

Committee: Executive
Date: Monday 5 February 2018
Time: 6.30 pm
Venue: Bodicote House, Bodicote, Banbury, OX15 4AA

Membership

Councillor Barry Wood (Chairman)
Councillor Colin Clarke
Councillor Tony Ilott
Councillor Kieron Mallon
Councillor D M Pickford

Councillor G A Reynolds (Vice-Chairman)
Councillor John Donaldson
Councillor Mike Kerford-Byrnes
Councillor Richard Mould
Councillor Lynn Pratt

AGENDA

1. **Apologies for Absence**

2. **Declarations of Interest**

Members are asked to declare any interest and the nature of that interest that they may have in any of the items under consideration at this meeting.

3. **Petitions and Requests to Address the Meeting**

The Chairman to report on any requests to submit petitions or to address the meeting.

4. **Urgent Business**

The Chairman to advise whether they have agreed to any item of urgent business being admitted to the agenda.

5. **Minutes** (Pages 1 - 4)

To confirm as a correct record the Minutes of the meeting held on 8 January 2018.

6. **Chairman's Announcements**

To receive communications from the Chairman.

7. **Developer Contributions Supplementary Planning Document (SPD)** (Pages 5 - 298)

Report of Executive Director for Place and Growth

Purpose of report

To seek approval of the Developer Contributions Supplementary Planning Document (SPD) so that it can be presented to Council for adoption.

Recommendations

The meeting is recommended:

- 1.1 To note the responses to consultation summarised in the Consultation Statement presented at Appendix 3.
- 1.2 To approve the final draft of the Developer Contributions SPD as presented at Appendices 1 and 2 and incorporating the changes summarised at paragraph 3.9 of this report.
- 1.3 To recommend to Council that it adopts the final draft of the Developer Contributions document as a statutory Supplementary Planning Document under the Town and Country Planning (Local Planning) (England) Regulations 2012.
- 1.4 To authorise the Executive Director for Place and Growth to make any necessary minor changes to the final draft of the SPD before the meeting of the Council.

8. **Draft Corporate Strategy Corporate Strategy and Revenue and Capital Budgets 2018/19** (Pages 299 - 384)

Report of Executive Director – Finance and Governance and Interim Director

Purpose of report

The Council is required to produce a balanced budget for 2018/19 as the basis for calculating its level of Council Tax. It has to base that budget on its plans for service delivery during the year, recognising any changes in service demand that may arise in future years.

The proposed budget and business plan for 2018/19, including the new cycle of growth strategies, are presented as an integrated report to demonstrate that the Council adopts a strategic approach to managing all of its resources, ensuring that the delivery of the Council's priorities for the district directs the allocation of financial resources.

Recommendations

The meeting is recommended:

- 1.1 To recommend the 2018/19 Corporate Strategy to Full Council (detailed in **Appendix 2**) and to delegate authority to the Interim Director, in consultation with the Leader of the Council, to make any minor amendments to the plan as required before consideration by Full Council.
- 1.2 To consider and approve the draft budget in the context of the Council's service objectives and strategic priorities.
- 1.3 To approve and recommend the balanced budget to Full Council.
- 1.4 To note the impact of the proposed budget on reserves and recommend the reserves 2018/19 to full council, see **Appendix 5**.
- 1.5 To note the latest Medium Term Revenue Plan (MTRP) for 2017/18 to 2022/23, at **Appendix 6**; this will be the basis of the work of the Budget Planning Committee for the following year.
- 1.6 To recommend, subject to any further changes Members may wish to include tonight, the updated draft revenue budget for adoption by Full Council on 26 February 2018.
- 1.7 To consider and recommend a Council Tax increase to Full Council.
- 1.8 To recommend to Full Council the proposed 2018/19 capital programme set out in **Appendix 8**.
- 1.9 To delegate authority to the Executive Director – Finance and Governance, in consultation with the Lead Member for Financial Management to amend the contributions to or from general fund balances to allow the Council Tax to remain at the level recommended to Full Council following the announcement of the final settlement figures, any changes relating to Business Rates or as a result of any financial implications arising from recommendation 1.7, above.

9. Exclusion of the Press and Public

The following report contains exempt information as defined in the following paragraphs of Part 1, Schedule 12A of Local Government Act 1972.

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

Members are reminded that whilst the following item has been marked as exempt, it is for the meeting to decide whether or not to consider it in private or in public. In making the decision, members should balance the interests of individuals or the Council itself in having access to the information. In considering their discretion members should also be mindful of the advice of Council Officers.

No representations have been received from the public requesting that this item be considered in public.

Should Members decide not to make a decision in public, they are recommended to pass the following recommendation:

“That under Section 100A of the Local Government Act 1972, the public and press be excluded from the meeting for the following item of business on the ground that, if the public and press were present, it would be likely that exempt information falling under the provisions of Schedule 12A, Part 1, Paragraphs 1, 2, 3 and 4 would be disclosed to them, and that in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.”

10. Award of New Landscape Management Contract (Pages 385 - 392)

Exempt report of Assistant Director for Environmental Services

Information about this Agenda

Apologies for Absence

Apologies for absence should be notified to democracy@cherwellandsouthnorthants.gov.uk or 01295 221589 prior to the start of the meeting.

Declarations of Interest

Members are asked to declare interests at item 2 on the agenda or if arriving after the start of the meeting, at the start of the relevant agenda item.

Local Government and Finance Act 1992 – Budget Setting, Contracts & Supplementary Estimates

Members are reminded that any member who is two months in arrears with Council Tax must declare the fact and may speak but not vote on any decision which involves budget setting, extending or agreeing contracts or incurring expenditure not provided for in the agreed budget for a given year and could affect calculations on the level of Council Tax.

Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012

This agenda constitutes the 5 day notice required by Regulation 5 of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012 in terms of the intention to consider an item of business in private.

Evacuation Procedure

When the continuous alarm sounds you must evacuate the building by the nearest available fire exit. Members and visitors should proceed to the car park as directed by Democratic Services staff and await further instructions.

Access to Meetings

If you have any special requirements (such as a large print version of these papers or special access facilities) please contact the officer named below, giving as much notice as possible before the meeting.

Mobile Phones

Please ensure that any device is switched to silent operation or switched off.

Queries Regarding this Agenda

Please contact Natasha Clark, Democratic and Elections
natasha.clark@cherwellandsouthnorthants.gov.uk, 01295 221589

Yvonne Rees
Chief Executive

Published on Friday 26 January 2018

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Cherwell District Council

Executive

Minutes of a meeting of the Executive held at Bodicote House, Bodicote, Banbury, OX15 4AA, on 8 January 2018 at 6.30 pm

Present: Councillor Barry Wood (Chairman), Leader of the Council
Councillor G A Reynolds (Vice-Chairman), Deputy Leader of the Council

Councillor Colin Clarke, Lead Member for Planning
Councillor Tony Ilott, Lead Member for Financial Management
Councillor Mike Kerford-Byrnes, Lead Member for Change Management, Joint Working and IT
Councillor Kieron Mallon, Lead Member for Public Protection and Community Services
Councillor Richard Mould, Lead Member for Performance
Councillor D M Pickford, Lead Member for Clean and Green
Councillor Lynn Pratt, Lead Member for Estates and the Economy

Also

Present: Councillor Sean Woodcock, Leader of the Labour Group

Apologies for absence: Councillor John Donaldson, Lead Member for Housing

Officers: Paul Sutton, Executive Director: Finance and Governance / Section 151 Officer
Claire Taylor, Director: Customers and Service Development
James Doble, Monitoring Officer
Natasha Clark, Democratic and Elections Team Leader

88 **Declarations of Interest**

There were no declarations of interest.

89 **Petitions and Requests to Address the Meeting**

There were no petitions or requests to address the meeting.

90 **Urgent Business**

There were no items of urgent business.

91 **Minutes**

The minutes of the meeting held on 4 December 2017 were agreed as a correct record and signed by the Chairman.

92 **Chairman's Announcements**

There were no Chairman's announcements.

93 **Bespoke / Custom Build Mortgage Pilot Scheme**

The Executive Director: Finance and Governance submitted a report to consider joining a version of the existing Local Authority Mortgage Schemes (LAMS) which was developed by Arlingclose to promote access to self/custom build home ownership within the district. It sets out the Bespoke/Custom Build (BCB) scheme which offers support to local people to access self/custom build houses by reducing the risk of self-build and provides a return to the council which could be reinvested in housing related activities.

Resolved

- (1) That agreement be given to join the Bespoke/Custom Build (BCB) scheme, but limited to an initial pilot scheme of 10 BCB mortgages, for launch in early 2018.
- (2) That authority be delegated to the Executive Director: Finance and Governance, in consultation with the Lead Member for Financial Management, to extend the scheme to new applications once the success of the pilot has been assessed and further capital funding is in place for additional bridging loans.
- (3) That authority be delegated to the Executive Director: Finance and Governance, in consultation with the Monitoring Officer and Lead Member for Financial Management, to enter into legal agreements required for the Bespoke/Custom Build scheme where land is owned by third parties.
- (4) That authority be delegated to the Executive Director: Wellbeing, in consultation with the Executive Director: Place & Growth and the Lead Member for Housing and the Lead Member for Estates & Economy to set the criteria for prioritising access to the scheme for applicants with a local connection.

Reasons

The scheme has been developed as an evolution of the local authority mortgage scheme (LAMS) to be relevant and available for customers wanting to self or custom build. The approach generates small returns for the authority and as a partnership activity does not require significant investment in people

and expertise to run the scheme. The primary benefits are the ability to start small and test the extent to which the product may increase access to the self-build market.

Alternative options

Option 1: To not join the scheme. This option has been rejected because the council may fail to meet housing needs in the district.

Option 2: To join the scheme without first conducting a pilot. This option has been rejected because it is more prudent to test the waters with a pilot to manage the expectations of the custom and self build community.

94

Council Tax Base 2018-2019

The Executive Director: Finance and Governance submitted a report to provide Executive with an estimate of the Council Tax Base for 2018-2019 and seek approval for the final determination of the Council Tax Base to be delegated to the Section 151 Officer in consultation with the Lead Member for Financial Management.

Resolved

- (1) That having given due consideration to the report of the Executive Director: Finance and Governance for the calculation of the Council's Tax Base for 2018-2019, the following be agreed:
 - (a) That pursuant to the Executive Director: Finance and Governance's report and in accordance with the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, the amount calculated by Cherwell District Council as its Council Tax Base for the year 2018-2019 shall be **52,681.6** This shall be subject to final confirmation by the Section 151 Officer in consultation with the Lead Member for Financial Management.
 - (b) As for the parishes which form part of its area shown in the annex to the Minutes (as set out in the Minute Book), the amount calculated as the Council Tax Base for the year 2018-2019 in respect of special items shall be as indicated in the column titled Tax Base 2018-2019.
 - (c) As for the Flood Defence Areas which form part of its area, the amount calculated as the Council Tax Base for the year 2018-2019 for the purposes of levies on Oxfordshire County Council by River Authorities, shall be:

Thames Flood Defence Area	50,381.7
Anglian (Great Ouse) Flood Defence Area	1,864.7
Severn Region Flood Defence Area	435.2
	<hr/>
	52,681.6.

- (2) That final approval of the Council Tax Base for 2018-2019 be delegated to the Section 151 Officer in consultation with the Lead Member for Financial Management.

Reasons

For the purposes of Section 31B of the Local Government Finance Act 1992 and the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, the Council is required to calculate the tax base (which will be used for tax setting purposes in February 2018) in respect of:

- (a) the whole of its area and;
- (b) for any parts of its area for the purposes of:
 - (i) Apportioning precepts and levies and;
 - (ii) Calculating the tax base for each area subject to a special item

Alternative options

Option 1: None. The Council has to set a tax base in order to set its council tax for 2018-2019.

The meeting ended at 6.35 pm

Chairman:

Date:

Cherwell District Council

Executive

5 February 2018

<p style="text-align: center;">Developer Contributions Supplementary Planning Document (SPD)</p>

Report of Executive Director for Place and Growth

This report is public

Purpose of report

To seek approval of the Developer Contributions Supplementary Planning Document (SPD) so that it can be presented to Council for adoption.

1.0 Recommendations

The meeting is recommended:

- 1.1 To note the responses to consultation summarised in the Consultation Statement presented at Appendix 3.
- 1.2 To approve the final draft of the Developer Contributions SPD as presented at Appendices 1 and 2 and incorporating the changes summarised at paragraph 3.9 of this report.
- 1.3 To recommend to Council that it adopts the final draft of the Developer Contributions document as a statutory Supplementary Planning Document under the Town and Country Planning (Local Planning) (England) Regulations 2012.
- 1.4 To authorise the Executive Director for Place and Growth to make any necessary minor changes to the final draft of the SPD before the meeting of the Council.

2.0 Introduction

- 2.1 The purpose of the Developer Contributions SPD is to set out the Council's approach to seeking Section 106 planning obligations from new developments for the provision of necessary infrastructure, community facilities and services. It will enable developers to understand the Council's planning obligation requirements and costs from an early stage in the development process and to make appropriate provision when formulating costs and undertaking financial appraisals. It will provide local communities with a clear understanding of the Council's requirements.

- 2.2 Since the introduction of the Community Infrastructure Levy (CIL) Regulations in 2010, the Government has expected developers to contribute towards the provision of infrastructure through a combination of mechanisms: paying a levy through CIL (if adopted at local level), S106 obligations, planning conditions and S278 highway contributions.
- 2.3 The CIL Regulations have recently been the subject of review by Central Government. The CIL Review Group was established by the former Communities Secretary and former Minister for Housing and Planning in November 2015. The purpose of the review was to '*Assess the extent to which CIL does or can provide an effective mechanism for funding infrastructure, and to recommend changes that would improve its operation in support of the Government's wider housing and growth objectives*'. The report was submitted to Government in October 2016, and published in March 2017.
- 2.4 The Government's formal response to the review is still awaited. However, at the Autumn Budget 2017 the Government announced that it will launch a consultation with detailed proposals on a number of matters including:
- removing restrictions on Section 106 pooling towards a single piece of infrastructure where the local authority has adopted CIL, in certain circumstances such as where the authority is in a low viability area, or where significant development is planned on several large strategic sites;
 - speeding up the process of setting and revising CIL to make it easier to respond to changes to the market;
 - allowing authorities to set rates which better reflect the uplift in land values between a proposed and existing use;
 - giving Combined Authorities and planning joint committees with statutory planning functions the option to levy a Strategic Infrastructure Tariff (SIT) in future.
- 2.5 The consultation document has yet to be published but there is a pressing need now to provide up to date guidance on developer contributions within the parameters of existing regulations and adopted local plan policies.
- 2.6 In November 2016 the Council published a draft Developer Contributions SPD and undertook a six week formal public consultation. That document was drafted to complement, and operate alongside an emerging CIL Charging Schedule. However, following the publication of the CIL Review which recommended significant reforms to CIL, work towards its introduction was 'paused' to await the Government's announcement.
- 2.7 A revised draft Developer Contributions SPD (Appendix 5), drafted in the context of the Council not adopting a CIL Charging Schedule at this time, was approved by the Executive for public consultation on 6 November 2017. The results of the consultation have now been taken into account and consequently modifications have been made to the document as now presented for approval (Appendices 1 and 2).
- 2.8 Upon approval by the Executive it is intended that the document be presented to Council for adoption as a Supplementary Planning Document (SPD). As an SPD the document will have statutory status as planning guidance. It does not establish Development Plan policy which is the role of the Council's Local Plans.

3.0 Report Details

- 3.1 Planning obligations, secured under Section 106 of the Town and Country Planning Act 1990 (as amended), are known as Section 106 agreements. They can either be a multi-party deed of agreement, or a unilateral undertaking made under planning legislation in association with a planning permission for new development. They are normally applied to aspects of development that cannot be controlled by imposing a planning condition or by the use of other statutory controls. Planning obligations are legally binding and enforceable if planning permission is granted. They can cover almost any relevant issue such as types of infrastructure or services and future maintenance.
- 3.2 The legal tests for the use of Section 106 agreements are set out in Regulations 122 and 123 of the Community Infrastructure Levy Regulations 2010 (as amended). Regulation 122(2) states that the use of planning obligations should only be sought where they meet all of the following tests:
- They are necessary to make a development acceptable in planning terms;
 - They are directly related to a development;
 - They are fairly and reasonably related in scale and kind to the development.

The obligation is a formal document, a deed which becomes a land charge. If the Section 106 agreement is not complied with, it is enforceable against the person that entered in to the obligation and any subsequent owner.

Developer Contributions SPD

- 3.3 The Developer Contributions SPD (Appendices 1 and 2) is a detailed, technical document. It is supported by a Consultation Statement (Appendix 3) which explains the public consultation that has taken place in preparing the document. It also provides a summary of all the representations received. A Screening Statement (Appendix 4) has also been prepared concluding that a Strategic Environmental Assessment is not required. Statutory consultees had the opportunity to review a draft Screening Statement during the formal consultation period. They concurred that a Strategic Environmental Assessment is not required.
- 3.4 The introduction to the SPD provides an overview of the document and describes the relationship between S106 agreements and CIL. The next section sets out the policy framework at both national and local level. There is then detailed general guidance on the procedures to be used by the Council in assessing the need and type of S106 agreement required for developers. The topics covered include pre-application discussions, fees, viability, monitoring and enforcement.
- 3.5 Section 4 of the SPD gives specific guidance for different types of infrastructure. The types of infrastructure covered include affordable housing, education, transport and access, open space, play facilities, indoor and outdoor sport and recreation, community facilities, nature conservation and biodiversity, apprenticeship and skills, and public realm and public art.
- 3.6 Detailed technical advice, including the Council's standards for indoor and outdoor recreation provision, and capital contributions and commuted sums for maintenance are set out in the appendices to the document.

Consultation Results

3.7 Thirty-two representations were received in response to consultation on the November 2017 draft of SPD (Appendix 5). The Consultation Statement at Appendix 3 to this report includes a summary of the main issues raised in each representation and explains how they have been addressed in the final draft of the SPD. The representations have been placed in the Members' Room and are available on-line at <https://www.cherwell.gov.uk/info/234/supplementary-planning-documents-spd/489/planning-obligationsdeveloper-contributions-in-preparation>.

3.8 In brief, the main issues raised include:

- Relationship to CIL – concern raised about the need to have an early review of the SPD to reflect any functional or legislative changes to the role of CIL. Concern was also expressed regarding the potential mechanisms to deliver strategic infrastructure, particularly transport, in the absence of an adopted CIL charging schedule and in the context of pooling restrictions on the number of contributions (5) per infrastructure project.
- The County Council has advised that it has begun work on a Developer Guide. Updated population figures based on a survey of new housing are due to be published in 2018. Given that the outcome of the Government's CIL review is also due to be published during 2018, the County Council states that the District Council should consider whether to postpone adoption of the SPD so that these revisions can be incorporated.
- Concern that the SPD contains a number of new policies which are not in the adopted Cherwell Local Plan eg affordable housing space standards, Employment Skills and Training Plans and Community Development Workers. The emerging Cherwell Local Plan Part 2 should provide the policy basis for all planning obligations.
- Evidence Base – Concern that there are a number of infrastructure items for which the SPD provides no supporting evidence to justify how values have been calculated.
- Viability – Concern that the SPD is not consistent with the NPPF. In addition the overall approach to viability reviews should be revised to ensure that it only applies to larger, multi-phased schemes.
- Views that there should be flexibility built in to the SPD to allow a more bespoke approach to infrastructure provision for larger scale developments, to capture opportunities for alternative approaches to delivery.
- Pre-Application discussions – A view that there needs to be direct consultation with Town and Parish councils at an early stage in the development process.
- Affordable Housing – A views that there should be greater flexibility in the SPD to allow changes to tenure split. University staff housing should be included as part of the affordable housing provision.
- Health – the Oxfordshire Clinical Commissioning Group (OCCG) has provided updated and detailed calculations relating to contributions towards primary care facilities.
- Concern that a number of requirements are not compliant with regulations e.g. waste bins, local management organisations for open space management, public art and community development requirements.
- Payments in Kind – Views that the SPD should allow for 'payments in kind' contributions to mitigate development impact.

- Heritage – Historic England state that it regrets that there is no sub-section specifically on heritage.

Response to the Issues Raised

3.9 The Consultation Statement at Appendix 3 explains how the issues raised have been taken in to account. The key proposed changes to the SPD, which have been incorporated into the final draft of the SPD at Appendices 1 and 2, are as follows:

- Clarification on the role of the SPD in the absence of a CIL Charging Schedule.
- Clarification on the role of ‘payments in kind’.
- Textual changes to financial viability requirements generally and more specifically in relation to affordable housing.
- Additional cost information relating to cemetery provision.
- The introduction of new and updated requirements related to the provision of primary care infrastructure (provided by the OCCG).
- Introduction of a new requirement for capital contributions where development results in the need for additional waste recycling capacity (capital costs).
- A new sub-section on ‘Heritage’.
- A general review of the ‘Procedures’ having regard to representations received.
- A general review of the infrastructure requirements having regard to representations received.

3.10 Changes are not proposed where the issues raised relate to wider local plan policy matters; where they assume that CIL will be introduced; where they seek unnecessary flexibility in the SPD's requirements; where there would be conflict with other corporate policy; and where they relate to matters more appropriately considered through any the future review of Development Management processes or by dealing with development proposals on a site-by-site basis.

3.11 The Developer Contributions SPD is now complete and presented for approval before seeking adoption by Council. Once adopted the SPD will be a material consideration in the determination of planning applications. It sets out the package of contributions or obligations expected to come forward from development proposals to mitigate the impact of development and help fund infrastructure needed to support growth. It is not intended to provide all the funding needed but could help maximize resource income which would otherwise not be available.

4.0 Conclusion and Reasons for Recommendations

4.1 Public consultation on a revised draft Developer contributions SPD occurred between 23 November 2017 and 21 December 2017. The results of that consultation have been considered in producing a final document for approval. Upon approval by the Executive it is intended that the document be presented to Council for adoption as a Supplementary Planning Document (SPD). As an SPD the document will have statutory status as planning guidance. It does not establish Development Plan policy which is the role of the Council's Local Plans.

5.0 Consultation

Internal briefing: Councillor Colin Clarke, Lead Member for Planning

Public consultation as set out in the Statement of Consultation
(Appendix 3)

6.0 Alternative Options and Reasons for Rejection

- 6.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: Not to approve the Developer Contributions SPD and seek changes.

Officers consider that the SPD has been prepared in accordance with the relevant legislation. The adopted Cherwell Local Plan 2011-2031 sets the planning framework up to 2031 with the SPD providing a further level of detail to guide development. Significant changes may require further consultation.

Option 2: Not to approve the Developer Contributions SPD and to rely on the current Draft Planning Obligations SPD (July 2011).

The Draft Planning Obligations SPD (July 2011) is now out of date, it carries little weight in decision making and its continued use will potentially make it more difficult for the Council to secure S106 developer contributions in the future. Not approving the new SPD will create uncertainty about the Council's requirements for developer contributions.

7.0 Implications

Financial and Resource Implications

- 7.1 Adoption of the Developer Contributions Supplementary Planning Document is being met within existing budgets.

Comments checked by:

Paul Sutton, Executive Director - Finance and Governance 0300 0030106

Paul.Sutton@cherwellandsouthnorthants.gov.uk

Legal Implications

- 7.2 The SPD is being prepared as statutory planning guidance in accordance with the relevant legislation. Once adopted, the SPD will be a material consideration in the determination of planning applications and provide a firm basis from which to seek planning obligations.

Comments checked by:

Nigel Bell, Interim Legal Services Manager 01295 221687

Nigel.Bell@Cherwellandsouthnorthants.gov.uk

8.0 Decision Information

Key Decision

Financial Threshold Met: No

Community Impact Threshold Met: Yes

Wards Affected

All

Links to Corporate Plan and Policy Framework

This report directly links to all four of the corporate priorities and objectives set out in the Cherwell District Council Business Plan 2017-18 as follows:

- Sound budgets and a customer focused council
- Thriving communities
- District of opportunity
- Safe, clean and green

Lead Councillor

Councillor Colin Clarke – Lead Member for Planning

Document Information

Appendix No	Title
Appendix 1	Developer Contributions SPD Final Draft - Main Document
Appendix 2	Developer Contributions SPD Final Draft - Appendices
Appendix 3	Consultation Statement
Appendix 4	SEA/SA Screening Statement
Appendix 5	Developer Contributions SPD – 2 nd Consultation Draft - November 2017 (Superseded)
Background Papers	
None	
Report Author	Christina Cherry, Senior Planning Policy Officer
Contact Information	01295 221851 Christina.cherry@cherwellandsouthnorthants.gov.uk

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**Developer Contributions
Supplementary Planning Document
(SPD)
February 2018**

Cherwell District Council

Draft for Executive

FEBRUARY 2018

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1. INTRODUCTION

Purpose of this Document

- 1.1. The purpose of this Developer Contributions Supplementary Planning Document (SPD) is to set out Cherwell District Council's approach to seeking Section 106 planning obligations in the absence of a Community Infrastructure Levy (CIL) Charging Schedule within the District.
- 1.2. This guidance does not cover every possible circumstance and/or obligation that may need to be taken into account, but it provides a clear indication of the Council's essential requirements from new development in respect of the provision of infrastructure, community facilities and services. It will enable developers to understand planning obligation requirements and costs from an early stage in the development process and to make appropriate provision when formulating costs and undertaking financial appraisals.
- 1.3. Since the introduction of the Community Infrastructure Levy Regulations 2010 (as amended) ('CIL Regulations'), developers are expected to contribute towards the provision of infrastructure through a combination of mechanisms: paying a levy through CIL (if adopted at local level), S106 obligations, planning conditions and S278 highway contributions.
- 1.4. The CIL Regulations mean that since 6 April 2015 the use of Section 106 obligations has become more restricted, with the Council only able to pool a maximum of five separate obligations (entered into on or after 6 April 2010) for a specific infrastructure project or a type of infrastructure.
- 1.5. The CIL Regulations have recently been the subject of review by Central Government. The CIL Review Group was established by the former Communities Secretary and former Minister for Housing and Planning in November 2015. The purpose of the review was to *'Assess the extent to which CIL does or can provide an effective mechanism for funding infrastructure, and to recommend changes that would improve its operation in support of the Government's wider housing and growth objectives.'* The report was submitted to Government in October 2016 and published in March 2017. It is anticipated that an announcement on the Government's response to this review will be made in 2018.
- 1.6. The timing and scope of the Government's review is outside the control of the Council. The guidance in this document is therefore provided within the parameters of existing regulations and adopted local plan policies. The Council will, however, undertake to

review this guidance should it introduce a CIL Charging Schedule (or other infrastructure tariff in accordance with new government legislation) in the future.

- 1.7. Appendix 16 details the types of infrastructure that will be covered by S106 planning obligations and what will be covered by CIL if a CIL charging schedule is adopted by the Council in the future.

What are Planning Obligations?

- 1.8. A planning obligation is secured by either a deed of agreement or a unilateral undertaking made under planning legislation (Section 106 of the Town and Country Planning Act 1990 (as amended)) in association with a planning permission for new development. It is normally applied to aspects of development that cannot be controlled by imposing a planning condition or by the use of other statutory controls. Planning obligations are legally binding and enforceable if planning permission is granted. They also run with the land. They can cover almost any relevant issue such as types of infrastructure or services and future maintenance.
- 1.9. Planning obligations should only be used where it is not possible to address the unacceptable impact of development through a planning condition (NPPF¹, paragraph. 203).
- 1.10. In addition, CIL Regulation 122 states that the use of planning obligations should only be sought where they meet all of the following three tests:
 - They are necessary to make a development acceptable in planning terms
 - They are directly related to a development
 - They are fairly and reasonably related in scale and kind to the development.

What is CIL?

- 1.11. CIL is a tariff charged on new development that the Council can choose to adopt to support the provision of infrastructure. Once adopted CIL is fixed, non-negotiable and enforceable.
- 1.12. To introduce CIL the Council must set a CIL rate or rates in a Charging Schedule, and follow two stages of consultation and an Examination in Public prior to adoption and implementation of CIL. The Council has consulted on both a Preliminary Draft and Draft CIL Charging Schedule. Work has however since been 'paused' on CIL pending

¹ National Planning Policy Framework

the outcome of the Government's review of CIL. Further guidance from the Government is awaited.

Relationship between CIL and Planning Obligations

- 1.13. The Government currently intends CIL to provide for infrastructure to support development rather than specifically to make individual development proposals acceptable in planning terms. Government guidance indicates that site specific mitigation will still be sought through the use of planning obligations.
- 1.14. CIL Regulations 122 and 123 place limits on the use of planning obligations and makes the planning obligations policy tests (paragraph 1.10 above) a statutory requirement. These two regulations seek to avoid overlaps between CIL and planning obligations and to limit the pooling of planning obligations towards infrastructure provision that could be funded by CIL. The Government's intention is for local authorities to operate CIL and planning obligations in a complementary way.

Planning Conditions

- 1.15. Planning conditions cannot require the transfer of land ownership or the payment of monies. They are attached to a planning permission and set out details or required standards, timeframes, and works which must be carried out at prescribed stages in the development process. They may also require further details to be submitted in order to make a proposal acceptable.
- 1.16. NPPF paragraph 206 states that planning conditions should only be attached to a planning permission where they are necessary, relevant to planning and to the development to be permitted, enforceable, precise and reasonable in all other respects.

Section 278 Agreements

- 1.17. Where a development requires works to be carried out on the existing adopted highway, an Agreement will need to be completed between the developer and Oxfordshire County Council under Section 278 of the Highways Act 1980². Examples of such works could be the construction of new access/junction improvement of the highway/junctions, or safety related works such as traffic calming or improved facilities for pedestrians and cyclists.

² Where works are required on a trunk road, Highways England will be party to the S278 Agreement.

- 1.18. The pooling restriction on planning obligations does not apply to S278 agreements. However, the CIL regulations prohibit CIL being spent on a highway scheme where a S278 agreement has been made.

2. POLICY FRAMEWORK

National Level

- 2.1. The statutory framework for planning obligations is set out in Section 106 of the Town and Country Planning Act 1990 (as amended); Regulations 122 and 123 of the Community Infrastructure Levy Regulations 2010 (as amended). The Council will also have regard to the advice in the National Planning Policy Framework (NPPF), particularly paragraphs 203 to 205; and PPS1 Eco Towns Supplement.

Local Level

- 2.2. The statutory Development Plan for the District currently comprises:
- The adopted Cherwell Local Plan 2011-2031 (Part1)(adopted July 2015 & incorporating Policy Bicester 13 re-adopted in December 2016)
 - The retained saved policies of the adopted Cherwell Local Plan 1996
 - The adopted Minerals and Waste Local Plan (Part 1 – Core Strategy) (adopted September 2017)
 - The saved policies of the Oxfordshire Minerals and Waste Local Plan 1996
 - Hook Norton Neighbourhood Plan 2014-2031
 - Bloxham Neighbourhood Plan 2015-2031
- 2.3. The adopted Cherwell Local Plan Part 1 contains the strategic policies covering the District and includes land allocated for housing and employment development at Bicester, Banbury and the former RAF Upper Heyford.
- 2.4. A Partial Review of the Cherwell Local Plan Part 1 is in preparation which seeks to contribute to addressing the unmet objectively assessed housing need from elsewhere in the Oxfordshire Housing Market Area (HMA), particularly from Oxford City. A proposed submission plan was published for public consultation on 17 July 2017 with comments invited until 10 October 2017. Work has also commenced on the production of Cherwell Local Plan 2011-2031 (Part 2): Development Management Policies and Sites.
- 2.5. Other key planning policy documents include:

- Supplementary Planning Documents (SPDs). SPDs expand upon and provide further detail to policies in Development Plan Documents.
- The Infrastructure Delivery Plan (IDP). The IDP is a live document adjusted over time and contains the infrastructure required to support **Policy INF 1: Infrastructure** of the adopted Cherwell Local Plan Part 1. An IDP was appended to the adopted Local Plan. IDP updates can be found on the Council's website.
- The Oxfordshire Local Transport Plan (LTP). The LTP provides the strategic framework for transport in the County.

2.6. The Council's Local Development Scheme sets out the programme for the preparation of the key planning policy documents.

Bicester Garden Town

2.7. In 2014 the Government announced that Bicester had achieved Garden Town status after the Council had successfully demonstrated plans to meet the necessary criteria of providing affordable homes, schools and jobs while preserving the countryside.

2.8. Since then two grants has been awarded to fund the necessary feasibility studies and provide capacity for the implementation of the Garden Town as set out in the adopted Cherwell Local Plan Part 1.

Healthy New Towns

2.9. In 2015 the Government launched its Healthy New Towns Programme. This programme promotes innovative ways to encourage people to live more healthy lives, and the many opportunities for the built environment to support this objective.

2.10. In 2016 Bicester was successful in being selected as one of the 10 exemplar healthy new towns. The Bicester Healthy New Town Programme aims to enable people who live or work in Bicester to live healthier lives and to prevent ill health in the future. The two key priorities for the programme are:

- To reduce the number of people who are overweight or obese so they are less likely to develop chronic health conditions in the future and;
- To reduce the number of people who feel socially isolated as that will have an important positive impact on peoples' mental and physical health.

- 2.11. The built environment has a role to play in promoting health and well-being of communities in the whole of Cherwell District and it is a Council priority to ensure new developments supports this aim.

3. PROCEDURES

General Approach

- 3.1 The Developer Contributions SPD once adopted will comprise the Council's current approach to planning contributions.

- 3.2 Although the scope for securing S106 planning obligations has been reduced since April 2015 due to the pooling restrictions, it is expected that planning obligations will still be sought for:

- Affordable housing; and
- Infrastructure which is required to mitigate the direct impact of a development. It should, however, be noted that this is a general guide and development proposals will continue to be assessed on a case by case basis with the individual circumstances of each site being taken in to consideration when identifying infrastructure requirements.

Planning Obligations

- 3.3 The Local Planning Authority (LPA) will assess each application to determine if a planning obligation is needed and if so what it should address. It will do this in consultation with other public bodies responsible for infrastructure provision. Oxfordshire County Council, for example, is a major provider of services and infrastructure.

- 3.4 The LPA, and other key agencies, will use planning obligations to:
- Secure general planning requirements that are necessary to allow the development to be permitted and where this cannot be achieved by way of planning conditions;
 - Ensure that there is a satisfactory infrastructure to allow the development to proceed and that the infrastructure provided will be maintained; and
 - Offset relevant adverse impacts, for example, on the environment, education, social, recreational and community facilities and transport that arise from the development where the development might otherwise have been refused because of those adverse impacts.

Pre-Application Discussions

- 3.5 As part of any pre-application discussions the LPA will seek to agree the requirements and Heads of Terms for any planning obligation.
- 3.6 It is the Council's strong preference, where applications and associated planning obligations are more complex, that negotiations occur, and agreement on Heads of Terms is achieved, prior to the submission of a planning application. Pre-application discussions can help to resolve potential problems and issues which may otherwise delay the determination of a planning application.
- 3.7 It is a local validation requirement that draft Heads of Terms accompany any application that requires a planning obligation.
- 3.8 A planning performance agreement can be a useful tool to focus pre-application discussions on the issues that will need to be addressed throughout the course of preparing and determining a planning application, and the timescales and resources that are likely to be required.

Unilateral Undertakings

- 3.9 In cases where a planning obligation is only dealing with financial contributions the LPA will encourage developers to make a unilateral undertaking and to make the relevant contributions on the granting of planning permission and/or at different stages of development.
- 3.10 This approach allows applicants for small schemes to reduce the legal costs and avoid potential delays often associated with legal agreements. The Council provides a standard form for a unilateral undertaking and this can be found on its website.

Cross Boundary Applications

- 3.11 Where an application site falls partly in another local planning authority area the Council will, as far as possible, work to coordinate proportionate planning obligation requirements with that authority. If however, agreement cannot be reached, the Council will seek obligations for the portion of the site that falls within the District.

Viability

- 3.12 A key objective of this SPD is to alert applicants of the likely level of planning obligations that can be expected from proposed developments well in advance of any

planning application being submitted. The developer can then factor these requirements in to any potential land transaction and/or scheme as early as possible in the development process and certainly prior to any grant of planning permission.

- 3.13 The Council will ensure, in accordance with the advice in the National Planning Policy Guidance (NPPG) when seeking contributions that, their combined total impact does not threaten the viability of the sites and scale of development identified in the Development Plan.
- 3.14 The NPPG states that in making decisions, the LPA will need to understand the impact of planning obligations on a proposal. Where an applicant is able to demonstrate to the satisfaction of the LPA that the planning obligation would cause the development to be unviable, the local planning authority should be flexible in seeking planning obligations. This is particularly relevant for affordable housing contributions which are often the largest item sought on housing developments. These contributions should not be sought without regard to individual scheme viability. The financial viability of the individual scheme should be carefully considered prior to a decision being made on the acceptability or otherwise of such a scheme.
- 3.15 The NPPG goes on to state that assessing viability should lead to an understanding of the scale of planning obligations which are appropriate. However, the NPPF is clear that where safeguards are necessary to make a particular development acceptable in planning terms, and these safeguards cannot be secured, planning permission should not be granted for unacceptable development.
- 3.16 The LPA recognises that financial viability is a material consideration. In exceptional circumstances it may be necessary for the Council to prioritise the securing of particular developer contributions having regard to the Development Plan, the needs of the locality and the particular characteristics of the site and its locality. However, there may be circumstances in which the material Development Plan policies and/or the needs arising from proposed development are such that contributions will be sought even if a viability assessment accepted by the Council demonstrates that the development would not be viable with the required contributions.
- 3.17 Where a disagreement arises about financial viability and the planning obligations sought, the applicant will be expected to provide the Council with clear and transparent evidence to support their case. In most instances this will involve the Council reaching an understanding based on a detailed open book financial appraisal, undertaken by an independent assessor. Where there are significant financial issues arising for other public bodies responsible for providing infrastructure (including Oxfordshire County Council), the LPA will expect that body to be actively involved in

this assessment process and conclusions. The Council will require this evidence prior to the granting of planning permission.

3.18 Section 106 Agreements can deal with issues of viability. For example, a developer may set out their 'predicted profitability levels'. In exceptional circumstances and on the basis of an open book appraisal prior to the determination of an application, it can be a requirement of the S106 Agreement for there to be a second viability appraisal at some point during the course of the development. If the results of this second viability appraisal show, for example:

- That the predicted profitability levels have increased then the Council will have a right to an overage, i.e. a further payment/provision of infrastructure or affordable housing to that already secured in the S106 Agreement;
- That the predicted profitability levels have stayed the same, then there will be nothing further to do with the S106 Agreement;
- That the predicted profitability levels have decreased, then the Council will negotiate further with the applicant concerning planning obligations.

