or cycle ways through the site. Existing facilities are located within Ormskirk town centre and bus stops are located along High Lane.

Movement Plan



Key Landscape Elements

The countryside in West Lancashire is well known for contributing to a green Lancashire. The landscape setting for the development will play a key part in retaining a strong landscape character

The West Lancashire Local Plan outlines some of the open space standards for new development.

An approach including a variety of Green Infrastructure opportunities should be embraced and located appropriately for:

- Driving character and memorable identity,
- Access,
- Recreation and Facilities,
- Biodiversity,
- Symbiotic relationships with the built form, where development is proposed; and
- Promoting links, where appropriate, to the broader landscape offer.

The design of Green Infrastructure should specifically:

- Consider native planting for biodiversity in the first instance,
- Limit the use of paved surfaces to locations whose function determines their necessity. Porous surfaces should always be considered in the first instance;
- Promote on-site water attenuation including grey water recycling within the development;
- Include elements of a Sustainable Drainage System, including ponds, ditches, swales and wetlands as appropriate. These need to be considered with new habitat creation in mind;
- Add Green Infrastructure to the built form. Features such as green roofs, green walls, balconies and roof terraces could be considered;
- Pay careful attention towards the provision of gardens, which can add to the overall Green Infrastructure objectives around reducing flood risk and promoting biodiversity, but their function could be tackled separately; and
- Include multi-functional open spaces which allow flexible uses and long term adaptability.

Utilities

Located on the site is an existing 11kV overhead line that crosses the site; however it is thought that this can be diverted underground. Gas services are located on the site and can be accommodated within the development.

Gas, water, electricity and telecommunications can be provided to the development site, without adversely impacting on the provision of services to the wider community.

Reducing Climate Change

The UK climate is changing as a result of human activity. Across the country, winter rainfall has increased in recent years and summer rainfall has decreased. There has been an increase in average temperatures and mean sea level has risen. Climate projections are telling us that we will experience hotter drier summers, warmer wetter winters, disruption in usual weather patterns and more frequent or intense weather events (e.g. heat waves, droughts, and flooding) and continued rising sea level. This is likely to have an adverse impact on people, agriculture, water quality and availability, biodiversity, human health, buildings and infrastructure, public spaces, soils and the economy. It is important that any development will take into account sustainable design and construction methods, whilst meeting the Code for Sustainable Homes requirement as set out in policy EN1 of the West Lancs Local Plan 2012-2027 and through the use of renewable energy.

Transport

There is capacity within the highway network to accommodate at least 400 dwellings, with limited highway improvements.

Access to the Grove Farm development site can be taken off High Lane at two locations one serving the southern portion of the site, opposite Priory Mount and the second access serving the northern portion of the site, to the north of Grove Farm. These vehicular access points are in accordance with Manual for Streets 2 guidance. However discussion will need to be undertaken with Lancashire County Council before an application is submitted.

Urban Design Opportunities

The site offers a significant opportunity to sustainably deliver much needed residential development in West Lancashire over the plan period to 2027, on the edge of Ormskirk. A well considered internal layout will open up the site, whilst minimising the impact of the wider community.

The site is located on the edge of the urban settlement and already displays landscaping boundaries to the north reducing the impact upon the Green Belt. The eastern boundary of the site, together with a 1km stretch of land to the north of the site adjacent to the railway line, provides a valuable opportunity for the creation of a linear park, connecting Ormskirk to Burscough. The existing watercourses and drains once realigned will assist in the creation of SUD's. The site allows for green space to be located on the boundaries adjoining the Green Belt, thus again reducing the visual impact to the surrounding areas.

The large dwellings and gardens to the west of the site can also offer opportunities for additional development; this will need to be incorporated into the Development Brief in order to establish a cohesive and integrated development.

Development Requirements

Quantum and mix of development

The overall quantum of housing required (2012-2027) in the Local Plan is heavily influenced by demographic and economic changes over the plan period, including the requirement for 35% affordable housing.

Development on Grove Farm is proposed to deliver at least 300 dwellings and approximately 1.5 ha of public open space.

The allocation of affordable homes and elderly provision is determined by policies RS1 and RS2 of the Local Plan. This requirement of 35% affordable homes and 20% for the elderly has been derived from the housing needs study for West Lancashire.

With regards to the provision of elderly accommodation, it should be located in a suitable walking distance to shops and modes of public transport. The typical perception of elderly persons' accommodation is bungalows or sheltered housing. However, this need not be the case, and such types of development are not always appropriate, e.g. from a density point of view. Elderly persons' housing could simply be individual private dwellings that contain features designed specifically for the elderly (as opposed to Lifetime Homes, which are able to be adapted to suit older or disabled people). The provision could also be met through a large Extra Care Facility or other purpose built elderly accommodation. The Council recommend that any applicant should consult with the Housing Strategy and Development Programme Manager, 01695 585244.

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Any subsequent application or applications will be required to attend a Places Matter design review panel, at the expense of the applicant.

Sustainability requirements

Most sustainability rating systems, including the Code for Sustainable Homes and BREEAM, are benchmarked against business-as-usual in the construction industry rather than against the global environmental measures that must be considered if sustainability is to be addressed adequately, namely:

- Ecological footprint - the productive land and sea required to provide for our consumption (such as cropland, fisheries and forestry) and to deal with our wastes (e.g. forests to absorb carbon dioxide),
- Greenhouse Gas footprint - carbon dioxide plus other gases such as methane and nitrous oxides); and
- Planetary boundaries – a set of critical natural systems including carbon, phosphate and nitrogen cycles which must be kept within boundaries for a 'safe operating space' for the planet.

These measures involve consideration of a wide range of behaviours, systems and institutional arrangements beyond simply the design and performance of new building stock.

The required minimum design standards for Grove Farm are, to achieve the Code for Sustainable Homes Level 3 as a minimum standard for new residential development, rising to Level 4 and Level 6 in line with the increases to Part L of the Building Regulations.

Open space public realm requirements

The site once developed will need to provide usable greenspace along the northern and eastern edges of the site. The greenspace is to be multifunctional by creating appropriate buffers between the proposed housing and the open countryside beyond the site to the north, the railway line to the east and the nearby Bath Lodge Listed Building beyond the railway line.

A Linear Park is required to connect the site to the wider Borough, the developer of the site will be expected to contribute to this by providing a Linear Park which stretches to Abbey Lane and connect with the Pine Grove estate through the existing public open space. This is demonstrated in the Movement Plan on page 12.

Open space will need to develop a relationship with the proposed landscape treatments, seeking to preserve a semi-rural character and maximising wildlife value within the open spaces throughout the development.

The location of the informal amenity space should carefully consider:

- Access standards and connections to the green grid,
- Physical and visual amenity,
- The design of the built form, should not leave left over spaces; and
- The management and maintenance of the open space.

Grove Farm is expected to deliver at least 300 dwellings with a minimum requirement of 1.4 sqm per bedroom of each dwelling of on site provision of public open space. This figure is correct at the time of writing this development brief; please refer to the most up to date requirements in the Open Space SPD.

Transport access and servicing requirements

There is the ability to have two access points entering the site from High Lane, one to the north of Grove Farmhouse and one to the south of Hilbre. Any development to the rear of existing properties on High Lane i.e. Hilbre, St Chads and Beltsville will be required to access the site via a communal access avoiding highway implications along High Lane. This will also ensure that all development is in keeping with the character of the area and the requirements of the Development Brief.

The design of all streets should comply with the Chartered Institution of Highways and Transportation's Manual for Streets 2.

Streets should be designed to encourage suitable behaviour from those who use them, particularly from drivers, through appropriate street design rather than simply relying on speed limits.

All streets should be fronted by development.

The pedestrian, cycle and public transport networks should be complete as soon as is practicable to encourage travel by these modes.

Development layout should ensure that a legible, connected street network is created.

There should be no single solution for the location of car parking spaces, but car parking on-plot is the preferred method with the preference for side parking, while parking to the rear of properties should be a second resort.

Car parking provision should be calculated using West Lancashire's Car Parking standards set out in Appendix F of the Local Plan. Attention is to be drawn to the requirement for Electric Vehicle Charging Points (Policy IF2), each dwelling is required to provide a charging point and communal parking areas should provide at least 1 space for charging or a 10% of spaces on site, whichever is the greater.

Land Use

The land use plan on page 17 demonstrates that the site will be broken up into a number of areas respecting the character and surroundings of the site.

The development proposes that through these respective areas the development comprises:

- Residential areas,
- Public open space and play equipment,
- SUD's; and

Landscaping boundaries

Land Use Plan



Key

Residential	
Elderly Housing	
Primary Road Network	
Greenspace	
Local Area of Play	
Allotments	
Cycle/Footpath	
SuDs	
Possible land to be included in the site	

Development Process

Outline of potential planning obligations

Planning obligations are sensitive to the overall site viability assessment, development mix and quantum. They could also be significantly affected by the site constraints, underground utilities, and variables that are not yet known. The list below is prepared as a guidance to inform the detailed discussions at the planning application stage.

Any development on site will make a proportionate contribution towards the strategic infrastructure either through S106 agreements or CIL charges which ever is applicable at the time of application.

In addition, the off site specific infrastructure items that could be funded through planning contributions include:

- Community Infrastructure (such as health, education, libraries, public realm),
- Green Infrastructure such as outdoor sports facilities, open space, parks, allotments, play areas, enhancing and conserving biodiversity and the creation of linear parks,
- Climate change and energy initiatives through allowable solutions,
- Affordable housing; and
- Elderly housing.

Required Supporting Information

Aside from the usual Planning Statement and Design & Access Statement, the following evidence is likely to be required to support any planning application in accordance with Policy RS1 of the Local Plan on the Grove Farm site:

Affordable Housing Statement – providing details relating to the provision of affordable housing, including the number and mix of residential units with numbers of habitable units, plans showing the location of units and the number of habitable rooms and/or bedrooms and the floor space of the units. If different levels or types of affordability or tenure are proposed for different units this should be clearly and fully explained.

Ecological Survey – as a minimum, a Phase 1 Habitat Survey, with more detailed assessments required depending on what the Phase 1 Survey identifies.

Coal Mining Risk Assessment – the presence of a Coal Mining Referral Area and Mineral Safeguarding Area will require close liaison with the Coal Authority on any development proposals and potentially a Coal Mining Risk Assessment Report.

Contaminated Land Report – where a development proposal includes a particularly vulnerable use (e.g. a care home) or where there is any suspected history of contamination on any part of the site, a Contaminated Land Report is required in line with the latest national guidance.

Crime Impact Statement – to consider whether the development can help avoid / reduce the adverse effects of crime and disorder. This can be provided as part of the Design & Access Statement.

Renewable Energy Statement – an opportunity for the applicant to show how the consideration of energy efficiency and sourcing energy from a renewable source, together with the use of sustainable resources, has influenced the development proposals. In line with Policy EN1 of the Local Plan, low carbon design should be incorporated into the development proposals as required by Building Regulations and the potential for renewable, low carbon or decentralised energy schemes serving the site should be considered thoroughly.

Site Waste Management Plan – should contain details of the types of construction waste to be removed from the site, the identity of the person who will remove the waste, and the site that the waste will be taken to. The plan should also include details of how waste will be minimised and materials re-used on site.

Statement of Community Involvement – setting out how the applicant has complied with the requirements for pre-application consultation provided in the Council's adopted Statement of Community Involvement and demonstrating that the views of the local community have been sought and taken into account in the formulation of development proposals.

Transport Assessment – required where any proposal would be likely to result in a material increase in traffic movements on roads, whether adjacent to or remote from the site.

Draft Section 106 Agreement – depending on the precise requirements at the time of application and what is outlined on the Council’s Regulation 123 list, this may address the provision of affordable housing, the provision / improvement of open space and / or contributions towards highways and transport improvements.

Flood Risk Assessment – provide a Flood Risk Assessment in line with the latest national guidance to assess any implications development may have on all forms of flood risk on the site and in the wider area, and address how sustainable drainage systems will be utilised in the development proposal.

Foul Sewerage Treatment Statement – all new buildings need separate connections to foul and storm water sewers and applications for such development should therefore be accompanied by a foul sewage assessment.

Landscape & Visual Impact Assessment – to ensure that the landscape and visual impacts of proposals are fully considered in the preparation of development proposals.

Landscaping Scheme – identifying the main areas and types of planting and hard surfaces (existing and proposed).

Parking & Access Arrangements – all applications requiring the provision of off-street parking and servicing will be required to demonstrate adequate on-site parking and servicing provision, including mobility spaces and provision for cycling and motorcycles as appropriate, in line with Policy IF2 of the Local Plan.

Travel Plan – should outline the way in which the transport implications of the development are going to be managed in order to ensure the minimum environmental, social and economic impacts. The travel plan should have a strategy for its implementation that is appropriate for the development proposal under consideration.

Tree Survey – in line with Policy EN2 of the Local Plan, consider the potential adverse effects of the development proposals on any existing trees or hedges on, or adjacent to, the site. This should be undertaken by a suitably qualified arboriculturist and in line with BS.5837:2012.

Utilities Statement – to indicate how the development will connect to existing utility infrastructure systems.

West Lancashire Borough Council

**Firwood Road
Draft Development Brief**

December 2013



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Assistant Director Planning
West Lancashire Borough Council**

www.westlancs.gov.uk

WEST LANCASHIRE



LOCAL PLAN

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Executive Summary

Introduction & Purpose

This development brief has been produced to guide developers and investors in their proposals and planning applications for the future of the housing development site bounded by Firswood Road, Neverstitch Road, Slate Lane, and Ormskirk Road / Blaguegate land ("Firswood Road"), on the edge of Skelmersdale in the parish of Lathom South. This Brief is not a blueprint for development, but a set of principles that, when applied, will significantly contribute to the aim of creating a high quality, sustainable development of the site.

Vision

The Vision for the Firswood Road site is to develop the land in such a way as to complement the existing residential areas and to diversify the choice and range of housing to meet local needs.

Existing Site

The site comprises approximately 22 ha of land allocated for residential use, of which 18 ha are considered to be developable. The topography of the site is relatively flat with a slight change in level towards the eastern boundary. The site is currently accessed via Neverstitch Road and Firswood Road and connected between the two access points by Old Engine Lane, a minor road.

Opportunity

The site will deliver at least 400 new residential dwellings with an associated linear park and open space/landscaping; this will assist in meeting the housing requirement of the West Lancashire Local Plan 2012-2027 of 4,860 dwellings over the plan period.

Sustainability, in all its aspects, will sit at the core of all that is developed on the site.

Phasing

It is anticipated that the site will be brought forward in a complementary, rather than competing fashion, and this should be reflected in more detailed phasing programmes for the site.

Next Steps

This Brief will inform the nature and content of outline and reserved matters / full applications that come forward involving this site, and, once adopted, it will be a material consideration in the determination of such applications.

Introduction

Background

Firwood Road has been identified from as far back as the early 1990s as a site to assist in the longer-term delivery of housing for West Lancashire Borough Council. From 1992-2013, the site has been subject to a safeguarded land policy. However, in the new West Lancashire Local Plan 2012-2027 (“the Local Plan”), adopted in October 2013, the site has been judged necessary to meet the Plan’s housing targets, and has thus been allocated for immediate development.

As part of Local Plan policy RS1 Residential Development, several of the allocated housing sites, including the Firwood Road site, are required to have a masterplan/development brief produced to assist in the delivery of the site.

Purpose of the brief

This document sets the agenda for the development of Firwood Road as a residential development site. It promotes high quality design and a contextually sensitive approach to existing development and place-making. Development at Firwood Road will have a lasting impact on the surrounding area, thus it is important to achieve a high quality residential development at this location on the western edge of Skelmersdale, whilst maintaining a strong Green Belt boundary on Firwood Road. As it will be developers that will roll out the future development of the site, the purpose of this Brief is to help achieve a vision for the site by establishing appropriate design principles for the site. By preparing the Brief, the Council is establishing a strategic approach to site development.

The Local Plan envisages the delivery of Firwood Road for at least 400 residential dwellings along with access and associated landscaping and the provision of a linear park link to assist in the delivery of the proposed Ormskirk – Skelmersdale Linear Park.

This Development Brief therefore provides a design framework with principles and guidance, which should inform detailed design solutions, but it also recognises the importance of retaining flexibility to respond to changing market conditions and social and technical demands. The Development Brief includes illustrations to indicate how future development might look but these are not intended as prescriptive blueprints for the site, but as an indication of how the principles might be adhered to.

The Brief will provide guidance and a basis for review whereby future development proposals can be assessed against the Brief.

Using the Brief

The Brief is intended to be instructive, assisting any developers interested in the development of Firwood Road. It sets out an understanding of what is required and what is acceptable. The brief acts as a reference document and a platform for further detailed design and a single or suite of successful planning applications. It does not, however, provide all the information necessary to inform a successful development proposal. Consultation and dialogue with West Lancashire Borough Council, the local planning authority, will therefore be essential to achieve a full and detailed appreciation of the planning position and expectations for the site. This should be through the formal pre-application process.

Vision & Key Principles

The Vision is for development at Firwood Road to complement the existing residential areas close to the site, and to diversify the choice and range of housing to meet local needs.

The following principles set the expectations at a strategic level:

- A range of high quality, well designed, low carbon homes will be encouraged;
- The housing aspect of the development will need to include a good mix of housing types to meet all local needs, including 35% affordable and up to 20% to meet the needs of older persons. Cross over between the two types of provision may be acceptable subject to the needs at the time of development i.e. some of the affordable housing element may also count toward meeting the provision for the elderly. These requirements are in accordance with policies SP3, RS1 and RS2 of the Local Plan.
- Any new development to meet Code for Sustainable Homes Level 3 as a minimum standard for new residential development, rising to Level 4 and Level 6 in line with the increases to Part L of the Building Regulations;
- Access to public transport and walking and cycling provision will be improved within the development site and the surrounding areas;
- Sustainable Drainage Schemes (SuDS) will be provided to deal with existing and the future increase in surface water discharge; and
- Biodiversity - development will incorporate biodiversity and safeguard protected sites (species / habitats). Natural 'green' spaces and routes throughout the site will be provided for people and wildlife.

The Site & Context

The site

Firwood Road comprises a total of 22 ha of formerly safeguarded land which has been released through the Local Plan 2012-2027 for residential development. The site is enclosed by relatively high density 30 – 40 dwellings per hectare residential development to the east, lower density development 15 - 20 dwellings per hectare to the south and south west corner; employment to the north and open agricultural Green Belt to the west. The existing access to the land is via Neverstitch Road and Firwood Road

Site context

The site is situated to the west of the built up area of Skelmersdale, and lies within Lathom South Parish. The site is located approximately 2 kilometres to the west of Skelmersdale town centre.

The site is bounded to the north by an established belt of trees. These act as a buffer to the employment site behind, which is dominated by two very large distribution warehouses.

To the east and south are the established residential neighbourhoods of Blaguegate, Chapel House and Pennylands (“Old Skelmersdale”) comprising properties fronting Ormskirk Road and various residential roads serviced off Clayton Street. The general styles of these dwellings are mixed 19th and 20th century detached/semi detached properties.

The land to the west of the Firwood Road site comprises open Green Belt land and agricultural holdings and Firwood Road acts as a natural boundary to the development site. To the south western corner of the site is a small cluster of lower density residential dwellings. These properties comprise mainly large post war dwellings with varying architectural details and a range of single and two storey properties.