3.19 All costs incurred by the Council in financial appraisal and viability assessment are to be met by the applicant.

Security and Timing of Payments

3.20 Financial contributions (apart from legal costs, which are usually paid prior to the completion of the agreement, and standard administration charges) will need to be paid prior to the implementation of planning permission or in accordance with a programme of agreed staged payments.

3.21 Prior to the making of a Planning Obligation, the developer should note the financial contributions payable and the corresponding triggers or payment dates as specified in the agreement.

3.22 Approximately 21 days prior to reaching a trigger or payment date, the developer should notify the Council of their intention to pay the financial contribution. If the developer notifies the Council of their intention to pay the financial contribution after the trigger or payment date has elapsed then late payment interest will be charged at a rate of 4% above the standard base rate or as otherwise stated in the Planning Obligation. In such circumstances, the applicant may also become liable for additional monitoring and enforcement costs.

- 3.23 The Council will then calculate the total financial contribution payable including any interest and/or indexation due and will provide a copy of this calculation to the developer. This calculation will be valid for a period of 14 days from the date of issue unless otherwise agreed in writing. If the calculation has not been agreed within 14 days and is shown to be arithmetically correct following the resolution of any dispute, then late payment interest will be charged as per paragraph 3.22 above.
- 3.24 Once the developer has agreed the calculation, the Council will issue an invoice to the developer for the agreed sum. The invoice issued will be subject to the Council's standard payment terms.
- 3.25 The Council will not accept payment of any financial contribution unless accompanied by a valid invoice.
- 3.26 Upon receipt, financial contributions will be held in a specific account before being transferred to the relevant internal departments or third parties (e.g. other public sector body, parish council etc.) responsible for spending the contribution.
- 3.27 The S106 agreement will include a clause detailing how and when any unspent funds will be refunded. Given that a unilateral undertaking, necessarily, does not have the Council as a party, there cannot be any obligations on the Council to return any unspent monies.
- 3.28 All receipts and spending of financial contributions will be recorded and monitored by the Council's Senior Manager-Development Management.
- 3.29 Please note that financial contributions payable to Oxfordshire County Council (i.e. those relating to highways and education and relevant administrative and monitoring fees) will be subject to a different process and developers are advised to refer to OCC's Developer Guide (available online) or contact the Oxfordshire County Council Infrastructure Funding Team for further information.

Fees

- 3.30 The Council's legal costs of preparing the Planning Obligation will be borne by the developer. These costs will be based on an hourly rate and will depend upon the complexity of the agreement and the length of time taken to settle the draft and proceed to completion. The Council will therefore require developers to provide a 'cost undertaking' to pay for the Council's reasonable fees, prior to it being able to instruct its acting solicitors.

- 3.31 The Council's reasonable legal fees will need to be met even if the planning obligation is not completed.
- 3.32 Standard unilateral undertakings will be subject to an administration charge covering legal costs and if necessary the transfer of money to third parties.

Monitoring and Enforcement

- 3.33 The Council monitors all Planning Obligations and will work with developers to ensure that financial contributions and non-financial obligations are delivered on-time. Monitoring fees may be charged in order to undertake such work, given that S106 Agreements/Unilateral Undertakings are made pursuant not just to section 106 of the Town and Country Planning Act 1990 (as amended) but also to section 111 of the Local Government Act 1972 and section 1 of the Localism Act 2011.
- 3.34 Where there is evidence of non-compliance with a Planning Obligation (such as the non-payment of financial contributions, failure to comply with an obligation, or failure to notify the Council of a due payment or event as required), the Council will seek to recover all reasonable administration costs incurred. This could include, for example, site visits, the recovery of any unpaid monies and/or correspondence.
- 3.35 If it is clear that matters within the planning obligation are not being complied with, the Senior Manager - Development Management will instruct the Council's Legal Team to take appropriate action to secure compliance. This could include for example, seeking a court injunction.

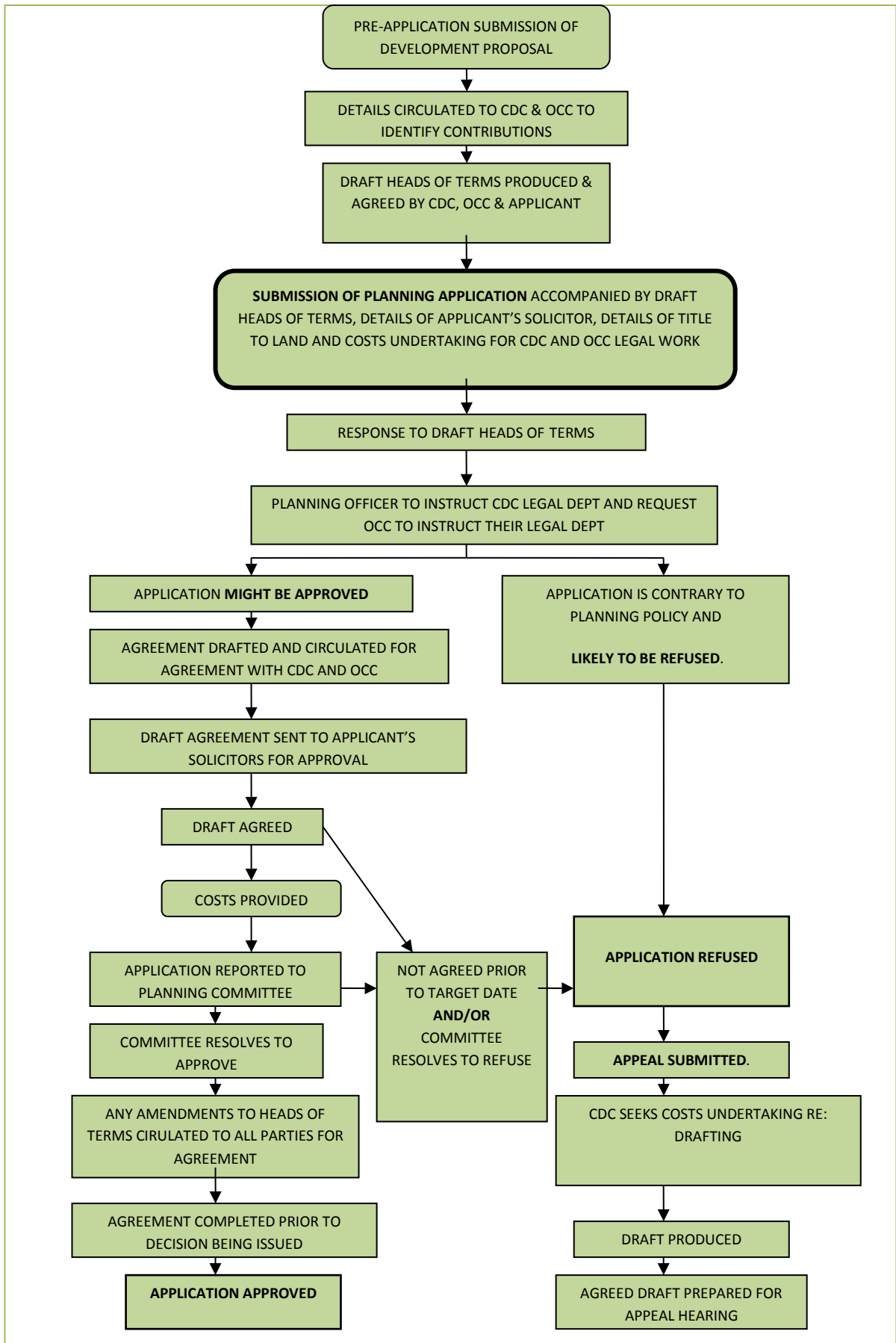
Indexation

- 3.36 Financial contributions are based upon the costs of infrastructure. Financial contributions will therefore be indexed (i.e. index-linked to inflation) to ensure that they retain their original 'real value'. The base date and appropriate index to be applied will be set out in the legal agreement.
- 3.37 Where a formula has been set for the calculation of contribution levels, any cost figures used will be updated regularly to take account of inflation and are the sums required at the time of negotiation.
- 3.38 All payment levels will be subject to an inflation factor (often RPI or CPI) adjusted according to the fluctuations between the date of the obligation and the quarter period in which payment is due to the District Council. The County Council will also adjust payments to it but these might be subject to different measures of inflation.

Dispute Resolution

- 3.39 Changes introduced by the Housing and Planning Act 2016 will amend the Town and Country Planning Act 1990 (as amended) by inserting a new section 106ZA and Schedule 9A which will give the Secretary of State the power to appoint someone to resolve issues that are holding up the completion of a planning obligation. As at the date of the SPD, these provisions are not yet in force.
- 3.40 Figure 1 overleaf provides an overview of the Planning Obligation process

Figure 1: Planning Obligation Process



4. SPECIFIC PLANNING OBLIGATION GUIDANCE BY TYPE

- 4.1. This section gives specific advice for various types of infrastructure commonly required by the Council to support development. However, as stated previously, it does not cover every circumstance and/or obligation that may be needed to make a development acceptable in planning terms. In all cases the LPA will ensure that the infrastructure sought complies with the three tests in CIL Regulation 122.
- 4.2. Appendix 16 offers a guide to the types of infrastructure to be covered by S106 planning obligations and what may be covered by CIL (or a similar replacement infrastructure levy) if it is introduced by the Council in the future.

Affordable Housing

- 4.3. Cherwell District has a high level of need for affordable housing. The Council's Housing Strategy 2012-17 recognises the need for affordable homes, and aims to ensure that Cherwell is well-placed to maximise investment by registered providers and to respond to opportunities as they arise.
- 4.4. The NPPF defines affordable housing as social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market.
- 4.5. The various types of affordable housing can be described as follows:

Social Rented Housing

- 4.6. Rented housing owned and managed by local authorities and registered social landlords, for which guideline target rents are determined through the national rent regime. It may also include rented housing owned or managed by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Homes and Communities Agency as a condition of grant.

Affordable Rented Housing

- 4.7. Rented housing provided by a registered provider of social housing, that has the same characteristics as social rented housing except that it is outside the national rent regime, but is subject to other rent controls that require it to be offered to eligible households at a rent of up to 80% of local market rents.

Intermediate Housing

- 4.8. Housing at prices and rents above those of social rent, but below market price or rents and which meet the criteria set out above but does not include affordable rented housing. These can include shared equity products or other low cost homes for sale such as:
- Shared Equity;
 - Shared Ownership;
 - Discount Sale.

Requirements & Thresholds

- 4.9. Policy BSC 3 of the adopted Cherwell Local Plan Part 1 requires the following provision:
- At Banbury and Bicester all proposed developments that include 11 or more dwellings (gross), will be expected to provide at least 30% of new homes as affordable homes on site.
 - At Kidlington and elsewhere, all proposed developments that include 11 or more dwellings (gross), or which would be provided on sites suitable for 11 or more dwellings (gross), will be expected to provide at least 35% of new housing as affordable homes on site.
 - Where there is a requirement that part of an affordable home should be provided, a financial contribution of equivalent value will be required for that part only. Otherwise, financial contributions in lieu of on-site provision will only be acceptable in exceptional circumstances.
- 4.10. The adopted Cherwell Local Plan requires all qualifying developments (ie those developments comprising 11 or more dwellings (gross)) to provide 70% of the affordable housing as affordable/social rented dwellings and 30% as other forms of intermediate housing. Social rented housing will be particularly supported in the form of extra care or other supported housing. It is expected that these requirements will be met without the use of social housing grant or other grant.
- 4.11. In calculating any affordable housing contribution the Council will apply 'vacant building credit' to qualifying developments. Guidance on qualifying developments will be provided by the Council's Strategic Housing Team.

Housing Mix

- 4.12. Adopted Local Plan policy BSC4 sets out the Council's housing mix requirements. In general there is a need to provide a mix of housing to reflect the needs of an ageing population, a growth in smaller households and the demand for family housing.

- 4.13. In all qualifying developments the mix of housing will be negotiated having regard to the Council's most recent evidence and evidence from developers on local market conditions.
- 4.14. Extra Care Dwellings will be important in meeting the needs of an older population. They comprise self-contained accommodation for older and disabled people which enables independent living by providing a range of support facilities on the premises and 24 hour care services. Housing sites of at least 400 dwellings will be expected to provide a minimum of 45 self-contained extra care dwellings as part of the overall mix. However, if the Council agrees that extra care housing would not be desirable in a particular location an equivalent amount of alternative specialist housing (use class C3) for older people will be required. All proposals will be expected to provide affordable housing in accordance with policy BSC3.
- 4.15. In some cases the Council may also seek to secure a small number of more specialist housing units which will provide accommodation for those with support needs. These will be sought in areas which are deemed to be appropriate and in discussions with applicants at an early stage.

Affordable Housing Standards

- 4.16. At present the Council' adopted local plan does not set out detailed policies on affordable housing standards, however, any registered provider will normally request that 50% of the affordable rented housing required will be built to Building Regulations Requirements M4(2) Category 2: accessible and adaptable dwellings. In addition, 1% of the affordable housing should be built to Building Regulation Requirement M4(2) Category 3: Wheelchair User Dwelling. This requirement will be assessed on a site by site basis in discussion with the developer.
- 4.17. It is expected that all affordable housing provided under a rented tenure will be built to the nationally described space standards. Intermediate housing which is deemed to be low cost home ownership should be built to the same or better space standards including garden sizes as the equivalent market housing on the site.
- 4.18. It is expected that where appropriate affordable housing should not be clustered in any more than 10 units of one tenure and 15 units of multiple affordable tenures with no contiguous boundary of the clusters. This is expected in the first instance and schemes should be developed with this in mind. However the Council will be flexible and pragmatic on this clustering approach when considering certain site constraints or scheme densities.

Viability

- 4.19. The Council will seek the provision of affordable housing on all qualifying developments in accordance with Policy BSC 3. However, if developers consider that the Council's policy requirements on affordable housing give rise to development viability issues they will need to fully justify their reasons. A detail of how the Council will assess viability issues is set out in Section 3 above.

Commuted Sum Calculations

- 4.20. Local Plan policy BSC3 states that only in exceptional circumstances will the Council accept commuted sums in lieu of on-site provision.
- 4.21. In the event that the Council accepts a commuted sum in lieu of on-site provision it will be calculated on the basis of the mix of tenures and sizes that the Council considers would have been appropriate for the site. The sum should be of a 'broadly equivalent value' of the developer/landowner contribution if the affordable housing was provided on site. The commuted payment will be based on a sum equal to the difference between an Open Market Value (OMV) and Affordable Housing Value (AHV).

Cherwell Local Plan 2011-2031: Partial Review – Oxford's Unmet Housing Need

- 4.22. In July 2017 the Council published its Proposed Submission Partial Review Plan. This is a focused Plan to provide Cherwell's share of the unmet housing needs of Oxford to 2031. It identifies a number of development sites with specific affordable housing requirements. Supported by a viability assessment the emerging policies in the Plan seek to meet Oxford City's requirements for 50% of its housing to be provided as affordable homes.
- 4.23. Oxford's Local Plan, its Housing Strategy and the Oxfordshire Housing Market Assessment (2014) describe the city's housing needs in detail. As Oxford's affordable housing need is so high the emerging Partial Review prescribes the mix of housing sizes needed for the defined 'affordable' element of the new housing supply. It also requires a higher level of affordable rent/social rented accommodation (80% of the total affordable housing requirement) than Cherwell's 70% requirement.
- 4.24. The affordable housing standards required by the policies in the Partial Review will be applied to section 106 negotiations once they have been adopted.

Further Advice

- 4.25. Detailed advice on the provision of affordable housing is available by contacting the Council's Strategic Housing Team.

Air Quality

- 4.26. Promoting sustainable development is a key focus of the adopted Cherwell Local Plan. The need to consider the effects of development on air quality, and how it can contribute towards improvements and mitigate against adverse impacts, is identified as a key challenge to ensuring sustainable development. Commuters in Cherwell travel relatively long distances and reducing travel by car and managing traffic congestion is a major challenge. Maximising the opportunity to shift from dependency on cars to sustainable modes of transport is also identified.
- 4.27. Policy SLE 4 includes a requirement for new developments to provide financial and/or in-kind contributions to mitigate the transport impacts of development. All development where reasonable to do so, should facilitate the use of sustainable modes of transport to make the fullest possible use of public transport, walking and cycling. Encouragement will be given to solutions which support reductions in greenhouse gas emissions and reduce congestion.
- 4.28. In March 2017 the Council approved an Air Quality Action Plan (AQAP) as part of its statutory duties required by the Local Air Quality framework. It outlines the actions to be taken to improve air quality in the District between 2017 and 2020.
- 4.29. There are four Air Quality Management Areas (AQMAs) in the District where air quality does not meet national air quality objectives for nitrogen dioxide. These concentrations are largely related to road traffic emissions.

Requirements and Thresholds

- 4.30. All new development within or immediately adjacent to Local AQMAs, or those with traffic routed through an AQMA may be subject to section 106 agreements which require the implementation of measures to offset increases in local pollutant emissions, and /or make an appropriate financial contribution towards improvement measures or air quality monitoring.
- 4.31. The following mitigation measures may be required

- Measures during the construction of new development including dust control;, site monitoring and plant emissions;
- Improved access to public transport;
- The provision of on and off site facilities for cycling and walking;
- The management of car parking;
- Traffic management;
- Road infrastructure;
- Green Travel Plans;
- Monitoring of air pollution.

4.32. The Council will calculate the contribution sought based on the scale of the development and the trip generation for different uses.

4.33. The list of the current Local AQMAs and the actions required are set out in the Council's AQAP which can be viewed on its website.

Apprenticeships and Skills

4.34. Paragraph 19 of the NPPF states the Government's commitment to ensuring that the planning system does everything it can to support sustainable economic growth. Securing the economic future of the District is the main priority of the adopted Cherwell Local Plan Part 1 ('the Plan'). The main focus of the Plan is strengthening the local economy, job creation, inward investment and company growth, as well as building cohesive communities. In particular, the Plan notes that as relatively large numbers of people in Cherwell are without qualifications and basic skills the level of education and training needs to improve. The Plan contains five strategic objectives for developing a sustainable economy. Strategic Objective 3 (SO3) aims, amongst other things, to support an increase in skills and innovation. Furthermore, paragraph B14 of the Plan states that the Council will support proposals to strengthen the skills base of the local economy which will include the promotion of local training providers.

4.35. The need to increase the number of apprenticeships locally is picked up by both the Oxfordshire Local Economic Partnership (OxLEP) and the South East Midlands Economic Partnership (SEMLEP). OxLEP's Strategic Economic Plan 2016 is committed to delivering 1150 more apprenticeships to 2020 within Oxfordshire. The SEMLEP Strategic Economic Plan 2015-2020 is seeking just over 94,000 apprenticeship starts within the SEMLEP area. Of these, it is anticipating that 7017 will be created within the Cherwell District. It notes in particular that there is a shortage of skills and an ageing workforce in the construction sector across the SEMLEP area and that there are significant opportunities for jobs growth in these sectors.

- 4.36. The Council approved an Interim Position Statement on Planning Obligations for Construction Apprenticeships and Skills in April 2016. This document provided detailed advice and guidance on the Council's approach to securing construction apprenticeships and skills through the planning system. This guidance has now been updated and is included at Appendix 13.
- 4.37. It states that the Council will require the provision of a stated minimum number of new construction apprenticeships (or apprenticeship starts) as part of a required Employment, Skills and Training Plan (ESTP) for each proposal for new development. The ESTP will be secured by S106 agreement.
- 4.38. A second key area of employment, skills and training for which S106 agreements will be sought is the 'end user phase' of commercial and mixed use development. S106 agreements will be used by the Council to support/provide the training and skills needed by local people to access the new job opportunities created by the development's end user. The ESTP, referred to above, will therefore also be required to address this end user phase.
- 4.39. Appendix 13 sets out the type of development and the thresholds on development that will trigger this requirement. However, if proposed developments fall below these thresholds and developers still wish to provide new construction apprenticeships, the Council will support them in doing so.

Cemeteries

- 4.40. The adopted Cherwell Local Plan Part 1 highlights a key community challenge for both Banbury and Bicester as being the need to provide additional burial site provision. Policy Bicester 9 and Policy Banbury 13 both make provision for additional burial site provision in their respective settlements. Both policies also state that developer contributions will be sought from new developments in the towns towards the establishment of such a facility.
- 4.41. In terms of need, the Local Plan Inspector appointed to examine the submission Cherwell Local Plan observed in relation to Policy Banbury 13, that: *'This policy confirms the local requirement for new burial site provision in Banbury with contributions from major new housing schemes to provide funding to facilitate an extension to the existing cemetery, subject to suitable ground conditions being demonstrated. The evidence of need is unquestioned and therefore the policy is soundly based and requires no modification.'*

- 4.42. In relation to Policy Bicester 9 the Inspector stated *'This policy confirms the urgent local requirement for a new burial site of around 4has in Bicester. It is consistent with the current expectation that it can be provided as part of the Policy BIC 1 scheme, with funding contributions from other housing developments in the locality to help secure delivery. The evidence of need is clear and unquestioned and therefore policy is soundly based and requires no modifications.'*
- 4.43. At Bicester it is anticipated that a site will be provided within the North West Bicester development area (Policy Bicester 1). At Banbury an extension to the north of the existing cemetery at Southam Road was granted planning permission in 2015 (planning application reference 15/01194/F).
- 4.44. Requirements for additional cemetery space in the rest of the District will be identified in the emerging Partial Review of the adopted Cherwell Local Plan, and the Cherwell Local Plan Part 2.

Thresholds and Contributions

- 4.45. All new residential developments of 10 or more dwellings will be expected to contribute to the provision of new, or the expansion of existing, cemeteries and their maintenance where the need generated by the development cannot be met by existing provision and a scheme has been identified to meet that need.
- 4.46. At Banbury and Bicester the Town Councils in association with the District Council are pursuing schemes for new /extended provision. Specific costs will therefore be available for individual schemes.
- 4.47. Financial contributions will be sought for land acquisition, laying out; and future management and maintenance on a site by site basis where there is an identified need. The contributions sought will be dependent upon site circumstances (eg ground conditions) and commensurate to the need generated by the development.
- 4.48. In those limited cases where a development is of a scale that necessitates a new cemetery, developers will need to carry out consultation with the local population, and consider national guidance and best practice prior to design and implementation of cemeteries.
- 4.49. The methodology to be used in the calculation of contributions is as follows:
- a) Number of burial plots required to 2031 divided by the average number of plots per hectare = area of land required.

- b) Cost (including land purchase cost (unless land given free of charge), drainage, paths, landscaping, fencing and storage facilities) of cemetery provision multiplied by % attributable to population growth.
- c) Divided by population growth = cost per person
- d) Multiplied by the average occupancy per dwelling type (2.49) = per dwelling cost (1 bed, 2 bed, 3 bed, 4+ bed)

Community Hall Facilities

- 4.50. Policy BSC 12 of the adopted Cherwell Local Plan sets out the Council's overall approach to the provision of new or extended community hall facilities.
- 4.51. In 2016/2017 the Council commissioned a 'Cherwell Community Spaces and Development Study (CCSDS) to provide evidence and policy proposals to inform community development and community indoor space provision in relation to new housing developments. An interim CCSDS was published in January 2016 and the study was completed in 2017.
- 4.52. The CCSDS Study recommends a local minimum standard of provision for community hall facilities required to meet the needs of the residents generated by new development. This minimum standard is 0.185m² per person.

Thresholds and Contributions

- 4.53. The local planning authority will expect all residential developments of 10 or more dwellings to contribute towards the provision of new community facilities or the improvement/expansion of existing facilities where there is not enough spare capacity in existing appropriate facilities to meet the needs generated by the development. This may include financial contributions and/or the provision of land and buildings to enable new community facilities to be provided, or for existing facilities to be extended or improved.
- 4.54. Where on site provision is required, the LPA will expect the developer to design and gain the necessary planning consents to a specification agreed by the LPA. The developer will then be expected to build the facility in accordance with the approved scheme. A commuted sum for the future maintenance of the facility will also be sought.
- 4.55. The threshold for provision of community facilities on site is normally a population that supports a minimum community facility of 345m² to include a main hall, kitchen, toilets and adequate storage. (ie approximately 750 dwellings). Where new

development is taking place that demands a larger space then the opportunity should be taken to provide a range of spaces for a wider range of activities.

- 4.56. The Council's accessibility standard is 800m walking distance for facilities in urban areas, and a 15 minute drive time for residents in rural areas. On-site provision may therefore be sought for smaller developments depending upon the proximity of existing community centres. The size of the on-site provision will be commensurate with the scale of the development. This will be assessed on a case by case basis.
- 4.57. Where new development gives rise to a need for additional indoor community provision (but not a new freestanding facility) financial contributions will be sought for either off-site provision or the improvement/upgrading of existing facilities where appropriate schemes have been identified. Those needs will be assessed on a pro-rata basis using the standards set out in Appendix 11
- 4.58. The appropriate contribution is calculated by reference to the expected population in the development and the facilities required to support the population, multiplied by a standardised cost for the provision of the facility. Where contributions are sought for the expansion or improvement of existing facilities then the costs applying to the proposed improvements will apply.

Community Development

- 4.59. Community development is a key objective of the adopted Cherwell Local Plan. Strategic Objective SO10 seeks to provide sufficient accessible, good quality services, facilities and infrastructure, to meet health, education, transport, open space, sport, recreation, cultural, social and other community needs, reducing social exclusion and poverty, addressing inequalities in health, and maximising well-being.
- 4.60. Strategic Objective SO14 seeks to create more sustainable communities by providing high quality, locally distinctive and well-designed environments which increase the attractiveness of Cherwell's towns and villages as places to live and work and which contribute to the well-being of residents.
- 4.61. These objectives are further supported by the statement in paragraph B.86 that the Council wishes to ensure that new development fully integrates with existing settlements to forge one community, rather than separate communities.
- 4.62. Evidence gathered in preparing the 2017 Cherwell Community Spaces Development Study (CCSDS) strongly endorses the value of having a community development worker available at an early stage in a new development to 'kick start' the process of

bringing people together, developing new activities and putting in place the building blocks of a strong community.

- 4.63. The Council will therefore seek financial contributions towards the provision of a community activation fund and community development workers for major residential developments.

Thresholds

- 4.64. The threshold for contributions will generally be where a new community building is required to meet the needs of the new development, where the development is likely to give rise to a large new community, or where there may be issues of integration with existing communities.
- 4.65. Contributions will therefore not be sought from developments of fewer than 100 new dwellings unless they form part of a larger scheme.

Contributions

- 4.66. Contributions will be sought on a case by case basis to fund support from a community development worker. The levels of contributions sought are set out in Appendix 12
- 4.67. In addition to contributions towards a staffing resource, contributions will be sought towards a community development fund to enable community development workers to support the community through the provision of newsletters, events and activities as appropriate.

Community Safety & Policing

- 4.68. The supporting text to the adopted Cherwell Local Plan Part 1 states that the Council will ensure that new developments, area renewal and town centre expansions are safe places to live, work and visit by using tools such as 'secured by design' and by requiring provision of appropriate community safety and police infrastructure where required.
- 4.69. Thames Valley Police (TVP) is the police force that covers the Cherwell area. TVP operate a police model based upon the creation of Local Police Areas. At present the Cherwell Local Police Area has a population of approximately 141,900 made up of 56,700 households (source: 2011 Census). This population generates an annual total of circa 32,500 incidents that require police action. These are not necessarily all 'crimes' but are calls to the 999 handling centre which require a police response.

4.70. TVP have advised that the anticipated planned growth in the District will place a significant extra demand on existing resources. The Council will therefore require all residential (10 dwellings or more) and commercial developments, where required and where appropriate, to contribute towards the delivery of the following items of infrastructure to serve new developments and mitigate against their impact upon existing policing resources.

- Staff Set Up Costs – the cost of equipping and setting up new officers required to police new communities and neighbourhoods (not salary).
- Provision of New Vehicles and Bikes – the purchase of new fleet vehicles and bicycles.
- Premises – contributions towards the adaption/alterations or extension of existing premises for new officers to base themselves or work out of.
- Mobile IT – provision of suitable kit and equipment to enhance the mobility and flexibility of officers when working.
- Radio Capacity – additional demand will lead to an additional impact upon existing capacity of infrastructure.
- ANPR Cameras – Automatic Number Plate Recognition Cameras aid in detection but also prevent crime. Funding for the strategic placement of these cameras either in or close to new housing development will be sought where appropriate.
- Control Room and Police National Database Capacity – At present police control room handling is at capacity at peak times. Contributions towards improving the capacity of the existing infrastructure may be required.

4.71. Requirements and contributions will be assessed on a site by site basis when a specific need or item of infrastructure that is directly related to the development is identified.

4.72. The costs relating to the proposed infrastructure items or area-based initiatives will be applied proportionately to the size or the potential occupancy of the development.

4.73. Further advice on the level of contributions sought for community safety/CCTV provision by development type can be found in Appendix 14.

Education

(Including primary, secondary, pre-school, further education and special needs education)

4.74. The NPPF (paragraph 72) states that the Government attaches great importance to ensuring that a sufficient choice of school places is available to meet the needs of

existing and new communities. This approach is further developed in the adopted Cherwell Local Plan Part 1 (Policy BSC 7) which seeks the provision of educational facilities throughout the District to accommodate population growth.

- 4.75. Oxfordshire County Council (OCC) has a statutory responsibility to ensure there are sufficient school and childcare places available for local children and young people living within the county of school age and whose parents wish their children to be educated by the state. It is important that these places are available within a reasonable travel distance for all those of school age occupying new residential development. OCC produces an annual Pupil Place Plan³ which sets out how school provision is expected to change over the next few years including anticipated requirements for new schools and school extensions linked to planned housing growth.

Planning Obligation Requirements

- 4.76. The LPA will expect all residential developments to contribute towards the provision of education infrastructure where there is not enough spare capacity in existing appropriate schools to meet the needs generated by the development. This may include financial contributions and/or the provision of land and buildings to enable new schools to be provided or for existing schools to be extended. A list of planned projects is set out in the Council's IDP which is updated on a yearly basis.
- 4.77. Developments which are of such a scale as to require the provision of a new school will be expected to fully fund the most appropriate size of school which would be sufficient to accommodate the projected pupil generation. Where a new school is serving the needs of multiple developments, the cost of the school will be shared proportionately across the relevant developments, subject to the constraints of the CIL regulations.
- 4.78. In some cases the most appropriate scale of new school may be less than the projected pupil generation, in which case the development may also be required to fund expansion of existing schools, where this is necessary.
- 4.79. Subject to approval by the Council and OCC the direct delivery of schools by developers may also be considered acceptable.
- 4.80. OCC's consideration of whether developer contributions towards education provision are required will be informed by the projected capacity figures. Empty places at a

³ www.oxfordshire.gov.uk/cms/content/pupil-place-plan

school do not necessarily equate to there being sufficient capacity at that school as it is generally accepted that schools should not operate at 100% of their capacity.

- 4.81. Where a new development is proposed in an area with sufficient projected capacity, no financial contribution will be required; however, where the proposed development would result in insufficient projected capacity, a contribution will be required. If there is insufficient capacity to accommodate the increase in pupils likely to be generated by a development and the development itself cannot enable the necessary provision the County Council will raise objections to the development.
- 4.82. It is in the interests of the developer and to potential residents to ensure that schools are able to accommodate the additional pupils generated by their development. It is recommended that developers contact the County Council's education team at the earliest possible stage in the process to ascertain whether there would be a requirement for additional education provision within the locality of their proposed development.
- 4.83. In circumstances where it is not possible to provide school places within a reasonable walking distance an additional contribution towards the cost of providing transport for children to school may be required. The contribution will reflect the cost of providing the transport for a defined period of time.
- 4.84. This requirement will apply to all urban and rural residential developments which are likely to generate demand for school places. Contributions will not be sought towards educational infrastructure from developments of studio or one bed dwellings, institutional accommodation exclusively for undergraduate students or from sheltered/elderly housing and other specialist housing developments where children will not live.
- 4.85. Further advice on the method of calculations and the expected costs are set out in Appendix 2 and Appendix 3 respectively. Reference should also be made to OCC's Developer Guide which is available on its website.

Flood Risk

- 4.86. There are extensive areas in the District that have been identified as being at risk of flooding. Flood risk arises from rivers, canals, sewers, surface water and ground water.
- 4.87. Policies ESD 6 and ESD 7 of the adopted Cherwell Local Plan Part 1 seek to manage and reduce flood risk by using a sequential approach to development. Developers will therefore need to demonstrate that account has been taken of flood risk from all

sources, and that the proposed development incorporates mitigation and management measures appropriate to the use and location. The Council also requires developers to improve water efficiency and reduce surface water run-off through the use of a range of Sustainable Drainage Systems (SUDs).

- 4.88. Flood defence measures that are deemed necessary to a development to mitigate specific impacts of that development, (including SUDs) will normally be sought through a planning condition. However, in certain circumstances a section 106 agreement may be required.

Health & Wellbeing

- 4.89. Policy BSC 8 of the adopted Cherwell Local Plan Part 1 sets out the Council's approach to securing health and well-being throughout the District. In addition, the Bicester Healthy New Town Programme aims to enable people who live or work in Bicester to live healthier lives and to prevent ill health in the future.
- 4.90. Improving public health, safety and individual wellbeing is also an overarching transport goal of OCC's LTP4. This will be achieved by increasing levels of walking and cycling, reducing transport emissions, reducing casualties, and enabling inclusive access to jobs, education, training and services.
- 4.91. New residential development will be expected to contribute towards the provision of additional health care infrastructure generated by its population growth where there is insufficient existing capacity, well located to serve the development. This may include financial contributions and/or the provision of land and buildings to enable the provision of doctor's surgeries and other health facilities to serve the local population, or the upgrading or extension of existing facilities in some locations.
- 4.92. An on-site new facility would not normally be required unless a need is generated by a patient population of 8,000 or more and only then if other nearby practices lack the capacity to expand. On smaller residential sites and where the new development increases demand on existing facilities, the need for new provision is likely to be replaced by extending existing facilities.

Contributions

- 4.93. The LPA will seek a financial or in kind contribution from developments of more than 10 dwellings towards the improvement and/or extension of existing primary medical care infrastructure where appropriate schemes are identified on a site by site basis.

- 4.94. Primary medical care infrastructure needs may include:
- Land on which to build either a new healthcare facility or an extension to an existing facility;
 - Building – either a new facility or an extension to an existing facility
 - ICT Infrastructure to support primary care expansion.
- 4.95. Contributions at an enhanced rate will be sought from developers of extra care housing, and care/nursing homes. This requirement reflects the much greater input and healthcare support required by the residents of such developments. Such contributions will be negotiated on a case by case basis.
- 4.96. Further detailed advice on the method of calculations and the costs of contributions can be found in Appendix 15.
- 4.97. As primary care practices are run as independent businesses an appropriate mechanism is needed to ensure that any facilities paid by developer contributions remain in community use for at least 15 years. As such any funds secured towards the provision of extensions/improvements or new facilities will be the subject of an agreement with the individual practices.
- 4.98. Any practice that benefits in this manner will be required to repay the funds if the practice does not continue for 15 years after the facilities have been provided.

Heritage

- 4.99. Policy ESD 15 of the adopted Cherwell Local Plan Part 1 seeks to protect, sustain and enhance designated and non-designated 'heritage assets'.
- 4.100. Where appropriate and assessed on a site by site basis the Council may require a S106 agreement which seeks to conserve and enhance the historic environment directly affected by a proposed development. Such projects could include:
- Repair, restoration or maintenance of a heritage asset and its setting;
 - Increased public access and improved signage to and from heritage assets;
 - Interpretation panels/historical information and public open days;
 - Measures for investigation, preservation and display of archaeological remains and sites;
 - Public realm obligations, including enhancement of historic squares and spaces, registered parks and gardens, historic pavement materials, street furniture, and removal of street clutter.

Indoor Sport and Recreation

- 4.101. Policy BSC12 of the adopted Cherwell Local Plan Part 1 sets out the Council's overall approach to provision and enhancement of indoor sport and recreation.
- 4.102. The Council's PPG17 Indoor Sports and Recreational Facilities Assessment 2006 identified the current and future deficiencies in provision and contain recommendations as to how these deficiencies can be met.
- 4.103. The Council is currently undertaking a review of the District's indoor sport and recreation provision. If this additional analysis work results in amendments to the Council's standards, they will be updated in the Cherwell Local Plan Part 2. Once in place, Local Plan Part 2 standards will replace Appendix 9.
- 4.104. The PPG17 Assessment recommended local minimum standards of provision and these are set out in Appendix 9.
- 4.105. New development that generates a need for sport and recreation facilities that cannot be met by existing provision will be expected to contribute towards the provision of new facilities or the improvement/expansion of existing facilities.
- 4.106. Where on site provision is required, the LPA will expect the developer to design and gain the necessary planning consents to a specification, in accordance with Sport England requirements, and agreed by the LPA. The developer will then be expected to build the facility in accordance with the approved scheme. A commuted sum for the future maintenance of the facility will also be sought in the event that the facility is transferred to the Council.

Thresholds

- 4.107. The threshold for provision of indoor sport and recreation facilities on-site is a population that supports a 4 court facility or 683m² of floor space. i.e. 12648 people or 5080 dwellings if the average occupancy is 2.49 per dwelling. (based on the adopted standard of 0.315 badminton courts per 1000 population)

Contributions

- 4.108. If on-site provision is not possible, or appropriate, or where the development falls below the threshold, financial contributions will be sought for either off-site provision

or the improvement/upgrading of existing facilities where appropriate schemes have been identified.

- 4.109. Costs relating to the proposed improvements will be proportionate to the size or potential occupancy of the development. The levels of contributions will be reduced where the developer makes appropriate provision on-site of particular services or facilities.
- 4.110. The appropriate contribution is calculated by reference to the expected population in the development and the facilities required to support the population, multiplied by a standardised cost for the provision of the facility. Where contributions are sought for the expansion or improvement of existing facilities then the costs applying to the proposed improvements will apply.
- 4.111. Further detailed advice can be found in Appendix 9.

Nature Conservation & Biodiversity

- 4.112. Policies ESD10 and ESD11 of the adopted Cherwell Local Plan Part 1 sets out the Council's approach to the protection and enhancement of biodiversity and the natural environment, including Conservation Target Areas.
- 4.113. Relevant habitat and species surveys and their associated reports will be required to measure the biodiversity impact following the locally adopted Defra Offsetting Metrics and submitted to accompany planning applications which may affect a site of known, or potential, biodiversity value or the biodiversity/natural environment of the local area.
- 4.114. In addition to identifying biodiversity impacts, biodiversity surveys and reports should identify opportunities to deliver biodiversity enhancements.
- 4.115. Detailed advice for preparing a biodiversity survey can be found in OCC's guidance entitled 'Biodiversity and Planning in Oxfordshire' which is available on its website.
- 4.116. Where mitigation for the ecological impacts of a development can be achieved on-site, the LPA would normally secure this through a planning condition. Arrangements for the long term management and maintenance of this mitigation will normally be secured by a S106 agreement. In certain circumstances the LPA may seek a Local Ecological Management Plan, or equivalent, through a planning condition.

- 4.117. Thames Valley Environmental Records Centre has identified ten Conservation Target Areas (CTAs) in the District. They have been identified to focus work to restore biodiversity at a landscape scale through the maintenance, restoration and creation of UK Biodiversity Action Plan (BAP) priority habitats.
- 4.118. General targets for maintenance, restoration and creation of habitats have been set for each area. These will be achieved through a combination of biodiversity project work undertaken by a range of organisations, agri-environment schemes and biodiversity enhancements secured in association with development. These targets are in the process of being made more specific in terms of the amount of each habitat type to be secured within each CTA.
- 4.119. Where on-site mitigation or compensation cannot be achieved contributions may be sought towards a scheme that closely offsets the impact of the development, and which also meets the aims of the Council's BAP.
- 4.120. The Council will generally seek to fund biodiversity enhancements via a S106 agreement. This is based on the Council's position that biodiversity offsets should not be classified as infrastructure⁴ because they do not enable the development to function, nor do they provide any facility to those living within or using the new development. This means that the pooling of 5 or more contributions towards one project or plan is possible.

Open Space, Play Facilities, Outdoor Sport & Recreation

- 4.121. Proposals for new development will be expected to contribute to open space, sport and recreation provision in accordance with Policies BSC10, BSC11 and BSC12 of the adopted Cherwell Local Plan Part 1.
- 4.122. The evidence base for these policies is the District's PPG17 - Open Space, Sport and Recreational Facilities Needs Assessment, Audit and Strategy 2006, the subsequent Green Spaces and Playing Pitch Strategies 2008 and the Open Space Update 2011. The Council has now commissioned studies to update this information. Should these studies result in amendments to the open space standards, these standards will be updated in the Cherwell Local Plan Part 2.

Local Standards and Thresholds

- 4.123. The Council's strategies referred to above establish the current and future deficiencies in open space, sport and recreation provision together with recommendations as to how these deficiencies should be met. The Strategies recommend local minimum

⁴ Defra communication to Warwickshire County Council (02/11/2015)

standards of provision and these are embodied in the adopted Cherwell Local Plan Part 1. They are set out in Appendix 4 for ease of reference. The Local Plan also includes qualitative standards of provision.

- 4.124. Obligations will be sought in cases where the proposed development will result in a net increase in demand for recreational facilities. If the development is for a purpose which is unlikely to generate demand then no contribution will be sought. The LPA may, however, seek contributions from applicants for commercial development as working population increases as a result of commercial development can add to demand for facilities. People travelling in to the District for work will often use facilities close to their place of work.
- 4.125. On-site provision will be sought, in the first instance, in accordance with the minimum standards set out in Appendix 4. Detailed guidance on the Council's specification and design requirements for different types of open space/facility can be requested from the Council's Street Scene and Landscape Services Section. Agreement will be sought with the relevant town or parish council on the equipment to be purchased.
- 4.126. If the proposed development results in an increase in demand for recreational facilities, and it is not practical to provide open space as part of the development, and there are identified shortfalls in the area, the LPA will seek a financial contribution towards off-site provision. This may include contributions to the improvement/enhancement of existing areas/facilities where appropriate schemes have been identified.
- 4.127. A list of deficiencies in open space, sport and recreation and priorities by Ward is set out in the Council's PPG17 Assessment – Open Space, Sport and Recreational Facilities Needs Assessment Audit and Strategy 2006, the subsequent Green Spaces and Playing Pitch Strategies 2008, and the Open Space Update 2011. Updated information will be published by the Council as it becomes available.
- 4.128. Commuted sums for maintenance of the open space or play facility will also be sought. This sum will be based on the LPA's actual maintenance costs, to cover the future maintenance of open space, sport, and recreation and play facilities, together with a sum to cover management costs for a 15 year period. A multiplier is used to account for the costs which will vary over the 15 year period and the 'discount effect' of a lump sum up front. In some instances a capital sum contribution for the build out of provision may be deemed necessary. The Council's 2016/2017 commuted sum requirements are set out in Appendix 6. These are subject to annual updates. Further detailed information and specifications can be accessed by contacting the Council's Street Scene and Landscape Services Section.

Local Management Organisations for Open Space Management

- 4.129. It is the Council's strong preference that public open space, outdoor sports pitches and play areas on new developments continue to be adopted by the Council in agreement with the relevant town or parish council with a commuted sum. The Council will only consider a local management organisation proposed by a developer if it meets the list of conditions set out in Appendix 8 and has the agreement of the relevant town or parish council.

Public Realm, Public Art and Cultural Well-Being

- 4.130. The public realm and public art can play an important role in enhancing the character of an area, enriching the environment, improving the overall quality of space and therefore peoples' lives. Public art and the quality of the public realm are important considerations in the design and layout of a development. Public realm relates to all those parts of the built environment, either publicly or privately owned, located between and within buildings that are publicly accessible such as all streets, squares, and other rights of way as well as open spaces and parks, watercourses and canals. High quality design and good management of the public realm is essential in creating successful and vibrant places and help to integrate new development in to the surrounding area. It can help to establish an identity for an area making it memorable and providing useful landmarks, particularly if it draws inspiration from local themes or associations.
- 4.131. One of the core principles of the NPPF is to take account of and support local strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs. It states that it is important to plan positively for the achievement of high quality and inclusive design for all development, including individual buildings, public and private spaces and wider area development schemes. It also advocates planning policies and decisions aimed at achieving places which promote, inter alia, safe and accessible developments, containing clear and legible pedestrian routes, and high quality public space, which encourages the active and continual use of public areas.
- 4.132. The Government's Planning Practice Guidance (PPG) (paragraph 018) states that 'Public art and sculpture can play an important role in making interesting and exciting places that people enjoy using'.
- 4.133. Policy ESD 15 of the adopted Cherwell Local Plan Part 1 states that the conservation of the historic environment and securing high quality urban design are very important

in protecting and enhancing the character of the District and ensuring that Cherwell is an attractive place to live and work.

- 4.134. Other adopted policies seek to support the District's town centres and to maintaining their vitality and viability and their associated infrastructure to create vibrant retail environments. In particular Policy Bicester 5 seeks to strengthen Bicester Town Centre. Similarly Policy Banbury 7 and Policy Kidlington 2 set out similar aims for Banbury and Kidlington respectively.
- 4.135. The adopted Banbury Masterplan SPD establishes a strategic vision for Banbury with a strong economy and vibrant and attractive town centre. It identifies areas for public realm, street, junction, environmental and public art improvements.
- 4.136. The adopted Kidlington Masterplan SPD establishes a strategic vision for the village in line with the adopted Local Plan. Key themes explored include opportunities to improve the public realm within the village centre, improvements to Oxford Road and the village gateways. Work is progressing on the Bicester Masterplan with one of its aims being to improve the character and appearance of the centre of Bicester and the public realm.

Contributions

- 4.137. Contributions will be sought towards the creation and/or enhancement of the public realm in the vicinity of new development where the proposed development will have a direct relationship with a public realm improvement scheme identified in the Council's IDP.
- 4.138. The level of financial contributions will reflect the character and scope of the works required and will be negotiated on a case-by case basis.
- 4.139. Financial contributions will be sought for public realm and public art projects listed in the Council's IDP which is updated on an annual basis.

Transport & Access

- 4.140. OCC is the local highway authority and is responsible for the management and maintenance of the adopted highway network within the District. OCC also produces the Oxfordshire Local Transport Plan, is responsible for traffic management and road safety and has further responsibilities in relation to public transport, school transport and public rights of way.

- 4.141. The Oxfordshire Local Transport Plan provides the strategic framework for transport in the County. It sets out likely transport infrastructure requirements and priorities for Cherwell aimed at tackling congestion, promoting sustainable travel, safer roads, improving public health and wellbeing, and improving the street environment. Specific schemes and projects are set out in the Council's Infrastructure Delivery Plan and the Oxfordshire Infrastructure Strategy (OxIS).
- 4.142. The Council's strategy, as set out in the adopted Local Plan, for managing growth is to locate development in sustainable locations and identify appropriate and deliverable measures to meet the transport needs of the District.

Planning Obligation Requirements

- 4.143. All new developments in the District will be required to provide financial and/or in-kind contributions to mitigate the transport impacts of the development. This will support delivery of the infrastructure and services needed to facilitate travel by sustainable modes. It will also enable improvements to be made to the local and strategic road and rail networks.
- 4.144. Where there is likely to be a transport impact the LPA will require the submission of a Transport Assessment. The type and level of any contributions towards transport infrastructure provision will be considered in the Transport Assessment and negotiated with the Highway Authority.
- 4.145. Detailed technical pre-application discussions with OCC on the transport assessment are essential for major developments.
- 4.146. Direct infrastructure provision, financial and other contributions (including those for bus services) towards mitigating measures will be included in a planning obligation. The implementation of any physical changes to the highway network required to accommodate, or mitigate, the effects of a proposal will be managed through a highways agreement with the Highway Authority. For major schemes it will be necessary to define the highways agreements at the time planning permission is granted. In such cases the highways agreement will be referred to in, and linked to, the planning agreement. This will ensure certainty and transparency of implementation requirements and costs for all parties.
- 4.147. In addition to local transport mitigation, S106 contributions will be required for strategic transport schemes (identified in the IDP) related to cumulative growth using the following formula (subject to the constraints of planning legislation):

X = Cost of Scheme(s)

Y = Held/Committed funding

Z = Alternative Funding

E = Expected Growth

$$\text{S106 Contribution} = (X - Y - Z) \div E$$

- 4.148. As denoted by 'E', where a scheme (to which a strategic transport contribution is requested) serves the needs of multiple developments, the cost of the scheme will be shared proportionately across the relevant developments (subject to any pooling restrictions).
- 4.149. The LPA may also require the preparation, agreement and implementation of a Travel Plan to mitigate the impact of the development on the transport system and environment. This will be a standard requirement for major developments and, depending on the nature of the development, the Plan may be secured by either a condition or planning obligation. Travel Plans for major development will normally include targets for modes of travel to and from the site and monitoring arrangements. There will be a need for financial commitments and incentives and/or penalties for non-compliance.
- 4.150. Further details on the above transport requirements can be found in OCC's Developer Guide.

Waste

Waste Collection Containers and Recycling Banks

- 4.151. The Council is committed to a strategy of minimising domestic waste sent for disposal through the development of recycling services and the reduction and reuse of materials. The Council will seek contributions for the provision of sorting facilities to deal with domestic waste at source. Each new dwelling will be provided with appropriate containers and the collected materials will be taken away to a recycling centre.
- 4.152. The Council's current waste collection service is currently working at full capacity therefore future new development will need capital investment to ensure the service to the customer meets all the requirements set out below.

- 4.153. Building Regulations 2000 (as amended by SI 2001/3335) H6 sets out the following planning requirement:
- Adequate provision shall be made for the storage of solid waste.
 - Adequate means of access shall be provided;
 - For people in the building to the place of storage and from the place of storage to the collection point.

Policy Framework

- 4.154. The NPPF paragraph 7 notes that planning has an environmental role, including the need to minimise waste and pollution and mitigate and adapt to climate change including moving to a low carbon economy.
- 4.155. The Cherwell Low Carbon Environmental Strategy, published in December 2011, seeks to deliver the objectives of the Cherwell Community Plan through the protection and enhancement of the local environment in terms of Waste minimisation, reuse and recycling.
- 4.156. Every residential dwelling requires (2017 prices):
- 1 X blue wheeled bin for the collection of dry recyclable material (£20) at the current size of 240 litre;
 - 1 X green wheeled bin for collection of residual waste (£20) at the current size of 180 litre;
 - 1 X brown wheeled bin for the collection of garden and food waste material (£20) at the current size of 240 litre;
 - 1 X brown kitchen caddy for the collection of food waste (£4) and transferral into the brown garden and food waste bin;
 - Capital investment in waste collection vehicles to service the new development (£42).
- 4.157. Where blocks of flats are proposed, waste collection should be through the use of communal collection containers or through provision of individual bins held in a communal location.
- 4.158. Communal bins stores should not be provided for groups of houses unless they are serviced by a private road. Communal bins should be housed in a covered storage area and the following issues should be taken into account: -
- Bin stores should be built to a specification that ensures they do not detract from the visual aspects of the local environment.
 - Stores should be no more than 5 metres from the kerbside or point where the vehicle would stop (vehicle access has to be proven rather than assumed)

- To provide sufficient space for residents to deposit their waste, a minimum of 1m must be provided in front of the containers
- Where more than one bin is to be placed in a storage area, the bins must be positioned so that they can be easily accessed without users having to move other bins. In short they must not be ranked or more than one deep
- A door or gate of a minimum opening of 1600mm should also be provided. Smaller doors for residents use can be provided in addition to this requirement
- Doors should open outwards, but not over the public highway or parking spaces
- A path leading from the kerbside to the bin store should be provided, with a minimum width of 1.5m. The path should be level or a gentle slope and should not contain steps
- Stores should not be behind gates or security barriers that would prevent them being emptied
- The structure must be robust enough to withstand everyday use
- Stores should not be behind designated parking bays or require the movement of containers past or through legally parked cars
- Communal bin compounds should be far enough away from housing units so as to reduce the impact of noise during bin use and collection but sufficiently close for easy use. Eliminating the need for collection vehicles to reverse will also assist in keeping noise to a minimum
- Dropped kerbs should be provided.

4.159 Bin storage areas should be a minimum 1.8 square metres per dwelling for houses/bungalows and 1.4 square metres per dwelling for flats or multi occupancy properties.

4.160. Local recycling banks or 'bring sites' shall be provided for recyclables not separated in domestic waste collection, such as glass and clothing. Recycling banks must include at least:

- 2 x Green glass banks
- 1 x Brown glass bank
- 2 x Clear glass bank
- 1 x Textile bank

4.161. Recycling banks (bring sites) are required to serve approximately every 500 dwellings. For residential developments a financial contribution towards the capital cost of providing collection banks shall be sought. Recycling banks (bring sites) currently

require the provision of 5 containers at a cost of £500 each. This equates to a cost of £5.00 per dwelling.

Size of Development	Contribution per dwelling
Developments between 1 and 199 dwellings	£106.00 for bin and collection vehicle provision. £5.00 towards recycling banks
Developments over 200 dwellings	£106.00 for bin and collection vehicle provision. £5.00 towards recycling banks. On-site provision of recycling bank including provision of land.

4.162 Where on-site contributions are required if this cannot genuinely be provided, a financial contribution equivalent to the cost of providing and equipping a local bring site shall be paid to the Council.

4.163 Waste and recycling bin contributions will be sought on occupation of new dwellings. The provision of recycling bring sites will be sought as early in the development as possible to serve the residents of the development.

4.164 The Council's Environmental Services department will be able to provide further advice on the Council's requirements.

Strategic Waste Management Contributions to Household Waste Recycling Centres

4.165 Oxfordshire County Council (OCC), as Waste Disposal Authority, is required under the Environmental Protection Act 1990 (Section 51) to provide Household Waste Recycling Centres (HWRCs). The Act requires that each HWRC is:

- Situated either within the area of the authority or so as to be reasonably accessible to persons resident in its area;
- Available for the deposit of waste at all reasonable times;
- Available for the deposit of waste free of charge by persons resident in the area.

4.166 Contributions will be required should there be a need to provide additional household waste recycling capacity resulting from new development. Further information on the developer contributions for these capital costs is available from OCC.

Appendix 2

APPENDICES

Draft for Executive

Appendix 1: Population Figures

This appendix sets out the assumed population generation rates per dwelling for Oxfordshire. Based on figures derived from OCC's Survey of New Housing (2008) and the 2014 SHMA mix, the average occupancy rate per dwelling for the whole of Oxfordshire is 2.49. This assumes that an average development would contain 15% one bed dwellings, 30% two bed dwellings, 40% three bed dwellings, and 15% four bed dwellings. (Source: SHMA 2014).

Average Occupancy per Dwelling

Dwelling Type	One Bed	Two Bed	Three Bed	Four Bed
All Ages	1.28	1.85	2.88	3.96

(Source: OCC – based on OCC Survey of New Housing 2008)

It should be noted that these figures are subject to change. The results of an updated survey of new housing are currently being collated and are due to be published in 2018.

The above occupancy rates will be applied to all residential development proposals of 399 dwellings and below. For larger developments an excel based model known as POPCAL 10 will be used to calculate a detailed population profile associated with the proposed development.

Average Pupil Generation per Dwelling

School Category (Years)	One Bed	Two Bed	Three Bed	Four Bed
Nursery (2-3)	0.00	0.05	0.10	0.12
Primary (4-10)	0.00	0.17	0.39	0.51
Secondary (11-15)	0.00	0.09	0.23	0.35
Sixth Form	0.00	0.01	0.03	0.07

(Source: OCC – based on OCC Survey of New Housing 2008)

A reduction of 15% to the pupil generation rates has been applied to take account of pupils who will be educated in the independent sector. The sixth form rates have been discounted further to account for pupils leaving school before the sixth form.

Appendix 2: Indices used for Contributions Sought on behalf of OCC

Contributions sought on behalf of OCC will be index-linked to maintain the real value of the payments.

Indexation will be applied using the formula:

$$\text{Index Linked Contribution} = \text{Revised Index Value}^{**} \div (\text{Principal Amount} \times \text{Base Index Value}^*)$$

* A base date for contributions is established in this Guide and within the planning obligation. Using this base date a precise value within a particular index can be found.

** The date that the contribution is indexed to will be identified within the planning obligation. This will usually be the date of payment. Using this revised date a precise value within a particular index can be identified.

The table below sets out the indices that will be used.

Contribution Type	Index Name	Source	Notes
Transport contributions (excluding Public Transport Services)	Baxter	Made available through the Building Cost Information Service (BCIS) of the Royal Institute of Chartered Surveyors (RCIS)	This index is a composite index comprising the following weighted indices from the Civil Engineering Formula '1990 Series' Index 1: Labour & Supervision (25%) Index 2: Plant & Road Vehicles (25%) Index 3: Aggregates (30%) Index 9: Coated Macadam & Bitumous Products (20%)
Public Transport Services Contributions	RPIX	ONS	RPIX is a measure of inflation in the UK. It is equivalent to the Retail Price Index (RPI) excluding mortgage interest payments.
All Other contributions	Tender Price Index of Public Sector Building (Non-housing) PUBSEC	Made available through the Building Cost Information Service (BCIS) of the Royal Institute of	The PUBSEC index is compiled from bills of quantities of accepted tenders forwarded from

		Chartered Surveyors (RICS)	Government Departments. The Index is an indicator of the trend in accepted tender prices for constructing public sector works in Great Britain. The results are published quarterly.
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Appendix 3: Education Infrastructure: Calculation of Contributions

Contributions for educational infrastructure will be calculated by multiplying the net increase in the forecast number of pupils (of the appropriate age) moving in to the new housing by the 'cost per pupil' of the required additional infrastructure.

Average Pupil Generation per Dwelling

School Category (ages)	One Bed	Two Bed	Three Bed	Four Bed
Nursery (2-3)	0.00	0.05	0.10	0.12
Primary (4-10)	0.00	0.17	0.39	0.51
Secondary (11-15)	0.00	0.09	0.23	0.35
Sixth Form	0.00	0.01	0.03	0.07

These rates are derived from the Oxfordshire Survey of New Housing (2008). Please note that survey updates may necessitate revised pupil generation figures.

A reduction of 15% to the pupil generation rates has been applied to take account of pupils who will be educated in the independent sector. The sixth form rates have been discounted further to account for pupils leaving school before the sixth form.

Based on the current percentage of pupils being educated in Special Educational Needs (SEN) schools in Oxfordshire 1.1% of the total pupils generated by the development will need to be educated in a SEN school (the majority of pupils with a statement of special educational needs are educated in 'mainstream' schools).

The table below sets out the standard cost per pupil of providing an extension to an existing facility. These standard costs will be used unless there is a specific scheme cost or where a new school is required. The figures are from the Department for Education (DfE) and have been adjusted for Oxfordshire using the DfE published location factors.

Table 1: Cost per pupil for extensions to existing facilities

	Total Cost per Pupil for Extensions (Cost base for indexation4Q16)
Nursery	£13,901
Primary	£13,901
Secondary	£21,033
Sixth Form	£22,454
SEN	£38,751

To give an indication of the contributions which may be necessary to address the impact of proposals the cost per pupil for extensions to existing facilities is multiplied by the pupil generation rates per dwelling to reach the contributions per dwelling shown below.

Table 2: Contribution per dwelling

	1 Bed	2 bed	3 Bed	4+ bed
Nursery	£0	£695	£1,390	£1,668
Primary	£0	£2,363	£4,948	£6,471
Secondary	£0	£1,893	£4,415	£6,718
Sixth Form	£0	£225	£615	£1,434
SEN	£0	£115	£277	£396

If a development creates all or part of the need for a new school a different level of contribution reflecting the actual estimated cost for the new school or part thereof will be applied. Where the development substantially necessitates a new school, developers will be expected to provide at nil cost to the education provider a suitable site (both in terms of size and location) which is fully serviced, fully decontaminated and remediated.

The Tables below give an indication of the likely costs of new educational infrastructure:

Cost of New Build Primary Schools

Size of School	Number of pupils accommodated		Cost (Excluding Land & Abnormals)	Cost Base
	aged 2-3	Aged 4-10		
1 Form Entry + nursery	60	210	£ 7,212,015	4Q 16
1.5 Form Entry + nursery	75	315	£9,166,019	4Q 16
2 Form Entry + nursery	90	420	£ 10,952,913	4Q 16

Cost of New Build Secondary Schools

Type of School	Number of Pupils accommodated	Cost (Excluding Land & Abnormals)	Cost Base
Secondary (11-16)	600	£ 17,847,000	4Q 16
Secondary (11-16)	900	£ 24,338,000	4Q 16
Secondary (11-16)	1200	£30,932,000	4Q 16
Secondary (11-18)	700	£21,438,000	4Q 16
Secondary (11-18)	1100	£30,288,000	4Q 16
Secondary (11-18)	1500	£39,145,000	4Q 16

Appendix 4: Local Standards of Provision – Outdoor Recreation.

Type of Provision	Quantitative Standard	Accessibility Standard	Minimum Size of Provision	Threshold for On-Site Provision
General green space (parks & gardens/natural semi-natural/amenity green space)	2.4ha per 1000 urban dwellers	5 minute walk (amenity open space) (400m)	200sqm	10 urban dwellings
	2.74ha per 1000 rural/urban dwellers	15 minute walk other (1200m)		6 rural/urban edge dwellings
Play space (combining provision for younger and older children including MUGAs)	0.78ha per 1000 people	5 minutes walk (400m) except for NEAPs 15 minute walk (1200m)	LAP – 100sqm activity zone; 400sqm including buffer	10 dwellings (for a LAP)
			LEAP – 400sqm activity zone; 3600sqm including buffer	50 dwellings (for a LEAP and LAP)
			NEAP – 1000sqm activity zone; 8500sqm including buffer	100 dwellings for a NEAP and LEAPs/ LAPs
			NB: In some cases a combined all-age area of play will be preferable to provision of LAPs/LEAPs/NEAPs.	
Outdoor sports provision (combining tennis courts, bowling greens, golf courses and playing pitches) (to be accompanied by changing facilities where appropriate)	1.13ha per 1000 people	Football, rugby, cricket: 10 minute walk (800m) urban areas, 10 minute travel time (8km) rural areas Tennis courts: 15 minute walk (1200m) urban areas, 15 minute	0.12ha	65 dwellings

Type of Provision	Quantitative Standard	Accessibility Standard	Minimum Size of Provision	Threshold for On-Site Provision
		travel time (12km) rural areas Bowling greens, golf courses: 15 minute travel time (12km) Hockey: 20 minute travel time.		
Allotments	0.37ha per 1000 people	10 minute walk (800m)	0.2ha	275 dwellings

Appendix 5: Summary of demand for open space, sport and recreational facilities by development type

Type of Green space	Houses	Flats	Bedsits	Hostels	Sheltered Accom	V. Sheltered accom	Care homes	Student accom
Parks and gardens	yes	yes	yes	yes	yes	no	no	yes
Natural/semi natural green space	yes	yes	yes	yes	yes	no	no	yes
Amenity green space	yes	yes	yes	yes	yes	no	no	yes
Play provision	yes	yes	no	no	no	no	no	no
MUGAs	yes	yes	no	no	no	no	no	yes
Tennis courts	yes	yes	yes	yes	no	no	no	yes
Bowling greens	yes	yes	yes	yes	yes	no	no	yes
Golf courses	yes	yes	yes	yes	no	no	no	yes
Allotments	yes	yes	yes	yes	yes	no	no	yes
Pitches	yes	yes	yes	yes	no	no	no	yes

Appendix 6: Commuted Sums for Children's Play Space, Sports Pitches, Public Open Space

The commuted sums for capital infrastructure are based on current contractor costs. The landscape maintenance rates are taken from the annually updated competitive rates of the Council's landscape maintenance contract. (quoted sums from 2016/2017)

Each provision is multiplied by the current multiplier to commute the payment over a 15 year period

Current Inflation Figure = CPI 0.5%

Current Multiplier - 15

Play Areas – Maintenance Provision	Total Cost (£)
LAP – Equipped (400m ²)	27501.52
LAP – Free Play Zone (400m ²)	12394.26
LEAP (3600m ²)	108761.69
LEAP/LAP Combined (4000m ²)	121492.13
NEAP (9500m ²)	249994.49
NEAP/LEAP Combined (13100m ²)	350435.88

Play Areas – Capital Provision	Total Cost (£)
LAP – Equipped (400m ²) Local Area for Play (fencing, furniture, surfacing & signage)	20779.15
LAP – Free Play Zone (400m ²) Local Area for Play (fencing, furniture, path surfacing & signage)	10882.91
LEAP (3600m ²) Local Equipped Area for Play (play equipment, fencing, furniture, surfacing & signage)	60783.45
LEAP/LAP – Combined (4000m ²) Local Equipped Area for Play (play equipment, fencing, furniture, surfacing & signage)	74723.30
NEAP (8500m ²) Neighbourhood Equipped Area for Play (play equipment, MUGA, fencing, furniture, surfacing & signage)	240326.82

Outdoor Sports Facilities – Maintenance Provision	Total Cost (£)
Tennis/netball/basketball court	27468.25
Bowling Green	173303.86
Cricket Square	53197.08
Football Pitch - Senior	70195.95
Football Pitch - Junior	61589.12
Synthetic Pitch – 400mm 3G (130m x 90m)	111638.94
Pavilions	
2 changing room – Tennis & Bowls	43164.75
2 changing room – Football – 1 pitch	41338.67
4 changing room – Football – 2 pitches	55084.05
6 changing room – Football – 3 pitches	71871.57

Outdoor Sports Facilities – Capital Provision	Total Cost (£)
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Tennis/netball/basketball court	40903.50
Bowling Green	122449.20
Cricket square	43267.93
Football pitch - Senior	77647.64
Football pitch - Junior	62670.80
Synthetic pitch – 40mm 3G (130m x 90m)	582900.00
Pavilion	
2 changing room – Tennis & Bowls	431648.51
2 changing room – Football – 1 pitch	413392.68
4 changing room – Football – 2 pitches	550840.50
6 changing room – Football – 3 pitches	718715.70

Green Infrastructure – Maintenance Provision	Total Cost (£)
Public Open Space (cost per hectare)	93222.18 (per m ² – 9.32)
Hedge Maintenance (cost per 1000 Lnm)	14354.42 (per m ² – 14.35)
New Woodland Area Maintenance (cost per 1000m ²)	23233.59 (per m ² – 23.23)
Mature Woodland Area Maintenance (cost per 1000m ²)	4629.23 (per m ² – 4.63)
Mature Tree Management (cost per 10 trees)	3348.23

Green Infrastructure – Capital Provision	Total Cost (£)
Public Open Space (cost per hectare)	110829.85
Hedge Planting (cost per 1000Lnm)	6051.91
New woodland planting (cost per 1000m ²)	6545.57

Water Feature – Maintenance Provision	Total Cost (£)
Pond maintenance (per 500m ²)	21904.28 (per m ² – 43.81)
Ditch maintenance (per 500 m ²)	16290.05 (per m ² – 32.58)
Stream Maintenance (per 500m ²)	8969.63 (per m ² – 17.94)
Balancing Pond maintenance (per 500m ²)	5812.92 (per m ² – 11.63)

Allotments – Maintenance Provision	Total Cost (£)
Allotment Areas (cost per hectare)	42190.84 (per m ² – 4.22)
Allotments – Capital Provision	
Allotment Areas (cost per hectare)	255713.11

Off- Site Contributions	Total Cost (£)
In lieu of Children’s Play Facilities – Developments (10+ dwellings)	23068.62 (per dwelling – 2306.86)

In lieu of Sports Pitch provision- Developments (10+ dwellings)	20170.30 (per dwelling- 2017.03)
In lieu of Open Space Provision- Developments (10+ dwellings)	14262.65 (per dwelling- 1426.27)

Appendix 7: Open Space, Sport and Recreation: Process and Procedures for Applications where On-Site Provision is Required.

Pre-application

The LPA will identify the on-site open space, sport (indoor/outdoor), recreation and play provision required, and the planning obligation (including commuted sums/rates) that is required.

The LPA will identify requirements in consultation with the appropriate Parish and Town Councils. Normally Town and Parish Councils are the preferred custodians and providers of open space, play, sport and recreation facilities and they will be expected to take ownership or adopt the facilities. In exceptional cases Town and Parish Councils may not be willing or able to take ownership or adoption and in these cases the LPA will proceed on the basis that the District Council will be generally be responsible for the long term ownership, management and maintenance after transfer.

Where possible any options for off-site provision will be identified at this stage.

Application

The same procedure for Pre-application applies. At this stage the LPA will seek the agreement of Parish and Town Councils to the concept and layout, and /or landscaping being undertaken, of the open space, sport (indoor/outdoor), recreation and play provision prior to the granting of planning permission. Their commitment to future ownership or adoption will also be expected.

At application stage specific proposals must be identified and defined to support preparation of planning obligation documents.

Approval of Submitted Open Space, Sport, Recreation and Play Proposals (Construction Details)

Conditions and planning obligations will require the developer to submit detailed proposals to the LPA for approval. These proposals must include detailed drawings, specifications, guarantees (transferable) and maintenance specifications to BS/EN standards. The LPA will provide formal approval to the developer once internal consultations are completed, or seek amendments to the open space, sport, recreation and play proposals, as necessary.

Approvals will be managed as follows:

- The LPA will discharge the conditions/obligations when open space, sport, recreation and play provision details are deemed acceptable by the Council.
- It is important to note that the development must not commence until there has been submitted to and approved by the LPA a scheme (including a phased programme [on large developments]) for the laying out, hard and soft landscaping and equipping of the open space, sport, recreation and play provision including, supporting changing accommodation.
- The planting, turfing and seeding to the open space, sport, recreation and play provision is to take place during the first planting season following the commencement of development [or phase of development]. The setting out of the landscaping and equipping of the open space, sport, recreation and play provision is to be in accordance with the approved scheme to the satisfaction of the LPA.

- The Developer is required to notify the LPA on the commencement and completion of the open space, sport, recreation and play provision, and must maintain the provision to its original standard for a period of twelve months following its completion, as certified by the LPA, replacing items (including surfaces) which are defective in the opinion of the LPA in accordance with the approved details contained in the scheme, and replacing any trees or shrubs which may die, are removed or become seriously damaged or diseased with others of similar size and species to the satisfaction of the LPA, The Developer is to carry on maintaining the open space, sport, recreation and play provision and supporting changing accommodation until these facilities are transferred, and to give access to the LPA's officers to enter to the area/s to carry out inspections.
- The LPA is to be notified by the developer on the commencement and completion of the open space, sport, recreation and play provision and supporting changing accommodation and the LPA will inspect the development at the following stages:
 - a) setting out,
 - b) drainage,
 - c) equipment installation,
 - d) surfacing; and
 - e) planting (including grass / wildflower seeding)

The developer is to ensure that a report is to be provided by a recognised body certifying that the construction is adequate for the intended use and submitted to the LPA.

Monitoring Development

The Developer is to provide an indicative timetable of on-site operations including indicative dates for the stages of construction and completion of the open space, sport, recreation and play provision to the LPA for the Council's coordinated monitoring of the open space, sport, recreation and play provision and supporting changing accommodation. It is necessary for the Developer to advise the LPA when the laying out of the open space, sport, recreation and play provision is taking place.

The LPA will monitor the commencement of development, compliance with conditions and planning obligations.

The LPA will endeavour to carry out inspections within 5 working days of notification by the developer at the stages listed above with the aim of ensuring that works are satisfactory, to identify remedial works when necessary and areas completed in accordance with the approved plan. Records will be kept on monitoring sheets of all inspections, and minutes of site meetings.

Enforcement (before practical completion)

The LPA will take enforcement action on conditions and obligations, should it be necessary, and will ensure good record keeping as evidence and provide expert witness statements, if required.

Practical Completion

The Developer must arrange for satisfactory Royal Society for the Prevention of Accidents (RoSPA) inspections and the subsequent reports to be forwarded to the LPA. They must also obtain transferable

guarantees for equipment which must also be sent to the LPA. For natural sports pitches or courts a satisfactory post completion 'fit for purpose' report from a recognised body, such as the Sports Turf Research Institute (STRI) or a member of the Sports and Play Construction Association (SAPCA), will be required. The Developer is to provide two sets of as-built drawings for the LPA. The LPA will carry out inspections of the completed open space, sport, recreation and play provision and inform the Developer of any defects in writing. The Developer must correct the defects as soon as possible and inform the LPA's planning department when the defects have been remedied, as early as possible. The LPA will then issue certificates of practical completion, detailing outstanding items of work, copies of which to be provided to the Developer and contractor.

The Developer is to confirm to the LPA that remedial works to defects are complete. Once the LPA has inspected the remedial works and found them to be satisfactory the LPA will then confirm that all works are complete in accordance with the approved plans and the open space, sport, recreation and play provision is acceptable for adoption.

The LPA will check and revise commuted sum calculations, if required (in cases where a schedule of rates was given by the District Council and shown in the planning obligation).

The Developer must ensure that the play areas/MUGAs are opened for use once practical completion is granted. Insurance cover must be provided by developer until formal transfer by the District. The developer should provide signs at each facility providing contact details for the public to report any defects. Joint monitoring of the open space, sport, recreation and play provision by the Developer and the Council is necessary to ensure the sites are safe for use. The LPA will consider any proposed change to the twelve month liability period by the Developer and agree to any changes in writing, if appropriate.

A twelve month maintenance period is required for open space and play provision to ensure that landscape features become established prior to the areas being transferred.

On sports pitches a minimum of two years is required before transfer from the date of seeding and completion to allow for establishment of the pitches.

Final Completion

The LPA will undertake an inspection of the open space, sport, recreation and play provision one month before the expiry of the twelve month defects period. The developer is to bring the space, sport, recreation and play provision up to the adoptable standard. The developer shall also provide the LPA with a post installation inspection and safety audit from a RoSPA -approved expert for play areas and informal open space. For sports pitches or courts a satisfactory post completion report from a recognised body such as STRI or SAPCA member will be required.

If all areas are satisfactory the LPA will issue certificates of final completion to the Developer.

Transfer

The Developer will start the legal transfer to the LPA, accompanied by an appropriate contribution towards its maintenance after adoption. This contribution will normally be in the form of a commuted sum, to cover 15 years maintenance, secured through a planning obligation document.

The LPA's finance section is to set up a new accounting code for each commuted sum. This will be specifically linked to the planning application reference number. All payments are to be made to the

LPA (by cheque or BACS) under the designated code with details of the application reference number and accompanied by a breakdown of capital and maintenance contributions.

The receiving LPA's Legal Team will complete the transfer of the open space, sport, recreation and play provision to the LPA on receipt of the commuted sum. On completion of the legal transfer the LPA will take over the maintenance responsibility. The LPA will then proceed to transfer or lease the provision to the relevant town or parish council along with any commuted sum balances.

Developer Responsibilities for maintenance of open space, sport, recreation and play facilities.

The long term maintenance of open space, sport, recreation and play facilities is critical to ensure that they achieve and maintain their maximum potential benefit and value. In the case of new housing developments, the developer will be required to make provision for the appropriate amount and type of open space, sport, recreation and play provision, plus supporting changing accommodation.

The developer is to submit to the LPA management plans and maintenance schedules to ensure that the soft/green areas of open space, sport, recreation and play facilities are established successfully for the benefit of the community and biodiversity. The maintenance specification is to be written and implemented in accordance with the relevant EN/BS standards.

Maintenance of Sports Pitches

The Developer's Contractor will be responsible for the maintenance of the grass sward for 2 years from the date of practical completion. A maintenance specification is to be submitted to the LPA. This maintenance specification must comply with industry best practice.

Maintenance of Play Areas and MUGAs

The Developer's Contractor will be responsible for the maintenance of the play areas and MUGAs for 12 months from the date of practical completion. A maintenance specification is to be submitted to the LPA and must comply with industry best practice.

Maintenance of Open Space and Recreation Areas

The Developer's Contractor will be responsible for the maintenance of open space and recreation areas for 12 months from the date of practical completion. A maintenance specification is to be submitted to the LPA and must comply with industry best practice.

Appendix 8: Local Management Organisation Requirements for Public Open Space, Outdoor Sports Pitches and Play Areas

NOTE: It is the Council's strong preference that public open space, outdoor sports pitches and play areas on new developments continue to be adopted by the Council in conjunction with the relevant town or parish council with a commuted sum. The Council will only consider a local management organisation proposed by a developer if it meets the list of conditions set out below and has the agreement of the relevant town or parish council.