The route of the former railway between Old Skelmersdale and Ormskirk travels across the site from south east to west, exiting the site in the west under an old bridge on Firwood Road.

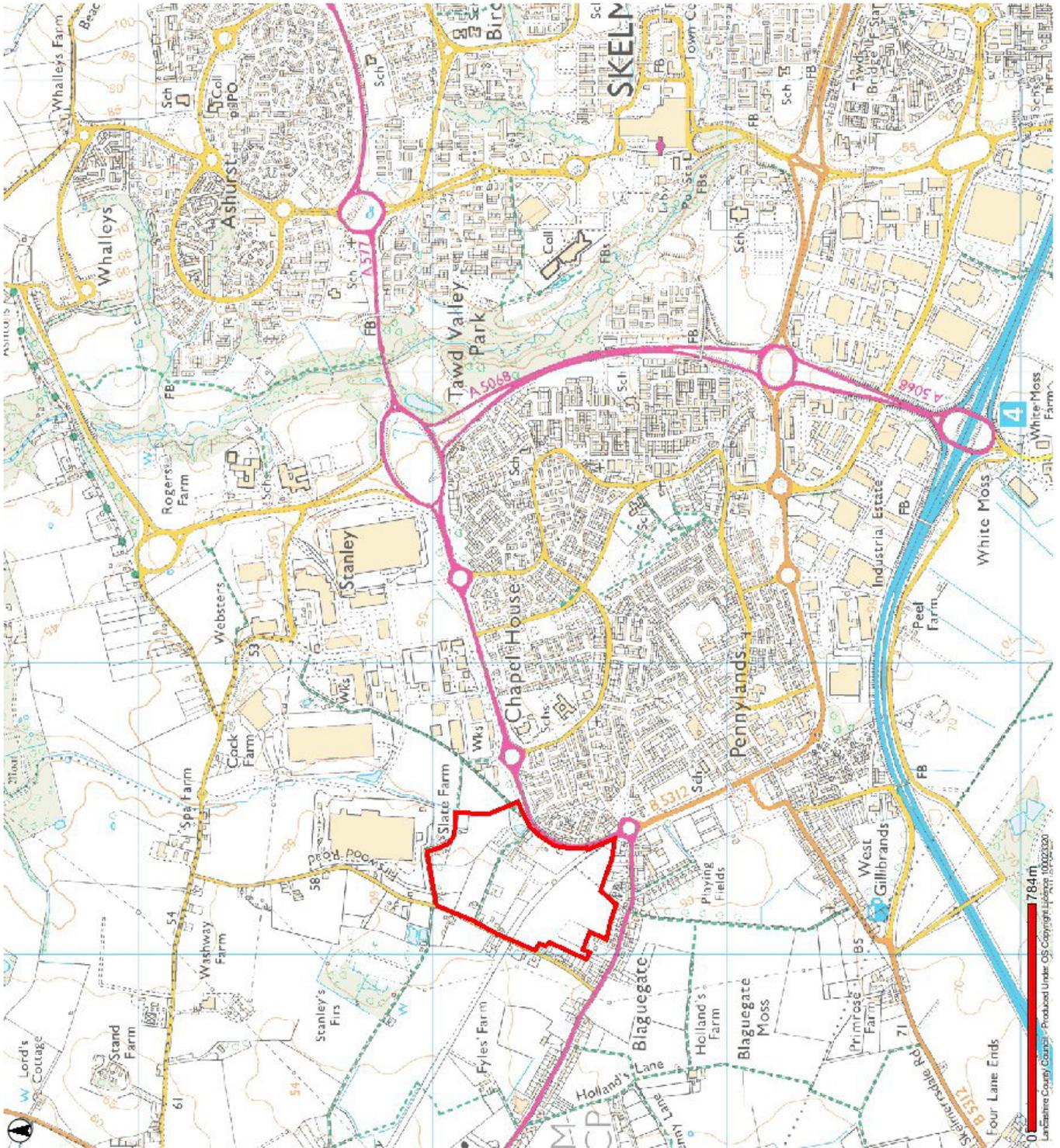
Wider Site Context

With regards to open space the nearest facilities are located at Skelmersdale Football Club, Cricket Club and Blaguegate Playing Fields. The nearest primary schools are Brookfield Park and St Richards Catholic Primary Schools, slightly further away from the site are Glenburn Sports College (Secondary School) and Lathom High School Technology College. Located approximately 2km metres away (as the crow flies) is Skelmersdale Town Centre with a range of shops and facilities within the Concourse Shopping Centre. The nearest health, facility Sandy Lane Health Centre, is located in the Sandy Lane Local Centre.

Existing uses and topography

The site consists of fields used as arable and pasture. The topography of the land is relatively flat; there is a slight slope of less than 5 metres falling from west to east in the far north eastern corner in the vicinity of Slate Farm.

Context Plan



Technical Constraints

Historic Environment

As far as West Lancashire Borough Council is aware, there are no archaeological constraints which would preclude the development at Firwood Road. However, applicants will be required to consult with Lancashire County Council's Scheduled Monument Register regarding any designations on the development site. Located on the site is a historic Powder Hut, a 19th century explosives store for the Lathom Colliery. The developer will be required to undertake a significance or heritage report for the Powder Hut and will ultimately be encouraged to retain this nominated locally listed feature in order for the historic role of the site to be reflected in the new development.

Ecology

Firwood Road maintains a habitat relatively typical of that of the surrounding area which would be thought to have low species diversity. During the Local Plan Publication consultation, representors referred to a number of habitat species on the site including barn owls; a full investigation of the presence of protected species, and proposals for mitigation, will be required as part of any planning application on the site.

Located to the north east boundary of the Firwood site, in close proximity to Sandwash House Farm lies an ecology standing advice zone. It is thought there could be potential breeding habitats located in this area and further investigation will be required through a Phase 1 Ecology Survey to accompany any future planning application.

Tree Preservation Order ref: TP (WLBC 31 2004) applies to part of the site; the TPO covers a mixed woodland area, mainly consisting of Birch, Oak and Hawthorn with some Ash, Swallow, Sycamore, Rowan, Holly and Wild Cherry which could hold potential for the roosting of bats.

The HRA undertaken as part of the Local Plan states that whilst the site supports grassland and/or arable habitat which may meet the basic needs of qualifying bird species, it is surrounded by existing residential and employment uses and divided by linear belts of shrubs and trees. Early engagement with the Ecology Section of Lancashire County Council is advised.

The line of the former railway running west to south-east across the site is designated on the Local Plan Policies Map as a wildlife corridor.

Flooding

Firwood Road is located within Flood Zone 1, which indicates that the site is at low risk of flooding. However a small section of land along the north eastern boundary to the east of Slate Farm is prone to surface water flooding. This area of land already accommodates a drain which will be required to remain open; subsequently areas of flooding will need to be addressed in this area. The constraints map overleaf shows a number of areas that are subject to surface water flooding.

Drainage and Sewerage

At present there are currently no public surface water sewers serving the Firwood Road site. On site SuDS will be required to manage surface water drainage to attenuate to a Greenfield run off rate. Early engagement with Lancashire County Council, the Lead Flood Risk Authority is required.

Noise

Due to the proximity of the employment area to the north of the site, it is important to consider noise and vibration measurements. The site is also bounded by Neverstitch Road (A577). Given the frequency of traffic running along this boundary, the land to the east would potentially have a slightly increased risk of noise.

Noise mitigation for the properties which fall within a higher noise level, for example to the north of the site or along the eastern boundary, will need to be considered in the design layout of the site and incorporate appropriate building fabric and installation of localised acoustic fences where required.

Contamination

There are two seams of coal under the land at Firswood Road, one shallow, one deep. Initial indications are that the existence of the coal under the site will not compromise development to any significant extent, taking into account land stability issues, and the need to consider sterilisation of any workable coal deposits. It has not yet been possible to carry out a detailed ground condition survey, but the site is located within a Coal Mining Development area, and a number of mine entries have been located along Old Engine Lane and in the vicinity of Slate Farm identified by a red cross on the plan below. The site also contains high risk development areas along the eastern boundary, which are identified by hatching. Any developer/applicant will need to engage with Lancashire County Council with regards to the minerals safeguarding area to the north of the site.

Landscape

The site is within the Skelmersdale Landscape Character Area, (Landscape Character SPD) but is not located within, or near to, an Area of Landscape Historic Importance. The only tree constraints are located on the north eastern boundary at the junction of Old Engine Lane and Neverstitch Road. Vegetation runs along all of the boundaries and the dismantled railway line, which adds character to the defensible landscape of the urban area.

Transport

There is capacity within the highway network to accommodate the anticipated traffic generated by the proposed 400 dwellings, with limited highway improvements.

The main access to the Firswood Road development site should be taken off Neverstitch Road. Minor access points may be located on Firswood Road (there should be no major access from this narrow lane). These vehicular access points are in accordance with Manual for Streets 2 guidance.

Bus stops are located along Neverstitch Road and Ormskirk Road/Blaguegate Lane, with services running to and from Ormskirk, Southport, Liverpool and Skelmersdale Town Centre.

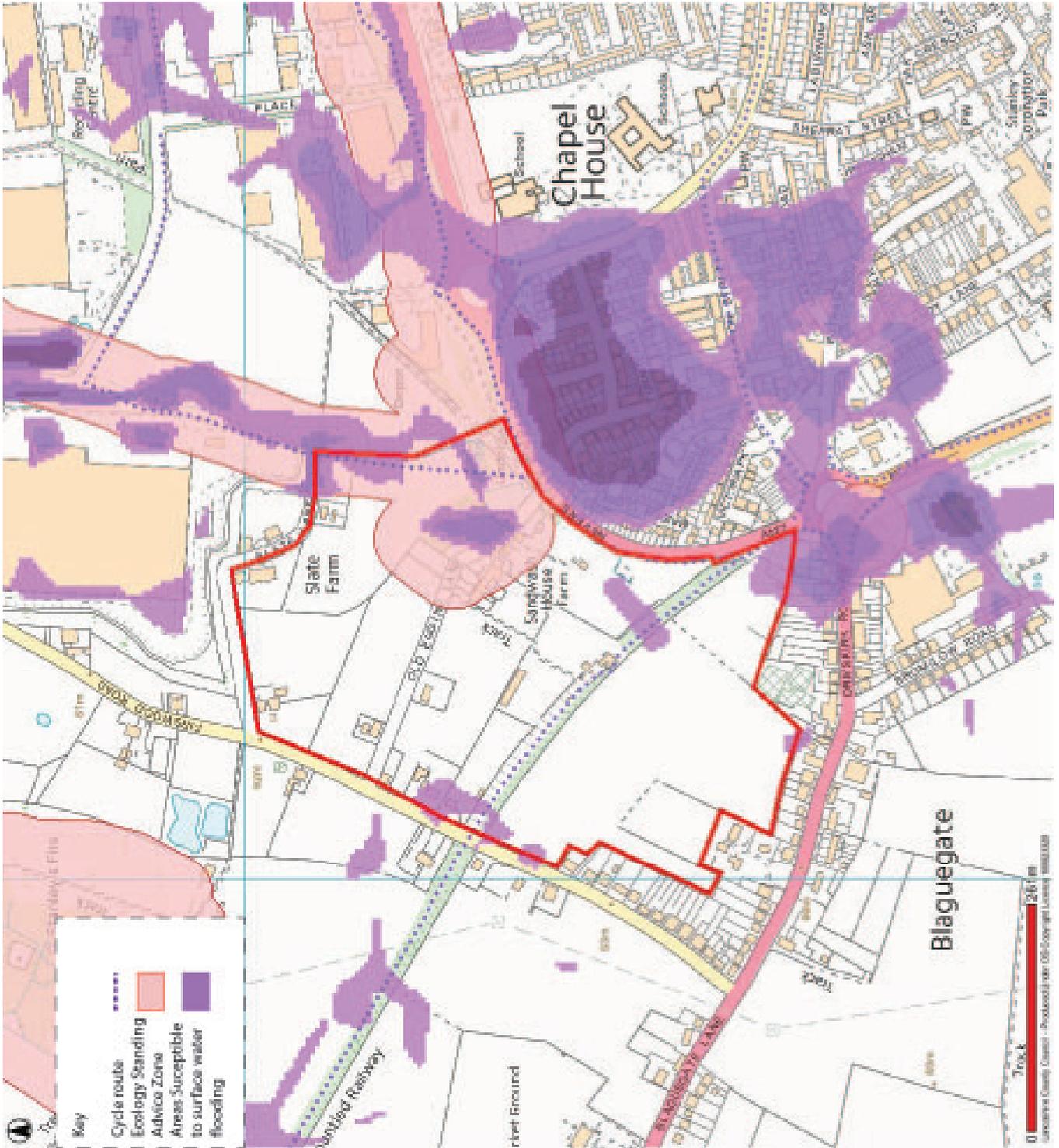
The site is surrounded by a number of existing cycle routes including the Southern Loop and the existing dismantled railway line which dissects the site. Footpaths 8-1-FP-26, 8-1-FP-24 and 8-2-FP-101 are located on the site on along the boundary of the site.

Utilities

An existing 11kV overhead line crosses the site; however it is thought that this can be diverted underground, by the developer during site construction, subject to the electricity provider's authorisation.

Gas, water, electricity and telecommunications can be provided to the development site, without adversely impacting on the provision of services to the wider community.

Constraints Plan



Policy Context

Policy Context

Planning policy should be referred to in respect to the future of the development of the site; however it is not appropriate for this brief to repeat the content of guidance and policies, but to guide developers, investors and their design teams to operate within the context of appropriate national and local policy guidance. There is an obligation on design teams to establish the policy context and the elements of their proposal in addition to the requirements of this brief. The main policies are summarised below:

National Planning Policy Framework

At the heart of the National Planning Policy Framework is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision taking.

The NPPF supports growth of areas to supply new homes, stating that this can be best achieved through planning for larger scale development, such as new settlements or extensions to existing villages and towns.

Good design is a key aspect of sustainable development, is indivisible from good planning, and should contribute positively to making places better for people. Development should:

- Function well and add to the overall quality of the area,
- Have a strong sense of place, using streetscapes and buildings to create attractive and comfortable places to live, work and visit,
- Accommodate development whilst creating and sustaining an appropriate mix of uses (including incorporation of green and other public space as part of developments) and support local facilities and transport networks,

- Respond to the local character and history, whilst reflecting the identity of the local surroundings and materials, and not preventing or discouraging appropriate innovation,
- Create safe and accessible environments where crime, disorder, and the fear of crime, do not undermine quality of life or community cohesion; and
- Be visually attractive as a result of good architecture and appropriate landscaping.

Local Planning Policy

The West Lancashire Local Plan 2012-2027 was adopted by Council on 16th October 2013, following receipt of the Inspector's Report in late September 2013. Policy RS1 allocates Firwood Road for residential development to assist in the delivery of 4,860 homes across the Borough over the period 2012-2027.

The following policies of the Local Plan are the most relevant to development at Firwood Road:

- GN3 Criteria for Sustainable Development
- RS1 Residential Development
- RS2 Affordable Housing
- IF2 Enhancing Sustainable Transport Choice
- IF3 Service Accessibility and Infrastructure for Growth
- IF4 Developer Contributions
- EN1 Low Carbon Development and Energy Infrastructure
- EN2 Preserving and Enhancing West Lancashire's Natural Environment
- EN3 Provision of Green Infrastructure and Open Recreation Space
- EN4 Preserving and Enhancing West Lancashire's Built Environment, Cultural and Heritage Assets

Design Guidance

Developers, investors and their design teams should also be aware of design best practice and this should be referred to in the preparation of proposals for this site.

Particular attention should be paid to the WLBC Design Guide SPD 2008; in addition, reference should also be made to national guidance such as Building for Life 12 (Design Council CABI 2012).

Open Space SPD

The Open Space SPD is designed to provide more detailed guidance on the District Council's approach to the protection and enhancement of existing open space and the provision of additional open space and associated facilities as part of new housing developments, this document should be referred to in the production of any planning application for the site.

Design Principles & Objectives

Design Principles

The following design principles underpin the proposals:

- To integrate development and support community cohesion, new homes should link to the existing residential neighbourhood to the east of the site,
- A transitional zone should mediate between the residential development, the Green Belt to the western boundary and the employment uses to the north; and
- The existing landscape including topography and dismantled railway suggest an opportunity for a linear park (connecting to the proposed Ormskirk – Skelmersdale Linear Park) and public open space, each with its own distinctive character responding to the landscape.

Firwood Road is expected to deliver at least 400 dwellings with a minimum requirement of 1.4 sqm per bedroom of each dwelling for on site provision of public open space. This figure is correct at the time of writing this development brief; please refer to the most up to date requirements in the Open Space SPD.

Character Areas

The Character Area Plan illustrates that the site is located within an existing arable farming area, displaying typical characteristics of field margins, tree and hedge planting and ponds. The hedging provides an opportunity as a framework for development. Typical of this character area are the meandering roads which serve the adjacent communities. Character areas draw on the unique landscape and physical form of the existing site.

The eastern site boundary features existing vegetation which creates a strong and defensible boundary to the site. Ormskirk Road acts as the outer periphery road for Skelmersdale and a gateway for Skelmersdale from Lathom.

Appropriate landscape treatments within the development can be used to strengthen the existing boundary and to create a strong defensible boundary to the urban area.

A variety of housing styles and densities of development can be found in the area immediately surrounding the Firwood Road site. The proposals for Firwood Road should complement and reflect the most successful elements of building character and distinctiveness, including building scale, massing and height. Appropriate development on the site will be in the region of 2 to 3 storeys, in the form of mews, semi-detached and detached dwellings. Building density should be lower towards the south and west in order to respect the existing residential properties and Green Belt. Higher density development should be located to the eastern section of the site, ground conditions permitting.