- Provide a method statement of how the funding will be provided to the Management Company to cover maintenance costs in perpetuity.
- Provide a method statement of how capital funding for replacement items/unforeseen costs will be generated.
- The Council's twice yearly inspection costs will be paid as a commuted sum for the first fifteen years for monitoring the management company's maintenance standards.
- Confirmation that the standards of maintenance will be identical to the standard set out in the Council's Technical Specifications for Landscape and Cleansing Operations.
- Confirmation that a diminishing bond will be put in place to cover the Council's costs of maintenance and management of the site, to be available for the council to draw upon if standards delivered by the management company do not match those set out in the Council's Technical Specifications.
- Confirmation that the Council has the step in rights if the management company let standards drop below the standards set out in the Council's Technical Specification along with the rights to recover costs.
- Confirmation that at no point will the service charges levied on residents increase the rents for affordable housing above 80% of the open market rents as published by the Home and Communities Agency (HCA), where affordable rents are in place.
- Confirmation that all public open space, outdoor sports pitches and play areas remain accessible and usable by the general public in perpetuity.
- If the management company goes in to administration, confirmation that title deeds of all public open space, outdoor sports or play areas transfer to the Council as the provider of last resort.

Appendix 9: Local Standards of provision – Indoor Recreation

Facility Type	Local Quantity Standard per 1000 Population
Sports Hall	0.315 badminton courts
Swimming Pool	9.31 m ²
Squash Courts	0.059 courts
Health & Fitness	5.28 stations
Indoor Bowls	0.045 rinks
STPs	0.046 pitches
Athletics Tracks	0.0012 8 Lane facility
Community Centre	185m ²

Sports Hall

There is a need for 0.315 badminton courts (sports hall) or 53.78m² per 1000 people (or 0.054m² per person). This figure is based on the area of a four court hall plus circulation, reception and changing space (683m²). The cost of construction is £2251 per m² plus land costs and VAT (at 2016). The cost per person for sports hall provision is therefore £121.56 plus land costs and VAT.

Swimming Pool

There is a need for 9.31m² of swimming pool area per 1000 people or 0.0931m² per person. The cost of construction of a new build swimming pool, using average of Swim 25 commercial product and RICS Building Cost Information Service construction costs, would be £2,296 per m² plus land costs and VAT (at 2010). The cost per person for swimming pool provision is therefore £213.76 plus land costs and VAT.

Appendix 10: On-Site Community Facilities and Indoor Sport Provision: Process and Procedures

The LPA will identify the on-site indoor sport and/or community centre provision required and will provide the developer with a specification for the floor space and the facilities that need to be provided on site. At application stage specific proposals must be identified and defined to support the preparation of planning obligation documents.

Conditions and planning obligations will require the developer to submit detailed proposals to the LPA for approval. These proposals must include detailed drawings, specifications and guarantees (transferable). The LPA will provide formal approval to the developer once internal consultations are completed, or seek amendments to the proposals as necessary.

The developer will construct the building/facility in accordance with the approved details and ownership of the building/facility will be transferred to the Council following a satisfactory final inspection. The Council may subsequently transfer the ownership to the relevant parish authority or a suitable community association. In exceptional circumstances the Council may accept alternative management arrangements for the facility. These circumstances will be assessed on a case by case basis.

The timing of provision of the facility will be negotiated on a case by case basis but the size of the development and proximity to existing facilities will be a determining factor. In the case of the community hall provision of a suitable temporary facility should be available to the residents on completion of the 100th dwelling.

Appendix 11: Community Hall Facilities

In accordance with the recommendation of the 2017 CCDS Study a required community hall facility standard of 0.185m² per person will be applied.

Capital Cost Estimates for Provision of New/Extended Community Hall Facility

	Capital Cost	Capital Cost/m ²	Cost per person
1 storey	£1,600,000	£2,315	£428
2 storey	£1,820,000	£2,633	£488
Hard landscaping	£331,000		£89
Soft landscaping	£10,000		£3
TOTAL			£520 (1-storey)
			£580 (2-storey)
Horizontal extension to existing community hall		£2,920	
Refurbishment of existing community hall		£2,482	

Costs are correct at 2017

Calculations are based on the construction of a 691sqm building.

The cost estimates are inclusive of main contractor preliminaries, overheads and profit, project/design team fees and client contingencies.

Contributions towards the maintenance of the facility will also be sought. This will cover a 15 year period following the transfer of the facility to the LPA (or community association). A list of typical maintenance tasks and costs is set out below:

Annual Costs (Repeated Each Year)	One off costs
Fire alarms and extinguishers	Electrical testing
Intruder alarms	Internal decoration
Boiler service and gas safety	Replacement boiler/water heaters
Water monitoring and legionella	Replacement extract fans
Emergency light maintenance	Replacement external lighting
Lift maintenance	Replacement shower fittings
Miscellaneous repairs	Replacement light fittings
Business rates	
Water rates	
Insurance	
Gas	
Electricity	

Guide Estimate for Commuted Sum for maintenance = £298.88 per m² (2017)

(Cost estimates are based on existing maintenance cost for community hall facilities in the District. However, actual commuted maintenance costs required from the developer will be assessed on a site by site basis).

Appendix 12: Community Development

On development sites in excess of 100 new dwellings, developers are expected to provide the costs of employing a community development worker as follows:

100>250 homes: 0.4 FTE for 1 year

250> 500 homes: 0.4 FTE for 2 years

500> 1000 homes: 0.8 FTE for 2 years

1000+ homes: 0.8 FTE for 2.5 years.

Community Development Workers should be in place once a certain threshold of new homes have been built. This threshold will be established on a case by case basis.

Appendix 13: Apprenticeships & Skills

Planning Obligations for Apprenticeships, Employment, and Training Plans (ESTPs)

How this Guidance will be applied

Approach

Cherwell Council will seek to apply this Guidance across its entire administrative area. It will seek the provision of a stated target number of new construction and (in the case of commercial developments) end user apprenticeships (or apprenticeship starts) as part of a required Employment, Skills and Training Plan (ESTP) for each proposal for new development, to be secured via S106 agreement. CDC is keen that the submission of ESTPs should not be unduly onerous for developers, hence an ESTP framework can be provided by CDC officers if required. This can be reproduced by developers and completed by filling in the relevant numbers.

This Guidance will apply to the types of new development and subject to the thresholds set out in the table below. However if proposed developments fall below these thresholds but developers would still like to provide new construction apprenticeships, then the Council will encourage and seek to support them in doing so. As the number of stated new apprenticeships will be expressed in planning obligations as a stated minimum figure to be achieved, if developers and / or their contractors are able and willing to exceed these, then the Council will encourage them to do so.

Type of Proposed New Development	Threshold	Indicative number of apprenticeships to be achieved
Housing (Use Class C3)	50 units	2 construction apprenticeships per 50 units
Non-residential uses	10,000 sq m of floorspace	2 construction apprenticeships and 2 end user apprenticeships per 10,000 sqm of floorspace GEA
Utilities and highways infrastructure applications	None	Subject to discussion with developers on a case by case basis

In essence, while Cherwell District Council is keen to achieve an increase in new apprenticeship opportunities in the District through the planning system, it also considers that such arrangements need to be arrived at through discussion and agreement with developers, rather than imposed in a top-down fashion. It will be counter-productive if the numbers of apprenticeships required by CDC are unrealistic because they are actually unable to be achieved.

Process

The purpose of the information in the above table is to provide guidance for developers and will be the starting point in discussions with developers about the amount of apprenticeships each application could yield. This is because the Council understands that each site's circumstances will vary and that apprenticeship yield largely relates to development cost / contract value/ end user characteristics.

This process has already been piloted successfully with planning applications which form part of the NW Bicester development.

Approach to S106 Agreements

S106 agreements will require applicants (or their successors in title) to submit an Employment Skills and Training Plan, in line with a specimen framework attached to the agreement, before implementation of the development. S106 agreements will seek to ensure that this is approved by CDC in writing prior to implementation and for the applicants (or successors in title) to be guided by the contents.

S106 agreements will also require that the ESTP sets out the arrangements by which the applicants will provide the stated target number of agreed construction (and related trades) and end user apprenticeships and will support the applicant to use The Apprenticeship and Training Company Ltd or other equivalent approach. Apprenticeship Training Agencies (ATAs) are organisations that directly employ apprentices and operate as the apprentice's day-to-day workplace manager. They coordinate the apprentice's training and pay the associated training costs. The host employer (i.e. where the apprentice will have his/her on-site placement) pays a fee which covers the cost of their salary (which will be at least the National Minimum Wage Rate), plus a management fee to cover the ATA's costs (which includes HR and payroll provision and the management of the off-site training provision). Therefore ATAs support businesses who want to take on apprentices by dealing with the administration associated with hiring or employing an apprentice.

The S106 will seek to ensure that the ESTP contains a commitment to provide Cherwell District Council with yearly reports (the first due a year on from the commencement of development) which set out how the required number of construction apprenticeships are being delivered and in the case of commercial developments, another report two years after the completion of the development which sets out how the required number of end user apprenticeships are being delivered.

Appendix 14: Community Safety/ CCTV Provision

Table 1: Levels of Contribution Sought

Priority	Level of Contribution
Priority 1	Seeking on-site provision of an appropriate number of CCTV cameras to monitor areas considered to be of high risk.
Priority 2	Relevant permissions to erect infrastructure, such as aerials, to facilitate transmission of images.
Priority 3	To install ducting to facilitate self-provide fibres
Priority 4	Where predominantly retail to contribute an agreed sum to monitoring and maintenance.
Priority 5	New development will be expected to contribute towards the provision of additional on-site infrastructure for at least a period of 10 years.

Crime impacts all development, however, retail and evening leisure uses usually have the greatest impact. Table 2 illustrates the measures likely to be considered appropriate for the type of development proposed.

Table 2:

Development Type	Priority/ Measure
Large Retail	1,2,3,4,5
Drinking Establishments	1,2
Nightclubs	1,2
Hot Food Takeaway	1,2
Local Retail	1,2,3
Large scale public open space	1,2,3

Table 2 is indicative only. Developments may include all, or only part of these elements. Specific requirements are therefore subject to negotiation following impact assessments by the police and partners.

Table 3: Guidance on Costs

Priority	Level of Contribution	Costs
Priority 1	Seeking on-site provision of an appropriate amount of CCTV cameras sufficient to monitor areas considered by police and partners to be of high risk as part of new development.	Cameras = £3,000 approx. This includes brackets and aerials
Priority 2	Relevant permissions to erect infrastructure such as aerials	Subject to planning permissions

	to facilitate transmission of images.	
Priority 3	To install ducting to facilitate self-provide fibres	Insignificant as ducting can be provided early in the construction process.
Priority 4	Where predominantly retail to contribute an agreed sum to monitoring and maintenance	Monitoring can range from £1,000 to £2000 per camera per annum. Where there are a large number of cameras the fee is negotiable. Maintenance would be approximately £300 per camera per annum.
Priority 5	New development will be expected to contribute towards the provision of additional onsite infrastructure for at least a period of 10 years.	The longevity of the provision is dependent upon the figures in Priority 4 being extended for at least 10 years.

APPENDIX 15: Health & Wellbeing – Calculation of Contributions

The following calculations are based on the formula and approach adopted by Oxfordshire Clinical Commissioning Group in July 2017.

Calculation of cost = occupancy x number of units in the development x £360 (as set out in the table below)

Size of Unit	Occupancy Assumptions based on size of unit	Health need/sum requested per unit
1 bed unit	1.4 persons	£504 per 1 bed unit
2 bed unit	2.0 persons	£720 per 2 bed unit
3 bed unit	2.8 persons	£1,008 per 3 bed unit
4 bed unit	3.5 persons	£1,260 per 4 bed unit
5 bed unit	4.8 persons	£1,728 per 5 bed unit

Where the unit sizes are not specified (ie in outline applications) an average occupancy of 2.4 persons will be used to indicate the initial costs required until such time as the size of units are confirmed.

Indicative square meterage calculations historically used to determine the core General medical Services (GMS) space required for a practice.

No. of patients	2,000	4,000	6,000	8,000	10,000	12,000	14,000	16,000	20,000
Type of Premises	A	A	B	B	B	B	B	B	B
Gross Internal Area Allowance (sqm)	199	333	500	667	833	916	1,000	1,083	1,250

Type A assumes a single storey premises

Type B assumes a two storey premises with one staircase and one lift

Source: NHS Property Services Demand Assessment Tool

Appendix 16: Guide to Funding Mechanisms by Infrastructure Type

NOTE: The Council is not currently (October 2017) proceeding with the introduction of a CIL Charging Schedule. This table therefore only gives an indication of the appropriate funding mechanisms *should* the Council adopt CIL in the future.

Type	CIL	S106	Condition	S278
Housing				
Affordable Housing		✓		
Commuted offsite payments for the provision of affordable housing		✓		
Extra Care Housing		✓		
Transport (includes PRow)				
Site specific Highway and Access Impacts		✓		✓
Non-site specific Highway improvements	✓	✓		
Site specific sustainable transport		✓		✓
Non-site specific sustainable transport	✓	✓		
Highways Depots	✓			
Education				
On site Education (Primary, Secondary, 6 th Form, Special Educational Needs)		✓		
Education (Primary, Secondary, 6 th Form, Special Educational Needs)	✓	✓		
Onsite early years and childcare provision		✓		
Early years and childcare provision	✓	✓		
Skills and Training				
Apprenticeships		✓	✓	
Utilities				
Sustainable Urban Drainage Systems		✓	✓	
On site provision of Refuse bins, recycling banks/'bring in' sites		✓	✓	
Off-site provision of Recycling banks/'bring in' sites	✓			
Strategic Waste Management (WRC)	✓	✓		
Strategic Flood Defence	✓	✓	✓	
Enhancements to the sewerage network beyond that covered by the Water Industry Act and sewerage undertakers (*)	✓		✓	
Fire and Rescue	✓	✓		
Community safety and policing				
Onsite provision of community safety and policing infrastructure		✓		
Off-site Community safety and policing infrastructure	✓			
Health				

Type	CIL	S106	Condition	S278
Onsite provision of health infrastructure		✓		
Off-site provision of health infrastructure	✓			
Air Quality				
Measures during construction of new development including dust control, site monitoring and plan emissions		✓	✓	
Measures for implementation of the Air Quality Action Plan	✓	✓	✓	
Indoor sport, recreation and community facilities				
Onsite Community centre/hub		✓		
Offsite Community centre/hub	✓			
Community Development Funding	✓	✓		
Site specific Indoor Sports		✓		
Indoor Sports	✓	✓		
Integrated Youth Support Service	✓			
Libraries	✓	✓		
Day care Provision for the Elderly	✓			
Adult Learning	✓	✓		
Museum Resource Centre (MRC)	✓	✓		
Open space recreation and Biodiversity				
Site specific Open space, play space, outdoor sport, allotments, recreation and landscaping		✓		
Country parks, open space, play space, outdoor sport, allotments, recreation and landscaping	✓	✓		
Cemeteries	✓	✓		
Onsite Nature Conservation and Biodiversity		✓	✓	
Nature Conservation and Biodiversity	✓	✓		
Sustainable Construction		✓	✓	
Public Realm				
Site specific Public Art & Public Realm		✓	✓	
Heritage				
Archaeology			✓	
Heritage-related projects	✓	✓		

Appendix 3

CONSULTATION STATEMENT

DEVELOPER CONTRIBUTIONS SUPPLEMENTARY PLANNING DOCUMENT

February 2018

Prepared under Regulation 12(a) of the Town and Country Planning (Local Planning) (England) Regulations 2012.

1. Purpose and Background

1.1 This consultation statement has been prepared in accordance with Regulation 12(a) of the Town and Country Planning (Local Planning) (England) Regulations 2012, which states that, before a local planning authority adopts a supplementary planning document it must prepare a statement setting out:

- The persons the local planning authority consulted when preparing the supplementary planning document;
- A summary of the main issues raised by those persons; and
- How those issues have been addressed in the supplementary planning document.

1.2 The Council has adopted a Statement of Community Involvement (July 2016) which shows how it will involve the community in its plan and policy-making process. This document can be viewed on the Council's website. The Developer Contributions SPD has been prepared in accordance with the steps outlined in Table 3 of that document.

1.3 The Planning and Compulsory Purchase Act 2004(as amended) sets out the requirements for preparing SPDs as part of the planning process. SPDs should build upon and provide more detailed advice or guidance on the policies in the Local Plan.

1.4 The purpose of the Developer Contributions SPD is to set out the Council's approach to seeking Section 106 planning obligations and their operation.

1.5 The SPD does not create new policy. The adopted Cherwell Local Plan 2011-2031 sets the planning framework up to 2031 with the Developer Contributions SPD providing a further level of detail to guide development proposals.

1.6 The SPD will be a material consideration in the determination of planning applications alongside the Local plan and other planning policies.

1.7 This Statement of Consultation includes a record of the following stages of consultation:

Stage A: Initial Preparation

- Consultation which informed the preparation of the first draft of the SPD

Stage B: Public Consultation 14 November 2016 – 9 January 2017

- Formal consultation on a first draft of the Developer Contributions SPD.

Stage C: Public Consultation 23 November 2017 – 21 December 2017

- Formal consultation on a second draft of the Developer Contributions SPD.

STAGE A

CONSULTATION STATEMENT

DEVELOPER CONTRIBUTIONS SUPPLEMENTARY PLANNING DOCUMENT

Prepared under Regulation 12(a) of the Town and Country Planning (Local Planning) (England) Regulations 2012.

1. Purpose and Background

This consultation statement has been prepared in accordance with Regulation 12(a) of the Town and Country Planning (Local Planning) (England) Regulations 2012, which states that, before a local planning authority adopts a supplementary planning document it must prepare a statement setting out:

- i. The persons the local planning authority consulted when preparing the supplementary planning document;
- ii. A summary of the main issues raised by those persons; and
- iii. How those issues have been addressed in the supplementary planning document.

The Council has prepared a Statement of Community Involvement (July 2016) which shows how it will involve the community in its plan and policy-making process. This document can be viewed on the Council's website. The Developer Contributions SPD has been prepared in accordance with the steps outlined in Table 3 of this document.

The Planning and Compulsory Purchase Act 2004 sets out the requirements for preparing SPDs as part of the planning process. SPDs should build upon and provide more detailed advice or guidance on the policies in the Local Plan.

The purpose of the Developer Contributions SPD is to set out the Council's approach to seeking Section 106 planning obligations and their operation alongside the Council's emerging Community Infrastructure Levy (CIL).

The SPD does not create new policy. The adopted Cherwell Local Plan 2011-2031 sets the planning framework up to 2031 with the Developer Contributions SPD providing a further level of detail to guide development proposals.

The SPD will be a material consideration in the determination of planning applications alongside the Local plan and other planning policies.

2. Consultation undertaken during early preparation of Draft SPD

Details of key consultations undertaken during the development of the draft Developer Contributions SPD are provided in the table below.

Persons Consulted	Method	When	Main Issues raised	How addressed in SPD
Cherwell District Council (DM, Legal)	Working Group	On a regular basis during preparation of SPD	Working Group discussed matters such as scope and content of SPD, including detailed procedures related to securing S106 contributions; project specific requirements.	Suggestions and comments used to develop and refine SPD. E.g. SPD reflects legal advice on scope for S106 agreements and compliance with regulations.
CDC – Key stakeholders	Meetings, emails	On-going basis, as necessary, during the preparation of the SPD	Detailed comments and suggestions received on content and scope of SPD.	Suggestions and comments used to develop and refine SPD. E.g. Detailed comments on affordable housing, inclusion of section on Apprenticeship & Skills, guidance on approach to Biodiversity.
OCC – Key stakeholders	Meetings, emails, telephone conversations.	On-going basis, as necessary, during the preparation of the SPD.	Detailed comments and suggestions received, particularly relating to education and transport.	Suggestions and comments used to develop and refine SPD. E.g. Education standards and detailed transport and highway requirements (including calculation of contributions).
Oxfordshire Clinical Commissioning Group	Email	18/7/2016	No comments received	
Thames Valley Police	Email	18/7/2016	No comments received	
Thames Water	Email	Via consultation on IDP	Projects to be included in IDP	SPD makes reference to projects listed in IDP.
SSE (Electricity)	Email	Via consultation on IDP	Projects to be included in IDP	SPD makes reference to projects listed in IDP.
All persons registered on the Council's Local Plans consultation	Email, website, hard copies, notices, social media, parish	12 February – 25 March 2016 as part of the CIL Regulation 15	Limited comments received on the relationship of CIL	SPD provides clear advice on relationship of S106

database	council workshops	consultation. Paragraph 2.3 of the Council's Position Statement on CIL and Planning Obligations (Feb 2016) stated ' The Council intends to publish for consultation a new Developer Contributions SPD at the next CIL consultation stage for the Draft Charging Schedule. However, early views are welcome as part of the first CIL consultation to help inform the SPD review process.'	with S106 requirements. (A summary of the representations received is set out in Appendix 1).	requirements and CIL. Document is compliant with CIL Regulations.
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3. Formal Consultation on the Draft SPD

Formal public consultation on the draft SPD will now be undertaken. A number of methods will be used to seek responses as follows:

- **Mail out:** information will be sent to all persons registered on the Council's consultation database, including specific, general and prescribed bodies. This will be undertaken by email or letter.
- **Website:** the SPD will be published on the Council's website.
- **Hard copies:** the SPD will be available in hard copies at the locations in Appendix 2.
- **Public Notices:** notices will be placed in the Banbury Guardian, Oxford Mail and Bicester Advertiser newspapers.
- **Social Media:** public notifications will be issued.

4. Responses

All representations received will be recorded, analysed and recommendations made about how they should be taken in to account to inform the final SPD. The final SPD will be presented to the Council's Executive, and if approved, presented to the Council for formal adoption.

5. Conclusion

The production of the Developer Contributions SPD has involved wide ranging stakeholder consultation. This has directly influenced both early development and later refinement of the document. Public consultation will now take place in accordance with statutory regulations.

If there are any questions on this Consultation Statement please contact the Planning Policy Team on 01295 227985 or email planning.policy@cherwell-dc.gov.uk

Appendix 1

Cherwell CIL Preliminary Draft Charging Schedule, February 2016: Summary of Representations Received Related to Section 106 Contributions

- Development-specific planning obligations may continue to be used for mitigation such as archaeological investigations, access and interpretation, and the repair and reuse of heritage assets. (*Historic England*)
- NW Bicester benefit from a resolution to approve for a number of dwellings and s106 negotiations are on-going but provision of County wide and town wide infrastructure is outstanding. The burden of infrastructure provision could well be exacerbated by the reliance entirely upon s106. Whilst we anticipate permission in respect of the A2D applications in advance of CIL, there are areas of the master plan that have yet to be the subject of permission. (*Barton Wilmore*)
- The key tests of CIL Regulation 122 should be outlined within the supporting documentation. (*Barton Wilmore*)
- Paragraph 2.14 should make clearer what types of infrastructure will be provided as S.106 planning obligations and what as CIL. If CIL is brought in, the role of planning obligations should be limited to onsite provision and limited offsite circumstances such as S.278 works. It is requested that CIL is placed on hold pending the outcome of the national consultation but if progressed the draft Regulation 123 List should be published asap and consultation undertaken on it. (*Bidwells*)
- Welcome CDC intention to operate CIL and planning obligations as complementary funding mechanisms. We wish to work with CDC to achieve this. (*OCC*)
- At times, the CDC documents refer to 'on-site' mitigation in reference to S106 agreements. Infrastructure 'directly related' to a development can be 'on-site' and 'off-site'. While S278 can deal with off- site highway mitigation there can be other off-site impacts. It will be important the forthcoming Planning Contributions SPD is not unduly restrictive in this regard. (*OCC*)
- Appendix 1 of the Position Statement sets out potential funding sources of infrastructure funding. Here, it refers to 'local site-related transport requirements'. This better reflects an approach that we would want to see in the forthcoming SPD and R123 List that would enable S106 contributions. (*OCC*)

Parish Council Workshops

Parish Councils were invited to consultation workshops as part of the issues consultation on the Cherwell Local Part 2 and the Partial Review of the Cherwell Local Plan Part 1.

Two workshops took place for Parishes in the north and south of the District on 23 and 24 February 2016.

Consultation on CIL was also highlighted although this was not the focus of the workshops.

Issues Raised Specific to S106 Agreements

- Discussion around potential sources of funding to supplement and improve existing and future infrastructure requirements. E.g. open space, transport, schools, and community facilities.
- Developer contributions needed to improve changing rooms and extend village hall.
- Parish has used S106 money to upgrade facilities.
- It would be beneficial if the contributions from various smaller sites could be used to fund much larger, better equipped sites.
- CDC officers advised on the preparation/review of the IDP and the relationship between CIL and S106 agreements and how they are used to fund infrastructure.

Appendix 2: Where and When to Inspect Documents

www.cherwell.gov.uk/policypublicconsultation

Hard copies are available at the locations listed below during opening hours

Cherwell District Council Offices, Bodicote House, Bodicote, Banbury, OX15 4AA
8.45am - 5.15pm Monday –Friday

Banbury Town Council, the Town Hall, Bridge Street, Banbury, OX16 5QB
Monday to Thursday 9am- 4.45pm, Friday 9am- 4pm

Banbury Library, Marlborough Road, Banbury, OX16 5DB
Monday 9am – 1pm, Tuesday 9am-7pm, Wednesday 9am – 8pm, Thurs and Friday 9am –
7pm, Saturday 9am – 4.30pm, closed Sunday

Neithrop Library, Community Centre, Woodgreen Avenue, Banbury, OX16 0AT
Monday 10am – 7pm, Tuesday Closed, Wednesday 2pm – 5pm, Thursday 10am – 1pm,
Friday 10am- 5pm, Saturday 9.30am – 1pm, closed Sunday

Bicester Town Council, The Garth, Launton Road, Bicester, OX26 6PS
Monday – Thursday 9am – 5pm, Friday 9am – 4pm

Bicester Library, Old Place Yard, Bicester, OX26 6AU
Monday 9.30am – 7pm, Tuesday 9.30-5pm, Wednesday and Thursday 9.30am – 7pm, Friday
9.30am – 5pm, Saturday 9am-4.30pm, closed Sunday

Kidlington Library, Ron Groves House, 23 Oxford Road, Kidlington, OX5 2BP
Monday 9.30am – 5pm, Tuesday 9.30am – 7pm, Wednesday 9.30am – 1pm, Thursday
9.30am – 5pm, Friday 9.30am – 7pm, Saturday 9.00am – 4.30pm, closed Sunday

Adderbury Library, Church House, High Street, Adderbury, OX17 3LS
Tuesday: 10 am –12 noon & 3 – 7pm, Thursday: 2pm – 5pm & 6 – 7pm, Friday: 10am – 12
noon & 2 pm – 5pm, Saturday: 9.30 am –1pm, closed Monday, Wednesday & Sunday

Deddington Library, The Old Court House, Horse Fair, Deddington, Oxon. OX15 0SH
Monday 2pm - 5pm, 5.30pm - 7pm, Tuesday Closed Wednesday 9.30am - 1pm, Thursday
2pm - 5pm, 5.30pm - 7pm Friday Closed Saturday 9.30am - 1pm, closed Sunday

Hook Norton Library, High Street, Hook Norton, Banbury, Oxon, OX15 5NH
Monday 2pm - 5pm, 6pm - 7pm, Tuesday Closed, Wednesday 2pm - 5pm, Thursday
Closed, Friday 2pm - 5pm, 6pm - 7pm, Saturday 9.30am - 12.30pm, closed Sunday

Copies will be available on the North, Central and West Mobile Library Services.

For details of locations and times of the mobile library visit www.oxfordshire.gov.uk or phone 01865 810240

Banbury LinkPoint, 43 Castle Quay, Banbury, Oxfordshire, OX15 5UW
8.45am (10am Wednesday) to 5.15pm Monday to Friday

Bicester LinkPoint, 38 Market Square, Bicester, Oxfordshire, OX26 6AL
8.45am (10am Wednesday) to 5.15pm Monday to Friday

Kidlington LinkPoint, Exeter Hall, Oxford Road, Kidlington, Oxon, OX5 1AB
8.45am (10am Wednesday) to 5.15pm Monday to Friday

STAGE B

CONSULTATION STATEMENT

DEVELOPER CONTRIBUTIONS SUPPLEMENTARY PLANNING DOCUMENT

November 2017

Prepared under Regulation 12(a) of the Town and Country Planning (Local Planning) (England) Regulations 2012.

Purpose and Background

This consultation statement has been prepared in accordance with Regulation 12(a) of the Town and Country Planning (Local Planning) (England) Regulations 2012, which states that, before a local planning authority adopts a supplementary planning document it must prepare a statement setting out:

- The persons the local planning authority consulted when preparing the supplementary planning document;
- A summary of the main issues raised by those persons; and
- How those issues have been addressed in the supplementary planning document.

The Council has prepared a Statement of Community Involvement (July 2016) which shows how it will involve the community in its plan and policy-making process. This document can be viewed on the Council's website. The Developer Contributions SPD has been prepared in accordance with the steps outlined in Table 3 of this document.

The Planning and Compulsory Purchase Act 2004 sets out the requirements for preparing SPDs as part of the planning process. SPDs should build upon and provide more detailed advice or guidance on the policies in the Local Plan.

The purpose of the Developer Contributions SPD is to set out the Council's approach to seeking Section 106 planning obligations and their operation.

The SPD does not create new policy. The adopted Cherwell Local Plan 2011-2031 sets the planning framework up to 2031 with the Developer Contributions SPD providing a further level of detail to guide development proposals.

The SPD will be a material consideration in the determination of planning applications alongside the Local plan and other planning policies.

Previous Consultation

Details of the key consultations undertaken during the early preparation of the Developer Contributions SPD is set out in the Statement of Consultation which was published alongside the November 2016 Draft Developer Contributions SPD. These documents are available on the Council's website.

Public Consultation 14 November 2016 – 9 January 2017

Consultation arrangements

On 14 November 2016 the Council published a Draft Developer Contributions SPD for consultation. The consultees listed in the Statement of Community Involvement and anyone who had registered on the Council's database were notified by letter or email and were asked to comment on the Draft SPD.

Hard copies were also placed at deposit locations across the district including libraries and Council offices.

Press Coverage: The statutory public notice was placed in the following newspapers:

- Oxford Mail (10 November 2016)
- Bicester Advertiser (10 November 2016)
- Banbury Guardian (10 November 2016)

Press releases regarding the consultation were also published on the Council's Facebook and Twitter pages.

A copy of the Public Notice is attached at Appendix 1.

Staffed public exhibitions were held during November and December 2016 at:

- Castle Quay Shopping Centre, Banbury OX16 5UN on Saturday 26 November 2016 from 10.00am to 6.00pm.
- Franklins House, Wesley lane, Bicester, OX2 6JU on Saturday 3 December 2016 from 10.00am to 6.00pm.
- The Pavilion, Cutteslowe Park, Oxford OX2 8ES on Saturday 10 December 2016 from 10.00am to 6.00pm.
- Exeter Hall, Exeter Close, Kidlington OX5 1AB on Monday 19 December 2016 from 2.00pm to 9.00pm.

Town & Parish Council/Meeting Workshops

Two Town and Parish Workshops took place for parishes in the south and north of the district on 7 and 12 December 2016 respectively. The workshops took the form of group discussions on the following agenda items.

- Partial Review – Context/Approach
- Draft Vision and Strategic Objectives
- Considering and Delivering Options
- CIL and Draft Developer Contributions SPD

On arrival, parishes were split into groups and each group discussed each agenda item. The group discussions were facilitated by a member of the Planning Policy Team with support from other officers.

A detailed note of the workshops can be found at Appendix 5

Stakeholder Workshop

A focussed stakeholder workshop was held at Bodicote House on Tuesday 13 December 2016.

A detailed note of the workshop can be found at Appendix 6

Representations Received

A total of 25 representations were received. A table providing a full summary of each representation is attached at Appendix 7.

How have they been considered?

Each of the representations has been considered in detail and where necessary further engagement with infrastructure/service providers has taken place. Where appropriate, suggested changes have been incorporated in the revised document. For example, additional information has been included on affordable housing and viability; and advice on the direct delivery of infrastructure has been included. Some further clarifications have been provided particularly in view of the fact that the Council is not taking work forward work on CIL ahead of the Government's 2017 Autumn Statement.

Further Consultation on the Draft SPD

Further public consultation on the draft SPD will now be undertaken. A number of methods will be used in accordance with the Council's Statement of Community Involvement, particularly as follows:

- **Mail out:** information will be sent to all persons registered on the Council's consultation database, including specific, general and prescribed bodies. This will be undertaken by email or letter.
- **Website:** the SPD will be published on the Council's website.
- **Hard copies:** the SPD will be available in hard copies at deposit locations throughout the District.
- **Public Notices:** notices will be placed in the Banbury Guardian, Oxford Mail and Bicester Advertiser newspapers.
- **Social Media:** public notifications will be issued.

Responses

All representations received will be recorded, analysed and recommendations made about how they should be taken in to account to inform the final SPD. The final SPD will be presented to the Council's Executive, and if approved, presented to the Council for formal adoption.

Conclusion

The production of the current draft Developer Contributions SPD has involved wide ranging stakeholder consultation and a formal public consultation exercise. This has directly influenced both early development and later refinement of the document. In view of the major redrafting of the draft SPD as a result of the decision to 'pause' the introduction of CIL at Cherwell District Council a further round of Public consultation will now take place in accordance with statutory regulations.

If there are any questions on this Consultation Statement please contact the Planning Policy Team on 01295 227985 or email planning.policy@cherwell-dc.gov.uk

Appendices

- 1. Public Notice**
- 2. Consultation letters/emails**
- 3. Consultation Poster**
- 4. Representation Form**
- 5. Town and parish Workshops – Attendees and Main Issues Raised**
- 6. Stakeholder Workshop – Attendees and Main Issues Raised**
- 7. Summary of Representations received.**



DISTRICT COUNCIL
NORTH OXFORDSHIRE

PLANNING POLICY CONSULTATIONS
14 NOVEMBER 2016 TO 9 JANUARY 2017

Partial Review of the Cherwell Local Plan (Part 1): Oxford's Unmet Housing Need – Options Paper

Consultation is being undertaken to inform a Partial Review of Local Plan Part 1, specifically to help meet Oxford's unmet housing need. An Options Consultation Paper is being published and comments are invited. The Options Paper and related documents, including an Interim Sustainability Appraisal Report and representation form, are available to view on line at www.cherwell.gov.uk/planningpolicyconsultation or at the locations listed.

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Draft Developer Contributions Supplementary Planning Document (SPD)

A new Draft Developer Contributions SPD is being published for consultation. The purpose of the SPD is to set out the Council's approach to seeking Section 106 planning obligations and their operation alongside the emerging Community Infrastructure Levy (CIL).

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S SMITH, CHIEF EXECUTIVE

Strategic Planning & the Economy

Adrian Colwell – Head of Strategic Planning & the Economy

Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Bodicote House
Bodicote
Banbury
Oxfordshire
OX15 4AA

www.cherwell.gov.uk

Please ask for:	Tony Crisp	Direct Dial:	01295 227985
Email:	planning.policy@cherwell-dc.gov.uk	Our Ref:	Partial Review / CIL / 106

11 November 2016

Dear Sir/Madam

Notification of Planning Policy Consultations:

Partial Review of the Cherwell Local Plan (Part 1): Oxford's unmet housing need – Options Consultation

Community Infrastructure Levy (CIL) Draft Charging Schedule

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Yours faithfully

David Peckford

David Peckford
Planning Policy Team Leader



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S SMITH, CHIEF EXECUTIVE

PlanningPolicyConsultation

From: PlanningPolicyConsultation
Sent: 11 November 2016 19:19
Subject: Cherwell District Council - Notification of Planning Policy Consultations7

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S SMITH, CHIEF EXECUTIVE

Public Consultation

14 November 2016 to 9 January 2017

Cherwell Local Plan Partial Review

- Oxford's Unmet Housing Need



Options Consultation - Your Chance to Comment

Cherwell District Council is undertaking a Partial Review of its Local Plan to determine how it can help Oxford with its unmet housing need.

It would like your views in preparing the Review.

All Oxfordshire Councils have accepted that Oxford cannot fully meet its own housing needs.

As its contribution, Cherwell District is being asked to accommodate 4,400 homes by 2031 in addition to the housing planned to meet its own needs.

Cherwell District Council has previously sought views on the issues it needs to consider in planning for the additional

development. It has considered these comments and is now consulting on options for housing development.

Are you also interested in how Cherwell funds its development infrastructure?

Cherwell District Council is also consulting on its draft Community Infrastructure Levy (CIL) and a Draft Developer Contributions Supplementary Planning Document.



View the documents The consultation documents are available on-line at www.cherwell.gov.uk/planningpolicyconsultation. Or contact Cherwell District Council on 01295 227985 for details on where you can view hard copies

Hear more details Speak to Cherwell officers at public exhibitions:

- Castle Quay Shopping Centre, Banbury OX16 5UN – Saturday 26 November 2016 -10am to 6pm
- Franklins House, Wesley Lane, Bicester, OX26 6JU – Saturday 3 December 2016 -10am to 6pm
- The Pavillion, Cutteslowe Park, Oxford OX2 8ES – Saturday 10 December 2016 -10am to 6pm
- Exeter Hall, Exeter Close, Kidlington OX5 1AB – Monday 19 December 2016 - 2pm to 9pm



Have your say

Submit your comments to:
PlanningPolicyConsultation@cherwell-dc.gov.uk

Or by post to: Planning Policy Team, Strategic Planning and the Economy,
Cherwell District Council, Bodicote House, Bodicote Banbury, OX15 4AA

For more information call 01295 227985

**DRAFT DEVELOPER CONTRIBUTIONS SUPPLEMENTARY PLANNING DOCUMENT (SPD)
Regulations 12b and 13 of the
Town and Country Planning (Local Planning) (England) Regulations 2012**

**PROPOSED COMMUNITY INFRASTRUCTURE LEVY (CIL) DRAFT CHARGING SCHEDULE
Regulation 15 of the
Community Infrastructure Levy (CIL) Regulations (2010; as amended)**

Representation Form

Cherwell District Council is currently consulting on two documents to help the funding of infrastructure such as schools, road improvements, community facilities and open space needed to support new growth in the district.

- 1. Draft Developer Contributions Supplementary Planning Document (SPD)**
A new guidance document setting out what contributions developers should be asked to make when they submit a planning application.
- 2. Community Infrastructure Levy (CIL) Draft Charging Schedule**
A proposed new charge on new development to help fund strategic infrastructure in Cherwell.

They are available to view and comment on from **14 November 2016 – 9 January 2017**.

To view and comment on both documents please visit
www.cherwell.gov.uk/planningpolicyconsultation.

The consultation documents are also available to view at public libraries across the Cherwell District, at the Council's Linkpoints at Banbury, Bicester and Kidlington, at Banbury and Bicester Town Councils and Cherwell District Council's main office at Bodicote House, Bodicote, Banbury.

You may wish to use this representation form to make your comments. Please e-mail your comments to planningpolicyconsultation@cherwell-dc.gov.uk or post to Planning Policy Team, Strategic Planning and the Economy, Cherwell District Council, Bodicote House, Bodicote, Banbury, OX15 4AA no later than Monday 9 January 2017.

You should receive a written acknowledgement. Email acknowledgements will be sent automatically by return. Acknowledgements by post should be received within five working days of your response being received. If you do not receive a written acknowledgement, please contact the Planning Policy Team on 01295 227985.

Please note that all comments received will be made publicly available.

Representations must be received by Monday 9 January 2017

Visit www.cherwell.gov.uk/planningpolicyconsultation

Post completed forms to Planning Policy Team, Strategic Planning and the Economy, Cherwell District Council, Bodicote House, Bodicote, Banbury, OX15 4AA or email to PlanningPolicyConsultation@cherwell-dc.gov.uk

Please provide the following details:

NAME:

ADDRESS:

.....

EMAIL:

TEL NO:

AGENT
NAME:

AGENT
ADDRESS:

.....

AGENT
EMAIL:

AGENT
TEL NO:

Your details will be added to our mailing list and you will be kept informed of future progress of this document and other Local Plan documents. If you wish to be removed from this mailing list please contact the Planning Policy team. Details are at the bottom of this representation form.

1. DRAFT DEVELOPER CONTRIBUTIONS SUPPLEMENTARY PLANNING DOCUMENT

Do you have any comments on the Draft Developer Contributions SPD?

Please make it clear to which part of the Charging Schedule your comments relate.

2.COMMUNITY INFRASTRUCTURE LEVY (CIL) DRAFT CHARGING SCHEDULE

Do you have any comments on the Proposed CIL Draft Charging Schedule?

Please make it clear to which part of the Charging Schedule your comments relate.

Please continue on another sheet if necessary.

Thank you for taking the time to respond to this consultation. Please ensure your comments are submitted by 9 January 2017.

Cherwell District Council- Local Plan Part 1-Partial Review**Developer Contributions and CIL****Parish Workshop (Bicester) Wednesday 7 December 2016****6pm – 8pm****Purpose:**

Parish Councils were invited to a consultation workshop as part of the Options consultation on the Partial Review of the Cherwell Local Plan Part 1 during November 2016 – January 2017. The Draft Developer Contributions Supplementary Planning Document and Draft Charging Schedule for the Community Infrastructure Levy were also discussed at the workshops. The workshops took the form of group discussions on the agenda items set out below (the agenda was circulated in advance to the parishes). On arrival, parishes were split into groups and each group discussed each agenda item. The group discussions were facilitated by a member of the Planning Policy team with support from a colleague. This document summarises the discussions that took place.

Two workshops took place for parishes in the south and north of the District on 7 and 12 December 2016 respectively.

Agenda:

- Introduction to the workshop and the consultation documents given by David Peckford, Planning Policy Team Leader, Cherwell District Council

Discussion on the following agenda items took place amongst each individual table group:

- Partial Review – Context/Approach
- Draft Vision and Strategic Objectives
- Considering and Delivering Options
- Developer Contributions SPD and CIL

Table Number	Facilitator and Assistant	Parish Councils
1	Sharon Whiting & Chris Cherry	Islip
		Kidlington
		Yarnton
		Cllr Billington (Kidlington PC)
		Cllr Simpson (Kidlington PC)
2	Maria Dopazo & Andy Bowe	Cllr Sibley(Bicester TC)
		Cllr Lis (Bicester TC)
		Chesterton
		Launton
		Wendlebury
3	Chris Thom & Lewis Banks-Hughes	Blackthorn
		Caversfield
		Middleton Stoney
		Piddington

		Woodstock
4	Yuen Wong & Sunita Burke	Fringford
		Kirtlington
		Noke
		Launton
		Shipton on Cherwell

Table 1**Partial Review – Context/Approach**

- 4400 is a large figure.
- There are pressures from the City to have housing close to Oxford.
- Oxford housing need is unique. It is different from the rest of the County.
- The need is for affordable housing
- The Council's policy is for 35% affordable housing which the Council is not always achieving.
- If the housing goes to Banbury and Bicester there will be traffic congestion for commuters
- Need a balance of housing and employment in Oxford to reduce 'in' commuting.
- Oxford should use employment sites for housing
- Reference to employment site at Langford Lane
- SW refers to emerging Transport Strategy
- Problems with convenience and price of P&R sites
- The road network around Oxford is a major constraint
- Problems of traffic congestion in Islip
- Need to solve problems of infrastructure before considering new housing
- How CIL and S106s agreements will deliver infrastructure

Draft Vision and Strategic Objectives

- The partial review should have the same vision as the adopted Cherwell Local Plan
- Impact on 5 year housing land supply
- Discussion around the release of MOD land eg Arncott
- Is Oxford City delivering housing on the scale required? Why are the build rates below expectation?
- SW refers to 'Duty to Co-operate' and commitment in adopted Plan to meet Oxford's needs.
- Should there be compensation for loss of Green Belt and enhancement of remaining Green Belt?
- SW refers to new Cherwell DC Green Belt Study

Considering and Delivering Options

- Concerns expressed about Oxford taking over parts of Kidlington and Gosford
- Need a radical public transport solution for Oxford
- Major development will radically change character of Kidlington. This is a major social issue
- Would be helpful to know about proposed housing in adjacent districts – cumulative impacts

- Railway connections a key component of Transport Study
- SW advised that there would need to be a dialogue with railway companies
- Are there the resources in Banbury and Bicester to build houses?
- Questions about sustainability of 'deliverability' of sites
- The Green Belt is not sacrosanct
- Need to assess capacity on railways

Developer Contributions SPD and CIL

- SW gave a brief introduction and description of these documents

Summary of Key Issues

- Can we seek contributions from the City for infrastructure in Cherwell?
- 4400 house seems high
- Need infrastructure before houses
- Traffic congestion and transport are key concerns
- If it is Oxford's need why does Cherwell need to fund it?
- Lack of progress on Oxford's housing sites delivery

Table 2

Partial Review – Context/Approach

- Still testing housing numbers
- Why timeframe and why hurry to do it? Why not do at same time as rest of Oxon?
- Growth Board commitment to work together
- West Oxon less apportionment because of constraints
- Planning powers for each local planning authority to accommodate Oxford's unmet needs
- Cherwell Local Plan (CLP) Part 1 commitment to look at Oxford's unmet Need (OUN) CLP adopted subject to reviewing it in 2 years
- Why do we have to review CLP already when other districts aren't doing it? Already lots of houses / development being built/ why do we have to accept another 4.5k houses?
- Adopted CLP to guide development to areas to secure 5 years housing land supply
- How does budget announcement on Oxford to Cambridge corridor change things? Would this not be better process? LP runs to 2031 but development will be longer than that
- Bicester eco town will be ghost town created by expressway
- What are benefits for Bicester? What infrastructure will be provided? Can't cope with what we've got already in Bicester – need jobs, shops,
- We build houses but there are no jobs planned
- Average House price in Bicester £60-70k more than Banbury
- Local housing for local needs
- Not building houses for local people
- Need to give people options e.g. people moving out of Witney because of difficulty of getting to Oxford
- Transport links to Oxford lagging behind housing development
- Vision and objectives considering all issues to set framework for development, rationale for development and growth.

- OTS providing transport infrastructure to support
- Government refused to support upgrading of A34 etc.
- Development not delivering infrastructure
- Railtrack spending £18m on Islip station
- Need more time to do review – unfortunately not got more time.
- If Oxford not prepared to meet unmet need why not get Oxford to contribute to cost of infrastructure – complicated – has Growth Board addressed this? City Deal bids – Growth Board to have a remit to look at funding bids for infrastructure – deal to commercialised local authorities each site to give something. Cannot take growth of Oxford and don't know Oxford's contribution.
- Need to strengthen CLP1 and need more evidence
- Some parties e.g. City and developers, will want some growth.
- Next stage transport modelling, impact on biodiversity to see if can accommodate growth around Oxford. Some initial evidence on transport.
- 5 year housing land supply –
- West Oxfordshire District Council (WODC) is preparing Modifications and submitting its Local Plan
- Problem need to address as a whole county, congestion problems around Oxford already
- Safety of A34 - risks need to be addressed but Cherwell District Council is not road planner
- Evidence needs to be based on what is impact on infrastructure
- Building more science parks north of Oxford - makes sense to put houses in North Oxford
- Worry about workload of officers to prepare partial review - too many words for consultees to read!!!
- Neighbourhood Plans (NP) not taken into account in planning partial review – Local Plan partial review needs to comply with NP
- Price of railway travel = people drive

Draft Vision and Strategic Objectives

- What is Oxford's vision to use brownfield land for development?– District is taking its vision to change to match Oxford's needs. How much does one vision have to change to accommodate that of the others?
- Difficult compromise for planners and residents – search areas do not fit with vision for CDC growth.

Considering and delivering Options

- Cluster C – sprawl development around motorway junction – initial transport evidence does not support area C
- Area E – Bicester – touching area C at SW end, same things apply
- Wendlebury Greenfield site , in flood plain for Oxford not close to Bicester Wendlebury, congestion on travel, not enough infrastructure J9, A34 rat running, away from focus for development
- Anything else on north side of Bicester will create more problems. Further development will add further traffic.
- Ring road is in wrong place – build new ring road or traffic increase will be unacceptable.
- Sewage capacity at Bicester STW at capacity – no plans to improve – health infrastructure in Bicester – GPs already closing.
- Garden town, healthy new town eco town in jeopardy with growth
- Social issues – growing too fast does not allow people to integrate creates ghettos

- How fast can you grow a town and make it a good place to live? Town centre not designed for size of town. Not sure Bicester can grow fast and still be a good place to live?

Developer Contributions SPD and CIL

- Will developers pay more or less?
- Exemptions from CIL e.g. affordable housing
- S106 still applied for mitigation specific to development
- Schools are on list but still a problem
- CIL system is convoluted
- Negotiate with CDC on spend
- CDC will need to publish programme of where money spent a percentage 15% to parishes if no NP 25% if do have NP
- Threshold for affordable housing
- CIL is non-negotiable s106 is negotiable
- Map of charges – less viable area pay less. Highest land values north of Oxford, lowest in rural areas
- Will affect final cost of property? Town centre retail no charge to preserve town centre viability – viability led.
- Self-build should contribute because puts pressures on local infrastructure

Summary of Key Issues

- Green Belt is not sacrosanct
- South of District preferred
- Spatial relationship to Oxford
- Need for Oxford – close to Oxford
- Infrastructure needs to be considered first
- Loop (Route) to Park and Rides
- Who is going to fund the infrastructure?
- Integrated cycle paths through to Oxford
- Areas A & B preferred
- Support for CIL and Developer Contributions

Table 3

Partial Review – Context/Approach

CT advised that on Plan PR150 – Change title from Bicester to Caversfield

- Questions about process and how sites were selected. CT explained process.
- We can't accommodate houses in Bicester for people working in Oxford. Most people here would oppose it. Page 18 of main consultation document appoints 3 sites around Kidlington. This would be the most appropriate site given proximity to Oxford. Why do we have to accommodate Oxford's housing need? Concern about A34 and traffic.
- Importance of Green Belt noted
- Noted that Oxford was proposing to build on golf courses
- Sites around Yarnton and Kidlington have been identified, why can't these be accepted?

- There must be areas within the Green Belt which can be used
- Discussion about the numbers for adjoining districts including South Oxfordshire figure
- Discussion about the SHLAA and whether it was determined by developers
- CT responded by explaining about economic growth rate and origin of SHLAA figures
- Why aren't the houses located in Oxford?
- Are houses in South of the district suited to people commuting to London?
- How do we ensure that new units are taken by local people?

Draft Vision and Strategic Objectives

- Discussion about objectives
- Oxford dominated by NHS and universities. Retail is not doing well and the start-ups outside of Oxford so why are we building houses for Oxford.
- Oxford has new employment near north of Oxford.
- Banbury suitable location for development compared to Bicester
- Can Cherwell give Kidlington to Oxford?
- If Oxford had a unitary authority then the boundaries would need to be changed.
- New Oxford to Cambridge Road will result in even more housing for people living in Cambridge.
- There is quite a lot of commuting between Oxford and Cambridge

Considering and Delivering Options

- When developers were asked to put sites forward were only larger sites selected?
- Too many houses and commuters and Eco town will make it worse.
- Majority view that development should be in areas A and B.
- No provision for improved transport. Question numbers we have to re-house. Woodstock doesn't want to be part of Oxford. Consequences of delivering growth not numbers.
- Caversfield is a category C village
- Sites south of Woodstock will not benefit Woodstock – Woodstock will become a commuter town.
- Site in Caversfield already turned down on appeal.
- Heyford is a viable option
- There are historic constraints at Heyford
- Station and transport network around Heyford need to be upgraded
- Oxford Unitary Authority not sustainable
- Disparity about size and mix of houses. What's needed is smaller units e.g. 1 bed units. Developers are only providing executive housing.
- If we have lots of houses, we need the services to accommodate them
- Woodstock has Stagecoach buses like Bicester – and people use them
- All Woodstock buses run by Stagecoach and as frequency goes up so does usage
- If Oxford is going to provide employment then we should not provide housing
- If we are going to provide housing, it needs to be small, affordable. New areas of recreation should be provided within area A

- Live work units might provide the option for employment in mainly residential areas
- Oxford should be providing employment if we are providing their housing need.
- All sites in Areas A and B have been assessed within the SA
- West Oxfordshire also looking for areas around Woodstock near areas A and B
- Sites near Oxford Parkway supported
- Shipton Quarry – supported site but we need new railway station
- Housing won't be built unless developers want to build. What measures are being taken by government to encourage house building?
- If we opt for options A and B, why are we even considering the other sites and villages?

Developer Contributions and CIL

- Contributions around Woodstock should go to nearest village/settlement not remote parishes
- Mentioned Piddington. Towns get the funding from new development not smaller parishes.
- We wouldn't want a village hall. We would like to secure open spaces and purchase them from developers which are holding them for housing. CIL would contribute towards play equipment.
- No particular view on CIL but more to do with weight limits etc.
- Would like refurbished village hall from CIL contributions and improvements to transport e.g. speed and weight enforcement

Summary of Key Issues

- Roads and Transport
- AONB should be established near Oxford
- Serious work to sort out transport around Oxford e.g. trams etc.
- Should Cherwell provide housing for Oxford?
- Don't protect all of the Green Belt e.g. in A and B apart from near Woodstock
- No industrial/commercial development
- No out of town shopping centre in Woodstock
- Smaller units and social housing
- Some CIL possibilities
- Constraints - Blenheim – World Heritage Site and Roman villa on proposed site near Woodstock
- Caversfield is within a conservation area.

Table 4

Partial Review – Context / Approach

- General consensus and support for A and B option. It is better if this is located close to Oxford. Cycle tracks to Summertown.
- A40 – Woodstock – straight route based on the existing transport links
- Are we talking to environmentalist?
- GP Policy – is not sacrosanct? Encroachment is likely

- County/Town Policy – now need for a greater strategy. Protect communities in the GB. GB zone is starting to change.
- Around Park and Ride the flood plain must be appropriately built
- Green Belt should be reviewed.
- Location should be close to Oxford as it is for Oxford's need.
- Huge improvement to infrastructure is required
- Points of principle. Not to worry so much about GB – look at individual villages/sites.
- It is legitimate to look at GB – Concept of the GB – Review
- Infill policy – object to 100 homes in villages – may support 10 homes.
- Any realistic prospect of building in the GB
- Oxford housing identified as need for Oxford.

Draft Vision and Strategic Objectives

- Agree with the vision and objectives. Housing units means number of doors – should be a variety of homes and not 4 and 5 bed homes.
- Oxford housing need is for affordable housing and key workers accommodation
- Missing clarity on Infrastructure – Infrastructure should come first – before housing
- Existing infrastructure doesn't work – you are talking about misery.
- Affordability
- Put genuine cycle paths through farms – rural cycle lanes
- Links to Oxford Parkway. All traffic and roads lead to the centre of Oxford. Need loop outside Oxford. Ring Road is not a Ring Road.

Considering and delivering Options

- Areas of search
- Hospital buses – better connections to key destinations without having to go through the centre of Oxford.
- Woodstock – A44 – closer to Oxford.
- 2021 – 2031 – Phasing strategy
- Affordable housing policy in the Local Plan.
- Build close to Oxford

Developer Contributions SPD and CIL

- CIL – 3 areas
- What is your (Council's) target revenue generation? -----DP – No target
- Strategic sites have S106 – CIL does not apply to these site – ECO Town and Heyford Park have S106 agreements in place for the permissions approved.
- Clarification on affordable housing and Viability
- What can the CIL money be spent on? – Infrastructure
- Welcome receiving 15% CIL for Parishes and 25% for those with the Neighbourhood Plan.
- S106 is currently used to secure a developer contribution which is negotiated on a site by site basis. Once CIL is in place and adopted by the Council, it will be able to start collecting CIL moneys from developments. CIL cap.
- All Parishes welcomed and support both documents.

Summary of Key Issues

- Need investment in transport, traffic and roads
- Should Cherwell provide it all?
- Don't protect all the Green Belt
- In A&B but not Woodstock
- Social housing
- No employment
- Some possibilities for CIL

Cherwell District Council- Local Plan Part 1-Partial Review

Developer Contributions and CIL

Parish Workshop (Banbury) Monday 12 December 2016

6pm – 8pm

Purpose:

Parish Councils were invited to a consultation workshop as part of the Options consultation on the Partial Review of the Cherwell Local Plan Part 1 during November 2016 – January 2017. The Draft Developer Contributions Supplementary Planning Document and Draft Charging Schedule for the Community Infrastructure Levy were also discussed at the workshops. The workshops took the form of group discussions on the agenda items set out below (the agenda was circulated in advance to the parishes). On arrival, parishes were split into groups and each group discussed each agenda item. The group discussions were facilitated by a member of the Planning Policy team with support from a colleague. This document summarises the discussions that took place.

Two workshops took place for parishes in the south and north of the District on 7 and 12 December 2016 respectively.

Agenda:

- Introduction to the workshop and the consultation documents given by David Peckford, Planning Policy Team Leader, Cherwell District Council

Discussion of the following agenda items took place amongst each individual table group:

- Partial Review – Context/Approach
- Draft Vision and Strategic Objectives
- Considering and Delivering Options
- Developer Contributions SPD and CIL

Table Number	Facilitator and Assistant	Parish Councils
1	Chris Cherry & Andy Bowe	Gosford and Water Eaton
		Kidlington
		Hampton Gay and Poyle
		Woodstock
		Duns Tew
2	Chris Thom & Tom Plant	Cllr Reynolds (Drayton)
		Kirtlington
		North Newington
		Wroxton
3	Yuen Wong & Sunita Burke	Bloxham
		Banbury Town Council
		Sibford Ferris
		South Newington
4	Maria Dopazo & Kevin Larner	Adderbury
		Bodicote

		Stoke Lyne
		Steeple Aston

Table 1

Partial Review – Context/Approach

- Affordable housing should be located near Oxford Parkway Railway station and Water Eaton Park and Ride
- “Commuter belt” along railway
- Local Plan can specify affordable housing percentage but needs to be balanced against viability
- What is Oxford’s requirement? Type of people? What is Oxford’s employment type – needs to match type of homes to be provided in partial review?
- What is being used to determine need? SHMA explained
- Oxford should build on its Green Belt
- Option of Green Belt release should be explored e.g. Southfield Golf Club could be relocated to a Green Belt site
- Oxford City wants growth closer to the city
- Is it reasonable to consider Banbury?
- Key issues are connectivity; building communities and deliverability (what can the market deliver?)
- Other infrastructure requirements include schools and doctors
- Oxford City Council has set out what it needs but development needed to provide it assuming 4.4k homes close to Kidlington
- Banbury, Bicester and Kidlington may be able to take more housing development. If development is distributed widely in small sites then there is less chance of securing developer contributions to deliver infrastructure
- Stakeholders favoured larger developments to fund infrastructure
- Continue county towns strategy but concerns of transport issues and links North of Oxford requiring infrastructure.
- Green Belt is not sacrosanct but needs to be protected/defended – need separation between Oxford and Kidlington, countryside and protection of flood plain

Draft Vision and Strategic Objectives

- Don’t agree with the strategic objectives
- What is definition of “affordable”?
- Supporting Oxford’s needs is important and importance should be emphasised
- Transport links are major constraint
- Need good transport links/infrastructure with infrastructure in advance of development
- CDC needs to join up with other infrastructure providers

Considering and Delivering Options

- Langford Lane/Begbroke to support small scale employment and around Pear Tree
- If don’t want anything between Oxford and Kidlington then puts pressure on Kidlington
- Should put sites on A44 not on A4260
- All roads are congested/at capacity

- Need more transport infrastructure
- Not PR 27 (The Moors) which impacts on the gap between the village and river
- PR 41 look to retain area of Green Belt
- Shipton Quarry – access to railway but deliverability issues and other constraints = not available within timescale.
- Heyford?
- NE Kidlington?
- No strong view on large sites

Developer Contributions and CIL

- Transport schools and doctors surgeries priority
- Stakeholders recognised that larger developments were likely to secure larger developer contributions to infrastructure
- No other uses suggested for CIL

Summary of Key Issues

- Can we see Oxford City's SHLAA?
- Oxford should maximise existing sites eg brownfield
- Transport Constraints
- Infrastructure delivery
- Green Belt – some incursion may be ok but need to preserve identity/character of existing towns and villages
- Need to have evidence to justify sites
- Better chance to get infrastructure with larger sites
- Need to preserve green gaps between settlements with some development close to Oxford

Table 2

Partial Review – Context/Approach

- Rural villages in Local Plan Part 2, why mentioned then in Part 1?
- Part 2 is Cherwell's need.
- Drayton becoming an extension of Banbury. Development down golf club and back of Drayton. Banbury and Bicester should expand for Oxford's unmet need.
- General discussion on meeting Oxford's need.
- Oxford should increase its densities, then this exercise would not be required.
- Should need 4,400
- SODC reneged on meeting Oxford's unmet need.
- Is this figure set in stone?
- How did CDC arrive at that figure?

Draft Vision and Strategic Objectives

- Will the housing really be affordable?
- Has Oxford looked at all its sites?

- Should initially look at Kidlington, as a bus would be required from Wroxton to Banbury.
- Attention drawn to new line from Oxford Parkway to Oxford.
- Need to build houses for people who work in Oxford.
- Banbury should not have to meet this need
- Put condition that new houses should only be for living and working in Oxford
- What is classed as affordable?
- Developers can justify what is affordable in Oxford but cannot ,however, justify its viability
- Government policy has changed re: green belt
- Kassam Stadium is in green belt
- Green belt now has lower value
- If green belt protected more growth at Drayton and Wroxton.
- We should push back to Oxford. Say no
- How did SODC get away with not working with Oxford?
- WODC would not give correct numbers. We should resist SHMA work
- If CDC agrees to 4,400 – what if CDC sets bar high re affordable houses. Does that fulfil our need on paper? Affordability a key driver.
- CDC gets to choose if green belt is developed or not.
- Process driven by developers who have a preference where they want to develop.
- Bus services important. Use of public transport to Oxford.
- Location of railway stations. Transport across Oxford. Trains direct to city and buses to city.
- Need to concentrate resources. Buses to hospital important.
- Need to build higher densities.

Considering and Delivering Options

- Options at M40 J9
- Push growth to SNC
- Need to consider Oxford and Cherwell's need – Is it Oxford's or Cherwell's 5 year housing land supply? – A and B sensible choices for development.
- Green credentials – request in the plan?
- Arncott – all houses there? EX MOD sites?
- Implications of Oxford- Cambridge express way?

Developer Contributions SPD and CIL

- S106 monies – Parish's don not see it
- S106 on site. CIL off site. – Parish's to decide how the money is spent.
- Cost of recreational equipment
- Link CIL to neighbourhood plans
- What is CIL consultation for?

Summary of Key Issues

- Housing type – affordable, density and scale
- Need new roads, bus services, cycling. Long term investment
- Continue with Areas A and B (but high land values)
- No development in villages
- Some opportunities in low value green belt (evidence needed)
- Use PDL but expensive to deliver
- Should have lower CIL on PDL to free up MOD land

Table 3

Partial Review – Context / Approach

- 4,400 - Is it a given? If South Oxfordshire doesn't deliver do we need to take it?
- The consensus was that Cherwell accommodated additional growth at the time of adoption because of the SHMA and Growth Board. The barrister for Oxford was very forceful and accommodated the additional housing need. Maybe we should use their Barrister next time?
- Not clear how the figure of 4,400 arrived at by the Growth Board – It is too much?
- What is going to happen with South Oxfordshire apportionment? If the decision is taken by whoever on the apportionment their
- Can this growth be accommodated at Upper Heyford? The allocations at Upper Heyford are based on Policy Villages 5, which covers the entire site area. It will form part of the review for LPP1 – PR
- Green Belt should be reviewed.
- Location should be close to Oxford as it is for Oxford's need.
- SHMA figure should be reviewed following Brexit as the assumptions for SHMA were based on the economic forecasts before Brexit.

Draft Vision and Strategic Objectives

- It is quicker to get to London than to Oxford from Banbury and the surrounding areas.
- Do not envisage people travelling to Oxford from Banbury. People within Oxford City want growth in Bicester as it is part of the knowledge corridor for Oxford City.
- The private rented sector in Oxford is very high and not affordable for the people who work in Oxford. There are a myriad of reasons for the shortage of housing in Oxford. It is a combination of expensive private rental market, type of housing available is not met by the demand for it. Employers are unable to recruit because of suitable housing. Families cannot afford to live in Oxford and have to move out, which involves travel into Oxford therefore not attractive to families. Oxford Colleges lobby against high rise – historic city.
- Where is the housing need?
- What is the housing need?
- Not all the academics, engineers coming to Oxford to work want to live close to their places of work.
- Salary difference

Considering and delivering Options

- Affordable housing policy in the Local Plan needs teeth to it in LPP2. It needs to make developers provide affordable housing and not use viability to lower the provision.

- Build close to Oxford
- Transport strategy is needed for Oxfordshire – County/City and not just City.
- Housing land supply update and its importance for Cherwell District, this means that it relieves pressure on villages in particular on that basis.
- National Government commitment of housing delivery. Colleges and many large developers have large land banks. The Government have been criticised for making that statement.
- Areas of Search – do you agree with areas A and B – Yes, but Bicester and Banbury can take more.
- HEELAA consists of site assessment and this is due to be reviewed and made available to public early next year. No date has been fixed
- LPP2 sites may be smaller sites.

Developer Contributions SPD and CIL

- CIL tariff is welcomed
- Welcome receiving 15% CIL for Parishes and 25% for those with the Neighbourhood Plan.
- S106 is currently used to secure a developer contribution which is negotiated on a site by site basis. Once CIL is in place and adopted by the Council, it will be able to start collecting CIL moneys from developments.
- All Parishes welcomed and support both documents.

Summary of Key Issues

- 4,400 too much
- What will happen with South Oxfordshire's apportionment?
- Grenoble Road
- SHMA should be reassessed after BREXIT
- What is the housing need? Who? Where?
- Employers in Oxford find it difficult to recruit.
- Oxford has high rents and land prices
- Preferred areas of search A&B, Bicester and Banbury

Question

Are garages included in CIL?

Answer

Yes, garages are included in the residential floor space calculations for CIL

Table 4

Partial Review – Context/Approach

- 4,400 additional homes
- 5 year supply – how will the new houses affect this?
- Cannot address until sites identified. Channel down from broad strategy first.
- Sites need to be deliverable to keep up supply.
- Transport links versus proximity to Oxford.
- Transport infrastructure not necessarily deliverable, gamble to rely on it.
- Transport subsidises cut.
- Car is preferred method realistically.

- Oxford City prefers sites close to city.
- All in one Oxford block, or spread around?
- People will buy houses according to own requirements.
- Will housing be tailored to presumed need of Oxford population?
- Do we know what mix is needed?
- Has Oxford determined who housing will be for? Further away will be primarily for commuters.
- Main need is for affordable housing, how will levels be determined?
- Want ideally cohesive self-contained communities.
- Need driven by new people moving to county.
- All economic benefit flows to Oxford and Bicester, not Banbury.
- Banbury more self-contained.
- Banbury in two LEP areas.
- Housing must be backed with employment.
- Committed economic growth will require more housing. Knowledge Corridor is planned for later.
- Planned growth areas already in Cherwell so do we use green belt or add to identified growth areas?
- Need to have all infrastructure ready.
- IDP accompanies LP1.
- All depends where sites can be found. Mobile and broadband not obliged to provide.
- Bodicote strongly doesn't want additional housing for Oxford. Should be nearer to Oxford.
- No option to do nothing.
- Green belt should be reviewed.
- Extend existing infrastructure or build brand new infrastructure in new area?
- South of district is better. Transport links are not good enough from north of district.
- Sum up – preference is for housing closer to Oxford.
- So much new development already. Already planned communities need time to develop.
- LP already identifies many village sites – how will those work with LP2 sites? Concern that rejected sites will be resubmitted.
- Percentage of social versus private.
- According to LP policy. Oxford's affordable ratio is 50% we need to decide if that can be sustained in Cherwell.
- Higher social needs better proximity to centres.
- S106 is negotiable, we have to consider if affordability is brought up.
- Neutral benefits.
- Possible to argue for share of benefits which would otherwise go to Oxford.

Draft Vision and Strategic Objectives

- Need vision that works for the whole of Cherwell.
- Objectives focus on proximity to Oxford, housing needs and working with City Council.
- Sustainability – social, economic, environmental.

- Cherwell must not be just a dormitory for Oxford.
- How will this work with Oxford's forthcoming LP?
- Consulted in summer. Policy framework is pre NPPF. SHLAA – generated more than had been envisaged
- Why are Cherwell and South taking so much more than Vale and West?
- More constraints in Vale and West (less well connected).
- In reality how deliverable is any of this? How long will this take (on top of existing quota)?
- Does CDC know how much land has existing, non actioned planning permission?
- Tabulated in AMR.
- Does CDC ask why not being delivered?
- Yes they are regularly contacted. Can consider accelerating some sites if other expected ones do not develop as expected.
- If this plan is not progressed we can expect speculative developments to start arriving.
- To what extent can CDC force/facilitate delivery of infrastructure?
- Can push/negotiate/pressure developer.

Considering and Delivering Options

- New Year – shortlist of sites then ask developers to demonstrate deliverability.
- Will developers build if not profitable?
- Cards are with developer, they hold the 5 year land supply. Changes mooted but developers are a strong lobby.
- Large strategic sites or dispersed?
- Housing mix will affect deliverability.
- Concerns for community cohesion – resentment.
- Question - New settlements in preference to multiple small sites? (All = yes).
- Social needs must be met – is this realistic for new settlement; employment, transport.
- Need to plan for cemeteries
- Economy – if bad could end up with huge housing development and no employment.
- Can 4,400 homes be economically sustainable?
- Employment types Banbury, Bicester and Oxford different. How improve employment types in Banbury and Bicester?
- Need to work closely with business community. Focus on apprenticeships.
- Academic education in Banbury not good enough.

Developer contributions SPD and CIL

- 106 negotiable
- CIL not negotiable
- Chair of OALC. Does district take CIL if parish does not have specific project?
- MD- Parish proportion 15% if no NP capped to £100 per existing dwelling.
- (if NP = 25%, no cap)
- 123 list – what will go from CIL and from S106?
- Look at what infrastructure needed.

- Will not be backdated on existing houses.
- MD - No it will not. Number of exemptions to CIL. More affordable housing = less £s to infrastructure.

Summary of Key Issues

- Preference for development closer to Oxford because of transport, sustainability, affordable housing.
- Review Green Belt
- New settlement in preference to multiple small developments.

Focus Stakeholder workshop
Tues 13 December 2016
Council Chamber 17:45-20:00pm

Table 1 David Peckford, Andrew Bowe	CDC
Richard Cutler	Bloombridge
Tom Rice	Barton Willmore
Sarah Gregory	Savills
Alan Storah	Oxford City Council
Lawrence Dungworth	Hallam Land Management Limited
Mitchell Tredget	Hill Residential
Julie-Anne Howe	OCCG
Steve Pickles	West Waddy ADP
Table 2: Chris Thom, Lewis Banks-Hughes	CDC
Peter Bateman	Framptons Planning
James Dillon-Godfray	London Oxford Airport
Fiona Mullins/Tom McCulloch	Community First Oxfordshire
Andrew Garraway	Turnberry
Jacqui Cox	OCC
Simon Joyce	Strutt & Parker LLP
Colin Blundel	Vale of White Horse District Council
Table 3 : Sharon Whiting, Tom Plant	CDC
David Flavin	OCC
Ben Simpson	WYG Bonnar Allen
Alan Lodwick	Oxford Green Belt Network
Jonathan Porter	Archstone Projects Limited
Charles Campion	New College
Gary Owens	CDC- Housing
Table 4: Maria Garcia Dopazo, Alex Rouse	CDC
David Burson	JPPC Planning
Mark Schmull	Nathaniel Lichfield & Partners
David Heathfield	Chiltern Railways
Jenny Barker	CDC
Peter Cox	Bicester Chamber of Commerce
Christopher Anstey	CRJ Anstey
David Keene	David Lock Associates
Table 5: Christina Cherry, Sunita Burke	CDC
Robert Davies	Gerald Eve LLP
Sue Marcham	CDC
David Stewart	David J Stewart Associates
Ellen Timmins	Boyer Planning
Paul Burrell	Pegasus
Bob Duxbury	CDC
Neil Roe	Amber Developments

1. Summary of main issues raised across the 5 tables during the focused discussions

The discussion focused first on the key priorities arising from the Local Plan Partial Review Options Consultation from the stakeholders' point of view and interest. This was followed by a discussion on the Local Plan Part 1 Partial Review proposed vision and objectives, consideration and delivery of options and a final discussion on the concurrent consultation on Developer Contributions and CIL Charging Schedule.

The sections below summarise the key issues raised under each discussion topic while Appendix 1 provides a more detailed record of the points raised also by topic.

1.1 Key priorities from the stakeholders' point of view and interest.

Main priorities raised by the participants focused on:

- **the wider/strategic implications of meeting Oxford's needs:** how does it fit a wider strategy, is the SHMA realistic?, what are the democratic processes? (i.e. whose policies are these?), impact on the environment and Green Belt aim to restrict sprawl.
- **Infrastructure:** whether planning growth and infrastructure on existing locations or clustered for new infrastructure, focus infrastructure in and around: Bicester, A34, A44 and A4260, possibility of new train station.
- **Location of development:** support for Area of Search A, support for close to Oxford and around existing/planned corridors, support for large strategic sites alongside some housing in villages for 1 and 2 beds. Deliverability by 2031 to be a consideration for the location of development.

1.2 Local Plan Part1 Partial Review: Context/Approach

Main comments on LP1 Partial Review context and approach included:

- **Approach to growth:** support for county towns approach and Sustainable Urban Extensions, concerns with urban extensions to Oxford due to environmental, Green Belt and Infrastructure constraints, support for an approach based on Oxford needs with development located near Oxford, support for an approach which leans on public transport and transport hubs.
- **SHMA , housing need and apportionment:** concerns with the adequacy of the SHMA (exaggerated needs and focus on employment growth), support for SHMA as ratified by PINs, queries about population updates needed at later stages of plan preparation, queries on whether CDC will accommodate further growth and the consequences of SODC not endorsing the Growth Board apportionment.
- **Green Belt (GB) and Kidlington gap:** Kidlington gap is strategic, queries on whether best to undertake a GB Review or a GB Leap with views pro and against both approaches, fears that a GB review will open 'Pandora's box' and hence it should not be reviewed, support

for a GB Review which is targeted not excessive review and permanent to 20+ years. Need to justify GB review's exceptional circumstances.

- **Deliverability:** Increased housing delivery possible, landowners looking at land disposal although builders are maxed out at the moment, landowners aspirations (land values) are an issue for affordable housing, need a mixed of large and sites. Smaller sites quicker and easier to deliver. Plan deliverable but GB review is needed.
- **Infrastructure:** high quality transport needed to areas for Oxford's growth, queries on when the Plan will address infrastructure needs and whether consultations will take place as part of OCC Local Transport Plan.
- **Location of growth:** support for areas A and B, support for and arguments against further growth in the north of the Cherwell, Upper Heyford and potential MoD land, motorway junctions seen as inappropriate, support for growth at Oxford Parkway, support for locating growth near existing development and near employment, question the approach to areas of search and whether areas A and B have been favoured, views on 4,400 being too much just for Kidlington.

1.3 Draft Vision and Strategic Objectives

Main comments on LP1 Partial Review context and approach included:

- **The focus of the vision and strategy:** non location specific vision as a starting point but responding to Oxford's needs and Cherwell's context. Some Views on vision trying to please everyone and following the wrong strategy, some views on support of the vision and strategy. Support for moving attractors (jobs and university) outside Oxford (i.e. Bicester), counter argument indicating business may move to Cambridge instead. Some views on vision and strategy too narrowly focused on housing with a counter argument on the Plan being only a partial review to LP1 to meet Oxford's unmet housing needs.
Addressing specific housing matters: Affordability of housing, small units, student accommodation, need to address health issues and design dementia friendly homes and care villages. Provision of a digital village at Kidlington.
- **Public transport and connectivity:** Important to provide good accessibility to Oxford City Centre and employment. Council to monitor progress on Oxford- Cambridge corridor.
- **Oxford/Cherwell impacts:** concerns with competition between houses built for Oxford's needs and those for Cherwell. The emphasis on the vision should not be on 'New balanced communities'. The vision for LP1 PR and Kidlington Masterplan do not connect the Masterplan should be brought to the fore. Contributions from development should go for infrastructure.
- **Objectives:** In Objective 1 partners should extend to through the Duty to Cooperate. Objective 17 relays on unrealistic job growth, vision for balanced communities is at odds with objectives 17 and 18 focusing on addressing Oxford's housing needs. Should consider common drivers for long term sustainability.