Movement

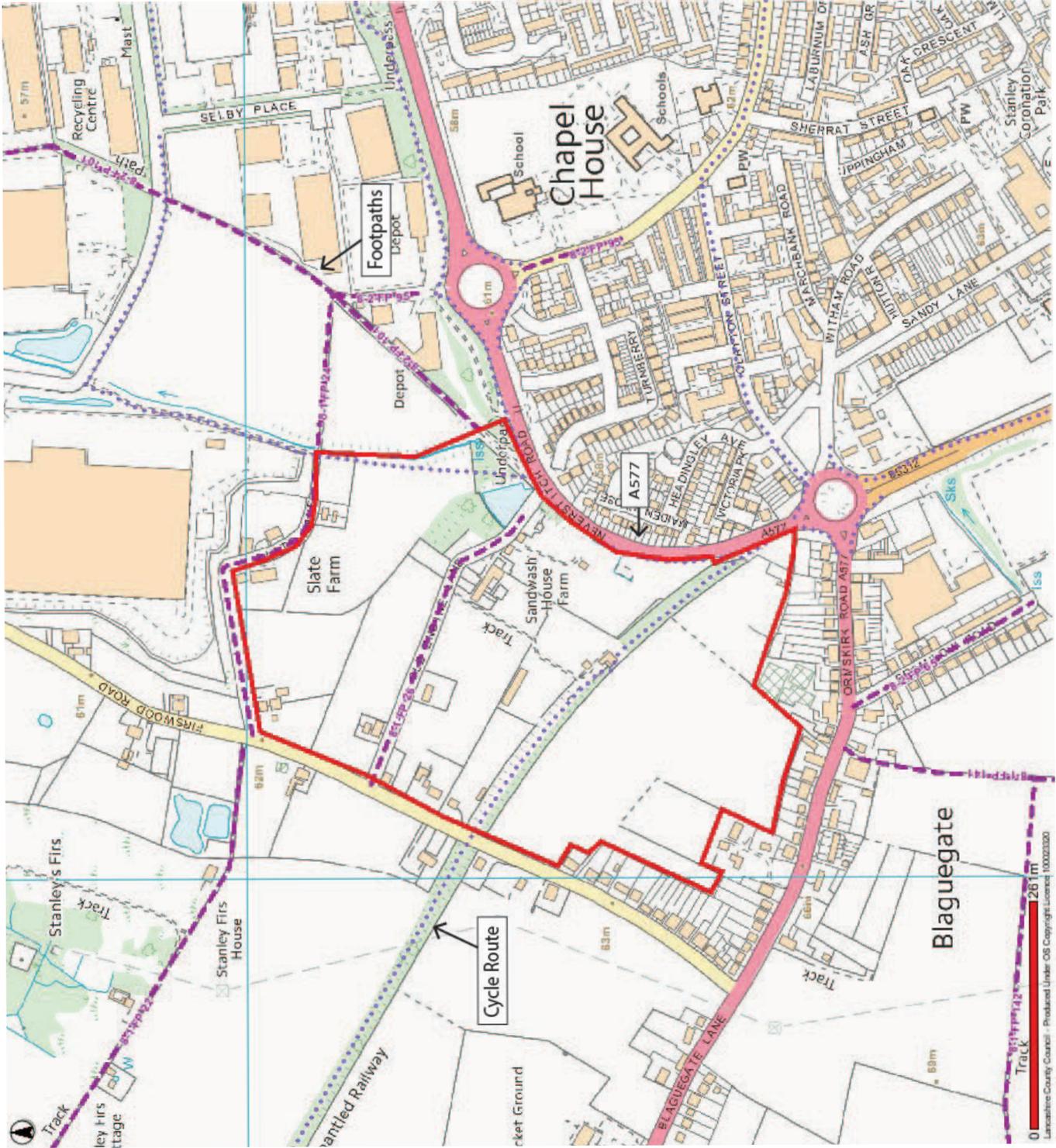
A Movement Plan addresses movement around the site, including provision for pedestrians, cyclists, public transport, and motorists in presenting a hierarchy of street types prioritising different movements. It presents an opportunity opening this site to public access and linking it into the existing residential community to the east.

The cohesive connection of existing and new communities will aid access to public transport and increase and support opportunities for walking and cycling.

A main access point from Neverstitch Road, with a number of secondary access points from Firwood Road is achievable, without impacting upon the existing traffic flows.

There are a number of public footpaths located within or connecting to the development site including footpaths 24, 26 and 101.

Movement Plan



Key Landscape Elements

The countryside in West Lancashire is well known for contributing to a green Lancashire. The landscape setting for the development will play a key part in retaining a strong landscape character.

The West Lancashire Local Plan outlines some of the open space standards for new development.

An approach including a variety of Green Infrastructure opportunities should be embraced and located appropriately for:

- Driving character and memorable identity,
- Access,
- Recreation and Facilities,
- Biodiversity,
- Symbiotic relationships with the built form, where development is proposed; and
- Promoting links, where appropriate, to the broader landscape offer.

The design of Green Infrastructure should specifically:

- Consider native planting for biodiversity in the first instance;
- Limit the use of paved surfaces to locations whose function determines their necessity. Porous surfaces should always be considered in the first instance;
- Promote on-site water attenuation including grey water recycling within the development;
- Include elements of a Sustainable Drainage System, including ponds, ditches, swales and wetlands as appropriate. These need to be considered with new habitat creation in mind;
- Add Green Infrastructure to the built form. Features such as green roofs, green walls, balconies and roof terraces could be considered;
- Pay careful attention towards the provision of gardens, which can add to the overall Green Infrastructure objectives around reducing flood risk and promoting biodiversity, but their function could be tackled separately; and
- Include multi-functional open spaces which allow flexible uses and long term adaptability.

Reducing Climate Change

The UK climate is changing as a result of human activity. Across the country, winter rainfall has increased in recent years and summer rainfall has decreased. There has been an increase in average temperatures and mean sea level has risen. Climate projections are telling us that we will experience hotter drier summers, warmer wetter winters, disruption in usual weather patterns and more frequent or intense weather events (e.g. heat waves, droughts, and flooding) and continued rising sea level. This is likely to have an adverse impact on people, agriculture, water quality and availability, biodiversity, human health, buildings and infrastructure, public spaces, soils and the economy. It is important that any development will take into account sustainable design and construction methods, whilst meeting the Code for Sustainable Homes requirement as set out in policy EN1 of the West Lancs Local Plan 2012-2027 and through the use of renewable energy. It is encouraged that District Heat Generation is investigated for this development site.

Urban Design Opportunities

The site offers a significant opportunity to deliver much needed residential development in West Lancashire over the plan period to 2027, enhancing the Skelmersdale residential offer. A well considered internal layout will open up the site whilst minimising the impact on the wider community.

The site is located on the edge of the urban settlement and already displays landscaping boundaries to the west reducing the impact upon the Green Belt. The dismantled railway running west- south east across the site provides a valuable opportunity for the delivery of a key section of the proposed linear park from Skelmersdale to Ormskirk. The creation of the linear park in this location is not resolute; however there is significant existing tree planting and wildlife corridor designation following the dismantled railway, therefore providing an opportunity.

It is also noted that a concentration of constraints is present in the North East, around the existing waterbody and TPO's. This offers an opportunity for habitat/ recreation provision. The existing watercourse in the north eastern corner of the site will assist in the creation of SuDS. The site allows for landscaping to be located on the boundaries adjoining the Green Belt, thus again reducing the visual impact to the surrounding areas.

Development Requirements

Quantum and mix of development

Development on Firswood Road is proposed to deliver 400 dwellings, of which 30% will be affordable, and 20% will be for elderly people, associated public open space provision and, if required ancillary retail floor space to support the development, such as a newsagent, hairdressers and hot food takeaway. Any retail development must not have a negative impact on the viability of the nearby Sandy Lane Local Centre.

The allocation of affordable homes and elderly provision is determined by policies RS1 and RS2 of the Local Plan. This requirement of 30% affordable homes and 20% for the elderly has been derived from the housing needs study for West Lancashire.

With regards to the provision of elderly accommodation, it should be located in a suitable walking distance to shops and modes of public transport. The typical perception of elderly persons' accommodation is bungalows or sheltered housing. However, this need not be the case, and such types of development are not always appropriate, e.g. from a density point of view. Elderly persons' housing could simply be individual private dwellings that contain features designed specifically for the elderly (as opposed to Lifetime Homes, which are able to be adapted to suit older or disabled people). The provision could also be met through a large Extra Care Facility or other purpose built elderly accommodation. Applicants are advised to consult with The Housing Strategy and Development Programme Manager, 01695 585244 jonathan.mitchell@westlancs.gov.uk for further information.

Any subsequent application or applications will be required to attend a Places Matter design review panel, at the applicant's expense.

Sustainability requirements

Most sustainability rating systems, including the Code for Sustainable Homes and BREEAM, are benchmarked against business-as-usual in the construction industry rather than against the global environmental measures that must be considered if sustainability is to be addressed adequately, namely:

- Ecological footprint - the productive land and sea required to provide for our consumption (such as cropland, fisheries and forestry) and to deal with our wastes (e.g. forests to absorb carbon dioxide),
- Greenhouse Gas footprint - carbon dioxide plus other gases such as methane and nitrous oxides); and
- Planetary boundaries – a set of critical natural systems including carbon, phosphate and nitrogen cycles which must be kept within boundaries for a 'safe operating space' for the planet.

These measures involve consideration of a wide range of behaviours, systems and institutional arrangements beyond simply the design and performance of new building stock.

The required minimum design standards for Firswood Road are, to achieve the Code for Sustainable Homes Level 3 as a minimum standard for new residential development, rising to Level 4 and Level 6 in line with the increases to Part L of the Building Regulations.

Open space public realm requirements

The site once developed will need to provide usable greenspace. The indicative layout in this Brief shows this along the dismantled railway and to the north east of the site around the existing pond to the advantage of what is already on the site in these locations. The greenspace is to be multifunctional by creating appropriate buffers between the proposed housing and the open countryside beyond the site to the west.

Areas of greenspace, roads and non built development will need to be strategically located on the Firswood Road site following site investigations that will accompany any subsequent planning application.

Open space will need to develop a relationship with the proposed landscape treatments, seeking to preserve a semi-rural character and maximise wildlife value within the open spaces throughout the development.

The location of the Linear Park and informal amenity space should carefully consider:

- Access standards and connections to the green grid,
- Physical and visual amenity,
- The design of the built form, should not leave left over spaces; and
- The management and maintenance of the open space.

Firswood Road is expected to deliver at least 400 dwellings with a minimum requirement of 1.4 sqm per bedroom of each dwelling for on site provision of public open space. This figure is correct at the time of writing this development brief; please refer to the most up to date requirements in the Open Space SPD.

Transport access and servicing requirements

There is the ability to have a number of access points entering the site, but the primary access will be via Neverstitch Road, with secondary access points located along Firswood Road.

The design of all streets should comply with the Chartered Institution of Highways and Transportation's Manual for Streets 2.

Streets should be designed to encourage suitable behaviour from those who use them, particularly from drivers, through appropriate street design rather than simply relying on speed limits.

All streets should be fronted by development.

The pedestrian, cycle and public transport networks should be complete as soon as is practicable to encourage travel by these

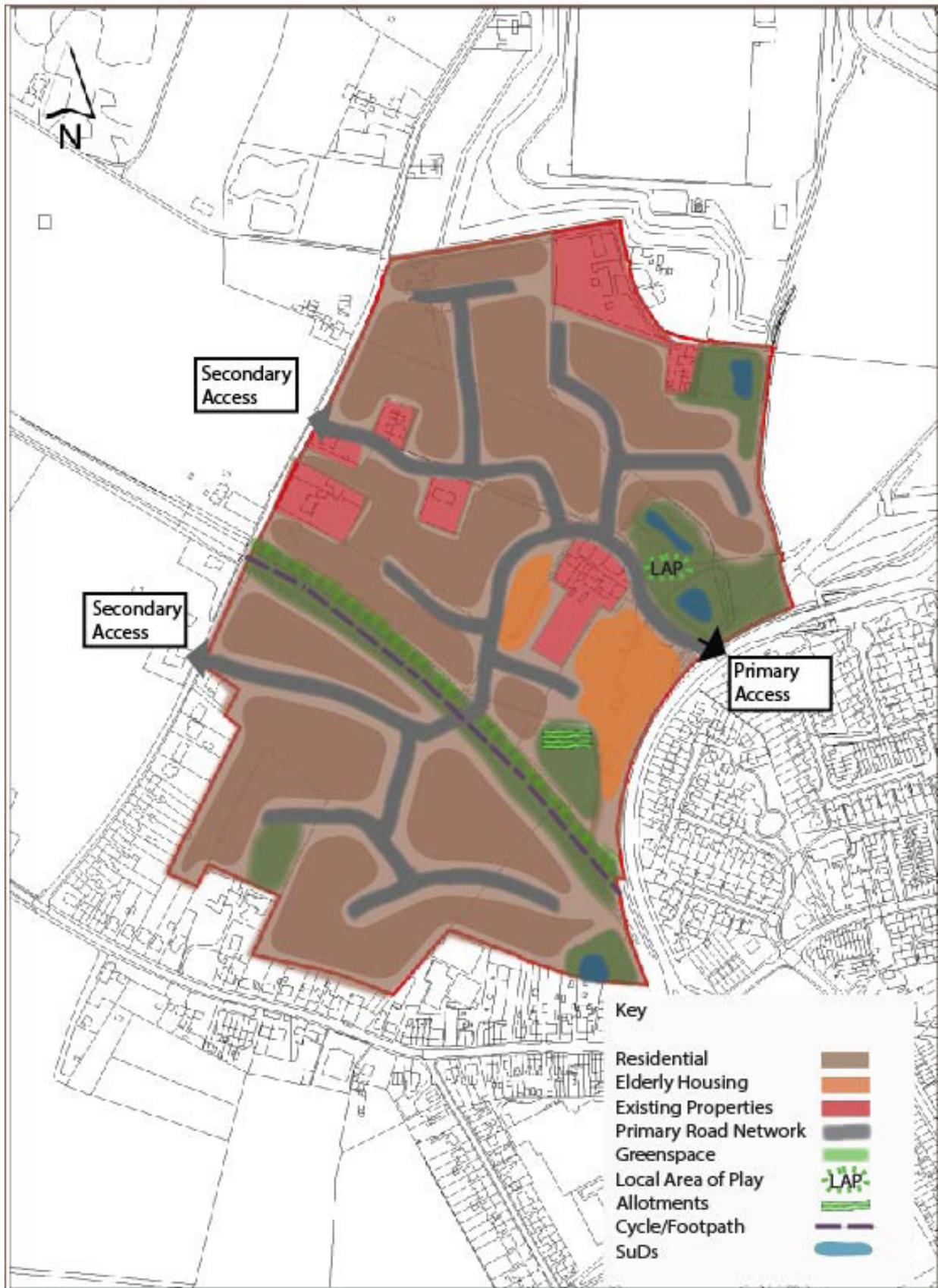
There should be no single solution for the location of car parking spaces, but on plot car parking with a preference for side drives is the preferred method, while parking to the rear of properties should be a second resort. Car parking provision should be calculated using West Lancashire's Car Parking standards set out in Appendix F of the Local Plan. Attention is to be drawn to the requirement for Electric Car Charging Points (Policy IF2), each dwelling is required to provide a charging point and communal parking areas should provide at least 1 space for charging or a 10% of spaces on site, whichever is the greater.

Land Use

The land use plan demonstrates that the site can be broken up into a number of areas respecting the character and surroundings of the site. It is proposed that through these respective areas the development comprises:

- Residential areas;
- Public open space and play equipment;
- Small retail area;
- SuDS; and
- Landscaping boundaries.

Land Use Plan



Development Process

Outline of potential planning obligations

Planning obligations are sensitive to the overall site viability assessment, development mix and quantum. They could also be significantly affected by the site constraints, underground utilities, and variables that are not yet known. The list below is prepared as a guidance to inform the detailed discussions at the planning application stage.

Any development on site will make a proportionate contribution towards the strategic infrastructure either through S106 agreements or CIL charges, whichever is applicable at the time of application. Charges may relate to all or some of the headings below that may be outside the site boundary.

In addition, the off site specific infrastructure items that could be funded through planning contributions include:

- Community Infrastructure (such as health, education, libraries, public realm),
- Green Infrastructure such as outdoor sports facilities, open space, parks, allotments, play areas, enhancing and conserving biodiversity and the creation of linear parks,
- Climate change and energy initiatives through allowable solutions,
- Affordable housing
- Elderly housing; and
- Biodiversity Mitigation

Required Supporting Information

Aside from the usual Planning Statement and Design & Access Statement, the following evidence will be required to support any planning application in accordance with Policy RS1 of the Local Plan on the Firwood Road site:

Affordable Housing Statement – providing details relating to the provision of affordable housing, including the number and mix of residential units with numbers of habitable units, plans showing the location of units and the number of habitable rooms and/or bedrooms and the floor space of the units. If different levels or types of affordability or tenure are proposed for different units this should be clearly and fully explained.

Ecological Survey – as a minimum, a Phase 1 Habitat Survey, with more detailed assessments required depending on what the Phase 1 Survey identifies.

Coal Mining Risk Assessment – the presence of a Coal Mining Referral Area and Mineral Safeguarding Area will require close liaison with the Coal Authority on any development proposals and potentially a Coal Mining Risk Assessment Report.

Contaminated Land Report – where a development proposal includes a particularly vulnerable use (e.g. a care home) or where there is any suspected history of contamination on any part of the site, a Contaminated Land Report is required in line with the latest national guidance.

Crime Impact Statement – to consider whether the development can help avoid / reduce the adverse effects of crime and disorder. This can be provided as part of the Design & Access Statement.

Draft Section 106 Agreement – depending on the precise requirements at the time of application and what is outlined on the Council's Regulation 123 list, this may address the provision of affordable housing, the provision / improvement of open space and / or contributions towards highways and transport improvements.

Flood Risk Assessment – provide a Flood Risk Assessment in line with the latest national guidance to assess any implications development may have on all forms of flood risk on the site and in the wider area, and address how sustainable drainage systems will be utilised in the development proposal.

Foul Sewerage Treatment Statement – all new buildings need separate connections to foul and storm water sewers and applications for such development should therefore be accompanied by a foul sewage assessment.

Landscape & Visual Impact Assessment – to ensure that the landscape and visual impacts of proposals are fully considered in the preparation of development proposals.

Landscaping Scheme – identifying the main areas and types of planting and hard surfaces (existing and proposed).

Parking & Access Arrangements – all applications requiring the provision of off-street parking and servicing will be required to demonstrate adequate on-site parking and servicing provision, including mobility spaces and provision for cycling and motorcycles as appropriate, in line with Policy IF2 of the Local Plan.

Renewable Energy Statement – an opportunity for the applicant to show how the consideration of energy efficiency and sourcing energy from a renewable source, together with the use of sustainable resources, has influenced the development proposals. In line with Policy EN1 of the Local Plan, low carbon design should be incorporated into the development proposals as required by Building Regulations and the potential for renewable, low carbon or decentralised energy schemes serving the site should be considered thoroughly.

Site Waste Management Plan – should contain details of the types of construction waste to be removed from the site, the identity of the person who will remove the waste, and the site that the waste will be taken to. The plan should also include details of how waste will be minimised and materials re-used on site.

Statement of Community Involvement – setting out how the applicant has complied with the requirements for pre-application consultation provided in the Council's adopted Statement of Community Involvement and demonstrating that the views of the local community have been sought and taken into account in the formulation of development proposals.

Transport Assessment – required where any proposal would be likely to result in a material increase in traffic movements on roads, whether adjacent to or remote from the site.

Travel Plan – should outline the way in which the transport implications of the development are going to be managed in order to ensure the minimum environmental, social and economic impacts. The travel plan should have a strategy for its implementation that is appropriate for the development proposal under consideration.

Tree Survey – in line with Policy EN2 of the Local Plan, consider the potential adverse effects of the development proposals on any existing trees or hedges on, or adjacent to, the site. This should be undertaken by a suitably qualified arboriculturist and in line with BS.5837:2012.

Utilities Statement – to indicate how the development will connect to existing utility infrastructure systems.