1.4 Considering and delivering Options

Main comments on LP1 Partial Review consideration and delivery of options included:

- **Approach to growth:** initial evidence indicates areas A and B most sustainable, support for growth at Banbury and Bicester with counter arguments supporting growth at the edge of Oxford accompanied by infrastructure. Support for consideration of new growth nodes. Views on dispersing some of the growth on grounds of natural limits to growth around Kidlington. Support for Upper Heyford and Bicester supported by high quality transport. Biodiversity could affect location of growth.
- **Infrastructure:** NHS does not have capacity for new surgeries; transport system around Cherwell generally poor cannot cope with more growth, transport capacity matters are a national issue. Growth driven in part by strategic employment, should apply for funding streams in connection to SEP. Wider strategy needed for infrastructure. Developers and landowners to be treated fairly. Arguments pro and against the benefits of larger vs smaller site allocations to help delivery of infrastructure.
- **Delivery:** Investment and returns drive the gradual delivery of houses not land banking and Green Belt. Ring-fencing site delivery may result on area I coming forward to meet 5 year housing land supply. Kidlington Masterplan can be delivered now work already done. Development around Water Eaton area is 10-15 years away. Phasing of sites not considered practical by triggers for occupation may work. Delays on S106s is an issue – should front load to pre-app stage. Sales rates are outside Council's hands and there is likely to be competition. Views on delivery not being an issue unless infrastructure upgrades have a knock on effect.

1.5 Developer Contributions SPD and CIL Draft Charging Schedule

Main comments Developer Contributions SPD and CIL included:

- **Approach:** SPD and CIL based on adopted Local Plan growth. The future impacts of Partial Review sites to be looked into as the plan progresses to adoption. CIL doesn't allow negotiation -prefer s106 route; Strategic site appraisal does not pick cumulative effect of assumptions; views that viability not an issue in Cherwell, need transparency in finances; Development is needed to pay for the infrastructure – so what other options are there?
- **CIL charges:** views on CDC CIL charges being higher than surrounding authorities countered with views on CIL charge being reasonable. Need to address balance between seeking contributions and not putting development at risk. Schedule seen as helpful; Garages factored into the levy; Keep CIL simple – Speeds it up Parishes keen to see how much they can get countered by views on CIL needing to fund infrastructure
- **SPD:** Table 2 in the SPD is very clear. Minimum threshold retained. Threat to small development coming ahead such as petrol station with retail, etc. Public art can fall into disrepair and wasted. City uses a calculator for mitigation on ecological matters. – Biometric – Defra. LPP2 – look at metric and biodiversity counting. Can contributions be more specific / itemised? They cannot just be viewed in isolation. Surcharges are very high, even comparatively.

Appendix 1 – Detailed list of main points raised by topic

Stakeholders' main issues arising from the consultations

Democratic process and strategic matters

- i. How does democratic process work with Oxford?
- ii. How Oxford's Unmet Need (OUN) fits wider county strategy how it responds to the Strategic Economic Plan (SEP)
- iii. High level context – not just about CDC strategic fit with Oxford context
- iv. How could needs be met in terms of scale and location of development and how does it manifest itself in terms of sustainability/detrimental impact on the environment
- v. Oppose SHMA, unrealistic and excessive
- vi. Support principles of greenbelt and appropriate use. Supports Cherwell's Green Belt Policy – Restricted sprawl.
- vii. City Council approach – to promote employment land rather than housing.
- viii. Housing market area vs Oxford cities need Policy? CDC or City for affordable homes threshold. Affordable housing – who gets it? Cherwell or City?
- ix. New homes bonus and incentives with housing growth
- x. Support Planners on strategic issues

Infrastructure

- i. Infrastructure issues e.g. constraints in Bicester
- ii. Interested in sites making most of existing infrastructure
- iii. Supportive of clusters of sites to improve transport infrastructure.
- iv. Query whether best to plan growth and infrastructure in existing locations or clustered for new infrastructure.
- v. Interest in social and wider infrastructure from community viewpoint
- vi. Specific transport infrastructure between A34 and Begbroke Science Park/Yarnton/Kidlington/Northern Gateway etc.
- vii. Impacts on existing infrastructure, need for a phasing approach to delivery and the relationship with Sustainability Appraisal and site scoring.
- viii. Possibility of new train station on Great Western line.
- ix. New employment in Kidlington area.

Location of development

- i. Where and how development will take place? Where 4,400 homes go by 2031 is also a delivery issue: where do you put it – is Banbury too far?
- ii. Should be close to Oxford and around existing / planned transport corridors.
- iii. Strategic sites with infrastructure and bigger and better sites while small villages with some small housing 1 and 2 beds.
- iv. Supporting Search Area 'A'

2. Partial Review: Context/Approach

Approach to Growth

- i. Country towns approach to growth in Oxfordshire dominated for years – Growth for Banbury
- ii. Oxford wrong to take premise - Sustainable Urban Extension (SUE) is the answer
- iii. Urban extension of Oxford is not sustainable – due to local circumstances – transportation A40 Northern Gateway environmental setting and quality, Green Belt and heritage and environmental setting compared to elsewhere in Kidlington – Kidlington needs regeneration
- iv. National Infrastructure Commission – Growth Corridor (above 4,400)
- v. House live/work in Oxford – affordability is fundamental
- vi. Difficult to object to the strategic view and approach in the Cherwell Plan
- vii. CDC initially thought for 2011-2031 was 16k. Consultants employed to defend deliverability. Ambitions deliverable targets
- viii. City's based need: people who have a job but need a house. It is a City requirement and not for commuting people. Junior academics and researches leaving Oxford as can't find / afford housing.
- ix. Spatial relationship important, also public transport and new modes
- x. If houses relate to Oxford, huge market / demand, especially for affordable.
- xi. Question whether jobs are/should be in the city– Science Park in Vale DC? Future job growth unnecessarily provided up at Oxford? Not required for all business to be right on Oxfords doorstep.
- xii. WODC garden village – approach to transport hubs.
- xiii. Long period existing strategy of Oxford City is at odds with OCC.
- xiv. Opportunity for high level jobs in Bicester.
- xv. Meeting all of the need immediately just compounds the problem.

SHMA, housing need and apportionment

- i. 15,000 homes for Oxford and Cherwell's apportionment is 4,400 homes. Can this be accommodated sustainably and where within Cherwell? How robust is 15K figure? Is the figure 4,400 too high?
- ii. SHMA - exaggeration of CDCs need and employment growth. Based on false evidence, jobs will not be delivered. It does not address need. It does not address affordable need.
- iii. SHMA – Ratified by PINS
- iv. Cherwell has accepted this figure from the Growth Board – Duty to Co-operate and agreed to meet the need through Partial Review of Local Plan Part 1.
- v. Need comes from SHMAA. Based on Oxford's identified needs and SHMAA – 10K met – Growth Board divided remainder. Statutory process through local plans. Figure could change through review of other LA plans.
- vi. The 4,400 is on top of the pre-existing numbers based on Cherwell's demand.
- vii. SHMAA is the document to be used and based on assessed need. Could be checked/updated? Have updated population projects been used? Would this be done through Growth Board?
- viii. CDC to review whether population updates are needed before examination

- ix. There may be some LAs challenge SHMAA – needs to be updated? 2014 has been through examinations and has been found robust.
- x. Could Cherwell get more than the 4,400 allocated by Oxford’s unmet housing need? If South Oxfordshire District Council continues to not agree to take a portion of Oxford’s unmet housing need – would Cherwell then have to take an additional portion of that amount too?
- xi. Interim SA looks at 4,400, significantly less and significantly more. However, the focus of the LP1 PR is the unmet need apportioned to Cherwell (4,400).
- xii. The focus of the LP1 PR is the testing through Cherwell’s statutory processes the Growth Board apportionment of 4,400 to Cherwell. It is for each local authority to address the Duty to Cooperate through their plan making process.

Green Belt and Kidlington Gap

- i. Kidlington gap is strategic survived over years. Kidlington needs regeneration no Green Belt focus.
- ii. Lots of the land in A and B is in Green Belt. Should CDC leap the Green Belt? Scope to review Green Belt?
- iii. CDC needs to justify exceptional circumstances for Green Belt development. Growth Board looked at land in Green Belt to identify which parts of Green Belt could take development. There are parts of the Green Belt with lower landscape quality than other parts.
- iv. Green Belt needs to be looked at – old concept – shouldn’t go in with view to leap Green Belt.
- v. Cambridge (without Green Belt constraint) has attracted significant employment. Oxford has been hampered by Green Belt constraints. Lots of industries would like HQ in Oxford but there are no [employment] sites available around city centre.
- vi. Green Belt review should be a targeted approach
- vii. No development in the Green Belt , real fear it is Pandora’s box
- viii. Green Belt review through sensible planning needed but not excessive – Carefully regulate
- ix. Re-fix green belt for 20+ years after this review.
- x. Green Belt review too look longer term view: 50-100 years
- xi. Coalescence of settlements? Kidlington/ Yarnton/ Begbroke have a sense of identity? Value of the Green Belt – Openness. Parts of the Green Belt have no value.
- xii. Are parts of the Green belt around Oxford able to meet Oxford’s need? What part of the Oxford’s Green Belt performs the Green Belt function?

Deliverability

- i. Landowner aspirations are a difficulty– Affordable Housing cost £60 per sq. ft. = £60k
- ii. Landowners looking for opportunity to dispose of land
- iii. Realistic rate of delivery – yes to increased housing delivery
- iv. Need a mix of sites small and large. If you draw down into what are deliverable sites.
- v. Sites out there, but builders maxed out at present
- vi. The LP1 PR is deliverable but needs green belt review
- vii. Delivering large sites takes 10 years to get spade in ground – is there potential to deliver large sites as series of small sites? No due to land equalisation

- viii. 5 year land supply from 2021? Yes
- ix. Market supply and demand – saturation. Hallam Land developing at Cranbrook in Devon - 450 units per annum starting to stall
- x. Smaller sites quicker and easier to deliver. Flexibility is key

Infrastructure

- i. Transport is key – cycling and train links are important
- ii. What about the levels of infrastructure needed, and would phasing be used?
- iii. Need to look at developing a strategy and identifying the location of growth first before establishing what infrastructure is needed.
- iv. High quality public transport is needed in these growth areas. Need better linkages further out to places and areas suitable for Oxford's growth.
- v. What is the consultation on OCC Transport Plan? – Can similar consultations be carried out on OCC transport matters in the area?
- vi. OCC are active in talking to District Councils and undertaking consultations such as the A40 scheme (OCC website).

Location

- i. Transport 30-60min journey is what most commuters will make
- ii. Housing - important to be close to Oxford
- iii. Area A and B are well connected by public transport. A and B logical place to centre new development. Sustainable communities should be created in their own right rather than dormitory towns. Proximity to Oxford promoted active travel links to reduce impact on infrastructure.
- iv. A and B. Have locations been ranked?
- v. SA and TA identify ranking of locations + sustainability and impact of proposals on Cherwell and Oxford. CDC hasn't set out a rank.
- vi. The partial review seems to imply that CDC has already made up their mind that the majority of the growth will be around Kidlington. Is this biased? Based on the documents, Kidlington looks like it is favoured – what drove that decision?
- vii. No decisions have been made at this stage. The starting point is looking at the whole of the district, including connectivity and public transport links
- viii. Areas of Search were drawn based on: urban areas, PDL, transport nodes and promoted sites. Initial SA and Transport Study indicate that Areas A and B seems the most sustainable locations but we need more evidence (HRA, SFRA, Landscape) to inform the next stage.
- ix. SA framework produced by LUC looks at Oxford's and Cherwell's objectives but addresses Oxford's unmet need.
- x. Upper Heyford has further potential
- xi. Fan of new garden town type development – new developments shouldn't be bolted onto existing development
- xii. Oxford Parkway good location for some housing
- xiii. Some form of bolstering into what is existing (with new development in these areas)

- xiv. Connectivity is very important – having location close to employment
- xv. A + B, Bicester and Banbury make more sense
- xvi. Should be more ruthless and say no to areas.
- xvii. North of District is stupid location for the LP1 PR, it does not relate to Oxford. Banbury related to WODC, SNC and Birmingham. Houses in North of the District exacerbates problems.
- xviii. Heyford and Banbury solve CDCs issues not Oxfords unmet need.
- xix. Motorway junctions area inappropriate
- xx. MOD land Comparable to Heyford or Graven Hill (i.e. Arncot)
- xxi. If high end jobs in Bicester, then Arncott would be good
- xxii. 4,400 are too many for just Kidlington. It wouldn't cope.

Other

- i. Could have policy for key workers offer land for free to construct houses for key workers e.g. Bloombridge in Kidlington 21 Ha site only need 10Ha market value = £1m per acre
- ii. Density should be revisited
- iii. Oxford is a world class city – it is a fundamental building block – support that
- iv. Historic built and natural environment are not in these assessments.

3. Draft Vision and Strategic Objectives

Vision

- i. Oxford suggested vision is non-location specific, a starting point to frame what follows. Responds to Oxford's needs in Cherwell context
- ii. Draft vision tries to please everyone all at the same time
- iii. Strategy is wrong
- iv. Should employment be pushed out of Oxford? Train line essential to move jobs out of Oxford perhaps.
- v. Oxford attractor of people and houses move universities to Bicester
- vi. In Oxford Astra Zenneca could not find site so moved to Cambridge not Bicester
- vii. Housing isn't just an isolated aspect; it has to coincide with employment opportunities.
- viii. The review does seem overly housing-focused. Should the review be wider than just housing?
- ix. There is an employment/housing imbalance in Oxford. The Partial Review is not a review of the LP but a partial review to help address Oxford's unmet housing needs.
- x. Needs vision is for a new city then dealing with the focus of Oxfords unmet need. Statement of a new garden city.
- xi. Connectivity to Oxford. Cambridgeshire is successful because of its connectivity between different modes of transport. Links to Ox Parkway.
- xii. All traffic and roads lead to the centre of Oxford. It is very important to provide good access into Oxford City Centre. In particular public transport and Park and Rides.
- xiii. Focus on Oxford impact on CDC

- xiv. Vision and objectives – health – need health to be designed to be dementia friendly need built facilities for healthy environment
- xv. LP1 Partial Review and Kidlington Masterplan don't connect. Kidlington Masterplan needs to be brought to the fore – housing will cost £500-£700 per sq. ft. at Oxford Parkway but £300 / sq. ft. in Kidlington
- xvi. Telecottages digital village in Kidlington as part of regeneration of the village
- xvii. Need to plan for care village
- xviii. City's requirement is for small units not executive homes. Concentrate what is missing, small units
- xix. Provide a range of housing types for Oxford's need.
- xx. Exemplar is a high bar + affordability contradicts each other.
- xxi. Oxford has lots of university colleges, which means lots of student accommodation – would Cherwell have to take a proportion of this, in addition to other types of housing?
- xxii. The competing nature of the houses build for Oxford's unmet housing need and those built for Cherwell's natural growth might seem to be somewhat adversarial.
- xxiii. Properties in Oxford are the most expensive around, so the issue of affordability will be key.
- xxiv. Can the Cambridge – Milton Keynes - Oxford corridor be considered as an example of good practice?
- xxv. The preferred route option has yet to be identified. We will keep an eye on future announcements.
- xxvi. New balanced communities in the Draft Vision for Meeting Oxford's Unmet Need – Does this have to be new? The existing settlements will have capacity for expansion?
- xxvii. 4,400 homes because of Oxford's needs. Accessibility to these employment areas is important such as Begbroke.
- xxviii. If 4,400 are for Oxford, roughly 3000 will generate value. Contributions from the development can go for better infrastructure provision.

Objectives

- i. Objective 1 - partners- only /City and County Councils? – partners to extend to growth board partners through duty to cooperate
- ii. Potential to work with other districts to meet unmet needs
- iii. Disagree with SO17 – unrealistic job growth.
- iv. We do still need to build balanced communities, as the impact of growth affects many other areas. A vision seeking balanced communities may not be supported by objectives focused mainly on addressing Oxford's housing needs SO17 and SO18. Need to consider the common drivers of long term sustainability.

4. Considering and delivering Options

Approach

- i. Initial evidence indicates areas A and B are most sustainable
- ii. University needs to do proper Research and Development at Water Eaton
- iii. 100 dwellings, thresholds way too low, dilutes strategy
- iv. Is this a real need or not? Do ½ now and see if it is deliverable review for other ½ 2,200, then if there is demand then the other 2,200

- v. Biodiversity can affect where new developments take place.
- vi. Cluster sites together
- vii. Urban extension or new towns
- viii. Sites or sustainability
- ix. Infrastructure also drives the level of delivery – the Oxford unmet housing would be best suited to the edge of Oxford (i.e. Kidlington), rather than around the other two urban centres in Cherwell – Banbury and Bicester, which are probably too far away.
- x. Strategy – Banbury/Bicester is supported. There are pros and cons for sites in Banbury and Bicester.
- xi. Fundamental point – jobs in Oxford.
- xii. Oxford need – not to confuse with Oxford’s need not being met in Bicester – net migration. Plan for growth in Bicester– Green Belt has value. Settle in places like Heyford/ Bicester and travel to Oxford using high quality transport to Oxford. It becomes a Bicester issue. Potential to allocate housing in Bicester to meet Oxford’s unmet need. Ability to fund infrastructure improvements.
- xiii. If development is around a node could not new nodes be created?
- xiv. Locating housing closer to Oxford will be better at meeting Oxford’s unmet housing need, as geographic proximity is a key driver for people.
- xv. Should the delivery of housing be dispersed or concentrated? There are natural limits for housing, and sites other than those around Kidlington will surely be needed to take some of the pressure.
- xvi. Infringing on the Greenbelt has negative connotations – but Greenbelts can be enlarged or moved around – they are not fixed points – look at the example of Cambridge. Are Cherwell thinking of undertaking a Greenbelt review?
- xvii. Are we going back to Regional Spatial Strategies again?
- xviii. Who decides which houses have been designated for Oxford’s unmet housing need, and which have been designated for Cherwell?
- xix. This is an argument that could be made about any plan making process not just in addressing Oxford’s unmet needs. There are limitations on how prescriptive planning can be (who lives/works where) but the next stage of LP1 PR will influence housing mix, housing types and affordability.

Infrastructure

- i. 440 homes per year added to housing delivery sites = c 6k people but NHS does not have capacity for new surgeries
- ii. The current Kidlington transport set-up is insufficient to deal with any more development
- iii. The transport system in and around Cherwell in general is poor, and the whole transport strategy wouldn’t be able to cope with such high levels of demand from an extra 4,400
- iv. Use of local building fund to deal with intractable problems of infrastructure
- v. Existing Capacity of the trains themselves - paths they can use – if you introduce new station, it will extend the length of the journey. Increase capacity on existing public transport (trains)
- vi. Major investment needed into public transport. The transport issues discussed are national, and not just localised.

- vii. Strategic employment driving unmet need – ways to apply for funding streams need to demonstrate going to provide jobs. Connection to SEP used to bid for funding
A wider infrastructure strategy is needed rather than just endless mitigation. Previous mistakes have been made with the funding of infrastructure – this must not happen again.
- viii. Private cars are still the main method of transport, rather than public transport.
 - 4,400 homes seems a lot, but if you put it in perspective of having good transport links, in a nice area of the country, with good employment opportunities, it isn't that much housing.
- ix. It's fine having better transport links, but if you can't get there without driving, then it's pointless. Transport services need to be better integrated into the wider community. But they also need to be commercially viable.
- x. Could/should buses get preferential treatment? There should be interconnection between buses and trains (in real time)?
- xi. Developers and landowners need to be treated fairly. Is the additional infrastructure costs only for the 4,400 homes of Oxford's unmet housing need, or can it go towards funding general improvements to services across the district?
- xii. Approach should be for large allocations, which will have ability to lever in investment for larger infrastructure.
- xiii. Quantum of development – deliver small sites for a new school/or an extension to an existing school. Small sites can help existing school in Yarnton.

Delivery

- i. Housing crises nationally. How does greenbelt review address the housing crises? Disagree with green belt and developers banking. Investment and return means delivering houses gradually.
- ii. Ring-fencing may result in area I coming forward to meet 5 year housing land supply
- iii. Need strategy for Kidlington to deliver 2-3k homes and to deliver Kidlington Masterplan – work done already – smaller sites controlled by individual landowners
- iv. Further development around Water Eaton = 10-15 years away
- v. Approach to 5 year land supply: 2 local plans piggy backing distinguish land supply supplies and demonstrate to inspector delivery.
- vi. Site in different ownership come with one application to deliver. Sites in CDC are big and can accommodate huge growth.
- vii. Phasing? Not practical to dictate that.
- viii. Triggers in place before occupation. Agree with triggers
- ix. Control infrastructure: Delay for 106 negotiations, 50 units taking 2 years for 106 to then get to REM. Try and front load everything at PREAPP rather than post planning granting subject to 106.
- x. Is there a different trajectory for the Oxford unmet housing need compared to the other housing being built in Cherwell?
- xi. It hasn't been decided yet, first need to develop a strategy as well as the quantum and location of growth.
- xii. Delivery shouldn't be a problem, as landowners want quick delivery. But infrastructure upgrades will have knock-on effects on the ability to deliver.
- xiii. The sales rate would be out of the council's hands anyway, and competition is inevitable.

5. Developer Contributions SPD and CIL

- i. SPD and CIL based on adopted Local Plan growth. The future impacts of Partial Review sites to be looked into as the plan progresses to adoption.
- ii. CIL doesn't allow negotiation – flat rate makes some sites unviable undeliverable when you crunch numbers which is why prefer s106 route
- iii. Strategic site appraisal does not pick Cumulative effect of assumptions
- iv. Need to build development tolerances into model
- v. Savills to provide detailed comments to feed into discussions with Montagu Evans
- vi. Health might not be new build but might be used to support existing by existing contributions – developers don't mind giving money to support facilities
- vii. Contributions into CIL pot but infrastructure not always seen to be spent
- viii. Viability not an issue in CDC
- ix. CIL charges are higher than rest of Oxon and strategic sites should be excluded.
- x. CIL appealing to communities because to split to parish councils
- xi. Small builders getting away with S106 but appeals to bigger clients because of fairer distribution.
- xii. Community development funding through CIL – no expectation though CIL.
- xiii. Can contributions be more specific / itemised? They cannot just be viewed in isolation.
- xiv. Surcharges are very high, even comparatively.
- xv. Transparency in the finances is needed.
- xvi. Development is needed to pay for the infrastructure – so what other options are there?
- xvii. The clarity in the documents was commended. No concerns raised except for out of centre retail and that CIL for new retail uses may not be viable.
- xviii. Notional proposition – A and B Areas are reasonable to deliver for oxford's unmet need. There needs to be a balance between managing the issue - existing place and the new place and how it will appear, what infrastructure it will need.
- xix. CIL approach – contributions requested are within reason
- xx. Balance between seeking contributions and not putting development at risk.
- xxi. CIL schedule is very helpful
- xxii. City uses a calculator for mitigation on ecological matters. – Biometric – Defra meter
- xxiii. LPP2 – look at metric and biodiversity counting.
- xxiv. Table 2 in the SPD is very clear. Minimum threshold retained. Threat to small development coming ahead such as petrol station with retail, etc.
- xxv. SODC has CIL adopted and its charges are lower, CDC expectations too high?
- xxvi. Garages factored into the levy
- xxvii. The bigger the shopping list gets and the developer / land owner doesn't understand contribution like public art, when issues such as school and bus routes important.
- xxviii. Makes developers question why sell land
- xxix. Keep CIL simple – Speeds it up
- xxx. Parishes keen to see how much they can get
- xxxi. CIL should be infrastructure and not what the Parishes can get – Schools, trains
- xxxii. Public art can fall into disrepair and wasted.

Appendix 7

Draft Developer Contributions SPD November 2016: Summary of Consultation Responses

Rep No.	Name	Organisation	Summary of Representation
CIL-B-002		Banbury Town Council	As a consultee Banbury TC would like to be privy to draft heads of terms for individual development proposals at the pre-application stage, possibly as part of wider stakeholder panels for interested parties within the town. Our members have detailed local knowledge and our planning committee provides members with a wider strategic view of the town and how developments will embed themselves within it
CIL-B-005		Persimmon Homes Midlands	Paragraph 4.15 states that 'it is expected that 50% of the affordable rented housing will be built to Building Regulation Requirement M4(2) Category 3: Wheelchair User Dwelling' The SPD is not the appropriate place to introduce this requirement. The appropriate place to introduce this policy would be through the Part 2 Local Plan process and would need to be fully evidenced as required by the NPPG.
CIL-B-006		Barton Willmore on behalf of Bellway Homes Ltd and Archstone Projects Ltd	The SPD does not comply with national policy on deliverability of development and the role of local plans. The SPD does not contain sufficient evidence and justification to support the contributions and costs proposed. <ul style="list-style-type: none"> • The PPG is clear that SPDs should not be used to add unnecessarily to the financial burdens on development and should not be used to set rates or charges which have not been established through development plan policy. • Appendix 9 sets out sums for open space provision. Each provision is multiplied over a 15 year period. This seems an unreasonably long period of time, and 10 years would be more reasonable. • The SPD is not supported by a robust evidence base to justify the contributions and associated charges.
CIL-B-008		David Lock Associates on behalf of Gallagher Estates	There are a number of infrastructure items for which the SPD provides no supporting evidence as to how values have been calculated, nor what assumptions support any such calculations. Eg Contributions for Education infrastructure, commuted sums for maintenance for community halls, commuted sums for maintenance of open space, community safety/CCTV costs. Security & Timing of Payments – There is no reference to a mechanism for the

			<p>repayment of unspent monies by the Council to the developer. Reference should be included in accordance with national guidance.</p> <p>Education – There is no reference to education requirements being met through direct delivery of schools and/or extensions to existing facilities.</p> <p>Local Management Organisations – It is noted that it is the Councils’ preference to adopt and maintain public open spaces, the option to use management companies is outlined within the document as an appropriate alternative. Any such decision taken in relation to a management approach should be solely between the developer and the District Council. It is not necessary or appropriate to require agreement of the town/parish council, who would not be party to any such S106 agreement. Reference to the need for propositions of management companies to secure approval of the town/parish council should be removed.</p> <p>Indoor Sport, Recreation and Community Facilities – The SPD should refer to opportunities presented by the commercial operation of community facilities that might provide appropriate and alternative means to fund the ongoing management and maintenance of community facilities, such that they do not require payment of commuted sums. Appendix 10 – Reference should be made to the alternative approach where it can be run as a commercial operation and/or management company. Timing of provision should be considered on a case by case basis. The timings for provision should therefore be expressed as a target, but not an absolute requirement. Community Safety & Policing – Reference to the CIL tests should be added for the avoidance of doubt.</p>
<p>CIL-B-009</p>		<p>Rapleys on behalf of Pandora Trading Ltd</p>	<ol style="list-style-type: none"> 1) It is noted that Draft Heads of Terms are required to accompany any application submission – this is part of the standard validation process. This is supported in principle. 2) It is noted that the developer is expected to pay all Council costs incurred as part of agreeing/assessing viability matters. 3) It is noted that the number of likely S106 obligations that may be required as a result of the development is greatly reduced as many items are intended to be paid for by CIL. This is supported in principle. It is noted that many of these CIL items are not identified in the Reg 123 list – Clarification is sought as this could result in considerably greater S106 financial contributions than anticipated.

			<p>4) It is unclear how the requirement to provide 2.5 apprenticeships per 50 dwellings will work in practice and how this is then calculated/reflected within any viability appraisal. Further clarity is sought on how this would operate and whether this can legally be required when measured against the necessary tests.</p>
CIL-B-010		Turley on behalf of Bovis Homes Ltd	<p>Further clarity should be provided throughout the SPD with regard to which infrastructure requirements will be delivered through S106 contributions and which will be delivered through CIL. The Council needs to ensure that there is no overlap between the Reg 123 list and the IDP to ensure no ‘double counting’ of contributions.</p> <p>Affordable Housing: Whilst primary legislation for Starter Homes has been introduced, to date the definition of affordable housing has not been altered within the NPPF and starter Homes do not have the necessary secondary legislation. Suggest that Starter Homes is removed from the SPD list of affordable housing types until it is defined as such.</p> <p>Education: It is not clear what the difference is between the education improvements which will be paid for by CIL and those more site specific contributions which will be sought through S106 agreements. Further detail should be provided to clarify the difference between the two. The Council may also wish to consider clarifying how they will calculate education contributions in relation to outline applications where the exact dwelling mix is unknown.</p> <p>Transport & Access: Upon adoption of CIL the Council will need to ensure that they are not seeking contributions from both S106 and CIL towards the same projects or types of infrastructure. It should also be clear which IDP projects developers would be expected to contribute towards and it should be demonstrated that these would meet the Reg 122 CIL tests.</p> <p>Health Care: It is noted that no indicative formula is provided for calculating healthcare contributions. It would be beneficial for further guidance to be provided within the SPD.</p>
CIL-B-011	Simon Dackombe	Thames Valley Police	<p>Welcome the recognition of the need to secure contributions towards ‘Community Safety and policing. Would however wish to see more specific comments relating to the role of TVP as the ‘service’ provider. Would like to see a reference to ANPR</p>

			<p>cameras. In certain cases there may be a requirement for an on-site presence. Usually in the form of a 'touchdown facility'. Amended wording to paras 4.77-4.80 is suggested.</p>
<p>CIL-B-012</p>		<p>Boyer Planning on behalf of Redrow Homes and Wates Developments</p>	<p>Concerned that the proposed approach for some developer contributions may not meet the limitations set out in Reg 122 and 123 of the CIL regulations. Also concerned that the SPD does not make clear whether it is intended to apply prior to adoption of CIL.</p> <p>Affordable Housing: Requirements appear to pass the CIL tests. Although the SPD should state that it is subject to site specific assessment and viability considerations.</p> <p>Transport & Access: It is considered that the current level of detail regarding potential S106 contributions towards transport and access proposals is not sufficient to enable a full response to be made at this stage. Further consultation is required once the specific transport schemes and payment mechanisms have been established.</p> <p>Education: Appendix 4 does not acknowledge that existing school capacity needs to be taken in to account, nor define or provide guidance on the means of doing this. It is important to recognise that for outline applications housing mix will usually be indicative. S106s must therefore be sufficiently flexible to allow the sums to be paid to be determined once the precise mix is known and approved as part of RM applications.</p> <p>Open Space, Play Facilities, Outdoor Recreation and Sport: It is clear that the evidence base for this cannot be considered up to date and should not form the basis for negotiations. An up to date evidence base is required which will be subject to further consultation. Para 4.37: There is no certainty provided as to when or how commercial development could trigger a contribution and how that assessment and judgement would be made. It is also not clear how any such contributions would be calculated. There is no evidence base to justify requirements related to commercial development and propose that this reference is deleted. There is no evidence to support Appendix 5.</p> <p>Indoor Sport, Recreation & Community Facilities: Again the evidence is out-of-date. An up-to-date evidence base should be provided which should be subject to further consultation prior to progressing these requirements.</p> <p>Nature Conservation & Biodiversity: No adverse comments.</p>

			<p>Apprenticeship & Skills: Argue that the SPD requirements do not appear to pass the tests of S106 obligations as set out in para 204 of the NPPF.</p> <p>Public Art: There is no detail on how the provision of public art would make the development acceptable in planning terms. Whilst such provision is desirable it cannot be considered necessary as required by the CIL regulations.</p> <p>Health Care: There is no guidance or formula to determine the nature and extent of the requirement. This lack of guidance could cause delay and uncertainty in the determination of major schemes where requirements will have to be determined from consultation with NHS trusts.</p> <p>Community Safety & Policing: Concerned that it has not been demonstrated how and to what extent, using tools such as 'secured by design' and CCTV requirements are necessary to make the proposed development acceptable in planning terms.</p> <p>Monitoring & Enforcement: Details on how costs will be updated must be clearly set out in the SPD and those details the subject of further consultation.</p>
CIL-B-014		Sport England	<p>Welcomes the council's approach to undertaking a Playing Pitch Strategy (PPS) and Built Facilities Strategy (BFS). It should be noted that Sports England does not support a standards based approach. The PPS and BFS will provide a robust evidence base and strategy for directing developer contributions.</p>
CIL-B-017		Oxfordshire County Council	<p>A number of minor wording changes have been suggested.</p>
CIL-B-018		West Waddy ADP on behalf of JA Pye (Oxford) Ltd	<p>The SPD shows a very extensive range of infrastructure that will continue to be funded from planning obligations rather than CIL. This is contrary to the understanding that CIL would in large part replace S106 contributions. It is also fundamentally different to the approach of Oxford City Council. Argument made that the combination of CIL and S106 requirements as set out in the SPD fails to demonstrate the viability of what is required. It is important that the SPD is amended to make it compliant with Government policy.</p>
CIL-B-20		OxLEP	<p>Table 2: No reference is made to skills or the Employment, Skills and Training Plans which are detailed in Appendix 13. This point would be strengthened if the wider skills agenda was reflected rather than just apprenticeships and if it were removed from the 'education' section to a stand-alone section. OxLEP supports the section on Apprenticeship and Skills. It also supports the interim position statement set out in Appendix 13 and are seeking broadly similar approaches across Oxfordshire. Have developed a paper on the use of Community Employment Plans. Appendix 13 needs</p>

			to refer to the Sep 2016 not the 2014 version. It would also be useful to also include reference to the Oxfordshire Skills Strategy and it relevant strategic priorities as well as the SEP.
CIL-B-021		Historic England	Note the reference to heritage 'infrastructure' in Table 2 which we welcome. Surprised that there is no sub-section on heritage which could be used to explain how developer contributions can be used for the conservation and enhancement of the historic environment.
CIL-B-022		Anglian Water Services Ltd	Recommend that Table 2 be amended to refer to planning conditions being sought for foul sewerage network enhancement rather than CIL charges as proposed. Reference should also be made to our ability to seek contributions from developers in accordance with the provisions of the provisions of the Water Industry Act 1991.
CIL-B-024		Bloxham Parish Council	<p>3.6 - Assume that parish councils will be fully engaged in pre-application discussions.</p> <p>3.16 - When considering administration charges, will account be taken of parish clerk costs in administering the payments?</p> <p>3.17 - Should the LPA identify the trigger points or payments dates?</p> <p>3.18 – Late payments should automatically result in additional charges for monitoring and enforcement costs.</p> <p>3.20 – Unless the LPA directs the payment schedule it may find it difficult to monitor the receipt of appropriate payments.</p> <p>3.22 – The system to be in place for transfer to Parich Council's needs to be simple and clear.</p> <p>3.30 – Rewording suggested.</p> <p>Fig 1: second box down should include Parish Council</p> <p>4.15 – Wheelchair user dwellings should be included as standard.</p> <p>4.36 – It is not often appropriate for full on site provision if these facilities are then to be the responsibility of a management company for which residents are charged. Far better to improve the village facilities as a whole for play and recreation and thereby encourage the integration of new residents.</p>
CIL-B-025		Adderbury Parish Council	Supports the retention of developer contributions outlined in the SPD. Agrees with the types of infrastructure outlined for S106 in Table 2. However, suggests that traffic calming measures are included as a potential developer contribution wherever they may be relevant to a particular site. Encourages CDC to engage more

			fully with PCs in making decisions with regard to developer contributions which affect their parish.
CIL-B-026		David Lock Associates on behalf of Hallam Land Management Ltd	<p>Table 2 and the relevant topic sections need to be clearer about the relationship between CIL and planning obligations for potential off-site items including education, early years, health, strategic waste and management and nature conservation and biodiversity.</p> <p>Section 3 should include text regarding the ability to recover unspent contributions. The average occupancy rate per dwelling of 2.49 should be revisited to reflect the most recent household projections. The average pupil generation per dwelling should be based on more up to date evidence than the 2008 Oxfordshire Survey of New Housing.</p>
CIL-B-027		Richborough Estates	<p>Security and Timing of Payments: Quoting case law argued that in the vast majority of cases fees cannot be charged for monitoring/administration of planning obligations. Any reference to such fees should therefore be deleted.</p> <p>Para 3.16 – Needs to be amended to remove reference to financial contributions usually being paid prior to the implementation of a planning permission. All the paragraph needs to say is that a financial contribution should be made in accordance with a programme of agreed payments.</p> <p>3.19 – Additional text is needed to reflect the fact that a 14 day period must be extended if necessary to allow any disputes to be resolved.</p> <p>4.14 – This requires that developments of at least 400 dwellings should include a minimum of 45 self-contained extra-care dwellings. The SPD does not provide any evidence as to why a figure of 45 is used, or why a threshold of 400 dwellings is enough to accommodate extra-care.</p> <p>4.15 – If the Council wishes to introduce policy relating to M4(2) standards it must do this through the Local Plan and not an SPD. Paragraph 4.15 should be deleted.</p> <p>4.28 – should be amended to say <i>that 'where necessary new development will be required to provide financial and/or in-kind contributions as mitigation if the development results in adverse transport impacts.'</i></p> <p>Open Space, Play facilities, Outdoor Sport & Recreation: It is difficult to see how the Council can make a genuine up-to-date assessment of need when their evidence base is so out of date. The Council needs to qualify why 15 years is the most appropriate length of time for maintenance costs. Object to the potential restriction</p>

			<p>on the use of management companies.</p> <p>Community Safety & Policing: It would be very difficult to link new proposals to issues of crime and disorder. Paragraph 4.78 needs more thought and references to the tests for planning obligations.</p> <p>New Schools: Some new schools can be owned and funded by companies whilst others are fee paying. In such circumstances it is not considered appropriate that these types of providers should receive land at no charge to themselves. A developer should not be expected to pay more than the amount generated by new pupil numbers. Appendix 4 needs amending to caveat the requirements regarding land for new schools and any subsequent financial contributions.</p> <p>Appendix 7: The SPD must make a distinction between the costs of new facilities and the costs of improving existing facilities.</p> <p>Appendix 11: If the open space provision meets the District Council's requirements then getting parish or town council agreement is not necessary. There is no particular need to make reference to how approvals will be managed as these will be contained in individual conditions specific to each planning permission. It is difficult to understand why commuted sums would need to be looked at again and this needs to be explained by the Council. The SPD needs to be very clear under what circumstances revised calculations would be undertaken.</p>
CIL-B-029		The Canal & River Trust	<p>The Trust will seek to maximise opportunities for partnership working to secure funding and will request developer funding where appropriate. Would like to see the upgrading of canal towpaths recognised where additional usage is likely to result from a specific development. The council recognise our concerns and has supported requests for S106 funding. Suggest that where an improvement/mitigation is required it should be secured by S106 rather than CIL. Would welcome this being clarified. Ask that specific canal towpath improvements are specifically mentioned.</p>
CIL-B-030		Banbury Civic Society	<p>The extent of infrastructure contributions will vary from site to site depending on a number of factors. It is not clear how a fixed schedule will provide for such variations in the same way as S106 can. Have any comparisons with current development sites in and around Banbury been made and if so what have been the conclusions?</p>
CIL-B-031		Oxfordshire Clinical Commissioning Group	<p>OCCG suggests an amendment in the Health Care section, para 4.75. This reflects developing OCCG policy and the units more frequently used for considering sustainable general practice size. There is some variation in the number of GPs</p>

			employed to serve a patient population across the county, and new developments in workforce planning are having significant effect. Proposes that the words '4 or more whole time equivalent (WTE) GPs' should be replaced by 'patient population of 8,000 or more (to be reviewed 2017)
CIL-B-032		Barton Willmore on behalf of A2Dominion Group Ltd	<p>Would welcome the opportunity of discussing the approach in respect of large strategic sites and NW Bicester in particular, and the interface between CIL and S106.</p> <p>Double Counting: This is not permitted by law. The Council must ensure that the combined total impact of CIL and S106 obligations does not threaten the viability of the sites and scale of development identified.</p> <p>Pre Application Discussions: It is vital that OCC is fully engaged with this process. While it can be good practice to submit information about a proposed planning obligation alongside an application, it should not normally be a requirement for validation of a planning application.</p> <p>Security & Timing of Payment: To ensure scheme viability is not threatened, CDC and OCC must adopt a flexible approach to the phasing of payments/delivery of on-site provision. How will CDC be reporting financial contributions?</p> <p>Table 2: This schedule should include anticipated County infrastructure types and the mechanism for delivery.</p> <p>In Kind Contributions: The SPD should reflect the fact that developments may provide 'payments in kind' to mitigate impact.</p> <p>Affordable Housing: The Council advises that it will apply its policy requirement to all developments in the first instance. This is contrary to Government policy where CIL top slices the viability, and affordable housing is the balancing mechanism. Affordable housing will be subject to viability testing. This should be set out in the SPD.</p> <p>Calculation of Contributions: Questions the evidence base behind the calculation of various contributions.</p>
CIL-B-033		Blue Cedar Homes	Viability testing demonstrates that sheltered retirement housing (Use Class C3) is very challenging. Applying generic obligations on retirement developments will be to constrain the delivery of schemes. C3 sheltered/retirement housing is subject to different levels of contribution across the authority. A justification for this argument is provided.