Appendix C. Equality Impact Assessment

Equality Impact Assessment - process for services, policies, projects and strategies

1.	<p>Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service/policy/strategy/decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people:</p> <p><i>People of different ages – including young and older people</i> <i>People with a disability;</i> <i>People of different races / ethnicities / nationalities;</i> <i>Men;</i> <i>Women;</i> <i>People of different religions/beliefs;</i> <i>People of different sexual orientations;</i> <i>People who are or have identified as transgender;</i> <i>People who are married or in a civil partnership;</i> <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave;</i> <i>People living in areas of deprivation or who are financially disadvantaged.</i></p>	No
2.	<p>What sources of information have you used to come to this decision?</p>	<p>The development briefs seek to provide a policy framework to deliver sustainable development for all including affordable housing. Consultation feedback from the Local Plan has helped inform this understanding.</p>
3.	<p>How have you tried to involve people / groups in developing your service / policy / strategy or in making your decision (including decisions to cut or change a service or policy)?</p>	<p>Engagement relating to the allocation of both sites took place through the Local Plan consultation and examination. This report is seeking authority to further consult on the documents to ensure involvement.</p>
4.	<p>Could your service / policy / strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:</p> <p><i>Eliminate discrimination, harassment and victimisation;</i> <i>Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people); and</i> <i>Foster good relations between people who share a protected characteristic and those who do not share it.</i></p>	<p>Could help as it will seek to provide a policy framework that will, amongst other things, deliver affordable housing (minimising disadvantage).</p>
5.	<p>What actions will you take to address any issues raised in your answers above?</p>	N/A

MINUTE OF CABINET 14 JANUARY 2014

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

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

A copy of revised recommendations were circulated at the meeting.

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

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

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

MINUTE OF PLANNING COMMITTEE: 16 JANUARY 2014

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

Consideration was given to the report of the Assistant Director Planning as contained on pages 1407 to 1457 of the Book of Reports and on page 1478 giving details of additional late information, the purpose of which was to recommend the draft development briefs for the allocated housing sites at Grove Farm, Ormskirk and Firswood Road, Lathom/Skelmersdale for public consultation 6 February – 21 March 2014.

That the following agreed comments be referred to the Assistant Director Planning:-

RESOLVED: A. That in respect of Firswood Road, Lathom, there were no agreed comments.

B. That in respect of Grove Farm, Ormskirk that the purpose of the Linear Park and its benefits be clarified/strengthened within the document.

(Note: Councillors Mrs. Hopley and Westley left the Chamber during consideration of Agenda Item 10 relating to the Development Briefs for Housing Sites at Grove Farm, Ormskirk and Firswood Road Lathom/Skelmersdale and were not present for the remainder of the meeting.)



AGENDA ITEM: 15

**EXECUTIVE OVERVIEW &
SCRUTINY COMMITTEE:
30th January 2014**

Report of: Assistant Director Housing and Regeneration

Relevant Managing Director: Managing Director (Transformation)

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

**Contact for further information: Jonathan Mitchell (Extn. 5244)
(E-mail: jonathan.mitchell@westlancs.gov.uk)**

SUBJECT: CONSULTATION ON DRAFT HOUSING STRATEGY 2014-2019

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

- 1.1 To advise Executive Overview and Scrutiny Committee that the draft Housing Strategy 2014 – 2019 is out for consultation and for agreed comments to be submitted to Cabinet for consideration.

2.0 RECOMMENDATION

- 2.1 That Members note that the draft Housing Strategy is out for consultation.
- 2.2 That any agreed comments from Executive Overview and Scrutiny Committee be submitted to Cabinet for consideration.

3.0 BACKGROUND

- 3.1 West Lancashire Council last published a full housing strategy in 2004. It covered the period 2004-2009 and was approved as Fit for Purpose by Government Office North West.
- 3.2 There is no longer a statutory requirement for the Council to produce a Housing Strategy; however it is acknowledged that such documents can be key to providing strategic direction on housing related matters and help to support

broader economic objectives. They can also be considered as a contextual document to support Local Investment Plans.

3.3 Government no longer provides guidance for local authorities about producing housing strategies. This was also clarified by the publication of the statutory guidance 'Creating Strong, Safe and Prosperous Communities' in 2008 which gives local authorities the discretion about how, when, and in what format they document their housing strategy.

3.4 Housing strategies are intended to:

- Provide an overview of housing related issues in the area
- Identify any mismatch between housing supply and demand and identify issues such as matters related to housing conditions, affordability, needs of vulnerable groups etc.
- Set out the key housing objectives for the authority and its partners
- Establish priorities for action and spending priorities
- Provide an action plan and policy direction to address the housing challenges and problems in the borough.

3.5 The Housing Strategy is intended to work in harmony with the Local Plan and other key local strategies.

3.6 Essentially, a Housing Strategy brings together and builds on a number of strategies which deal with aspects of housing and any other related activity that leads to the creation of an appropriate sustainable local housing offer.

4.0 CURRENT POSITION

4.1 Arc4 Housing Consultants have been appointed to assist in developing a five year housing strategy for the period 2014-2019.

4.2 The process of producing the Strategy is summarized in the section below.

5.0 HOUSING STRATEGY DEVELOPMENT PROCESS & CONTENT

Identifying the challenges and potential priorities

5.1 Our consultants have carried out telephone interviews with key Council Officers and Managers and reviewed a range of relevant documentation at a local, regional and national level to get a sense of what type of strategic housing issues are facing West Lancashire.

5.2 The review work enabled our consultant to identify the areas which would then be used as discussion points in stakeholder consultation.

Early Stakeholder Consultation

- 5.3 This was an important element of the work with a modest event being held late in 2012 at West Lancs Investment Centre. The purpose of the event was to try and tease out what the strategic housing objectives might look like.
- 5.4 Attendees at the consultation event included:
- Housing Developers / Registered Providers
 - Housing Strategy, Economic and Planning Colleagues at Neighbouring Councils
 - HCA
 - Borough Council Elected Members
 - Edge Hill University and Skelmersdale College
 - LCC Colleagues
 - Public
 - Voluntary Sector / agencies
 - Other stakeholders and partners
- 5.5 For those people who could not attend we issued housing strategy questionnaires that could be completed on-line. Two questionnaires were developed; one for professionals and one for members of the public. In addition, our consultants took telephone calls from those who wished to provide feedback in that manner using a free phone number that had been provided.
- 5.6 The emerging priorities that were to be included in the Housing Strategy have been shared with the relevant Portfolio Holders.

Preparing the Housing Strategy

- 5.7 Following the work done by Arc4 Council Officers have refined the strategy document and shared it with Officers from across the Council

Content of the Strategy

- 5.8 The Housing Strategy is structured using the following delivery objectives:
- Achieving the right supply new homes including maximising affordable housing
 - Regenerate and remodel areas of Skelmersdale
 - Making the best use of all existing homes
 - Encourage well managed and maintained homes across all tenures
 - Encourage investment to meet specialist housing requirements
 - Deliver the Council's Sustainable Energy Strategy 2012-2020 – residential and domestic sector objectives

- 5.9 The proposed Housing Strategy Vision is *“the provision of good quality housing which meets people’s changing needs and is located within pleasant, safe and sustainable communities”*.
- 5.10 The diagram on page 15 of the draft Strategy shows the Housing Strategy in the corporate context. Chapter 6 of the document sets out the key delivery actions for each of the six key objectives.
- 5.11 The Housing Strategy includes delivery actions under each of the key objectives. The detailed workstreams for each of these actions will be considered under future Service Action Plans.

Housing Strategy Consultation

- 5.12 The Housing Strategy is going through an eight week period of public consultation which started on 7th January 2014 and shall finish on 28th February 2014.
- 5.13 It is intended to seek feedback via:
- Direct mail of those who contributed to the first stage consultation as mentioned in (5.4) above.
 - Press release to direct those parties interested in housing issues to a copy of the draft Housing Strategy 2014 – 2019 on the Council website in order that they can provide their consultation feedback.
- 5.14 A detailed Action Plan will be developed following the consultation period which will reflect and be framed around the final agreed Housing Delivery objectives.

Delivery Timescales

- 5.15 The key delivery timescales are set out in the table below.

Milestone	Date
8 weeks consultation	7 January 2014 to 28 February 2014
Consultation feedback reviewed and document amended where necessary	28 February 2014 to 4 March 2014
Cabinet consider the Housing Strategy for adoption	18 March 2014

6.0 SUSTAINABILITY IMPLICATIONS / COMMUNITY STRATEGY

- 6.1 The Housing Strategy complements the housing related objectives of West Lancashire Community Strategy which aims to provide more appropriate and affordable housing to meet the needs of local people.
- 6.2 The Housing Strategy takes account of other related strategy and plans across the Council which are focussed on addressing housing development growth in a

manner that is sustainable and meets the housing needs of the Borough's residents.

- 6.3 There are no negative sustainability or community strategy implications by virtue of this report.

7.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 7.1 At this stage though no specific resource implications have been identified, key actions will need to be considered through future Service Action Plans.

8.0 RISK ASSESSMENT

- 8.1 Failure to develop a housing strategy which has clear evidenced based housing delivery objectives will mean that the Council will not be able to target resources effectively to address the housing requirements of the Borough.

9.0 CONCLUSION

- 9.1 Developing a Housing Strategy will provide direction on which strategic housing issues the Council wishes to address during the life of the Strategy.

Background Documents

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

Equality Impact Assessment

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

Appendices

Appendix A – EIA – Initial Assessment

Appendix B – Draft Housing Strategy 2014-2019



Housing Strategy 2014 to 2019

CONSULTATION DRAFT – JANUARY 2014





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Preface

We are delighted to introduce this housing strategy for West Lancashire, which provides the opportunity for us to explain our vision and delivery objectives over the next five years.

It has been developed against a backdrop of unprecedented change in national policy including fundamental reforms to planning policy, welfare benefits and the role and funding of social housing.

In developing this strategy we have ensured that we have engaged with and consulted with stakeholders. It is evidenced based and reflects the Council's Corporate priorities along with the housing related objectives of our Sustainable Community Strategy 2007 - 2017. This strategy also takes account of:

- Private Sector Housing Strategy 2006 - 2009
- Affordable Housing Strategy 2008 - 2013
- Homelessness Strategy 2007 - 2013
- Sustainable Energy Strategy 2012 - 2020
- Tenure Strategy 2013
- Local Plan 2012 – 2027
- HRA Business Plan 2012 -2042

In West Lancashire we recognise that the Borough has both opportunities and challenges. Ensuring that “we improve housing and deliver housing that meets the needs of local people” is a key focus for the Council and contributes to sustainable regeneration and growth, and a Borough which looks and feels cared for. We retain and manage our Council Housing stock and so understand that access to good quality homes at the right price, in the right location and in sustainable neighbourhoods is important for our residents and those households looking to relocate to the area with the aim of investing and making their home in our Borough.

Housing is therefore important to us and helps to deliver our Corporate priorities, which take account of our need to manage reducing budgets to deliver public services for our residents. This means as we move forward, we need to remain prudent, be cost effective and innovative in our approaches and continue to work more closely with existing partners and seek out different ways of working with new partners to help deliver the right housing offer.

We recognise that everyone's needs are different, and we are committed to ensuring that housing and services meet a wide range of specialist housing needs. Housing will play a crucial role in our economic success and is a central component of people's lives.

We have already achieved much, following the publication of our last housing strategy 2004-2009 and we have worked positively with our partners in improving housing, the housing offer and the lives of local people as a result. We wish to build upon this success and this housing strategy allows us an opportunity to refocus our priorities within the current strategic delivery context.

We are committed to trying new approaches and doing things differently as we seek to address our most pressing housing issues. We do not have the resources to do everything, so in developing this housing strategy we realise we will have to work increasingly with private, statutory and voluntary sector partners to achieve our objectives.

The Action Plan with this housing strategy will be reviewed regularly as part of our existing Service Action Planning arrangements. This will allow progress to be monitored and delivery outcomes to be measured.

Finally, we would like to thank all those who responded to our consultation and who have otherwise contributed to this Strategy, and we look forward to working with our partners to turn this strategy in to reality.



Bob Livermore
Assistant Director Housing and
Regeneration



Adrian Owens
Portfolio Holder for Housing
(Finance), Regeneration and Estates



Val Hopley
Portfolio Holder for
Landlord Services

Housing Strategy for West Lancashire – An Executive Summary

West Lancashire Borough Councils' housing strategy sets out our strategic housing delivery objectives which we aim to address over the five-year period from 2014 to 2019. Housing market conditions and housing needs will change over time, but it is important to establish direction and to set out strategies and targets for improving housing circumstances in the short to medium term.

We have based our strategy and action plan on analysis of our housing market and housing needs. Equally importantly, we have consulted widely with people in housing need and other stakeholders. This consultation process has influenced the objectives we have established. Achievement of these objectives will be subject to resource availability. Our key delivery actions which accompany our housing strategy objectives are shown on page 7. Our housing strategy delivery objectives are:

- ✚ Achieve the right supply of new homes including maximising affordable housing
- ✚ Regenerate and remodel areas of Skelmersdale
- ✚ Make the best use of all existing homes
- ✚ Encourage well managed and maintained homes across all tenures
- ✚ Encourage investment to meet specialist housing requirements
- ✚ Deliver the Council's Sustainable Energy Strategy 2012- 2020 Residential and Domestic Sector objectives.

Analysis of needs – Housing sector issues

The profile of West Lancashire as a whole is one of a Borough with high demand for housing in the private and public sector, with house prices more than 30% higher than Lancashire's average.

House price data suggests that there are three main housing markets. These consist of Skelmersdale, Ormskirk and the more rural areas of the Borough, containing smaller towns and villages. The housing issues within each area range from extremely low to high demand for accommodation.

Our population is growing – The 2001 Census recorded a Borough population of 108,400 and the Census in 2011 recorded a population increase of 2.1% to 110,700. Population projections predict that by 2031 the population will be in the region of 120,900. We need to cater for this growth and will do so in line with our Local Plan 2012-2027.

It's ageing - We know that our population is ageing and that by 2035, there will be 10,300 more people aged 60 and over, and 7,200 people aged 75 and over. This is likely to increase demand for housing related support and other forms of social care to enable residents to remain in their own homes.

It's expensive - We know it's expensive to buy a home in most parts of the Borough and that in 2010 we had an annual affordable housing shortfall of 214 units (homes) per year. While affordable housing has been developed we still have growing levels of unmet need each year.

Added to this is the fact that we know that economically active households, particularly those who would traditionally be classed as first time buyer households, struggle to find housing at an affordable price in our Borough and as a result they move away. We need to ensure we are providing the 'right' type of housing offer to retain and attract younger and economically active growing families and first time buyers while at the same time provide suitable housing for older people.

Private Sector Housing - We need to make more of the private rented sector, including ensuring homes that are let are well managed and maintained. The private rented sector can assist, in part, with some of the matters mentioned above by providing rented homes as an extension to the social rented sector, where waiting lists can mean a significant wait before rehousing occurs. It can also act as an alternative tenure for households currently unable to access the home ownership ladder.

Our Private Sector Stock (PRS) condition survey 2010 identifies that there are properties in the private sector that still need investment and in some instances this can impact on the occupiers' health. Funding to address these issues is limited and so we need to consider how we can tackle stock condition and also advise and support householders to make their homes more energy efficient. This will also help address the issue of fuel poverty experienced by some households in the Borough.

Skelmersdale - The new town of Skelmersdale was built in the 1960's, and was the first new town in the North West. Skelmersdale faces a number of challenges in terms of its housing market, physical design and environment and these are considered in the main text of the housing strategy.

Skelmersdale Town Centre – The Council is keen to improve the attractiveness and functionality of Skelmersdale Town Centre. While it is well used it does not offer the shopping experience that can exist elsewhere in the region, which in many cases now offer entertainment venues, such as cinema or bowling and tend to include a range of well known eating establishments. Such facilities in themselves provide a reason for people to visit and can help to create a vibrant night time economy. Such facilities would provide an alternative purpose for visiting other than for day time shopping.

To help with this issue the Council and the Homes and Community Agency (HCA) approved a Supplementary Planning Document and master plan in 2008. We are working with St Modwen, a regeneration company to bring the aims of the master plan to fruition and improving the housing offer and range of tenures available is seen as a significant driver in the area's redevelopment with the masterplan including the development of high quality market housing, for sale and to rent, low cost market housing and affordable housing. This work is intended to help improve the local economy by increasing visitors and enhance the overall appeal of the area. Planning permission has now been granted for a supermarket, cinema and other retail and leisure facilities in the Town Centre.

Work is on-going to achieve our town centre aspirations, and the Council, working in partnership with the HCA identified land, and is marketing, where appropriate, sites suitable for residential housing development. In September 2011, West Lancashire College opened its doors to a brand new state-of-the-art campus situated in the town centre. Added to this is to be the development of a £2 million youth zone by the County Council, consisting of a two-storey facility on land based to the north of Skelmersdale police station.

Other relevant themes and housing market challenges - We have highlighted in this executive summary some of the issues which we have considered during the development of this housing strategy. They relate mainly to our housing market and housing supply, making the best use of existing stock, the impact of population growth and changes in age profile in the years to come. The main housing strategy document introduces other housing related matters that have also influenced the delivery objectives that this strategy will focus upon.

Resources - Delivering this housing strategy will require a significant amount of inward investment and there are likely to be competing financial "demands" in trying to achieve them. It is clear that the authority is not in a position to finance all its aspirations from existing resources and so all avenues will be considered to help make progress. To that end we are strongly committed to working in partnership to pursue all funding opportunities, which will allow this authority to deliver real and sustainable solutions, which meet its housing challenges.

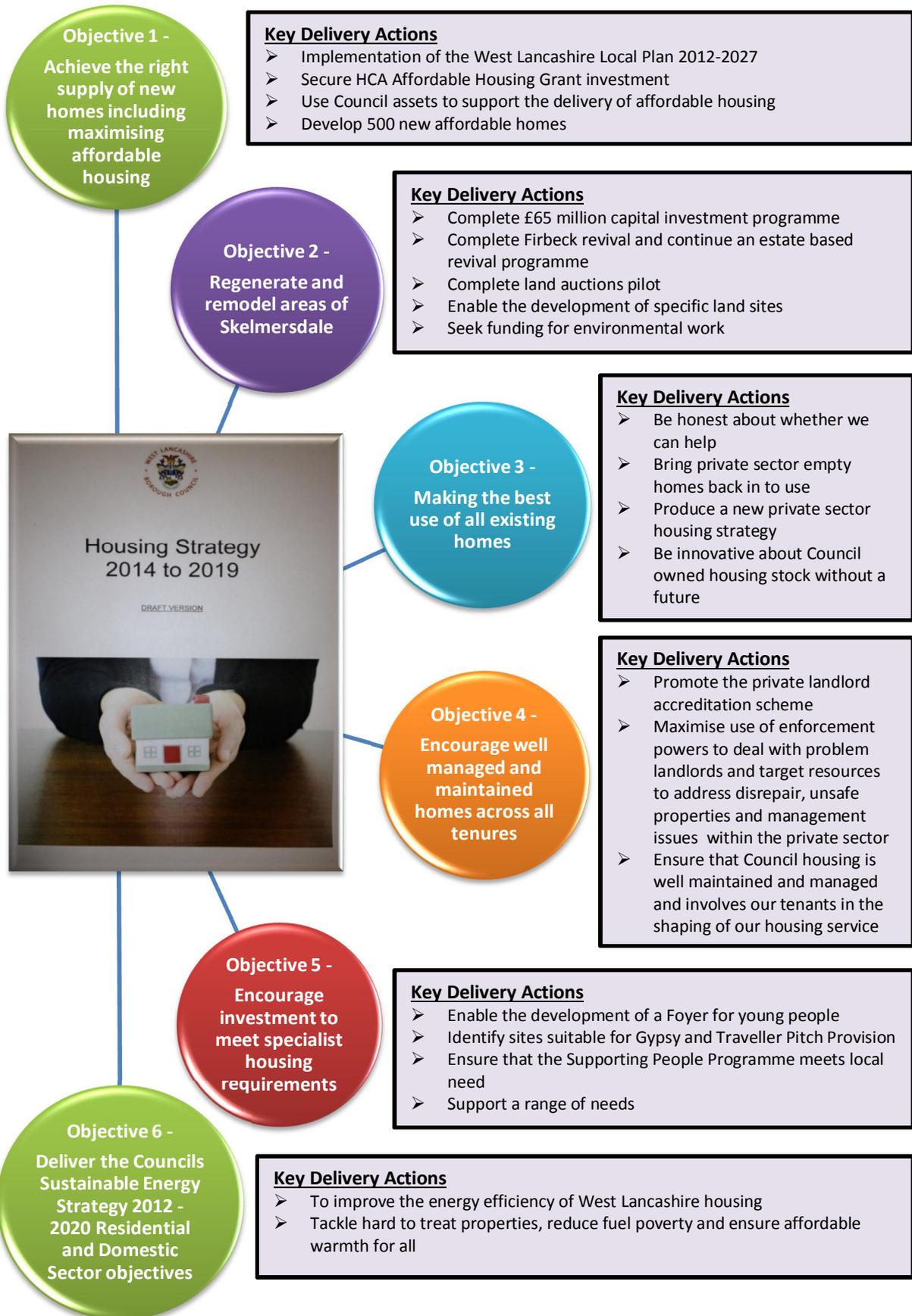
Progress since our last housing strategy

We have made good progress following the publication of our last housing strategy 2004-2009. Below is a summary of some of the achievements:

- Since 2005 secured £10 million Homes and Community Agency grant which has provided 271 affordable dwellings with total scheme cost of £34.5 million, including a 111 Unit Extra Care Scheme in Ormskirk and the Council building 17 homes in Elmstead in Skelmersdale;
- The Council Housing stock is now self-financing which has enabled total investment of £65 million in property improvements to Council housing to commence, including £5 million to be invested to support the revival of Firbeck;
- Established a partnership arrangement with Regenda Housing Group to develop affordable housing in Borough called The Affordable Housing Capital Partnership Scheme;
- Significant energy efficient improvements to Council housing stock to provide long term fuel efficiencies, reduce fuel poverty and ensure affordable warmth for tenants. Measures include insulation programmes, including external wall insulation, boiler replacements, fuel switching, and installation of renewable technologies including biomass, air source heat pump, and solar photovoltaic panels.
- Becoming a pilot for land auctions – One of three councils country wide. This pilot has the potential to provide affordable and market housing to the area;
- Establishing a Transfer Incentive Scheme to enable Council Tenants to Downsize in to smaller Council property therefore making better use of existing Council Stock;
- Achieving and maintaining the Decent Home Standard in Council Housing;
- Becoming a member of People Power Collective Energy Switching Scheme which will help Lancashire residents to find out if they can save money by switching energy providers.

West Lancashire's Housing Strategy 2014 – 2019

(Strategic housing objectives and key delivery actions)



Introduction

1.0 Profile

West Lancashire has a population of 110,700¹ spread across a mix of vibrant towns and villages sitting alongside tranquil countryside which covers an area of 38,109 hectares and contains the greatest proportion of Green Belt land in England.

The Borough is complex and diverse in its nature, and includes rural areas together with the urban conurbation of Skelmersdale and the key service centres of Ormskirk, Aughton and Burscough. The majority of residents live in these settlements.

There are three distinct rural areas; the Northern, Eastern and Western Parishes, containing a number of villages, the largest of which are the linear settlements of Tarleton and Hesketh Bank.

Our geographical location in the North West of England is unique. We have a dual identity, being the southernmost Borough in the County of Lancashire, whilst also located within the Liverpool City Region and adjacent to the Manchester City Region .

The Borough is also adjacent to a number of large urban areas, including Southport to the west, Liverpool and parts of Knowsley to the south, St Helens and Wigan to the east and Chorley, Leyland and Preston to the north east. It is a popular area for commuting to other parts of Lancashire and Manchester, whilst there are particularly strong links with the economy of Liverpool.

There is motorway access to Liverpool via the M58 and to Preston, Wigan and St Helens via the M6. This defines one of the key features of the West Lancashire housing market which is the strong linkages with surrounding areas which generates demand for housing in the area from higher income groups and those willing to commute, which can create affordability problems for those on lower incomes.

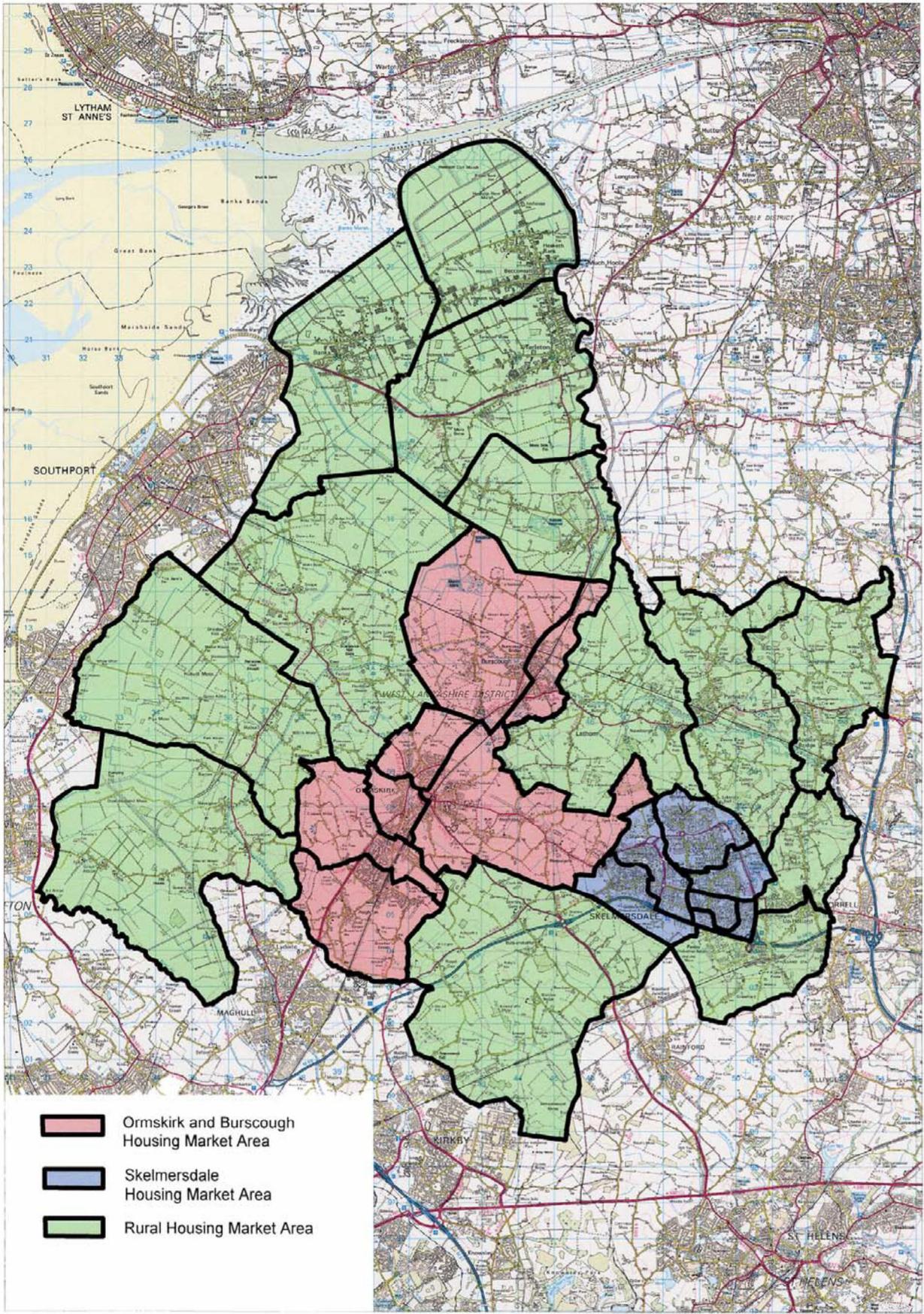
Our analysis suggests that there are three main housing markets. These are:

- Skelmersdale which as well as being a free-standing employment centre and settlement has house prices which are typically below those elsewhere in the Borough;
- Ormskirk which is also a free standing settlement and employment centre along with Burscough and Aughton;
- The more rural areas of the Borough, containing smaller towns and villages. These areas are generally distinguished by higher prices and in some cases a commuter function associated with employment centres outside the Borough. This sub-market covers a large area with significant differences in accessibility to large employment centres.

The profile of West Lancashire as a whole is one of a Borough with high demand for housing in the private and public sector, with house prices more than 30% higher than Lancashire's average.

These housing markets present us with a challenge, particularly because housing issues within each area range from extremely low to high demand for accommodation.

¹ Census 2011



The purpose of a housing strategy

2.0 The purpose of a housing strategy

The Government is determined that local authorities must become more strategic in their thinking, developing plans for the longer term to deliver measurable outcomes.

In housing, the agenda has moved on from the requirement to produce a “fit for purpose” housing strategy to having an excellent strategic approach – requiring us to be clear about our direction for housing and how we will enable delivery – and communicate this to the right people, in the right way, to the benefit of our communities.

Housing led initiatives can contribute to improving skills, education and employment chances, whilst ill health can be improved and alleviated by living in homes which are adaptable and located in safe and supportive environments. Local housing authorities’ work in producing housing strategies has been a lever for economic and social change in many areas, reflecting a shift towards ensuring local housing markets meet local demands, rather than a narrower focus on directly providing social housing.

In essence a housing strategy is a plan that considers housing issues in an area and sets out how to tackle them over a given period of time, having regard to identified housing needs and the resources available. It reflects the important strategic and enabling role of the Council in place shaping and meeting and facilitating housing needs in the Borough. It also has to consider the delivery and policy context applicable at the time of its development and evolve as policies change. Chapter 3 considers the current national, regional and local policy context in which this housing strategy should be considered.

The housing strategy is intended to be an over-arching document that establishes priorities for action, both by the local authority and, where appropriate, by other service providers and stakeholders and sets out a clear action plan.

The strategic housing role therefore has an important part to play in a number of locally based plans, as it can assist in promoting a joined-up approach to activity that helps support sustainable communities including:

- assess and plan for current and future housing needs of the local population;
- make the best use of existing housing stock;
- plan and facilitate new housing supply;
- work in partnership to facilitate commissioning of housing support services which link homes to support and other services that people need to live in them;
- have working partnerships that secure effective housing and neighbourhood management;
- ensure good design which encourages informal social mixing and support community cohesion within estates and neighbourhoods;
- support the economy by having the right number of homes of the right tenure and price for workers;
- link where people live to the services they want and need;
- ensure that all residents’ voices feed into shaping strategy by encouraging their participation of the housing strategy development process;
- improve poor housing and the corresponding health problems associated with such housing.

In overall terms a housing strategy aims to provide an appropriate balance of good quality housing, which meets the housing needs of the population, provides variety, choice and is accessible and contributes positively to the well-being of the citizens of the local authority area. It involves making the best use of the housing that is already there, as well as working effectively with the market to supply new homes. It is also about looking and working across all housing tenures, and ensuring that appropriate links are made to the support services which people need to live in their homes.

National, regional and local context

3.0 West Lancashire's housing strategy within a national context

The Government's stated aim is to deliver a nationally sustainable and resilient economy that is rebalanced across regions and sectors (public, private, voluntary and community). Since the Coalition Government has come to power it has stressed its commitment to decentralisation, localism and the 'Big Society', and its 'Programme for Government' set the scene for a radical devolution of power to local authorities and community groups; critical to this has been the 'Localism Act 2011' which included measures to reform the planning system, social housing and the Council housing financial system. One of the key elements that the Act provided was reform to ensure that decisions about housing are taken locally.

The Government's Housing Strategy 'Laying the Foundations: A Housing Strategy for England' 2011 set out its intended direction of travel for housing, its role in the wider economy and its contribution to social mobility. Government want to see primacy of home ownership, social housing as welfare, and an increasing role for the private rented sector. The key elements of this strategy are summarised below:

- An agenda of growth in housing delivery, recognising the positive role that housing and its construction has in supporting economic growth of the economy, increasing employment opportunities and supporting inward investment. This is underpinned by a number of private sector led funding initiatives such as The Regional Growth Fund, designed to support public sector dependent economies to private sector led growth. The Government introduced the New Homes Bonus to specifically encourage housing growth;
- The introduction of the new National Planning Policy Framework, is designed to simplify and speed up the planning system and has a presumption in favour of development. The framework requires West Lancashire to work more closely with local communities to deliver homes, jobs and infrastructure needed for a growing population;
- Within overall housing growth priorities there is a commitment to deliver more affordable housing and bring empty homes back into use to support new affordable housing delivery. This has been supported through Government funding focused around the Affordable Rent Model introduced in April 2011, which utilises higher rent and lower Government grant levels;
- Access to social housing has been a key focus of the Government's social housing reform agenda. The priorities are to ensure that affordable housing is available to those who need it for as long as they need it and this has seen the ending of 'tenancies for life'. Local authorities now have the flexibility to offer minimum fixed term tenancies to households moving into social housing stock. Alongside social housing reform sits the reform to the welfare system, which with its changes to benefit, eligibility and entitlement, will impact significantly on housing supply and demand. These changes affect both social and private sector tenants;
- The Government sees the provision of a healthy, well managed private rented sector as essential to meeting housing need and demand and it is focusing on raising standards within the sector, and for local authorities to address fitness and disrepair issues. This is very much in line with the Government's aim to improve health outcomes whilst reducing health inequalities. The Government is keen to increase the supply of private sector homes for rent by supporting investment in new private rented provision; it sees the growth in the private rented sector as underpinning economic growth as it allows greater mobility of people and skills;
- The Government recognises that older people are living longer and wants to see a better deal provided for older people, with greater choice and support to live independently. The Government is committed to ensuring that housing and planning policies positively reflect the wide range of circumstances and lifestyles of older people, who already occupy nearly a third of all homes. In terms of safeguarding vulnerable adults, housing has a strong role to play alongside social services, health, the police and other agencies. The Care and Support Bill introduced in May 2013 sets out a new safeguarding power, and places a duty on local authorities, in our case, Lancashire County Council, to respond to safeguarding concerns by making enquiries as necessary to decide on whether, and what, action is needed;

- In August 2012 the Government published its Homelessness Strategy, 'Making every contact count: A joint approach to preventing homelessness'. The Strategy focuses on prevention and aims to 'make sure that every contact local agencies make with vulnerable people and families really counts.';
- The Government continues its commitment to delivering Zero Carbon homes and, along with other binding carbon reduction targets by the previous Government, makes energy efficiency and tackling fuel poverty key issues for housing. Tackling energy efficiency in existing housing stock remains the sector's biggest challenge, and therefore utilising the Green Deal is important;
- Housing is seen by Government as key to creating and sustaining local communities. It is seen as contributing to the economy and supporting economic growth and employment, both directly and indirectly, which is why housing issues need to be addressed at a local level but in a planned and strategic way. The primary role of West Lancashire is to understand and address the needs and aspirations of communities while having regard to the National Context.

3.1 West Lancashire's housing strategy within a regional context

One of the strengths of the West Lancashire Borough is its geographical location. While we are included in the Liverpool City Region (North)², not all of West Lancashire in housing market terms, is influenced by this connection. We are also influenced by Greater Manchester City Region and being part of the three tier arrangement of Lancashire County and Parish Council's in many areas; we are aware of significant housing market linkages between the northern part of West Lancashire and Central Lancashire. This geographical placement means we have strong linkages with surrounding areas which generate demand for housing in our locality from higher income groups and those willing to commute; this creates affordability problems for those on lower incomes.

While the Government's decentralisation and austerity agenda has dismantled the regional tier of Government, it is still important for us to understand the nature of West Lancashire's placement within the region and how the City regions and neighbouring authorities housing and economic issues and aspirations could impact upon us. We highlight some of the regional influences below.

3.2 The Liverpool City Region

We are part of the Liverpool City Region (North) and its' economic and strategic influence is relevant to West Lancashire. With the abolition of Regional Development Agencies, Local Enterprise Partnerships (LEP's) have become the focus of activity in delivering economic growth. LEP's are responsible for determining local economic priorities and undertaking activities to drive economic growth and local job creation. The Liverpool City Region LEP want to see growth and increased productivity and a rebalanced economy focusing on private sector led growth driven by low carbon economy, knowledge economy, visitor economy and SuperPort. West Lancashire is not currently within the Liverpool City Region LEP but hopes to work closely with it given the functional economic geography of the area. The Council will also continue to work closely with partners, including the LEP in Lancashire.

The Liverpool Local Investment Plan (LIP2) published in August 2012 responds to the changed political and economic landscape and its vision underpins the priorities of the LEP.

It 'sets out how the Liverpool City Region will create the environment to stimulate the private sector market to accelerate growth, rebalance the economy and deliver housing and neighbourhoods where people choose to live, work and visit'.

Its priorities include investment in transformational sectors and strategic locations and supporting investment through planning, infrastructure and site availability, maximising public sector investment impact and land assets, developing global markets and increasing the number of residents in work. This may afford opportunities for West Lancashire and so continued dialogue and partnership working on housing and economic issues remains important to us.

The Homes and Communities agency states that

'Housing will play a key role in supporting the City Region's economic ambitions. LIP2 has made a commitment to improve the choice and quality of homes and neighbourhoods. It will focus on ensuring existing stock is energy efficient,

² Liverpool City Region (North) comprises of Wirral, Liverpool, Sefton, Knowsley and West Lancashire.

providing mixed tenure homes to meet the needs of local people. Bringing 16,400 long term empty properties back into use, tackling deprivation and worklessness and encouraging private sector led housing building’.

3.3 Lancashire

The Lancashire Strategic Housing Partnership is made up of three separate sub regions: Central Lancashire, Pennine Lancashire and Mid Lancashire. West Lancashire forms part of Mid Lancashire.

The Mid Lancashire Housing Contextual statement 2012-2015, sets out the priorities for housing across the Mid Lancashire area of Lancaster, Preston, South Ribble, Chorley, Ribble Valley and West Lancashire. These authorities, along with Lancashire County Council, have agreed to:

- Maximise the potential of Mid Lancashire’s key economic development and regeneration activities;
- Ensure that infrastructure that supports the area is capable of supporting challenging economic growth ambitions; and
- Capitalise on the area’s unique educational attributes to support and sustain commitment to a knowledge led economy.

Underpinning the Housing Contextual Statement, the Local Investment Plan (LIP) for Mid Lancashire was published in May 2012. The LIP puts forward the case for investment in housing and regeneration across the sub region. Set within the context of the Lancashire Local Enterprise Partnership, the LIP considers all relevant strategic priorities for investment, and develops a set of thematic priorities that bring together aspirations, needs and potential; these include:

- Delivering significant sustainable housing growth and regeneration to meet demographic and economic needs;
- Integrating housing and economic potential to maximise investment in both;
- Delivering affordable housing to meet economic and social needs;
- Providing better life chances for communities;
- Creating and maintaining places where people want to live; and
- Making the best use of assets and achieving more for less.