CIL-B-039	Peter Webber		It is particularly important that proper weight is given to S106 and S278 contributions. This is important as some charities who own land may be exempt from CIL. No major infrastructure, no major development.
CIL-B-041	Susi Peace		Because of the small amount of development in the village of Islip can the village apply for some of the fund relating to the other development that is near ie Bicester and JR as the traffic produced is making Islip unsafe for pedestrians.

STAGE C

Public Consultation 23 November 2017 – 21 December 2017

1. Consultation arrangements

- 1.1. On 23 November 2017 the Council published a Second Draft Developer Contributions SPD for consultation. The consultees listed in the Statement of Community Involvement and anyone registered on the Council's database were notified by letter or email and were asked to comment on the Draft SPD.
- 1.2 **Hard copies** were also placed at deposit locations across the district including libraries and Council offices.
- 1.3 **Press Coverage:** The statutory public notice was placed in the following newspapers:
 - Oxford Mail (23 November 2017)
 - Bicester Advertiser (23 November 2017)
 - Banbury Guardian (23 November 2017)

A copy of the Public Notice is attached at Appendix C1.

2. Representations Received

- 2.1 A total of 32 representations were received. A table providing a full summary of each representation is attached at Appendix 4.

3. How have they been considered?

- 3.1 Each of the representations has been considered in detail and where appropriate suggested changes have been incorporated in the revised document. For example, additional information has been included on the provision of primary care facilities; and a new sub section on 'Heritage' has been added. A detailed officer response to each of the representations received is set out in Appendix 4.

4. Conclusion

- 4.1 The production of the Developer Contributions SPD has involved wide ranging stakeholder consultation and formal public consultation. This has directly influenced both early development and later refinements of the document.
- 4.2 If there are any questions on this Consultation Statement please contact the Planning Policy Team on 01295 227985 or email planning.policy@cherwell-dc.gov.uk

Appendices

1. Public Notice
2. Consultation letters/emails
3. Representation Form
4. Summary of Representations Received and Officer Response

CHERWELL DISTRICT COUNCIL

PLANNING POLICY CONSULTATIONS

23 November 2017 to 21 December 2017

Draft Developer Contributions Supplementary Planning Document (SPD)

A new Draft Developer Contributions SPD is being published for consultation. The purpose of the SPD is to set out the Council's approach to seeking Section 106 planning obligations from new developments for the provision of infrastructure, community facilities and services.

Draft Design Guide Supplementary Planning Document (SPD)

A new Draft Cherwell Design Guide SPD is being published for consultation. The purpose of the SPD is to support the delivery of high quality homes and places across the District. The contents of the SPD will be used to provide guidance to developers and help support robust decision making on design issues by the planning authority.

Viewing the Documents: Online at: www.cherwell.gov.uk/planningpolicyconsultation

Hard copies at the locations below during opening hours

**Cherwell District Council Offices, Bodicote House, Bodicote, Banbury, OX15 4AA, 8.45am-5.15pm
Monday to Friday**

**Banbury Town Council, the Town Hall, Bridge Street, Banbury, OX16 5QB, Monday to Thursday
9am-4.45pm, Friday 9am-4pm**

**Banbury Library, Marlborough Road, Banbury, OX16 5DB, Monday 9am-1pm, Tuesday 9am-7pm,
Wednesday 9am-8pm, Thursday and Friday 9am-7pm, Saturday 9am-4.30pm**

**Woodgreen Library, Woodgreen Leisure Centre, Woodgreen Avenue, Banbury, OX16 0AT, Monday
10am-5pm, Tuesday 10am-1pm, Wednesday 2pm-5pm, Thursday 10am-1pm, Friday 10am-5pm,
Saturday 9.30am-1pm**

**Bicester Town Council, The Garth, Launton Road, Bicester, OX26 6PS, Monday-Thursday 9am-5pm,
Friday 9am-4pm**

**Bicester Library, Franklins House, Wesley Lane, Bicester, OX26 6JU, Monday 9.30am-7pm, Tuesday
9.30-5pm, Wednesday and Thursday 9.30am-7pm, Friday 9.30am-5pm, Saturday 9am-4.30pm**

**Kidlington Library, Ron Groves House, 23 Oxford Road, Kidlington, OX5 2BP, Monday 9.30am-5pm,
Tuesday 9.30am-7pm, Wednesday 9.30am-1pm, Thursday 9.30am-5pm, Friday 9.30am-7pm,
Saturday 9am-4.30pm**

**Adderbury Library, Church House, High Street, Adderbury, OX17 3LS, Tuesday: 10am-12pm & 3pm-
7pm, Thursday 2pm-5pm & 6-7pm, Friday 10am-12pm & 2pm-5pm, Saturday 9.30am-1pm**

**Deddington Library, The Old Court House, Horse Fair, Deddington, OX15 0SH, Monday 2pm-5pm,
5.30pm-7pm, Wednesday 9.30am-1pm, Thursday 2pm-5pm, 5.30pm-7pm, Saturday 9.30am-1pm**

**Hook Norton Library, High Street, Hook Norton, Banbury, Oxon, OX15 5NH, Monday 2pm-5pm,
6pm-7pm, Wednesday 2pm-5pm, Friday 2pm-5pm, 6pm-7pm, Saturday 9.30am-12.30pm**

**Banbury LinkPoint, 43 Castle Quay, Banbury, Oxfordshire, OX15 5UW, 8.45am (10am
Wednesday) to 5.15pm Monday to Friday**

Bicester LinkPoint, Franklins House, Wesley Lane, Bicester, OX26 6JU, 8.45am (10am Wednesday) to 5.15pm Monday to Friday

Kidlington LinkPoint, Exeter Hall, Oxford Road, Kidlington, Oxon, OX5 1AB, 8.45am (10am Wednesday) to 5.15pm Monday to Friday

Submitting Comments: Comments on the documents should be sent: By email to PlanningPolicyConsultation@cherwell-dc.gov.uk Or by post to: Planning Policy Consultation, Planning Policy Team, Strategic Planning and the Economy Cherwell District Council, Bodicote House, Bodicote. Banbury, OX15 4AA.

Comments should be received no later than 5pm on Thursday 21 December 2017. Any comments received will be made publicly available.

YVONNE REES, JOINT CHIEF EXECUTIVE

Strategic Planning & the Economy

Adrian Colwell – Head of Strategic Planning & the Economy

Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

NAME
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ADDRESS LINE 2
TOWN
COUNTY
POST CODE (must be on
own line)

*Bodicote House
Bodicote
Banbury
Oxfordshire
OX15 4AA
www.cherwell.gov.uk*

Please ask for: Tony Crisp

Direct Dial: 01295 227985

Email: Planning.policy@cherwell-dc.gov.uk

Our Ref: Design Guide/S106

20 November 2017

Dear Sir/Madam

**Notification of Planning Policy Consultations
Draft Developer Contributions Supplementary Planning Document (SPD)
Draft Design Guide Supplementary Planning Document (SPD)**

Please find enclosed a copy of a public notice about consultations on the above planning policy documents. The consultation period extends from Thursday 23 November 2017 to Thursday 21 December 2017.

You have been sent this notification as your contact details are on our Local Plan database. If you no longer wish to be informed of our planning policy consultations then please let us know by telephoning 01295 227985 or by emailing planning.policy@cherwell-dc.gov.uk.

Please note that we now have a separate email address for consultation responses. This is PlanningPolicyConsultation@cherwell-dc.gov.uk. Hard copies can still be posted.

Yours faithfully

David Peckford

David Peckford
Deputy Manager – Planning Policy & Growth Strategy

**DRAFT DEVELOPER CONTRIBUTIONS SUPPLEMENTARY PLANNING DOCUMENT (SPD)
Regulations 12b and 13 of the
Town and Country Planning (Local Planning) (England) Regulations 2012**

Representation Form

Cherwell District Council is currently consulting on a new Draft Developer Contributions Supplementary Planning Document (SPD). It is a new guidance document which sets out what contributions developers should be asked to make when they submit a planning application to help the funding of infrastructure such as schools, road improvements, community facilities and open space needed to support new development in the district.

The SPD and associated documents are available to view and comment on from **23 November 2017 – 21 December 2017**.

To view and comment on the documents please visit www.cherwell.gov.uk/planningpolicyconsultation.

The consultation documents are also available to view at public libraries across the Cherwell District, at the Council's Linkpoints at Banbury, Bicester and Kidlington, at Banbury and Bicester Town Councils and Cherwell District Council's main office at Bodicote House, Bodicote, Banbury.

You may wish to use this representation form to make your comments. Please e-mail your comments to planningpolicyconsultation@cherwell-dc.gov.uk or post to Planning Policy Team, Strategic Planning and the Economy, Cherwell District Council, Bodicote House, Bodicote, Banbury, OX15 4AA no later than Thursday 21 December 2017.

You should receive a written acknowledgement. Email acknowledgements will be sent automatically by return. Acknowledgements by post should be received within five working days of your response being received. If you do not receive a written acknowledgement, please contact the Planning Policy Team on 01295 227985.

Please note that all comments received will be made publicly available.

Representations must be received by Thursday 21 December 2017

Please provide the following details:

NAME:

ADDRESS:

.....

EMAIL:

TEL NO:

AGENT
NAME:

AGENT
ADDRESS:

.....

AGENT
EMAIL:

AGENT

TEL NO:

Your details will be added to our mailing list and you will be kept informed of future progress of this document and other Local Plan documents. If you wish to be removed from this mailing list please contact the Planning Policy team. Details are at the bottom of this representation form.

1. DRAFT DEVELOPER CONTRIBUTIONS SUPPLEMENTARY PLANNING DOCUMENT

Do you have any comments on the Draft Developer Contributions SPD?

Please make it clear to which part of the Document your comments relate.

Please continue on another sheet if necessary.

Thank you for taking the time to respond to this consultation. Please ensure your comments are submitted by 21 December 2017.

Representation Number	Name	Summary	Officer Response
S106-A-001	Anglian Water Services Ltd	Flood Risk (paras 4.86-4.88) – Reference is made to developers considering the risk of flooding from all sources including sewers and surface water which is welcomed. The use of SuDs being required is also welcomed. Request that reference is included to the use of planning conditions for both foul and surface water drainage.	These comments have been noted and welcomed. Reference to the use of planning conditions for both foul and surface water drainage has been added to the Table in Appendix 15 of the SPD.
S106-A-002	Sport England	Indoor Sport & Recreation – Supports the updating of the current 2006 Assessment, but cannot support the adoption of standards. This is in conflict with NPPF para 73. Sport England has a number of tools which can assist in providing robust assessments and have been promoting to CDC over the years. The results of using standards can be farcical. Supports the council's approach to seeking contributions but they need to be based on sound evidence and not setting local standards for sport. Participants can normally travel 20 minutes for the majority of pitch and indoor sports, however in some instances over an hour is not unusual for travelling time. Sport England therefore supports the creation of sporting hubs in the right locations which must be supported by the sport's governing bodies and based on sound assessments.	The Council is currently undertaking a review of the District's Indoor sport and recreation provision. If this work results in the need to amend the Council's standards/approach, they will be updated in the Cherwell Local Plan Part 2. Sport England is actively engaging in the District's review.
S106-A-003	Oxford Bus Company	Support para 4.145. The guidance should also state that if OCC become the funding authority it should be stated that when operators who receive S106 funding from the transport authorities and hence a service is under contract to OCC bus operators that are able to claim concessionary fares scheme can claim marginal capacity costs where applicable from the County Council. Keen that the formula at para 4.146 does not create the unintended consequence of expected LGF/Alternative funding not coming forward and therefore making a scheme unviable. The formula needs to be amended to reflect the certainty of funding.	These comments are noted and welcomed. The formula at paragraph 4.145 has been amended following comments from Oxfordshire County Council. This amendment should address the concerns raised in this representation. It is considered that the suggested change to the text regarding concessionary fares is too detailed to be appropriate for the SPD.
S106-A-004	Natural England	Whilst welcoming the opportunity to comment, the SPD is unlikely to have major impacts on the natural environment.	Noted

S106-A-005	Bloxham Parish Council	<p>Para 3.5: Pre Application Discussions – If these discussions are to be meaningful and effective, it is essential that the LPA has prior awareness of the requirements of the local community. This is especially relevant where there is a ‘made’ NDP.</p> <p>Para 3.15: Viability- It is not clear how this would be effectively monitored.</p> <p>Para 4.46: Cemeteries: Consideration needs to be included for the inclusion of village sites and their requirements for additional cemetery space.</p> <p>Para 4.59: Indoor Community Provision: This will have greater relevancy following a meaningful discussion with the local community.</p> <p>Para 4.67: In areas where minor developments would be permitted then the baseline needs to be set very much lower than 100 dwellings. These smaller developments still result in an impact on the provision of facilities. If changes should allow greater massing of development contributions the sums from such developments could lead to positive improvements.</p> <p>Education: There does not appear to be a calculation set out for the provision of pre-school education and support of Children’s Services.</p> <p>Para 4.91: Healthcare – Strongly support these comments.</p> <p>Para 4.118: Biodiversity – This is an example of where discussions as set out in point 1 would have relevancy.</p> <p>Para 4.127: Local Management Organisations – Strongly support this.</p> <p>Appendix 7 and 8 – Strongly support the comments in these appendices. (It should be noted that there appears to be a lack of awareness of this topic as included within this CIL consultation document within the wider Planning Department).</p> <p>Para 4.101 – As with point 1 the local community/PC needs to be meaningfully involved.</p>	<p>Pre-Application Discussions & Viability: These comments are noted. The sections on viability reflect Government Guidance.</p> <p>Cemeteries: An additional reference has been added.</p> <p>Education: OCC is the Education authority. The requirements in the SPD are guided by their advice. Figures have been added to reflect nursery requirements.</p> <p>Para 4.67 – Community Development Workers: The requirements set out in the SPD are based on the Council’s 2017 Cherwell Community Spaces and Development Study.</p> <p>Other comments raised by the Parish Council have been noted but it is not considered necessary to amend the SPD.</p>
S106-A-006	South Oxfordshire DC	Have no comments to make.	Noted
S106-A-007	The Environment Agency	Pleased to see that you have referred to flood risk and water efficiency in paragraphs 4.86- 4.88. In paragraph 4.87 please note that it is the	These comments have been noted.

		<p>sequential test that should be referred to first as a way of avoiding flood risk before the sequential approach is applied. This is consistent with the NPPF paragraphs 100-103. The sequential approach is applied within a site when there is a range flood zones within the site. The sequential test looks at delivering development on sites with a lower probability of flooding. In 'Appendix 15: Guide to Funding Mechanisms by Infrastructure Type' we are pleased to see that 'Strategic Flood Defence', 'Enhancements to the sewerage network beyond that covered by the Water Industry Act and sewerage undertakers' and 'Nature Conservation and Biodiversity' have been included in the table in reference to CIL contributions.</p> <p>Please note that under the 2010 Flood and Water Management Act, responsibility for local flood risk (ie flood risk from ordinary watercourses, surface water and ground water) is transferred to the lead local flood authority. In this case the LLFA is Buckinghamshire County Council. The Environment Agency does not comment on groundwater or sewer flooding. We only comment on fluvial flood risk (flooding from main rivers).</p> <p>In paragraph 4.128 you have mentioned watercourses as part of the public realm. Please can you clarify whether watercourses and their associated riverbanks have been considered as a valuable part of green or blue infrastructure? Will developers be expected to contribute to green infrastructure? Paragraph 4.114 refers to the arrangements for the long term management and maintenance of mitigation for the ecological impacts of a development. We expect this to include the ecological buffer zones for watercourses and the rivers themselves. In paragraph 4.118 you have stated that, 'biodiversity offsets should not be classified as infrastructure..... as they don't provide any facility for those living within or using the new development'. We disagree with this point as biodiversity enhancements can provide an amenity value for residents.</p>	<p>Watercourses and associated riverbanks are considered to be part of the green/blue infrastructure. Para 4.118: The SPD states that it is not considered that biodiversity offsets are subject to pooling restrictions. It is accepted that biodiversity enhancements can benefit local residents. No changes are therefore not considered necessary to the SPD.</p>
S106-A-008	Bicester Town Council	Appendix 7: Bicester Town Council would expect to be directly consulted at an early stage of consultation for any contributions which directly affect Bicester.	The comments of the Town Council have been noted. Detailed Development Management

			<p>consultations are not a matter for the SPD.</p>
<p>S106-A-009</p>	<p>David lock Associates on behalf of the University of Oxford, Merton College and private landowner (The Tripartite)</p>	<p>The Tripartite supports the principle of a Developer Contributions SPD. It recommends changes to maximise its effectiveness and clarity once in force.</p> <p>Relationship to CIL: It is considered essential that the role and scope of S106 obligations is reviewed to reflect any legislative or functional change to the role of CIL. Such changes would necessitate a review of the Developer Contributions SPD. The Tripartite has reservations regarding the potential mechanism to deliver strategic transport infrastructure in the possible absence of an adopted CIL Charging Schedule. There is concern that a reliance on s106 contributions to fund strategic infrastructure places a disproportionate requirement on large-scale developments and risks smaller developments failing to make equitable contributions towards such infrastructure.</p> <p>Affordable Housing: University staff housing must be included as part of the affordable housing provision - the Tripartite considers University staff housing to be an intermediate form of tenure that is subject to specific clause /terms of the lease (as detailed further in the representations on the Local Plan Partial Review (in respect of Policy PR8). The Tripartite request that this is reflected in the Developer Contributions SPD.</p> <p>Community Hall Facilities & Indoor Sport & Recreation: Where a development meets the necessary threshold, the Council requires through the SPD that the developer of the site shall design and build and then transfer the relevant community facility. There may be alternative models of delivery for community facilities including where third parties may want to provide a facility and so some flexibility to this requirement should be incorporated in the SPD to allow for such alternative delivery models. Furthermore, the guidance should make appropriate reference to the possible co-location of facilities that can accommodate a range of services and multi-use provision in one location, in the interests of the efficient use of land and resources. The opportunity for co-location of community, sports and other facilities including, for instance, schools</p>	<p>Relationship to CIL: Further clarification on the relationship of the SPD and CIL has been added to the text of the SPD.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>The Partial Review of the Cherwell Local Plan, once adopted, will set out the detailed policies and requirements for affordable housing to meet Oxford’s unmet housing need.</p> <p>In addition, detailed development briefs will be prepared for the strategic housing allocations proposed in the Partial Review Plan.</p> <p>Definition of ‘major’ development – This has been clarified in the SPD text.</p> <p>There may be a case for alternative delivery models. However, these will need to be assessed on a site specific basis. There is no requirement to amend the SPD.</p>

	<p>should be considered on a case-by-case basis for major strategic developments, and therefore the SPD should be flexible to reflect and facilitate this. Notwithstanding the recognition that contributions will be assessed on a site-by site basis, the Tripartite also considers that the requirement for a community development worker should include specific reference to being subject to site specific considerations and justification. The threshold for this requirement is quite low and it will depend on the location [in relation to existing communities] and nature of the site and proposed development.</p> <p>Open Space, Play facilities, Outdoor Sport & Recreation: Supports the principle of applying suitable standards to meet local need. However, there is a need to include a more flexible approach to open space provision and the application of the standards, particularly as the standard refers to both a quantitative and accessibility standard. A case by case consideration still needs to be applied and reflected in the SPD.</p> <p>Community Safety: supports the principle of ensuring that developments are safe and inclusive but considers that as a priority this should be achieved through scheme design. If, on particular sites or in certain parts of a development, additional measures, such as CCTV, are considered necessary and safety cannot be addressed by other means, then it may be appropriate to consider such measures but do not consider that this should be a default infrastructure requirement.</p> <p>Education: It is vital that the education requirement for a development is fully supported by evidence to demonstrate the associated child/pupil yield equates to the type, number and size of schools to be provided as part of a development. The SPD refers to situations where a new school may serve the needs of multiple developments and that ‘the cost of the school shall be shared proportionately across the relevant developments’. It is important that infrastructure requirements, such as schools, that relate to more than one ‘allocated development site’ are considered in the context of the NPPF and apportioned on a pro rata basis across relevant sites. This will need to take account of the land-take required on the site that may provide the school and its value since it will be land that</p>	<p>Open Space: The open space standards are set out in the adopted Cherwell Local Plan. The SPD cannot amend these.</p> <p>Community Safety: The requirements go beyond scheme design therefore they are appropriate for the SPD.</p> <p>Education: The requirements in the SPD reflect the requirements of OCC, as the Education Authority. The SPD addresses the provision of a new facility to serve multiple developments. No change is required.</p> <p>Pooling Restrictions: The SPD clearly outlines the regulations relating to ‘pooling’ and the limitations that this brings.</p> <p>General: Specific S106 requirements will be a detailed matter for planning applications.</p> <p>Other comments raised in the representation have been noted but it is not considered necessary to amend the SPD.</p>
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		<p>would otherwise be developable for other uses, including residential. It is necessary that final contributions are fair and equitable taking account of the additional provision of land and requests that this is clearly stated in the SPD, for the avoidance of doubt.</p> <p>Transport: Concerned about the approach to delivering strategic transport schemes. The proposed approach outlined at Paragraph 4.146 indicates that s106 contributions will be required for strategic transport schemes, related to cumulative growth using a defined formula. Concerns regarding this proposed approach are twofold:</p> <ul style="list-style-type: none"> • The proposed formula which is outlined as a means of ensuring that “the cost of a scheme will be shared proportionately across the relevant developments”, makes no reference to pooling restrictions set out within the CIL Regulations, which could restrict the ability to obtain contributions from appropriate developments; and. • The guidance fails to outline how contributions will be obtained from small to medium sized developments that cumulatively create impact and consequently require improvements and benefit from any upgrade. <p>General: In a number of instances throughout the draft SPD, reference is made to “major residential developments”. This needs to be clearly defined and clarity provided to define the scale of “major” development that could trigger the need for such an obligation, as there is ambiguity or a lack of precision within the current wording. It is also acknowledged and supported by the Tripartite that strategic scale developments, such as the type promoted by the Tripartite at Begbroke (Draft Allocation PR8) will enable the delivery of a variety of community and local facilities. Where this is the case, recognition should be given to the wide range of facilities (community, education and green infrastructure) that can be provided through such a major strategic development. Therefore, seeking the full range of obligations is, in some cases, not necessary or in some cases, desirable. Obligations for strategic developments would therefore benefit from being negotiated on a case by case basis, rather than be defined within a Developer Contributions SPD, and should reflect provision in-kind. the SPD and the relevant sections should identify:</p>	
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		<ul style="list-style-type: none"> • Where a developer delivers early infrastructure in advance of development, then the abnormal costs of this infrastructure provision should be credited against future planning obligations. This approach is particularly pertinent to the delivery of strategic developments. • That where infrastructure requirements relate to more than one allocated strategic development site, costs will be apportioned on a pro-rata basis to each site having regard to the impact of the proposed development of each site, and appropriate phasing of infrastructure delivery. <p>The Tripartite also welcomes and supports the reference to financial viability in respect of securing developer contributions. The viability of a development is a material consideration and must be taken into account when negotiating contributions with applicants/developers. This includes recognition of the delivery of on-site strategic infrastructure and ‘abnormal’ costs.</p>	
S106-A-010	David Lock associates on behalf of Gallagher Estates	<p>General: Gallagher Estates support the preparation of a Developer Contribution SPD to help provide certainty of the general approach to requests for contributions and the operation of triggers and phased payments, with regard to the application of a proportionate approach to ensure contributions are fair and reasonable and justified. Do wish to identify areas where the guidance appears to be at odds with the statutory tests for planning obligations. Notwithstanding CDC’s uncertainty at whether it will progress to adopt CIL, it does remain difficult to have confidence in the effectiveness of a Developer Contributions SPD whilst there is uncertainty in how contributions towards strategic scale strategic infrastructure items will be funded. It is imperative therefore that there is flexibility built into the Developer Contributions SPD that allows a review should CIL come into force, and indeed capture any such changes to the legislative role of CIL. The draft SPD makes reference to “major” residential developments. “Major” should be clearly defined in this context, to provide certainty to developers, at an early stage. Furthermore, an approach that seeks the full range of obligations as a default, is not appropriate in many cases,</p>	<p>General: Further clarification has been added to the text to acknowledge that the SPD will need to be reviewed should the Council adopt a CIL Charging Schedule (or other alternative) in the future.</p> <p>The SPD provides certainty and transparency for service providers and communities on the type and scale of Developer contributions that may be sought. The planning application stage provides the opportunity for precise heads of terms/ phasing etc to be discussed.</p> <p>Pooling Restrictions: The SPD clearly outlines the regulations relating to</p>

		<p>particularly those that relate to strategic developments, a site-specific approach that is negotiated on a case by case basis, would be more effective than that defined within the Developer Contributions SPD. There should be flexibility built into the SPD that allows a more bespoke approach to infrastructure provision for larger-scale developments, to capture opportunities for alternative approaches to infrastructure delivery that can be achieved through development at scale. This also includes phased developments, whose infrastructure requirements may not follow common methodologies. In cases where development delivers early infrastructure in advance of development, including in cases where the it is to satisfy a “wider than site” generated need, the abnormal costs of this infrastructure provision should be recognised and credited against any such future planning obligations. A further concern is the potential reliance placed on s106 contributions to fund strategic infrastructure, in the absence of CIL, which can place disproportionate requirements on large-scale developments which can further threaten viability of larger scale developments that are already bearing significant site-specific infrastructure costs. There are a number of infrastructure items for which the SPD provides no supporting evidence as to how values (both capital payment and commuted sums) have been calculated, nor what assumptions support any such calculations. It must therefore fall to the development management process to interrogate costs sought in relation to a particular planning application, taking into account the specific needs arising from that development, existing capacity within the area and viability of the development.</p> <p>Affordable Housing: Whilst there is some flexibility referred to in terms of disposition of affordable units across a scheme, and the quantum of total provision when set against development viability, the Council are seeking 80% of affordable housing as affordable rent/social rented dwellings and 20% as other forms of intermediate affordable homes, and as drafted, there is no apparent flexibility for an alternative method/type of provision. It is considered that the Council should allow itself more flexibility to allow changes to the tenure spilt, to ensure it can respond</p>	<p>‘pooling’ and the limitations that this brings.</p> <p>Definition of ‘major’ development – This has been clarified in the SPD text.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Affordable Housing: Affordable housing requirements and tenure splits are set out in the Council’s Local Plans.</p> <p>Air Quality: The Council’s approved Air Quality Action Plan provides details on the application of these requirements.</p> <p>Indoor Sport, Recreation & Community Facilities: There may be a case for alternative delivery models. However, these will need to be assessed on a site specific basis. There is no requirement to amend the SPD.</p> <p>Land Costs: The SPD acknowledges that costs relate to the costs of land as well as build costs. There is no requirement to amend the SPD.</p>
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		<p>effectively to changes in local housing demands and indeed to amendments in national legislation.</p> <p>Air Quality: The draft SPD suggests that contributions will be required by developments within and adjacent to Local AQMA's to deliver mitigation measures to offset increases in local pollutant emissions or to make financial contributions to improvement measures or air quality monitoring. In addition, reference is made to contributions for cumulative developments' but there is no specific guidance on what might be considered 'cumulative'. As drafted, the SPD is not precise in terms of the scope of development that might be required to contribute towards air quality mitigation, nor are details provided in relation to the method of calculating such contributions. Gallagher Estates have concerns that as drafted, the SPD is not precise and does not provide any certainty as to how the impact on air quality and proportionate contributions, could be generated and as a such, as currently drafted this could result in a significant cost burden for the development that cannot be considered as directly relevant to a development proposal.</p> <p>Indoor Sport, Recreation & Community Facilities: The SPD should not be prescriptive in terms of the mechanism for delivery of sport, recreation and community facilities. As drafted the SPD assumes transfer of facilities to CDC, however to maximise effectiveness the SPD should provide sufficient flexibility to support alternative models of delivery for community facilities that include direct deliver by a developer, or indeed, third party delivery. Gallagher Estates also wish to comment on the Local Standard of Outdoor Open Space provision as set out in Appendix 4. The CDC provision exceeds the open space standards when compared against national open space standards, particularly with regards to the minimum size of individual facilities. The SPD should refer to opportunities for shared use of facilities, and co-location of facilities could provide efficiencies in management and maintenance responsibilities, as well as land-take, of benefit to the Council and the viability of the development.</p> <p>Education: The SPD refers to circumstances where education infrastructure is provided that serves the needs of multiple</p>	<p>Other comments raised in the representation have been noted but it is not considered necessary to amend the SPD.</p>
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		<p>developments. Gallagher Estates supports the approach taken that such costs should be shared proportionately across the relevant developments, however the SPD should make clear that costs relate to land as well as build costs, including the costs of servicing a site. These elements are all part of the overall infrastructure cost and it is imperative that infrastructure apportionment is comprehensive and captures each element of cost associated with its provision.</p> <p>Transport: In the absence of certainty regarding CIL, the SPD seeks to capture funding for strategic transport schemes through a matrix type contribution to development, stating that contributions will be sought from ‘relevant developments’. The SPD makes no reference to pooling restrictions, which could restrict the ability to obtain contributions from appropriate developments. There is also reference to strategic sites and major development, but limited certainty on the approach taken to smaller sites, and how contributions could be obtained from smaller developments. The implications are an over-reliance on large scale sites to deliver strategic transport projects, which could have significant implications for the viability of large-scale schemes that generally bear significant site specific up-front infrastructure costs.</p>	
S106-A-011	Education & Skills Funding Agency	<p>The ESFA strongly supports the use of planning obligations to secure developer contributions to education facilities where housing development generates the need for school places. CDC should also have regard to the Joint Policy Statement from the Secretary of State for Communities and Local Government and the Secretary of State for Education on ‘Planning for Schools Development’¹ (2011) which sets out the Government’s commitment to support the development of state-funded schools and their delivery through the planning system. The ESFA welcomes the level of detail accorded to education in the draft SPD and its appendices, including the commitment in paragraph 4.78 to securing financial contributions and/or the provision land and buildings for education. The reference to annual updates to the Infrastructure Delivery Plan (IDP) is also supported. While the ESFA recognises the Council’s statement at paragraph 1.6 that the timing and scope of the</p>	<p>The comments in support of the SPD are welcomed.</p> <p>There is a pressing need to adopt the Developer Contributions SPD. The current Draft Planning Obligations SPD (July 2011) is out of date. Not progressing the new SPD will create uncertainty about the Councils’ requirements for developer contributions.</p> <p>The requirements set out in the SPD for Education provision are based on</p>

		<p>Government’s CIL review is outside the Council’s control, nonetheless the outcomes of the review are soon to be published and it would make sense to postpone adoption of the SPD so that revisions to national policy can be incorporated. supports the Council’s expectation in paragraph 4.79 that developments of a scale necessitating provision of a new school will fully fund a school of sufficient size to accommodate the forecast number of pupils generated. When new schools are developed, local authorities should also seek to safeguard land for any future expansion of new schools where demand indicates this might be necessary. The ESFA recommends that reference is made to the purchase of additional land at education land value, where appropriate, to allow for future expansion of the school. This would support the long-term sustainability of the school and education facilities in the area, especially in cases where the development only justifies a single form of entry (1FE) school. Appendices 1-3 provide details on pupil yields from housing developments and the costs of expanding schools. The ESFA supports the evidence-based approach being used, but questions whether the pupil yields in the 2008 Oxfordshire Survey of New Housing have been verified against more recent housing developments to ensure the pupil product ratios are still accurate. Welcomes the evidence of school expansion costs set out in Table 1, Appendix 3, and suggests that reference to DfE figures is clarified to explain the context of these figures and their annual update, to allow for the figures to be adjusted in line with any revised per pupil rate provided by DfE. The Council differentiates (Appendix 3, page 6) between the costs of providing school expansions and new builds. While the ESFA supports the Council’s recognition of the difference in cost and the need for site-by-site negotiation for new schools, it would also be helpful if the SPD signposted evidence of average costs of new school provision. For example, the National School Delivery Cost Benchmarking report (February 2017)² sets out the average cost of providing new schools per pupil for primary schools (£19,051), secondary (£20,235) and special schools (£94,509), before location factors are applied. It may strengthen the Council’s position in negotiating developer</p>	<p>local circumstances as advised by OCC.</p>
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		contributions if the SPD refers to the benchmarking report, including any subsequent updates.	
S106-A-012	Banbury Town Council	<p>Pre Application Discussions: Banbury TC has previously stated that as a consultee, it would like to be privy to draft heads of terms for individual development proposals at the pre-application stage, ideally as part of wider stakeholder panels for interested parties within the town.</p> <p>Security & Timing of Payment: Banbury Town Council would like more explicit guidance concerning the timing of payments. The Town Council would like payments to be made as soon as possible to ensure that community infrastructure is in place before any transfer to the Town Council occurs. In relation to the topic of unspent funds, as a third party Banbury Town Council want clearer guidelines on how to access funds. Commuted sums don't increase with inflation and the parish council has to incur fees for the transfer from District to Parish, the cost of these fees and search fees is ever increasing. What happens if the transfer to the parish does not occur for five years or more? Often this means the spending of much of the money up front to restore or upgrade.</p> <p>Air Quality: Are pleased to see the inclusion of Air Quality as there have been concerns over air quality in the area, particularly around Hennef Way and into Grimsbury.</p> <p>Apprenticeship & Skills: Support the raising of education attainment and aspiration levels in Banbury and the district. The basis for developing a highly skilled technical workforce already exists in Banbury through the automotive industry and needs to be built upon. More apprenticeships The Town Council would also like to see the inclusion for landscape/ horticulture. There is a significant shortfall of qualified and experienced people in the landscape sector and horticultural industry.</p> <p>Cemeteries: Banbury's ability to provide cemetery services to the population of Banbury has been severely affected by the delay of Part 2 of the Local Area Plan. The cost list provided is by no means exhaustive and could go on to include parking provision, landscaping, head stone beams, toilets, bins, water provision. It mentions that an extension to the existing cemetery should be "subject to suitable ground conditions being</p>	<p>The comments of the Town Council have been noted. Many relate detailed development management consultation processes or legal/corporate processes which are too detailed to be included within the SPD.</p> <p>Cemeteries: A reference to the laying out and landscaping of cemeteries has been added. The reference to ground conditions cannot be removed as the SPD is only reflecting local plan policy.</p> <p>Community Development: The requirements set out in the SPD are based on the Council's 2017 Cherwell Community Spaces and Development Study.</p> <p>Recreation facilities; Health and Wellbeing: The many sentiments expressed by the Council are reflected in the Adopted Cherwell Local Plan, especially Policy BSC 8.</p> <p>Para 4.123 – the text has been amended to reflect this request.</p> <p>Sports Facilities: The Council is currently undertaking a review of the</p>