These themes are also articulated spatially within the LIP following an exercise to consider potential housing sites and areas against the thematic priorities. This work produced a portfolio of potential housing sites and areas considered to be the key strategic sites for initial investment in the sub region; these sites include Skelmersdale Town Centre in West Lancashire. A refresh of Lancashire LIP is underway and expected to be issued before the end of 2014/15.

We remain committed to the Mid Lancashire Housing Partnership and will continue to work to deliver housing priorities developed through the Mid Lancashire Housing Contextual Statement and Local Investment Plan

3.4 Opportunity

The economic and housing agendas in both the Liverpool City Region and Lancashire provide significant opportunities for West Lancashire. New employment opportunities are likely to present themselves and local business will be able to benefit. West Lancashire will be positioning itself to ensure that it is considered as an attractive place to live and work and that local people can benefit from opportunities that develop through our regional partnerships

In overall terms we recognise the importance of and need to be part of and influence relevant housing and economic agendas beyond that of our own Borough Council boundary. With that in mind we aim to maximise any opportunities and work within any partnership arrangements across Liverpool, Manchester and Lancashire to enable us to achieve our broader Council objectives.

3.5 West Lancashire's housing strategy within a local context

Housing is one important element to the economic prosperity and growth of West Lancashire. The West Lancashire Local Strategic Partnership, now replaced by One West Lancashire, prepared a sustainable Community Strategy for West Lancashire 2007-2017. One of the key objectives is 'To provide more appropriate and affordable housing to meet the needs of local people' and One West Lancashire has reconfirmed its commitment to retain this as a strategic objective.

The Council's vision is:

To be a Council to be proud of, delivering services that are lean, local and fair.

Our Corporate Priorities are:

- Balancing the budget and providing the best possible services within the resources available;
- Focussing upon sustainable regeneration and growth within the Borough;
- Caring for our Borough by delivering the small improvements that can make a big difference.

Our services will continue to prioritise the following, subject to affordability:

- Protect and improve the environment and keep our streets clean and tidy;
- Combat crime and the fear of crime;
- Work to create opportunities for and retain good quality jobs in particular for local people;
- To be a top performing landlord;
- Improve housing and deliver housing that meets the needs of local people, including affordable housing;
- Provide opportunities for leisure and culture that together with other council services contribute to healthier communities.

The vision within the Local Plan is underpinned by the delivery of good quality housing in terms of price, type, tenure, size and location in sustainable neighbourhoods supported by quality services, amenities and good transport links and this is reflected within the key objectives within the plan to '*provide a range of new housing types in appropriate locations to meet the needs to West Lancashire's population, including affordable housing and specialist accommodation.*'

The vision for the housing strategy is:

The provision of good quality housing which meets people's changing needs and is located within pleasant, safe and sustainable communities.

Diagram 1 below shows the housing strategy as it sits within the Corporate context of the authority.

Chapter 5 highlights the housing market challenges we face.

Diagram 1 – Housing Strategy in the Corporate Context



What has changed since the last strategy?

4.0 Introduction

Since our last housing strategy there have been significant changes to the policy context within which we operate. These are:

- Welfare Reform Agenda which has changed the way that housing benefit is paid in the social rented sector and private rented sector along with the phased introduction of Universal Credit from October 2013;
- New ways of funding new affordable homes;
- Changes to the way in which social housing is let to people in housing need;
- Our Council housing is now self-financing;
- The way in which housing is planned for and built potentially makes it more difficult to deliver affordable housing;
- Much less money to fund our priorities

We outline below some of the most relevant changes and impacts for housing and local people in West Lancashire and how the Council has responded to date.

4.1 Welfare reforms

The Welfare Reform Act, introduced by the Government, changes the way welfare support is calculated, decided and paid. For tenants living in the private rented sector, changes on the amount of housing benefit available already limit the choice of properties that are available to them within Local Housing Allowance payments.

In April 2013, social housing tenants, of working age, living in a home larger than their household needs, have had their housing benefit reduced. If they are deemed to have one spare room, their benefit will reduce by 14%. If they have two or more spare rooms, there will be a 25% reduction. As at December 2013 this change affects approximately 950 Council tenants in West Lancashire and places an increasing importance on the Council encouraging and facilitating our tenants to transfer to appropriately sized accommodation. There are other changes within the Welfare Reform Bill and the Council is working alongside a number of different partners to ensure that local people remain informed and where possible supported. In the case of Council housing, we are already supporting tenants through the appointment of a financial inclusion officer and additional staff to help tenants examine what options are available to them.

Welfare reform will also impact upon some of the tenants of private landlords and other registered providers of social housing. Tenants affected by these changes may therefore need advice and assistance to support them manage any financial impact so that they can retain their tenancy or explore their housing options if they need to move to smaller accommodation.

We do recognise that welfare reforms will have a financial impact for some households and so we have commenced work to develop a cross tenure financial inclusion strategy to provide a co-ordinated approach to assist households to maximise their incomes and their ability to manage their money effectively.

4.2 Funding for affordable housing

On a national level, the grant from the Homes and Community Agency (HCA) for affordable housing development over the period 2011-15 has reduced and is about 50% less than during the previous four year period. Despite the decrease in grant in real terms during the period 2011-2015, the Government developed a new tenure, known as 'Affordable Rent'. The new tenure approach was intended to sustain levels of affordable housing development by enabling social housing providers to charge higher rents, at up to 80% of market levels, and use the increased rental income to support additional borrowing to compensate for the reduced grant.

The Council recognises the importance of increasing the number of affordable homes that are built in West Lancashire, and this remains an on-going priority for the Council which has been underpinned by the Council committing its own funding and land to support new schemes.

The Council works strategically with its Registered Provider (RP) partners and the HCA to continue its success of leveraging in grant investment to the Borough from the National Affordable Housing Programme. Since 2005 our joint working has helped secure £10 million HCA grant investment and has provided 271 affordable dwellings with total scheme cost of £34.5 million. This is a significant amount of inward investment into our Borough.

4.3 Access to affordable housing

Access to social housing has been a key focus for the Government, and through the Localism Act 2011 social landlords have the option of introducing fixed term tenancies which have given social housing providers the ability to provide a fixed term tenancy rather than having to provide a 'lifetime' tenancy.

In 2013 the Council published a tenure strategy which lists the type of tenancies the Council will make available. The Council aims to make the best use of social housing stock whilst also maintaining cohesive and stable communities and has chosen to introduce five year fixed term tenancies. For the majority of new tenants this will mean that following a satisfactory introductory period of the tenancy (the first 12 months) tenancies will be then offered on a fixed term of five years. There are certain exceptions to this approach where lifetime tenancies will remain.

The Act also provides powers to allow local housing authorities to exclude those with no statutory priority for social housing from applying for it. Following review and consultation the Council published a new allocations policy in 2013 which changed who can apply for its social housing. This new policy approach takes account of the fact that Council housing is a limited resource and that some households on the Council's Housing Register have a reduced chance of ever being allocated a property because priority is given to those in the greatest housing need. The Council knows that many families work hard and are on relatively low incomes and so the Register recognises and provide some preference to households that can demonstrate that they are working or making a contribution to the community in other ways, e.g. volunteering or training. Members of the British Armed Forces with a local connection to West Lancashire and seeking accommodation on discharge are also recognised.

Council housing is the main source of affordable housing in the Borough with RP's providing in the region of 1000 affordable homes. The Council has established nomination rights to most of these homes and works closely with RP's to allocate them in line with the principles established by our Allocation Policy 2013.

4.4 Council housing finance reform

The Localism Act 2011 has been the vehicle for reforming the system for financing Council housing by introducing a model known as self-financing. Previously, the Government have decided the level of rent that local authorities could charge, this was then 'pooled' nationally and redistributed in line with an agreed formula which took into account a number of things, such as the cost of managing housing stock. West Lancashire was a loser under this arrangement in that up to £6.2 million pounds per year of rental income out of £20 million was paid into this national pool.

West Lancashire has now come out of this system and is a self-financing local authority, which means that we have effectively "bought ourselves out" of the national subsidy arrangement, and have taken on debt in the region of £88 million. The benefits of this is that we can now retain all of the rent paid by tenants for use within West Lancashire.

As a landlord, we have developed a 30 year business plan that has structured the repayment of this debt in a way that enables us to maximise the level of investment into our housing stock. Specifically, we have profiled the repayment of this debt to enable us to invest £65 million in our housing stock during the first five years of our business plan. This is already resulting in significant improvements to many tenants' homes.

The long term viability of the business plan is of course dependent upon rental income being charged and received. With this in mind our business plan is underpinned by a risk assessment which is reviewed regularly to ensure that identified risks including that of Welfare Reform implications are managed effectively.

4.5 Planning Reform and the national planning policy framework

The Government regards effective planning policy as key to the delivery of new housing supply. To this end a fundamental review of planning policy has been undertaken culminating in the introduction of the National Planning Policy Framework.

The National Planning Policy Framework was published in March 2012 and stresses the need for Councils to work with communities and businesses to seek opportunities for sustainable growth to rebuild the economy; helping to deliver the homes, jobs, and infrastructure needed for a growing population whilst protecting the environment. The emphasis is on developing viable housing sites. In the current economic climate, where values in some areas have dropped and sites purchased some time ago for much higher values than they are worth today, can mean that achieving housing development can become challenging. The economic viability of some sites can be further affected by the requirement to provide affordable housing. This can mean that it becomes increasingly difficult for a Council to negotiate the level of affordable housing that it needs to deliver. Innovative approaches to assist in meeting affordable housing targets are needed.

In addition, the Government has also announced a series of planning and housing measures aimed at facilitating housing growth that enable developers to **renegotiate Section 106 agreements**: legislation now allows any developer of a site deemed unviable due to affordable housing planning obligations to appeal with immediate effect. The Planning Inspectorate will then review the application to determine the number of affordable homes that need to be removed to reach viability. The original Section 106 agreement will then be suspended for a three year period.

Another change introduced is the Community Infrastructure Levy (commonly called 'CIL'). It is a planning charge, introduced by the Planning Act 2008. It came into force on 6 April 2010 through the Community Infrastructure Levy Regulations 2010 and allows local authorities in England and Wales to raise funds from developers who are undertaking new building projects in their area. The money can be used to pay for a wide range of infrastructure that is needed as a result of development. This can include things like transport schemes, green spaces and the maintenance of new infrastructure. In West Lancashire we are aiming to introduce CIL in May 2014. Affordable housing contribution will not be included in CIL and will continue to be negotiated through Section 106 agreements.

4.6 West Lancashire Local Plan 2012-2027

In October 2013, the Council adopted a new local plan which guides future development within West Lancashire over the 15 year period to 2027 and sets out:

- The distinctive features, issues and challenges in the Borough;
- A vision of how we would like the Borough to be in 15 years time;
- What we need to do to achieve this vision;
- Key policies to help meet our goals.

It contains clear objectives for housing 'to provide a range of new housing types in appropriate locations to meet the needs of West Lancashire's population'. This will include delivering these on brownfield sites where the sites are available, viable and deliverable. They will also be concentrated, where available, in the major urban areas, where services and transport facilities are established. The plan allows for the delivery of 4,860 net new dwellings with 2000 of the homes being in Skelmersdale. Over the plan period this breaks down to 302 per year for the period 2012-2017 and 335 per year for the period 2017-2027.

The following chapter considers our housing challenges.

The challenges in our housing market

5.0 Introduction

Our Borough is predominately rural in nature and is widely recognised as a very popular place to live but we also face a number of challenges which are explained in this chapter:

5.1 Population growth

Our population is growing – The 2001 Census recorded a Borough population of 108,400 and the Census in 2011 recorded a population increase of 2.1% to 110,700. Population projections predict that by 2031 the population will be in the region of 120,900. We need to cater for this growth and will do so in line with our Local Plan 2012-2027.

Within our existing population, the age profile in West Lancashire is generally older than that of the sub region, region and England; we have more residents aged over 40 and fewer under this age. However, there are variations in the population age structure between settlements. In general, the rural areas of West Lancashire are more attractive to people of middle or retirement age, whilst Skelmersdale has a younger, more varied population structure.

England experienced a baby boom of 6.9 million live births between 2001 and 2013. In 2020, the first children from this boom will be turning into ambitious young men and women, looking to move out, find work and kick-start their adult lives. We know already that West Lancashire is losing younger households to other areas, and this is a cause for concern because younger people support economic growth and ensure the future supply of a skilled and active labour force.

This means that one of our priorities is to deliver more homes for the future needs of our residents. In doing so our housing offer must be realistic and market facing and we must consider how best to encourage development by using all the tools at our disposal including seeking out new models for housing delivery. Our Housing Need Survey of 2010 and other housing data research highlights a need to ensure we are providing the 'right' type of housing offer to retain and attract younger and economically active growing families and first time buyers.

5.2 An ageing population

We know that our population is ageing and the number aged 60 and over is projected to increase by 35.5% from current levels, and the number aged 75 and over by 77.4% to 2035. This means by 2035, there will be 10,300 more people aged 60 and over and 7,200 people aged 75 and over. This is likely to increase demand for housing related support and other forms of social care to enable residents to remain in their own homes. It is therefore important to work to develop suitable housing tenure and property type housing offers, including specialist supported housing solutions for our ageing population.

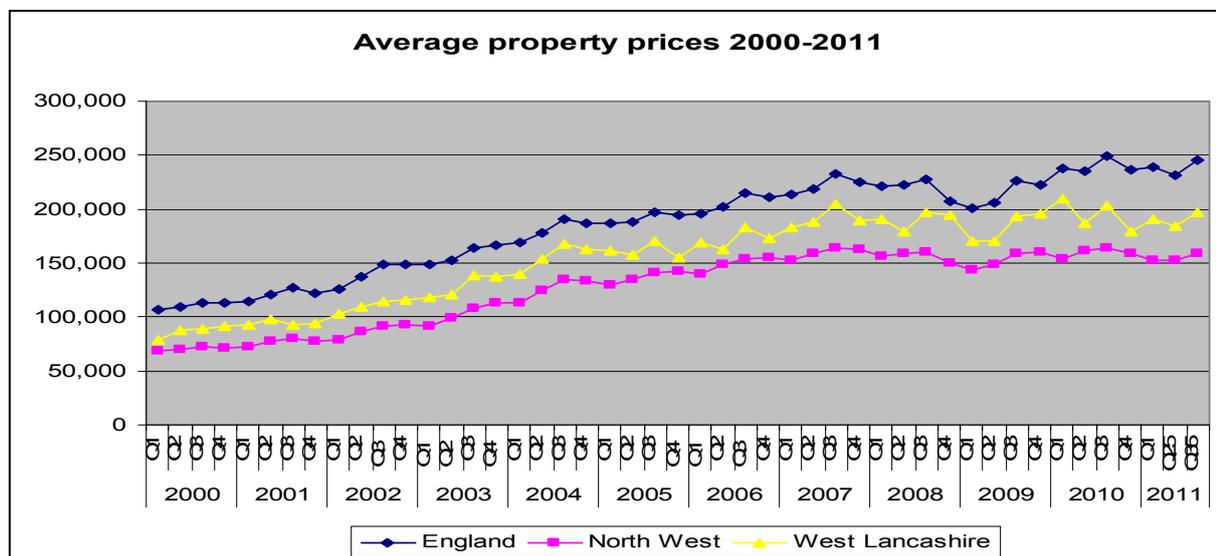
5.3 Specialist housing requirements

We recognise that there are specific vulnerable client groups who need particular types of housing to help them have an opportunity to live independently. We already work with Lancashire County Council Supporting People Team and other statutory agencies in health and social care services to try to assist in increasing accommodation provision. We know from these agencies that the lack of appropriate supported accommodation options available has meant that people have been placed in out-of- area residential placements, moving them away from their localities – family, friends and community infrastructure.

We want to work with health and social care statutory agencies to stop this happening. We have the desire to assist, however the challenge is providing the right type of accommodation along with the right model of support that proves both economically viable and provides a suitable housing solution for the particular client group.

5.4 It is expensive to buy a home

Buying a home in West Lancashire is relatively expensive. Average prices and lower quartile prices (usually targeted at first time buyer) are higher for West Lancashire than the North West average. Over the period January to the end of July 2013 the average house price was £197,882, with £219,469 for a new build property. This means that there are cheaper properties in neighbouring local authorities to West Lancashire, a key factor in attracting households to the area. Such households trying to get on the housing ladder can access more affordable areas outside of the Borough and in some instances do relocate to a cheaper home in another Borough. This may also mean that they are not able to live close to their families. The chart below demonstrates how West Lancashire house prices are consistently higher than the North West average.



House price is just one aspect of the issue of affordability. Household incomes need to be understood along with other factors such as changes to financial institutions lending criteria or deposit requirements for those wishing to buy a home.

The contraction in the mortgage market and increase in deposits required to purchase a property has made home ownership even less accessible for first time buyers in the Borough and there are a growing number of households that make up what has become known as the 'excluded middle market'; those unable to access home ownership and unlikely to qualify for social housing. It is important that we have a housing offer for this group.

The Government has responded with different house purchase initiatives to help households bridge the deposit gap, usually with equity loan type products. While these products are helpful, they do not assist all household income types and so we need to ensure that purchasers in West Lancashire can access a range of low cost home ownership products, such as shared ownership and shared equity; which are currently in short supply.

New build properties are always popular with first time buyers, having relatively low maintenance costs, and are often offered with a number of moving in 'incentives'. However, average new build prices in the Borough in 2012 were £183,259. This means that a household would require an income of £52,359 to afford to buy an average new build home if they had no existing equity. The most affordable new build properties are in Skelmersdale at circa £143,000, which would require a household income of £40,857. The average household income in the Borough is £35/36,000.

It is clearly important that we have a housing offer that will not only meet affordable housing need but also help retain and attract younger and economically active growing families and first time buyer households. This will help assist in economic growth and ensure the future supply of a skilled and active labour force. Low Cost Home Ownership products can be helpful as part of that housing offer.

The table below illustrates the ratio of median house price to median earnings average earnings in relation to neighbouring authorities and Liverpool and Lancashire wide. This table further demonstrates that housing affordability is an issue in the Borough and that neighbouring authorities are likely to be more appealing to prospective purchasers from a house price perspective.

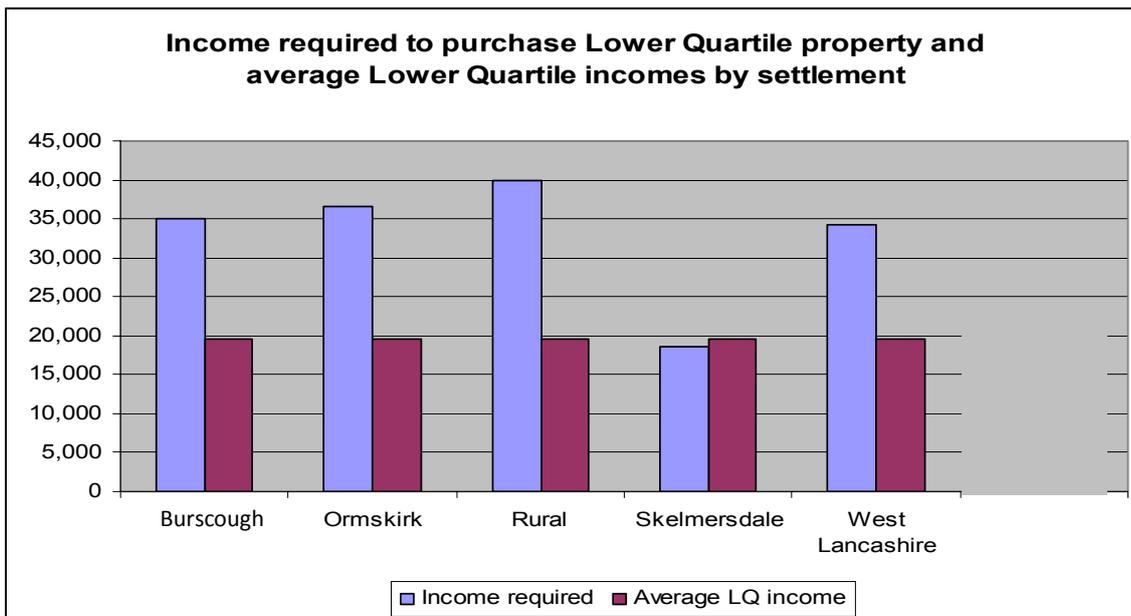
Location	Ratio as at 2012
West Lancashire	6.53
Chorley	6.25
South Ribble	6.13
Sefton	6.06
Wigan	5.00
St Helens	4.76
Knowsley	4.15
Lancashire Wide	5.40
Liverpool	4.12

The Local Plan (2012-27) anticipates a significant increase in housing delivery from 2015 onwards. This will provide an opportunity, in part, to address affordability issues as there is a planning policy requirement to provide affordable housing where certain criteria are met.³

5.5 We need more affordable housing

As stated previously housing is relatively expensive in West Lancashire. This coupled with a households income and lending criteria can affect whether a household is able to find housing, whether to rent or buy within their household budget.

However, when household income is considered within the context of a household trying to gain access to the housing ladder, then even the cheapest of homes, remain unaffordable for some households. The chart below shows the income required to purchase lower quartile property and average lower quartile incomes by settlement.



According to data at July 2013 there were a total of 3,380 households on the Council's Housing Register. The last full assessment of housing need undertaken in 2009 by Fordham Research and published in 2010 estimated an annual net shortfall for affordable housing of 214 units per year. The assessment went further and suggested that the tenure mix should comprise mainly of social rent units at 80% of all new affordable housing and the 20% remainder being in the form of intermediate housing products⁴.

³ Policy RS2 of the Local Plan provides further information.

⁴ 'Intermediate' housing is a term which refers to housing which falls between 'social housing' (such as traditional rented council housing) and 'open market' housing; it is intended to bridge the gap between the two. It was noticed that as house prices increased, the gap between social housing and open market housing grew, meaning people often could not afford to progress from social housing to owning their own home. Intermediate housing tries to bridge the gap as 'more affordable', sitting below open market prices but above social housing

The social housing stock available for those in housing need is low compared to the average levels in the North West (18.6%). Social housing represents 15.1% (7,000) of the total housing stock in the Borough (47,000). This, alongside the Borough's proportionately higher house prices, means that access to affordable housing is limited in West Lancashire.

Affordable housing is also geographically limited in West Lancashire. The chart above shows that the majority of it is located in Skelmersdale. This is an important factor, and one we need to consider when looking at affordable housing requirements and supply at local level. While there has been significant affordable housing development success in recent years, there still remains a pressing need for affordable housing in the Borough, particularly in rural areas and the towns of Ormskirk, Burscough and Aughton.

Rebalancing the housing market, to increase the proportion of affordable housing outside of Skelmersdale and increase the proportion of affordable housing for families and accommodation for older people in Skelmersdale, will be a priority within our overall plan to increase the supply of affordable housing across the Borough.

Building homes to the Lifetime Homes standard is also important and the Local Plan 2012-2027 expects all affordable housing units to be built to Lifetime Homes Standards.

5.6 We need to make more of the private rented sector

In September 2012, the Government announced a range of proposals to encourage the provision of new homes to meet the country's demographic needs and to help generate local economic growth. As part of that announcement, Government established a Build to Rent Fund to invest £200m in housing developments to ensure that the high quality rented homes that are needed are delivered. They recognised that demand for market rented homes is increasing in many parts of the country and that this sector could:

- be a very effective extension to the social rented sector, where lengthy waiting lists and allocations based predominately on need mean that many households are less likely to ever gain access to it;
- and it can also support those households who are now unable to access the home ownership ladder given the tightened mortgage lending restrictions and increased deposit requirements.

In West Lancashire we have seen an increase in the total number of properties coming onto the market from 675 in 2009 to 1,028 in 2012; an increase of 52.3% (Vizzihome). The growth in part is likely to be the expanding student population and also as a result of the Borough attracting migrant workers working within the local rural economy.

Although there has been an increase in the supply of private rented accommodation since 2009, only 30% of all properties coming to the market have been within the Local Housing Allowance caps. Households relying on housing benefit to pay their rent lack choice in the existing private rented market. This will be further constrained by the financial impact upon those households as a result of bedroom tax and remaining Welfare Reform changes.

In July 2013 the Council Housing Allocation policy changed to provide increased priority for social housing to those applicants who demonstrate a commitment to contribute to the Borough's economic growth as working households or who make a contribution by their contribution within communities. This will assist some economically active households but those remaining will still be reliant upon the private sector housing to obtain housing.

This means there is potentially an important role for the private rented sector both in meeting people's housing needs, and in supporting economic growth by enabling people to move to and / or move within the Borough to take up jobs and respond to their households changing circumstances.

We recognise that the private rented sector, if managed effectively, could help provide an alternative housing offer to those households, who are unable to purchase a home. The Council will consider it's role carefully in respect of this growing sector and whether it is appropriate to encourage build to rent and other options to expand this tenure, whilst also aiming to improve overall housing quality and its management.

5.7 Many properties still need investment

The relationship between poor housing and poor health has been recognised for a long time. Poor housing has a direct impact on the number of accidents in the home, educational achievement and general well being. In addition to the wider benefits to society of improving housing, there is a direct benefit to the NHS through reduced injury rates and treatment costs where the condition of housing is improved.

Our 2010 Private Sector House Condition Survey provides in depth information about stock condition in the Borough and identifies that where homes have failed the decent home standard or the Housing Health and Safety Rating System introduced in 2004, there is often a correlation between improvement works being required but the residing household not being able to afford them. This means that some households will be unable to fund the required improvements to their homes, improvements that could remedy problems such as inadequate heating, damp and mould and any associated health conditions

5.8 Promoting energy efficient homes

The Climate Change Act 2008 aims to help the transition towards a low-carbon economy in the UK and includes legally binding target of at least an 80% cut in greenhouse gas emissions by 2050. The Act commits the UK to reduce household CO2 emissions to almost zero over the next four decades. The Government's flagship policy to achieve energy reduction in buildings is the Green Deal – a loan scheme for householders and business to finance energy related home improvements.

In West Lancashire we are aware that the mean SAP rating of privately owned properties in West Lancashire is 53 as reported in the Councils 2010 Private Sector Stock Condition survey. This is better than the national average of 48, but there is scope to reduce emissions from this sector. Typically, the lower SAP ratings are found in older, pre-1919 dwellings and converted flats, which suffer with high heat loss. The privately rented dwellings across the Borough have a mean SAP rating of 51.

The same Housing Stock Condition Survey identified that 43% of privately owned properties have less than 200mm of loft insulation with 2.9% having no loft insulation at all and that many properties in Skelmersdale which were built using structural pre-cast concrete units with solid external walls are thermally inefficient and difficult to improve, in terms of thermal efficiency.

The Government is also committed to tackling the issue of vulnerable people being unable to afford to heat their homes. The national fuel poverty strategy aims to end fuel poverty by 2016.

With these Government objectives in mind and our own desire to improving the energy efficiency of the housing in West Lancashire, this has been set as a priority for the Council as defined within its sustainable energy strategy 2012 - 2020.

5.9 Other relevant themes and housing market challenges

We have highlighted above some of the issues that we aim to address in this housing strategy. They relate mainly to our housing market and the issue of housing supply, making the best use of existing stock, the impact of population growth and changes in age profile in the years to come.

However housing strategies also consider other issues. These are introduced in the next chapter, all of which make up the housing strategy objectives that we have chosen to focus upon during the life of this Housing Strategy. Our housing market issues are summarised below:

- We have an ageing population and this will mean we will have to deliver an increasing range of tailored housing solutions for this client group, and where appropriate promote the use of our own Home Care Link monitoring service and assistive technology to help households remain independent in their own homes;
- Research suggests that younger households are leaving West Lancashire to move to adjacent Borough's, often in search of more housing choice at a price they can afford. Our housing need survey 2010 indicates a need for smaller (2 bed) starter homes for first time buyers;
- The housing market is polarised with affordable housing being geographically concentrated in Skelmersdale, reducing the choice of location for people who want to access affordable housing. Whilst in house price terms, there is a good supply of affordable housing in Skelmersdale it does not meet with prospective purchaser house type aspirations. There is also a shortage of accommodation that meets the housing aspirations of older people, with some Council sheltered property not proving

popular by virtue of size and design. Similarly there is a shortage of smaller affordable housing units for young families to suit their housing aspirations;

- There is a need to increase supply of affordable housing in rural areas and Ormskirk, Burscough and Aughton;
- It is important that we develop a housing offer for the excluded middle market to either access home ownership using Low Cost Home Ownership products such as shared ownership and shared equity or to facilitate the private rented sector to provide a good quality alternative;
- There are increasing demands for private rented sector. This is a growing sector and we need to facilitate and encourage an increased supply of good quality, well managed properties;
- There is a need to continue to support the green agenda and improve the energy efficiency of the housing in West Lancashire. This will assist households with their energy housing costs, help to alleviate fuel poverty and contribute to CO2 reductions;
- We need to ensure that our placement and relationships within the Lancashire, Liverpool and Manchester geographical context enables us to actively support our strategic housing priorities.

Our housing strategy objectives

6.0 Introduction

In developing our housing strategy objectives we have examined housing data, reviewed our existing policies, and identified potential areas for priority for the Council. Based on these findings; the wider strategic housing agenda and following discussions with officers, we then consulted with residents of the Borough and relevant partners to identify the housing strategy priorities for the Council over the next five years.

Throughout the consultation process we made clear that the Council had finite resources. It was acknowledged that the Council, as it worked on delivering this housing strategy, would therefore have to:

- ⇒ **Manage housing demand** by having mature and honest conversations with our customers so that they have realistic expectations by virtue of the provision of quality advice, so that they understand the housing options available to them. From that point they can exercise choice, perhaps amend their housing expectations which may enable them to find their own solutions to their housing circumstance.

We have chosen six housing strategy delivery objectives which are discussed further in this section.

6.1 Objective 1 - Achieve the right supply of new homes including maximising affordable housing

For this objective we want to encourage a choice of homes that meets the needs of our existing residents and provides a suitable housing offer for those households wishing to invest and make their home in West Lancashire. We want to develop high quality new homes in locations where people want to live and that support economic growth and we want to ensure that there is a choice of different tenures available.

This has been difficult given the economic conditions in recent years which made it necessary for housing developers to display caution when they have looked to develop housing sites. However, there has been consistent interest by developers in delivering new homes in our Borough, although now, we are noticing that interest culminating in receipt of actual planning applications. This is positive and we would wish to work with developers and other housing providers to create a housing offer which is appropriate for West Lancashire.

The West Lancashire Local Plan 2012 – 2027 is central to increasing housing supply and it intends that the needs of all sectors of the community are intended to be catered for through the provision of lifetime homes where this is deemed to be appropriate. The Local Plan requires that in housing schemes of 15 dwellings or more, 20% of new residential units should be designed specifically as accommodation suitable for the elderly. This will assist in part, to providing a housing offer suitable for our ageing population, although further work will need to be undertaken to ensure that there is range of tenure options suitable for this household group. Additionally we will ensure that smaller homes are provided for First Time Buyers with a range of purchase options such as shared equity and shared ownership.

The plan allows for the delivery of 4,860 net new dwellings with 2000 of the homes being in Skelmersdale.

Over the plan period this breaks down to:

- 302 per year 2012-2017
- 335 per year 2017-2027

We aim to create sustainable communities and promote sustainable development and we will seek out new ways of delivering housing supply in the future. We will explore and consider a number of options which are likely to include developing new delivery vehicles where the public sector takes on risk (and profit) alongside other public and private sector partners; these will make best use of public sector assets, particularly land, and we are aiming to maximise new investment sources such as the New Homes Bonus, and think more innovatively about how we can use funding sources to bring new housing supply forward.

We will also explore any pilot opportunities to try out different delivery approaches. Most recently the Council became just one of three Councils in the Country to work with the Homes and Communities agency to

undertake a Land Auctions pilot. The pilot project tests the land disposal elements of a proposed national community Land Auction model, which could potentially replace the current planning system for the provision of new homes. The pilot began in 2012 and will last for two years, during which time development sites will be brought forward which meet the objectives of the Local Plan. It is anticipated that the sale of at least part of the land will take place during the early part of this housing strategy. Dependent upon which site(s) are selected, there is the potential for a significant sum of money to be raised which can then be used, through the Capital Programme, to invest in the priorities of the Council.

6.2 Objective 2 - Regenerate and remodel areas of Skelmersdale

Skelmersdale was designated in 1961 and was the first new town in the North West. The town has a population of 35,000 (Census 2011), has a good central location, near main transport routes such as the M58 and M6 and has excellent links with the wider region. The town was initially intended to accommodate population overspill from Liverpool with the former New Town being established as part of an overall masterplan, which included provision for a new town centre comprising new retail, leisure, services and commercial facilities.

Work started on the new town centre in the late 1960s and was initially seen as a great success. Over the course of the last 20 years the town has struggled to compete with larger and more successful centres and as a consequence its influence and popularity has declined.

For many years West Lancashire Borough Council has recognised the need to regenerate the town by improving existing facilities and attracting new retail and leisure elements. In addition the housing offer in Skelmersdale is such that it has led to an imbalance in the local housing market with there being evidence of:

- Some areas of low demand, in both social housing and owner occupied stock, associated with poor design and/or neighbourhood reputation;
- High housing densities and poor estate layout can contribute to feelings of insecurity;
- Relatively low house prices, and a lack of variety in housing types, leading to more affluent households moving out of the area;
- Some evidence of properties being bought up by absentee private landlords, with unstable private tenancies undermining the sustainability of some neighbourhoods;
- Relatively high concentrations of deprivation in some areas.

This is not unusual in former New Towns as reported in the DTLR Report (2002) 'The New Towns: Their Problems & Future' which highlights some of the problems faced by former new towns, including Skelmersdale.

The town is known to have a higher percentage of people affected by a long-term illness, or a physical health problem, than elsewhere in the Borough and this means there is a continuing and long-term demand for specialist and adapted accommodation.

There has been, in the last decades or so, building of new private housing estates on the outskirts of the town. These estates have proved popular and some of the houses are in the top income-purchasing band, however there is still a need to diversify the style and range of residential accommodation available and for this work to be complemented by the Town Centre Regeneration.

In order to address the issues mentioned above a Supplementary Planning Document and masterplan was developed and adopted in 2008, with housing as a significant driver in the area's redevelopment. The masterplan includes the development of high quality market housing, for sale and to rent, low cost market housing and affordable housing.

6.3 Objective 3 - Make the best use of all existing homes

Making the best use of the existing housing we have whether in the private sector or that social housing owned by the Council and Registered Providers will play a central role in meeting housing need and demand as well as enabling housing choice.

It is important to use existing housing stock effectively, including reducing long term empty properties. We wish to make the best use of all existing homes available across the Borough, to connect people to an improved housing offer whether that be a larger or smaller home or a home with an adaptation.

6.4 Objective 4 - Encourage well managed and maintained homes across all tenures

Many households aspire to homeownership yet are unable to buy their own property. This often means that they will seek to obtain housing by renting from either a private landlord, the Council or other Registered Providers. Some households are happy to rent and find that it suits their lifestyles. Irrespective of their tenure preference though, households who rent, will expect their home to be well managed and well maintained.

This Council seeks to encourage, professional housing management across West Lancashire. We are also mindful that we are the largest landlord in the Borough and that our own approach needs to reflect the high standards that we expect by other landlords within the private rented sector and social housing owned by the Registered Providers.

There are enforcement tools available to the Council to ensure that property is maintained and managed in line with legislation. The Council would prefer to inform and educate any offending landlords to allow them opportunity to respond in a manner that would mean enforcement is not required. Sometimes this approach is all that is required as the landlord has not been fully aware of what is required from them. We will though, continue to use enforcement powers when necessary.

6.5 Objective 5 - Encourage investment to meet specialist housing requirements

We are keen to encourage investment in the Borough to help assist in meeting specialist housing requirements. Vulnerable client groups such as those with a learning disability, physical disability, those subject to domestic abuse, sensory impairment, including those with mental health issues sometimes require both accommodation and appropriate support to help sustain independent living. Dependant on the circumstances then such support may also be required for young people who are affected by homelessness, are estranged from home or in need of appropriate support for some other reason. Older people's health or social circumstances can also mean that on a case by case basis, older members of the population may need access to specialist housing and/ or support.

This is a diverse area of development that not only requires use of capital assets but also revenue funding to support the provision of the required support services. Encouraging investment and achieving delivery will be challenging in the current environment as budgets continue to be squeezed. The Council, along with statutory agency colleagues across the social care and health spectrum will need to work together and explore the availability of funding streams and delivery models to support investment. This will include exploring funding availability from the recently established Clinical Commissioning Groups (CCGs) who replaced Primary Care Trusts (PCTs) from March 2012.

6.6 Objective 6 – Deliver the Council's sustainable energy strategy 2012- 2020 Residential and Domestic Sector objectives.

West Lancashire Borough Council has produced and published a sustainable energy strategy 2012-2020. It covers a number of themes which recognise that climate change is an internationally important problem and that we can play a significant part in tackling the issue locally. It refers to housing sector issues under a theme described as the Residential and Domestic Sector. It has two delivery objectives identified as follows:

- To improve the energy efficiency of West Lancashire housing;
- Tackle hard to treat properties, reduce fuel poverty, and ensure affordable warmth for all

It is important to recognise the importance of this work, hence reference being made to it in this strategy as housing has a significant role to play in terms of reducing fuel poverty, improving the energy efficiency of existing housing stock and ensuring that all new housing built is sustainable.

6.7 Summary of our housing strategy objectives.

We show in the next few pages the high level actions which we consider will make the greatest impact to achieving the following six objectives:

- ✚ Achieve the right supply of new homes including maximising affordable housing;
- ✚ Regenerate and remodel areas of Skelmersdale;
- ✚ Make the best use of all existing homes;
- ✚ Encourage well managed and maintained homes across all tenures;
- ✚ Encourage investment to meet specialist housing requirements;
- ✚ Deliver the Council's Sustainable Energy Strategy 2012- 2020 Residential and Domestic Sector objectives.

Objective 1 - Achieve the right supply of new homes including maximising affordable housing

Delivery Action - Implementation of the West Lancashire Local Plan 2012-2027.

The plan sets out a clear objective for housing, 'to provide a range of new housing types in appropriate locations to meet the needs of West Lancashire's population'.

Implementation of the plan will result in acceptable land sites delivering new homes, jobs and training opportunities for residents of the borough and additional affordable housing through use of planning policy.

Policy RS2 of the West Lancashire Local Plan 2012-2027 requires that at least 25% of units in residential schemes of 8 dwellings and above be affordable.

Delivery Action - Secure HCA Affordable Housing Grant investment .

We will ensure that, through joint working with Registered Providers, we secure inward investment from the Homes and Community Agency to develop affordable housing.

Delivery Action - Use Council assets to support the delivery of affordable housing.

We will use Council land and / or other assets, where appropriate, to support the delivery of affordable housing. This will encourage investment in the Borough while also meeting affordable housing need. This includes using our existing partnership arrangement with Regenda Housing Group.

Delivery Action - Develop 500 new affordable homes.

We wish to encourage and enable the delivery of no less than 500 affordable homes during the life of this housing strategy which shall consist of a range of affordable housing tenures including, where appropriate, tenure suitable for First Time Buyers. This will be achieved by using planning policy requirements, development of 100% affordable housing schemes and a modest council new build programme where it is affordable and contributes to Objective 2.

Objective 2 - Regenerate and remodel areas of Skelmersdale

Delivery Action - Complete £65 million capital investment programme.

The majority of the Council housing stock is in Skelmersdale. We have embarked upon a five year £65 million capital investment programme which will significantly improve all our housing to the benefit of our tenants. The works include new bathrooms, kitchens, windows, energy efficiency improvements and other measures.

We aim to deliver the programme on time and in budget.

Delivery Action - Complete Firbeck revival and continue an estate based revival programme.

A Birch Green estate, known locally as Firbeck is benefitting from significant investment from the programme mentioned above. It involves a £5.5 million capital investment programme.

This comprehensive scheme will see existing homes improved along with some small scale demolition and regeneration provided by new homes being built. There will also be improvement to the street scene.

A second revival scheme will be identified and completed during the life of this housing strategy.

Delivery Action - Complete land auctions pilot.

The Council is participating in a land auctions pilot. This is intended to support our approach of stimulating housing growth and diversification of the housing offer in Skelmersdale and may generate capital receipts to assist further with this work. There is the potential for up to 650 new homes to be provided through the land auctions pilot across sites in Whalleys.

Delivery Action - Enable the development of specific land sites.

We intend to support the housing element of our Town Centre Masterplan and diversification of the housing offer through disposal and development of land at Findon, Delph Clough and former Skelmersdale Sports Centre. There is the potential for around 270 new homes to be provided across the three sites.

Delivery Action - Seek funding for environmental work.

In contrast to our current capital investment in our Council housing stock, our ability to invest in the environment is significantly limited, yet we are aware of the benefits of doing so. We will seek to secure any suitable funding opportunities to lever in investment to enable wider scale environmental improvements to our housing estates.

Objective 3 - Making the best use of all existing homes.

Delivery Action - Provide housing advice.

In the context of high house prices and rents, pressures on the supply of new affordable housing and welfare reform, we may well see an increase in the number of people approaching the Council because they are experiencing problems with their housing – we currently experience around 1700 enquiries a year for housing but we cannot help everyone.

People need to be able to make informed decisions and understand what broader housing options are available to them to help them with their housing issue. We will provide appropriate support and quality advice so that our customers have realistic expectations, and we will help people exercise choice and find their own solutions to housing problems. Providing easy access to good quality housing advice for those experiencing problems with their housing is important. People want us to be honest about their chances of being rehoused.

Delivery Action - Bring private sector empty homes back in to use.

In September 2013, 1300 privately-owned homes in West Lancashire were empty. Of these 600 had been empty for six months or more. We are committed to bringing empty homes back into use and have found that charging Council Tax at 150% for properties empty for 2 years or more has had a positive impact on the number of empty properties. We will however, explore other approaches that could assist further in reducing the number of empty homes in West Lancashire.

Delivery Action - Produce a new private sector housing strategy.

Our previous private sector housing strategy covered the period 2006-2009. A new strategy will take account of the current policy and delivery context and will shape strategic direction related to empty homes, fuel poverty, house condition, other relevant private sector themes and funding availability.

Delivery Action - Be innovative about Council owned housing stock without a future.

We know, that a very small proportion of our properties have come to the end of their natural life and their future use needs to be reviewed. This may be because they don't meet modern day family living or because they cannot support the changing needs of older people. Where this is the case, we will undertake an options appraisal to consider alternative uses for the building or the land

Objective 4 - Encourage well managed and maintained homes across all tenures

Delivery Action - Promote the private landlord accreditation scheme.

West Lancashire's Landlord Accreditation Scheme (WLLAS) was established in February 2012. The scheme is administered by the Residential Landlords Association (RLA) and has accredited four landlords to date. The aim of the scheme is to improve property and management standards in the private rented sector. Accredited landlords will have access to RLA's training resources and legal support and a host of other benefits. The scheme is open to all landlords and has been particularly supported by Edge Hill University and Edge Hill Students Union. The scheme will continue to be promoted to raise awareness and encourage take up amongst non student landlords.

Delivery Action - Maximise use of enforcement powers to deal with problem landlords and target resources to address disrepair, unsafe properties and management issues within the private rented sector.

A large proportion of private landlords do provide good quality accommodation and fulfil their legal obligations. However where this is not the case we will maximise use of the enforcement powers available. This approach mirrors the expectation of Government in line with the Department Communities and Local Government guidance issued to local authorities about dealing with problem landlords in August 2012. We do often find that where there are problems, they can be remedied with the Council providing advice and support. In some instances the landlord may be inexperienced and so we provide them with guidance so that they can comply with their legal obligations.

Delivery Action - Ensure that Council housing is well maintained, managed and involves our tenants in the shaping of our housing service.

The Council owns and manages 6,200 homes and we aim to be a top performing landlord. That aspiration from a Council housing function perspective consists of a number of important components as follows:

Make our customers our number one priority; Be in the top 25% of performers nationally; Give our tenants the best possible value for their money; Support local people to be more independent; Tackle any incidents of anti-social behaviour in partnership with our community safety partners; Provide jobs that are rewarding and help people develop; use our spending power to help local businesses and provide local jobs and so help West Lancashire grow.

Objective 5 - Encourage investment to meet specialist housing requirements

Delivery Action - Enable the development of a Foyer for young people.

Many young people become homeless after leaving care or following parental disputes or for other reasons. The Birchwood Centre, based in Skelmersdale provide a service for young people (16-25 years old) to help prevent homelessness. They approached the Council to seek support for the development of a Foyer, a place where young people can live and receive integrated support to help them to achieve their goals and move onto independent accommodation. The Council supports the principle of the development of a Foyer and is satisfied that there is a need for such provision and have agreed to use our enabling role to try and bring the statutory and voluntary sector together to develop a Foyer in West Lancashire.

Delivery Action - Identify sites suitable for Gypsy and Traveller pitch provision.

Apart from one pitch with planning permission, there are no authorised sites for Gypsies and Travellers in the Borough, although there is an authorised site for Travelling Showpeople, located in Burscough. The Council is currently preparing a planning document to allocate two types of sites, those which may be used for Travellers to base themselves throughout most of the year, or for Travelling Showpeople to live and store their equipment outside their touring season, and sites to meet the short term transit needs of Travellers who are passing through West Lancashire.

The authority is required by national planning policy to ensure that enough sites in West Lancashire are made available to meet the needs of the travelling community. If the Council does not comply with this obligation, it will be more vulnerable to the establishment of illegal encampments and sites in the Borough. The lack of allocated sites weakens the ability of the Council to take quick and effective action to secure the removal of such encampments and sites.

Delivery Action - Ensure that the Supporting People (SP) Programme meet local need.

SP is the government programme which provides housing related support services for vulnerable people to maintain their tenancy and independent living. It is administered locally by Lancashire County Council with Borough Councils input about service provision in their locality. The SP Programme faces budget reductions and so it is important to influence positively and try different delivery models to ensure that services continue to meet local needs.

Delivery Action - Support a range of needs.

We are aware of a lack of specialist accommodation options to support a range of needs including those with physical disabilities and sensory impairment, those subject to domestic abuse, mental health problems and learning disabilities. We will work with specialist partners to ensure that we can assist with suitable accommodation options. The Council will be reliant on solid partnership arrangements being formed, supported with funding and a clear understanding of the accommodation models proposed.

Objective 6 - Deliver the Council's sustainable energy strategy 2012- 2020 Residential and Domestic Sector objectives.

To improve the energy efficiency of West Lancashire Housing

The Delivery Actions are:

- Sign up to "Climate Local";
- Increase the number of properties with the recommended level of loft and cavity wall insulation;
- Provide an easily accessible and helpful advice service for households across all tenures;
- Continue to progress the energy efficiency work programme on Council owned properties;
- Secure maximum funding from all available sources for energy efficiency projects;
- Work with landlords to improve energy standards in the private rented sector;
- Aid successful roll out of the Government's Green Deal so that it is promoted locally to householders
- Produce a HECA progress report on an annual basis.

Tackle hard to treat properties, reduce fuel poverty, and ensure affordable warmth for all

The Delivery Actions are:

- Identify opportunities to retrofit hard to treat homes in the private sector;
- Lead by example by continuing to tackle fuel poverty in Council housing;
- Explore opportunities for fuel switching;
- Aid the implementation for fuel poverty referral system;
- Consider projects specifically focussed on the vulnerable groups within our communities.

The delivery actions shown above are taken from the Council's sustainable energy strategy 2012-2020. They can be found in the Residential and Domestic Sector theme of that strategy along with further information about other planned activity to help support the Council's sustainable energy aspirations.

Resourcing and monitoring the housing strategy

7.0 Introduction

We are mindful that we are aiming to deliver this housing strategy at a time when nationally, lowering the national deficit is central to the Governments national policy agenda. Integral to this is the expectation that the private sector and local communities will deliver services in place of the public sector. Public spending has been reduced and this has meant that the Council has needed to achieve revenue savings of around 30% over the period 2011-2015. To balance the Council's budget in this context means constant, managed change and is reflected and underpinned by our Corporate Business Plan 2011 – 2015. Since the implementation of our Corporate Business Plan significant inroads have been made with £4.9 million identified of permanent revenue savings towards the £5.7 million we anticipate is required.

Delivering a housing strategy in such circumstances where funding in the public sector is reduced will mean that partnership working to deliver this strategy may become more challenging as resources become more stretched. The Action Plan that accompanies this housing strategy is therefore presented in a manner that looks at tackling our housing strategy challenges over the short, medium and longer term. This allows for flexibility to respond to funding opportunities and / or funding issues.

It is also important to note the distinction between funding of housing between that of Council housing and the rest of the housing stock (private sector) in the Borough.

- ❖ Council housing and improvements to Council housing stock is funded through receipt of rents paid by Council tenants. Council housing operates a Housing Revenue Account and is not subsidised by any Council Tax revenue. Council housing, although operated and administered by the Council, has its own income stream, through the rent it receives, in which to operate, manage and maintain its service and housing stock. Rental income received from Council tenants cannot be used to improve private sector housing. Registered Providers operate in a similar manner. The Council housing service, since 2012, operates under a self-financing model. Through that model the service has been able to borrow money to enable for £65 million of capital investment to take place in the Council housing stock. This is in stark contrast to the funds available to assist in improving private sector housing.
- ❖ Income received by the Council through collection of Council Tax is used to achieve the Corporate Priorities of the Council. As mentioned above public spending nationally has been reduced and this means the Councils financial ability to support housing initiatives that help to improve private sector housing is limited.

7.1 Resources

There are significant resources required in order to deliver the objectives set out in this housing strategy. Staffing resources are key to this and span across many teams both internal and external to the Council. In addition to this, the Council owns land and property assets which are considered possible for housing use (considered on a site by site basis) on an on-going basis through the work of our SAMP – Strategic Asset Management Plan.

Any funds made available to support this housing strategy will need to satisfy the following five principles that underpin all of our financial decisions:

- financial planning based upon realistic and prudent assumptions about the resources available to the Council and its partners
- capital and revenue resources used in such a manner as to extend and enhance finances under our direct control
- priorities aligned to local, regional and national funding streams to maximise capital income
- service users, residents and partners influence and participate in financial decision-making processes
- pro-active approaches to new funding opportunities

In addition to the above principles, the Council assesses its capital requirements using a system to rank proposed capital schemes against a range of criteria that are set out in our capital strategy and asset management plan. These criteria cover a wide range of factors including corporate and service objectives and priorities, external funding levered in, partnership working, revenue implications, and the results of stakeholder consultation. This formalised system of assessment ensures compliance with agreed priorities and is administered in line with the Councils budgeting cycle.

There are sources of funding to help support some aspects of delivery, however we will also have to try and maximise external funding opportunities as they present themselves, work with partners and think creatively about the use of any of our own funds and assets to support our housing strategy objectives. Paragraphs 8.1 to 8.7 refer to existing funding types / routes / opportunities.

7.2 Housing Revenue Account

Council housing - As a stock retained landlord the council produces a Housing Business Plan. The plan considers the capital investment needs of our housing stock to ensure that we keep our properties to a high standard. The plan also considers if there are any particular investment needs to assist in regenerating parts of our Council housing estates and takes account of the need to have appropriate staffing levels to manage the Council house service. Our Housing Business Plan can be viewed on our Council web pages at www.westlancs.gov.uk

7.3 Right to Buy Receipts

Legislation allows for most Council Tenants to exercise their right to buy their Council home. Under existing rules, when a Council home is sold, the Council is able to keep a proportion of the sales receipt which can then be used to fund new affordable housing units.

It is not possible to forecast how many homes will be sold in any financial year, however receipts from such sales can be used to support affordable housing development or regeneration.

7.4 National Affordable Housing Programme

Affordable housing – The Homes and Community agency (HCA) is a Government agency that aims to meet Government aspirations to develop affordable homes across the Country. The HCA provide affordable housing grant to Registered Providers of Social Housing to develop affordable housing. Grant is awarded via a bidding cycle where bid applications are considered against specific criteria. The amount of grant provided does not cover the full build cost and so the Registered Provider will have to fund the gap between the development cost and the amount of grant received. West Lancashire Borough Council is able to bid for HCA Affordable Grant Programme funding and may explore this route if viable.

The Council will, however, continue to work hard to maximise the amount of HCA grant provided to this authority.

7.5 Affordable Housing Capital Fund

The Council has also committed capital resources of £650k to help achieve its affordable housing delivery aspirations. This resource has been committed to a partnership arrangement with Regenda Housing Group who have ensured that their Development Teams capacity has been enhanced to deliver success through this arrangement. The partnership was originally intended to achieve delivery of up to 32 affordable housing units, however by using this fund and working with the HCA we will exceed this original delivery target with current live schemes leading to the development of up to 65 affordable units. Start on sites are planned for 2014/15 and scheme completions anticipated in 2015/16. Further affordable housing units will be delivered through this arrangement.

7.6 Supporting People Programme

The Supporting People Programme, administered by Lancashire County Council, funds housing related support services for specific vulnerable client groups across the County. The Council will need to work closely with the Supporting People Team to ensure that appropriate housing related support services are funded in West Lancashire.

7.7 CCG's Commissioning

Clinical Commissioning Groups (CCGs) replaced Primary Care Trusts (PCTs) from March 2012 when the 2010 White Paper "Equity and Excellence: Liberating the NHS" became law under the Health and Social Care Act 2012. This was part of the Government's wider desire to create a clinically driven commissioning system that is more sensitive to the needs of patients. This new arrangement does not particularly bring with it any significant additional funds, however its new operational focus may afford funding opportunities across mental health and learning disability. This will be particularly explored when aiming to deliver positive outcomes for Objective 5 - Encourage investment to meet specialist housing requirements.

7.8 Monitoring

The Council produces a number of strategies and plans directed at achieving our vision and priorities. These plans and strategies contain numerous tasks and targets which, when completed successfully, are the building blocks of our success.

To keep track of our progress we use a performance monitoring framework. This helps us monitor progress and take any remedial action to make sure that what is supposed to be done gets done. Each of our service areas produce Service Action Plans which reflect the key delivery actions we are working on as contained in our strategies and plans. These are monitored regularly through our monitoring framework with performance updates being provided to relevant service managers and service heads. Performance and achievement is also reported to our Elected Members in line with our constitution so that progress is fully understood.

The housing strategy action plan will be monitored as part of the process outlined above.

Appendix A: Equality Impact Assessment - process for services, policies, projects and strategies

1.	<p>Using information that you have gathered from service monitoring, surveys, consultation, and other sources such as anecdotal information fed back by members of staff, in your opinion, could your service/policy/strategy/decision (including decisions to cut or change a service or policy) disadvantage, or have a potentially disproportionately negative effect on, any of the following groups of people:</p> <p><i>People of different ages – including young and older people</i> <i>People with a disability;</i> <i>People of different races/ethnicities/ nationalities;</i> <i>Men; Women;</i> <i>People of different religions/beliefs;</i> <i>People of different sexual orientations;</i> <i>People who are or have identified as transgender;</i> <i>People who are married or in a civil partnership;</i> <i>Women who are pregnant or on maternity leave or men whose partners are pregnant or on maternity leave;</i> <i>People living in areas of deprivation or who are financially disadvantaged.</i></p>	<p>No - The housing strategy is intended to assist in meeting the housing needs of our local communities.</p> <p>In developing the housing strategy it takes account of a range of data sources and housing needs surveys to help determine what housing issues exist in the area and from this information, key delivery objectives have been identified.</p> <p>The Housing Strategy Vision is to: <i>“The provision of good quality housing, that is affordable, which meets people’s changing needs and is located within pleasant, safe and sustainable communities”</i></p> <p>The Housing Strategy aims to increase housing supply and that existing housing is used effectively to best meet housing need. This will have a positive impact across all the EIA groups who are regarded as being in housing need in line with recognised national guidance, legislation and policy.</p>
2.	<p>What sources of information have you used to come to this decision?</p>	<p>The Council holds a range of information in the form of surveys and other data types that helps the Council understand the Borough housing situation and the housing issues faced by our residents. Such information includes stock condition survey, the Council housing register and Housing Need Survey 2010. We are also able to access other data that that helps in our understanding of our housing markets and if there are any specific issues faced by vulnerable housing client groups.</p> <p>This information helped the Council to identify local housing issues. Consultation then took place with our partners, stakeholders and members of the public which led to the shaping of the housing delivery objectives now included in the housing strategy.</p>
3.	<p>How have you tried to involve people/groups in developing your service/policy/strategy or in making your decision (including decisions to cut or change a service or policy)?</p>	<p>Consultation has taken place with our partners, stakeholders and members of the public to shape the housing delivery objectives contained in the housing strategy.</p> <p>It is now intended to share the housing strategy, through an eight week consultation exercise, to allow a further opportunity to ensure that this strategy has captured the housing issues that need to be considered in the Borough.</p>
4.	<p>Could your service/policy/strategy or decision (including decisions to cut or change a service or policy) help or hamper our ability to meet our duties under the Equality Act 2010? Duties are to:-</p> <p><i>Eliminate discrimination, harassment and victimisation;</i> <i>Advance equality of opportunity (removing or minimising disadvantage, meeting the needs of people);</i> <i>Foster good relations between people who share a protected characteristic and those who do not share it.</i></p>	<p>It will not alter our continued duty on Equality.</p> <p>The housing strategy will assist in the Council meeting its duties under the Equality Act 2010.</p>
5.	<p>What actions will you take to address any issues raised in your answers above</p>	<p>N/A</p>