		<p>demonstrated” (paragraph 4.43) this has been adequately identified to Cherwell District Council in our Planning application to extend the site and in the approval of the extension by the environmental agency. The Town Council would ask that this comment be removed. The calculation for a new site (paragraph 4.51b) should include the items that you have identified but also include for:</p> <ul style="list-style-type: none"> o Security of the site i.e fencing and gates o Electricity for lighting and self-closing gates/barriers etc. o Drainage o Beams o Road construction o Car Parking o Hard & soft landscaping o Water Supply o Storage compound with properly constructed concrete flooring & bays for soil storage. <p>Community Hall Facilities: one of the concerns of the Town Council in relation to the introduction of community hall facilities is the future of the management of the building and any facilities that it may offer.</p> <p>Community Development: Applaud the recognition of a system to be put in place to set up associations, however SPD states that no contributions will be sought for any developments under 100 dwellings (para 4.67). Communities exist when any number of properties are built so this figure should be reduced to take this into account. Some villages/ hamlets have less than 100 houses in them and would be considered communities. Appendix 6 identifies offsite contributions of commuted sums provision for development of over 10 properties, this perhaps is a better standard for this purpose.</p> <p>Community Safety & Policing: Recognise the existing demand that is on services and how planned growth and development will further put these services under pressure. The Town Council already contribute toward CCTV, and the local Crime Partnership, and further endorse the need to additionally assist services.</p>	<p>District’s indoor sport and recreation provision. If this additional analysis work results in amendments to the Council’s standards, they will be updated in the Cherwell Local Plan Part 2. Once in place they will replace those in the SPD.</p> <p>Nature Conservation & Biodiversity: Open Space: The adopted Cherwell Local Plan provides the policy basis for the SPD. Issues such as tree species and soft landscaping are too detailed for the SPD.</p> <p>Appendix 4, 6: The current requirements reflect adopted Local Plan policy. The Council is currently undertaking a comprehensive review of open space and recreation provision within the District. If this results in a revision to the standards these will be reviewed in the context of Cherwell Local Plan Part 2.</p> <p>Appendix 8: Noted. The agreement of the Town or Parish council is required for the transfer of sites.</p> <p>Appendix 9: This reflects the adopted local plan policy.</p> <p>Appendix 10: This advice has been</p>
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	<p>Health & Wellbeing: There is little mention of this tying into strategic landscaping and open space development on estates. It has been identified through numerous studies and reports that this criteria is overwhelmingly affected by what open space provision is provided and its design. This factor should be clearly identified in this section. One of the key benefits for this is the installation of outdoor gyms/fitness equipment, adequate seating, litter and dog bin provision, which always seems to be missed in landscape designs. There are numerous reports from experts in the field that this should be key to any new development proposal. Banbury Town Council see the need for further GP and service provision for the people of Banbury and the surrounding areas. There is an increase in the population of Banbury but the services available at the Horton Hospital are ever decreasing and the GP surgeries that are located in the town are at breaking point.</p> <p>Indoor Sport & Recreation: The document states that the recreation provision should meet with Sport England requirements (paragraph 4.104) this should also include the individual sporting authorities i.e. FA, LTA, TCCB, IRB etc. to ensure that the provision is fit for purpose. Current provision that has been handed over and transferred to the Town Council so far has not been.</p> <p>Nature Conservation & Biodiversity: There is no specific mention in the document about using native species or ensuring soft landscaping materials are from renewable/sustainable sources and provenance native sources.</p> <p>Open Space, Play Facilities, Outdoor Sport & Recreation: “Agreement will be sought with the relevant town or parish council on the equipment to be purchased.” (paragraph 4.123) The Town Council would like to add the wording “and landscaping being undertaken”. This is whether it is for open space, amenity, or recreational provision. There is no mention in this section about correct and appropriate allotment provision. Where ancillary items are to be addressed these areas should include:</p> <ul style="list-style-type: none"> o Provenance of native materials used o Seating 	<p>provided by the Council’ Landscape Services Team. The Town Council’s concerns have been forwarded.</p>
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		<ul style="list-style-type: none"> o Drainage o Safety & security of users o Lighting o Toilets o Litter & dog bins o Car parking as necessary (not only for sports provision but also large NEAP play areas where it is required to comply with the standard for this category of play provision). <p>Banbury Town Council fully support what has been outlined in paragraph 4.127, and share the sentiment of preference that public open space, outdoor sports pitches and play areas on new developments continue to be adopted by the Council in agreement with the relevant town or parish council with a commuted sum.</p> <p>Public Realm & Public Art: It is essential that in future developments there is clearly identified ownership of public realm areas whether it is to be adopted by the local authority or put into private ownership.</p> <p>Transport & Access: The bus services within Banbury have been recently reduced, parts of the town that were previously serviced by a regular bus service are no longer. The Town Council wish to see improvements made in the bus service, and adequate provision of service to the planned development within the town. Banbury needs its traffic issues addressed. Bringing about a Southern Relief Road remains an aspiration, as the historic core of the town becomes clogged with HGVs making their way to and from the motorway. This can only be exacerbated by the planned new housing developments.</p> <p>Appendix 4: There is no mention of outdoor fitness equipment or gyms. <i>“accompanied by changing facilities where appropriate”</i> all recreational provision should have some changing facilities especially outdoor sports provision.</p> <p>Appendix 5: Both V. Sheltered and Care Homes are shown to have no requirement for parks, gardens, natural/semi natural or amenity green space. As previously mentioned for Health & Wellbeing this is essential for all social groups to enjoy outdoor space and have that facility. Play is</p>	
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		<p>not just about children under the age of eighteen, the definition covers all age groups and is not just about the equipment but also encompasses: Educational, Social, Physical, Spiritual, or Mental needs of the community. There is also no mention of the needs of those with a disability be it physical or mental.</p> <p>Appendix 6: LAP's – do not need to be equipped with play equipment with the Town Council preferring to have these unequipped spaces. These areas do however require the free play zone in addition to the ancillary items such as seating, litter bins and site security for free play. The locations of these sites is of major concern with current provision being located in inappropriate locations, this is especially important when striving to overcome any possible anti-social behaviour. LEAP's – catering for younger children from toddler to 12 shouldn't be combined with LAP's as suggested but incorporating this in its design. These should be designed with free space around it for ball games and free play. NEAP's – catering for users up to the age of eighteen. PEAP's should be included where possible on larger developments, but there is no mention of this type of provision for all potential users.</p> <p>It is requested that the Town Council be made aware of how these capital and maintenance costs have been calculated. An important issue that requires to be addressed is that prior to adoption of any land, most of these commuted sum costs are used by the Local Planning Authority for maintenance during the transfer of the land from the developers leaving little or reduced figures to be passed to the Town Council without any consideration or agreement. There are usually no details of what transpires with regard to the spending of these sums for maintenance prior to handover that has often taken many years to complete.</p> <p>Outdoor sports provision identifies the possibility of an artificial 3G pitch all sports provision should be provided to the most up to date standards and therefore this should be identified as a 4G pitch. There appears to be no mention of outdoor athletics facilities anywhere only indoor facilities.</p> <p>Appendix 7: This mentions consultations, expectations, and agreements</p>	
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		<p>for land to be transferred but there is no mention that this will be reciprocated by the Local Planning Authority or their appointed service. The Town Council was promised several years ago that any strategic development discussions would include the Council in any round table consultation with developers, unfortunately to date this has not occurred. When comments have been made to date by parish or town councils, about land to be transferred through Planning consultation, these have normally fallen on deaf ears with no feedback or correspondence as to why our comments are ignored. If the Town Council is to be the end user and land owner of these areas, it is essential that it is included and correspondence with the Local Authority is not beneficial for both parties. This document states that developers are to “<i>submit detailed proposals to the LPA for approval</i>” – there is no mention of the LPA seeking agreement or approval from the parish or town councils to these or that we would be party to any monitoring or enforcement actions. If we are to be the recipient of these areas then we must be party to these aspects as well. RoSPA (page 14 last paragraph) is not the only authority in site safety and can often provide questionable reports on specific issues. If this is intended to refer to play areas then it should stipulate a Registered Play Inspectors International (RPII) inspection report which covers all aspects of provision in this area of expertise. On matter of Practical Completion again no reference to agreement with town or parish councils. Banbury Town Council would like this to be mandatory. It is mentioned that pitches are to be transferred after 2 years, this should not happen without the accompanying changing facilities (not mentioned under this section), which should be ready at and available for use at this time. <input type="checkbox"/> As this document is to become a binding document between the developer and Local Authority but there is no reference to ongoing consultations, expectations and agreements with the end authority who will be expected to take ownership of the land and maintain it for future use by the communities.</p> <p>Appendix 8: Local Management Organisations: It is the opinion of the Recreation and Amenities Manager of Banbury Town Council that these</p>	
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		<p>have never worked and the diminishing bond is a major concern as is the possibility that this may only be available for the LPA should the LMO fail in its management of the area/s concerned. These sites have been observed degrading to such an extent that it takes a considerable amount of expenditure in time and resources to bring them up to a required standard. It is possible that the LPA may seek to transfer these to the parish or town councils dependent upon the site/s therefore we should be involved in any decisions made in this regard.</p> <p>Appendix 9: There is no mention of indoor tennis courts.</p>	
S106-A-013	Bodicote Parish Council	<p>Para 3.5: Pre Application Discussions – If these discussions are to be meaningful and effective, it is essential that the LPA has prior awareness of the requirements of the local community. This is especially relevant where there is a ‘made’ NDP.</p> <p>Para 3.15: Viability- It is not clear how this would be effectively monitored.</p> <p>Housing Mix: Banbury and the surrounding area has seen huge amounts of development. The villages and more rural areas also have a high proportion of older residents. Yet there has consistently been a lack of accommodation, either in size or a style that would be appropriate to meet the needs of our older residents. One only has to look at development locally to see that developers are only interested in building 3/4/5 bedroom homes, with no very little provision for residents of any age who require 1/2 bedroom dwellings.</p> <p>Air Quality: Traffic congestion in the Banbury area has become a major headache for local residents, which will only be exacerbated by plans for further housing development. Facilitating use of public transport in reality sounds good, but in terms of practicality is difficult to implement. Bus services have either been cut or removed, making it difficult for many non-carowning and elderly residents to get about, and car drivers like the ease and flexibility of driving to and from places rather than being restricted by timetables and often high bus fares.</p> <p>Para 4.46: Cemeteries: Consideration needs to be included for the inclusion of village sites and their requirements for additional cemetery</p>	<p>Pre Application Discussions: These procedures reflect current development management practice.</p> <p>Viability: The SPD reflects Government guidance.</p> <p>Housing Mix: This requirement reflects the housing mix policy in the adopted local plan.</p> <p>Cemeteries: An additional reference has been added.</p> <p>Education: OCC is the Education authority. The requirements in the SPD are guided by their advice. There is a requirement for contributions towards nursery provision.</p> <p>Para 4.67 - Community Development: The requirements set out in the SPD are based on the Council’s 2017 Cherwell Community Spaces and</p>

		<p>space.</p> <p>Para 4.59: Indoor Community Provision: This will have greater relevancy following a meaningful discussion with the local community.</p> <p>Community Development: This is something that needs to be looked at further, because in reality I don't think the nature of what is happening in development currently allows for integrated communities. The majority of new housing in village locations are bolted on to land parcels which often sit on the edge of the existing communities, are self- contained due to the design of the site, have their own infrastructure facilities and are rather insular in their nature</p> <p>Para 4.67: In areas where minor developments would be permitted then the baseline needs to be set very much lower than 100 dwellings. These smaller developments still result in an impact on the provision of facilities. If changes should allow greater massing of development contributions the sums from such developments could lead to positive improvements.</p> <p>Education: There does not appear to be a calculation set out for the provision of pre-school education and support of Children's Services.</p> <p>Para 4.91: Healthcare – Strongly support these comments.</p> <p>Para 4.118: Biodiversity – This is an example of where discussions as set out in point 1 would have relevancy.</p> <p>Para 4.127: Local Management Organisations – Strongly support this.</p> <p>Appendix 7 and 8 – Strongly support the comments in these appendices. (It should be noted that there appears to be a lack of awareness of this topic as included within this CIL consultation document within the wider Planning Department).</p> <p>Para 4.101 – As with point 1 the local community/PC needs to be meaningfully involved.</p>	<p>Development Study.</p> <p>Air Quality: The issues raised relate to planning policy. They should be addressed through the local plan and Local Transport Plan.</p> <p>Other comments raised in the representation have been noted but it is not considered necessary to amend the SPD.</p>
S106-A-014	Kingerlee Homes	<p>At Paragraph 1.14 the SPD includes a helpful distinction between planning obligations and the CIL charge and claims that overlaps should be avoided. It is rather perplexing therefore why such a distinction is not made in Appendix 15 'Guidance to Funding Mechanism by Infrastructure Type'. Whilst it is understood that the Council does not have a CIL</p>	<p>Relationship to CIL: Further clarification has been added to the text of the SPD.</p> <p>Infrastructure Requirements: The</p>

		<p>charging schedule, there are numerous examples of an 'Infrastructure Type' being (or intended to be) funded both through CIL and a Planning Obligation.</p> <p>The point is made in paragraph 3.4 that a S106 is appropriate when a planning condition is not. However, Appendix 14 includes several items which feature in both the S106 and in the Condition column. This should also be amended.</p> <p>Paragraphs 3.6 & 7 – It is difficult to understand why an applicant (of a 'complex' proposal) would readily agree to 'Heads of Terms' prior to the validation of the application. At that point and perhaps not for some time after, the precise impact of the proposal would not have been fully assessed. There is a requirement that an application must be registered irrespective of the situation on 'Heads'. The applicant might reasonably reserve his position on this especially in those circumstances where he has signed an option agreement with an obligation to the landowner to reduce the impact of S106 costs, thus maximising the site value to the owner. It would be unreasonable to request an undertaking through a 'Heads of Terms' prior to any consideration of the application.</p> <p>Paragraphs 3.9 & 10 – There may well be situations where a Unilateral Undertaking is an attractive alternative but arguably not in those instances where there is a need for a financial contribution. In this case having benefitted from a payment and as the District (or County) is not a signatory to the Undertaking then there is no obligation on them to spend the cash for the purposes for which it has been demanded and paid.</p> <p>Paragraph 3.13 – The second sentence is wholly unreasonable. If the Council (and possible the District Valuer if involved in determining the viability of the project) has agreed that a contribution renders a scheme unviable then there is no justification for that recognition to be set aside because an item of infrastructure or service is required. Does the Council expect the developer to proceed in such circumstances? This sentence must be deleted.</p> <p>Paragraph 3.15 – I am not aware of any instances in which a Council can</p>	<p>SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Paragraph 3.13: The key test is whether the development is permissible having regard to the development plan and other material considerations.</p> <p>Paragraph 4.142 & 143: Planning Applications are required to submit Transport Assessments which set out the impact of development and hence mitigation that may be necessary.</p> <p>Paragraph 4.21: This paragraph has been amended.</p> <p>Other comments have been noted but it is not considered necessary to amend the SPD.</p>
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		<p>have a 'second bight at the cherry'. An obligation has been entered into following a decision on the viability of the project based on pre-determined costs and values. Indeed the SPD identifies what these are in numerous cases as a price for an item of infrastructure including the indexation of contributions. All parties should proceed on the basis of what has been agreed, all taking 'the rough with the smooth'. How is the suggestion in the third bullet point taken forward if all the obligations have been satisfied and payments made and/or services provided? Will the Council reimburse the developer to a level of previously agreed profitability?</p> <p>Paragraph 3.17 – it may be more appropriate and equitable to request an undertaking from the applicant to pay the Council's reasonable legal costs before negotiating an agreement and then require/take payment with a few days of signing the S106 but not prior to.</p> <p>Paragraph 3.27 – insert 'reasonable' after Council's as per the last line.</p> <p>Paragraph 3.29 – refer to earlier comments.</p> <p>Paragraphs 3.30 - 32 – These cover the payment of a monitoring fee to ensure that transactions are timely and that obligations are complied with. If a payment is made on time for a service or facility to be provided by the District or County what recourse does the developer have if the authority does not perform in delivering that? The usual period of 10 years is for too long as the obligation is entered into in order to deal with the immediate impact arising. Even with contributions to the education service new/expanded facilities can be provided in this timescale.</p> <p>Guidance by Type</p> <p>Paragraph 4.9 Unfortunately I cannot argue in this response that the reference to 'gross' dwellings in the application of affordable housing is inappropriate as it is an approved Local Plan Policy. However, the earliest opportunity should be taken to review this and apply a net calculation, in line with the majority of Local Plan policies in other authorities. This would also be in line with DCLG guidance on the application of the Vacant Building Credit should premises be demolished and the site redeveloped. In such cases a net increase is assumed.</p>	
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S106-A-015	William Davis Ltd	<p>The Draft SPD contains a number of new policies for Developer Contributions which are not in the adopted Cherwell Local Plan. Case law is quoted. The Policy areas of concern are:</p> <p>Affordable Housing Standards (Paras 4.16, 4.17): If the Council wishes to adopt the nationally described space standards in a new local plan, then the Council should only do so by addressing the issue in accordance with the detailed criteria in the NPPG.</p> <p>Apprenticeships and Skills (Para 4.39): Employment Skills and Training Plan (ESTP) for each new development. The justification for this is noted to be the Council’s Interim Position Statement on Planning Obligations for Construction Apprenticeships and Skill (April 2016), which has no status as part of the Development Plan.</p> <p>Community Development (para 4.65): Financial contribution towards the provision of community development workers for major residential development.</p>	<p>Housing Standards: These comments are noted. The SPD does not require the provision of these standards but reflects the aspirations of RPs.</p> <p>Apprenticeships & Skills: The Council’s requirements have recently been supported at appeal by a Government appointed inspector.</p> <p>It is considered that the wording in the SPD is compliant with all the relevant Government advice and legislation.</p>
S106-A-016	Barton Willmore on behalf of A2 Dominion Group Ltd	<p>General: Concerned that the Draft SPD is not consistent with the CIL regulations nor best practice. The SPD should be predicated on the basis of the current position, ie no CIL. If CIL is adopted, then the Council should be clear that the SPD will be cancelled and reviewed. In terms of viability, the Council should set out its position and be clear as to the role of such assessment in the application of the SPD. Anticipated revisions to the NPPF may also affect the Council’s position on Section 106. Appendix 15 of the Draft SPD (November 2017) sets out the guide to</p>	<p>Relationship to CIL: Further clarification has been added to the text to acknowledge that the SPD will need to be reviewed should the Council adopt a CIL Charging Schedule (or other alternative) in the future.</p> <p>Viability: The SPD is clear on viability</p>

	<p>funding mechanisms for infrastructure types, including a breakdown between CIL and S106. Many of those originally listed as being addressed through CIL, such as education (Primary, Secondary, 6th Form, Special Education Needs) (Table 2 in the Draft SPD dated November 2016), are now listed as being dealt with as part of S106 Agreements also. It is unclear how the Council plans to approach funding mechanisms by infrastructure type. With regard to the relationship with the extant Section 106, the Developer Contributions SPD should be clear that ‘double counting’ of Section 106 contributions and CIL is not permitted by law. The key tests of CIL Regulation 122 should therefore be outlined within the SPD. The Council should not rely upon Section 106 contributions where CIL would provide a better mechanism to secure monies.</p> <p>Viability: The Council must ensure that the combined total impact of CIL and/or Section 106 obligations does not threaten the viability of the sites and scale of development identified.</p> <p>Pre-Application Discussions: It is vital that Oxfordshire County Council is fully engaged with this process, to ensure meaningful discussions take place. Whilst it can be good practice to submit information about a proposed planning obligation alongside an application, it should not normally be a requirement for validation of a planning application (Planning Practice Guidance, para 042), as currently set out in para 3.7. If Heads of Terms are to be a requirement of the local list, CDC should be able to justify their inclusion in relation to any particular development.</p> <p>Security & Timing of Payment: Note that the SPD makes reference to financial contributions usually being required prior to the implementation of planning permission (para 3,17). This is not acceptable or justified. To ensure scheme viability is not threatened, CDC and Oxfordshire County Council (OCC) must adopt a flexible approach to the phasing of payments/ delivery of on-site provision. This should be secured in the Section 106. Contributions are required to mitigate the impact of the development. If the development is not implemented, then the impact would not arise. How CDC intends to report financial</p>	<p>testing. Any future CIL charging schedule would need to be viability tested.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Timing of Payment: The SPD clear that S106 agreements will have a programme of agreed staged payments where necessary.</p> <p>Health & Wellbeing: All contributions will need to meet the CIL tests as set out in the SPD.</p> <p>Appendix 15: This is included for reference only. Assumptions with regard to future CIL requirements should not be made. These will be subject to a detailed consultation process.</p> <p>Other comments in relation to infrastructure have been noted. The Council will only require S106 contributions that are CIL compliant. Many of the issues raised are site specific and will be addressed at the planning application stage.</p>
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	<p>contributions should be set out in the SPD.</p> <p>Unilateral Undertaking: Para 3.24 of the Draft SPD states that given that a unilateral undertaking (UU) does not have the Council as a party, there cannot be any obligations on the Council to return any unspent monies. The recent Albion Appeal (reference APP/C315/W/16/3163551), included a UU which obligated the Council to return unspent monies. Such obligations were accepted by the Inspector in the Appeal Decision. CDC should take into consideration recent appeal decisions in the drafting of this SPD and review its position accordingly.</p> <p>Appendix 15: This sets out the mechanism for various forms of infrastructure. As stated, many of those originally listed as being addressed through CIL, are now listed as being addressed as part of S106 Agreements also. It is unclear how the Council plans to approach funding mechanisms by infrastructure type. How will CDC manage pooled contributions that may also be augmented by CIL receipts? This appendix should also include anticipated County infrastructure types and the mechanism for delivery.</p> <p>In Kind Contributions: The SPD should reflect the fact that developments in the District may provide 'payments in kind' contributions to mitigate impact.</p> <p>Affordable Housing: The Council advises that it will apply its policy requirement to all developments in the first instance (para 4.19). This is contrary to Government policy where CIL effectively 'top slices' the viability, and affordable housing is the balancing mechanism. Affordable housing provision will be subject to viability testing. This should be set out in the SPD. On page 17, the Draft SPD sets out Affordable Housing Standards. We do not consider this to be the appropriate document to set out Affordable Housing standards. This section should be deleted.</p> <p>Air Quality: Many of the obligations set out in the Air Quality section of the Draft SPD (see para 4.32) could be addressed by way of a planning condition. Planning obligations should only be applied where planning conditions cannot be used to secure mitigation, i.e. for a financial contribution towards mitigation.</p>	<p>It is not considered necessary to amend the SPD.</p>
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		<p>Apprenticeships: When considering viability as part of S106 negotiations, Councils must consider the indirect costs associated with the provision of apprenticeships and training. A2D note the 'end user phase' training requirement. Future occupiers of commercial space should not be obligated to employ local people only.</p> <p>Cemeteries: The SPD should reflect the fact that developments in the District may provide 'payments in kind' contributions to mitigate impact.</p> <p>Community Hall Facilities: This section again needs to address that some developments may provide 'payments in kind' to mitigate impact. CDC must adopt a flexible approach to the delivery of community hall facilities.</p> <p>Community Development: As part of the UU for the recent Albion Appeal (reference APP/C315/W/16/3163551), a Community Development Workers contribution was set out. The Inspector concluded that the contribution sought was not directly related to the development and not fairly and reasonably related in scale and kind because they duplicate revenue raised through Council tax. Contributions to the cost of a Community Development Worker did not therefore meet the CIL tests. This requirement should be removed from the Draft SPD.</p> <p>Community Safety & Policing: CDC should ensure that contributions are sought towards CIL compliant infrastructure only.</p> <p>Education: The SPD should reflect the fact that developments in the District may provide 'payments in kind' contributions to mitigate impact. Circumstances may arise where one development is asked to provide a school site to accommodate a school that is larger than would or is required to meet the needs of the development proposed. In such circumstances, the developer should receive a land payment for the additional land on an agreed basis. Elsewhere, this has been assessed on market value. OCC should adopt a flexible approach in the Draft SPD in terms of who should deliver new schools, i.e. developer or County or third party subject to Government policy at the time. To ensure scheme viability is not threatened, CDC and OCC must adopt a flexible approach to the phasing of payments and delivery of onsite provision in relation to</p>	
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		<p>educational facilities.</p> <p>Flood Risk: Where flood risk matters could be dealt with by way of a planning condition, they should be. Planning obligations should only be applied where planning conditions cannot be used to secure mitigation, i.e. for a financial contribution towards mitigation.</p> <p>Health & Wellbeing: Here CDC needs to ensure that there is no ‘double counting’ as a result of duplicate revenue raised through Council tax. The SPD should reflect the fact that developments in the District may provide ‘payments in kind’ contributions to mitigate impact.</p> <p>Indoor Sport & Recreation: Para 4.104 states that CDC will expect the developer to design and gain the necessary planning consents for onsite sporting facilities. The developer will then be expected to build the facility in accordance with the approved scheme. Here, there is a question of evidence of need and not over providing. Again, ‘payments in kind’ in respect of sporting facilities should be considered. Where new facilities meet more than one developers needs, i.e. at NW Bicester, the cost of the facilities should be shared across developers. What is the mechanism where facilities will be used by other developments?</p> <p>Nature Conservation & Biodiversity: Where nature conservations and biodiversity matters could be dealt with by way of a planning condition, they should be. Planning obligations should only be applied where planning conditions cannot be used to secure mitigation, i.e. for a financial contribution towards mitigation.</p> <p>Open Space, Play Facilities, Outdoor Sport and Recreation: Again, ‘payments in kind’ in respect of open space, play facilities, outdoor sport and recreation facilities should be considered in the Draft SPD. Furthermore, there is a question of evidence of need and not over providing. Where new sporting facilities meet more than one developers needs, i.e. at NW Bicester, the cost should be shared across developers. What is the mechanism where facilities will be used by other developments?</p> <p>Local Management Organisation for Open Space Management: The Council should clarify what it means by a local management organisation.</p>	
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		<p>We do not consider this obligation to be CIL compliant. This requirement should be removed from the Draft SPD.</p> <p>Public Realm & Public Art: In relation to public art, the Albion Appeal Decision (reference APP/C315/W/16/3163551) concluded that the Council’s Infrastructure Delivery Plan makes no provision for the expenditure of any public art contribution. Where schemes are submitted in outline, layout and landscaping are often reserved. When reserved matters are submitted, the Council can then consider this detail, including the requirement for public art. The Inspector concluded that in relation to Albion, the public art obligation was not CIL compliant.</p> <p>Transport & Access: We do not consider highways agreements (Section 278 and 38 Agreements) need to be finalised and appended to Section 106 Agreements at the time of granting planning permission. Instead, an obligation requiring the completion of the appropriate highways agreement should be accepted. The SPD should reflect this.</p> <p>Waste: The recent Albion Appeal (reference APP/C315/W/16/3163551) concluded that waste bins need to be provided for the Council to carry out its statutory waste collection service and it would be convenient for them all to be provided to a standard pattern. Most developers would consider it a selling point for new homes to be provided with waste bins. However, failing that, the Council has the power to charge for waste bins. Consequently, there is no necessity arising from the development for them to be provided through a planning obligation (para 69). The Inspector therefore concluded that an obligation to pay for the provision of refuse bins did not meet the CIL tests (Para 70). Accordingly, this requirement should be removed from the Draft SPD.</p> <p>Calculation of Contributions: The Draft SPD includes appendices which set out the calculation of various contributions. A2D questions the evidence base and viability testing behind these calculations. We reserve the right to comment on these calculations, once we have had sight of the evidence base. To inform draft Heads, a clear understanding of the evidence base behind OCC’s financial contributions should also be provided.</p>	
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<p>S106-A-017</p>	<p>Savills on behalf of Christ Church, Exeter and Merton Colleges and the University of Oxford</p>	<p>General Approach: The consortium is supportive of the Council’s aim to provide certainty in setting out specific guidance on the operation of triggers for planning obligations, and recognises the need for a transparent, proportionate and fair approach to deriving contributions. The principle of the Developer Contributions SPD is therefore supported, whether or not CIL forms part of the future arrangements.</p> <p>Viability & the Role of Strategic Sites: Currently NPPG requires that, where Councils seek contributions, their combined total impact does not threaten the viability of sites and the scale of development identified in the Development Plan. This point is recognised by the Council in the draft SPD, but is particularly relevant for affordable housing contributions, and especially because, in the case of the sites being proposed to support Oxford’s unmet need, the affordable housing percentage being required is 50%. In combination with the delivery of strategic transport infrastructure, the consortium is concerned to ensure that the mechanism will ensure an equitable approach that is not proportionately reliant on strategic sites, and that recognises the need to enable strategic sites to come forward in a manner that ensures a continuous supply of housing over the Plan period. It is appreciated that this mechanism will also need to avoid setting charges which are overly complex to implement and administer.</p> <p>Affordable Housing: As set out in its representations to the Local Plan Partial Review, the consortium is supportive of the vision for meeting Oxford’s unmet need. It is noted that the minimum 50% affordable threshold proposed in the Partial Review, and linked to Sites PR6a and PR6b, derives from evidence of how the City of Oxford’s own specific land supply operates. However, as highlighted in the consortium’s representation to the Partial Review, Cherwell’s own affordable housing policy (BSC3) sets a 35% requirement subject to viability testing. Moreover, Oxford City Council is currently in the process of proposing amendments to its own Affordable Housing policies so that they better reflect current market conditions and housing requirements. The consortium has therefore requested that the policy for affordable</p>	<p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>The Partial Review of the Cherwell Local Plan, once adopted, will set out the detailed policies and requirements for affordable housing to meet Oxford’s unmet housing need.</p> <p>In addition, detailed development briefs will be prepared for the strategic housing allocations proposed in the Partial Review Plan.</p> <p>Transport: The formula has been amended following advice from OCC.</p> <p>The limitations of the pooling restrictions are reflected in the SPD</p>
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		of the proposed development of each site, and appropriate phasing of infrastructure delivery.	
S106-A-018	Historic England	We commented on the consultation draft in January this year, including highlighting that development-specific planning obligations may offer further opportunities for funding improvements to and the mitigation of adverse impacts on the historic environment, such as archaeological investigations, access and interpretation, and the repair and reuse of buildings or other heritage assets. We regret that there is still no sub-section specifically on heritage as there is, for example, nature conservation and biodiversity, the omission of which we previously noted and which could be used to explain how developer contributions can be used for the conservation and enhancement of the historic environment.	A new section covering heritage has been added to the SPD.
S106-A-019	NHS Oxfordshire Clinical Commissioning Group	<p>A. Framework</p> <p>i. OCCG are very grateful that paragraph 4.91 acknowledges the need for developers to contribute to expanding healthcare facilities. Primary medical care in the Cherwell district is mostly at capacity, so any significant population increase will require additional primary care infrastructure and staffing.</p> <p>ii. OCCG also agree with paragraph 4.92 that we would not normally anticipate an on-site new facility for a population of less than 8,000. The direction of travel in OCCG’s Primary Care Framework 2017 is towards working at scale in larger practices with a list size of 10,000 to 20,000, or in clusters of smaller practices.</p> <p>iii. OCCG anticipates that developers proposing housing developments of more than 10 dwellings will contribute financially or in kind to primary medical care infrastructure.</p> <p>iv. Primary medical care infrastructure needs may include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Land on which to build either a new healthcare facility or an extension to an existing facility. <ul style="list-style-type: none"> o This includes appropriate parking and access. o When deciding land allocation, space may need to be set aside to make room for increased infrastructure to meet growth associated with projected future developments which have not yet reached 	These comments have been noted. Amendments to the ‘Health and Wellbeing’ section have been made to reflect the OCCG’s advice.

		<p>planning application.</p> <p><input type="checkbox"/> Buildings- either a new facility or an extension to an existing facility. Again, future proofing for anticipated future development may be a factor.</p> <p><input type="checkbox"/> ICT infrastructure to support primary care expansion. This may include:</p> <ul style="list-style-type: none"> o Connectivity to other healthcare providers to enhance the services and capability which patients can access at the local facility o Digitising historic paper medical records to free up space for patient care. <p>B. Contribution formula</p> <p>i. OCCG proposes a different approach to calculating contributions from the one set out in paras 4.94 – 4.96.</p> <p>ii. We suggest that contributions are not linked to a calculation of numbers of GPs – primary care is delivered by a wide team of clinicians and the staffing model varies in different areas and in response to innovation. In Oxfordshire, Banbury GP practices in particular have been pioneers in developing key roles for pharmacists, emergency care practitioners, physiotherapists and others within the local primary care practices. The number of patients per GP therefore varies widely, and is subject to ongoing change.</p> <p>iii. It is much more relevant to link developer contributions directly to numbers of additional patients associated with a housing development.</p> <p>iv. OCCG’s adopted policy is to seek contributions on the following formula for residential development. References to s106 funding should also include Community Infrastructure Levy (CIL) contributions.</p> <p>The sum to be requested for health under S106 should be based on a calculation consisting of occupancy x number of units in the development x £360.(details provided) OCCG formally adopted this approach advised by NHS Property Services in July 2017 through its Oxfordshire Primary Care Commissioning Committee.</p> <p>NHS Property Services also advise that if the planning application doesn’t specify the unit sizes in the proposed development, the average occupancy of 2.4 persons is used in the initial health calculation until such</p>	
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		<p>time as the size of the units are confirmed at which point the final costs/health calculation would be confirmed. For example if the proposal was for a 400 dwelling development the initial calculation would be – 2.4 persons x 400 dwelling units x £360 = £345,600.</p> <p>NHS Property Services also provide advice on the indicative square meterage calculations historically used to determine the core GMS space required for a practice. (details provided).</p> <p>C. Extra care housing</p> <p>i. OCCG will also seek contributions at an enhanced rate from developers of extra care housing, and also care or nursing homes.</p> <p>ii. The residents of these developments require much greater input and support from healthcare services and so careful planning and service development is required to ensure appropriate healthcare will be available.</p> <p>iii. At this stage OCCG anticipates negotiating contributions on a case-by-case basis.</p> <p>D. Other relevant developer contributions</p> <p>i. Over and above direct contributions to health infrastructure, OCCG will prefer to support developments which offer the following:</p> <ul style="list-style-type: none"> • Improved transport infrastructure (including public transport) to help • patients and staff access healthcare facilities • Residential environments which support healthy lifestyles • Environments, including ICT infrastructure, which support residents in taking responsibility for their own health, for example through telemedicine technology. Examples of these can be seen in Healthy New Town developments. <p>ii. OCCG may wish to propose other enabling factors relevant to health as appropriate to specific future planning applications</p>	
S106-A-020	David Lock Associates on behalf of Hallam Land	<p>Timing of the SPD and Local Plan Part 2</p> <p>The SPD will need to be revisited once Community Infrastructure Levy (CIL) charging schedule has progressed and this should be acknowledged</p>	Further clarification has been added to the text to acknowledge that the SPD will need to be reviewed should

	<p>Management Ltd</p>	<p>in the document. The SPD will also need to be revised once the Cherwell Local Plan Part 2 progresses as many of the detailed standards set out in the appendices will be reviewed (for example cemeteries, indoor sports and outdoor sport and open space). In the light of this, it would be prudent to hold back on this SPD until the CIL and Local plan 2 have advanced further and it is aligned to those processes.</p> <p>Viability The SPD is not consistent with National Planning Policy Framework (NPPF) regarding viability considerations. Paragraph 3.12 states that the key objective is to alert applicants to the likely level of planning obligations so that they can be “factored in to land transactions”. Even if this occurs, the costs would still fall on either the landowner or developer therefore this does not bypass the need to take viability into account properly. NPPF paragraph 173 states that sites should not be subject to a scale of obligations and policy burdens that their ability to develop is threatened. The scale of obligations needs to ensure: “competitive returns to a willing land owner and willing developer to enable the development to be deliverable”. Paragraphs 3.12-3.16 of the SPD should be revised to be consistent with national policy on viability. It is also unclear if the scale of the obligations in the draft SPD has been tested in viability terms in conjunction with other policy requirements. This would be best done either alongside Local Plan Part 2 or the CIL charging schedule.</p> <p>Community safety and policing Paragraphs 4.70 to 4.77 of the draft SPD do not provide adequate evidence for the request for police infrastructure as listed in paragraph 4.72. No evidence has been provided to demonstrate that housing growth itself results in higher crime or that new housing development results in higher crime (given new housing helps to address wider social and economic issues). Neither is there sufficient justification that all the items of infrastructure described are necessary to make developments acceptable in planning terms or directly related to developments. The link between development and items such as staff set up costs, radio capacity, mobile IT and provision of vehicles, is not direct or clear enough</p>	<p>the Council adopt a CIL Charging Schedule (or other alternative) in the future.</p> <p>Relationship to CIL: Further clarification has been added to the text of the SPD.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Community Safety: The requirements go beyond scheme design therefore they are appropriate for the SPD.</p> <p>Viability will be assessed in accordance with Government advice.</p> <p>Population Figures: The SPD can only rely on information presently available. OCC is currently collating the results of an updated survey of new housing. These are due to be published in 2018.</p> <p>Open Space Requirements: These reflect the standards in the adopted Local Plan.</p>
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		<p>to meet the CIL Regulations. Instead, greater emphasis should be given to crime reduction measures such as ‘secure by design’ and the intrinsic role of good design in new developments in ensuring community safety. Only where capital projects are directly related to the site and impacts of the development itself should these be sought through planning obligations.</p> <p>Open space requirements</p> <p>There is a disconnect between the open space standards and CIL Regulations regarding the ‘minimum’ provision and meeting wider deficiencies as set out in the Local Plan Part One. Where more than the minimum open space level is offered on-site in response to local community aspirations and/or to meet wider deficiencies, this has been interpreted through recent planning decisions as not being CIL compliant and disregarded as a material planning consideration. This essentially means the open space standards must be met but cannot be exceeded which is too prescriptive and does not provide sufficient flexibility. This issue reinforces the need to review the standards to introduce a greater level of flexibility to so that schemes responding to local needs can be taken as material considerations within reasonable limits. On a more specific point, the requirement to provide a Neighbourhood Equipped Area of Play (NEAP) on schemes of 100 dwellings or greater is onerous. Field in Trust guidance (‘Guidance on Outdoor Sport and Play: Beyond the 6-acre standard’ Table 2) sets out a benchmark of 500 dwellings for a NEAP.</p> <p>Average Household Size and pupil generation assumptions</p> <p>The average occupancy rate per dwelling of 2.49, set out in Appendix 1, should be revisited to reflect the most recent household projections (2014 based projections to 2039). The projections show the average household size in Oxfordshire as being 2.4 in 2014 and projected to fall to 2.35 by 2024. Moreover, the average pupil generation per dwelling (appendix 3) should be based on more up to date evidence than the 2008 Oxfordshire Survey of New Housing.</p>	
S106-A-021	William Davis Ltd	Duplicate of S106-A-015	
S106-A-022	Turley on behalf of	Recommend that the SPD includes a review mechanism whereby the	Further clarification has been added

	<p>Hill Residential Ltd</p>	<p>Council commits to reviewing the document should they choose to progress CIL in the future.</p> <p>Viability: Para 3.13 - statement is regarded as very general, generating uncertainty in respect of the policies which the Council may seek to obtain despite a proven lack of viability. In line with the NPPF, we request that further definition should be provided in respect of those policies which the Council regards as being in need of protection despite the potential for such policies to push schemes into a position where it is not possible to provide competitive returns to a willing land owner and willing developer. Para 3.15 - In line with PPG provisions, a review of viability should be reserved for large scale, multi-phased schemes, as follows: "...where a scheme requires phased delivery over the medium and longer term, changes in the value of development and changes in costs of delivery may be considered. Forecasts, based on relevant market data, should be agreed between the applicant and local planning authority wherever possible." The proposed overall approach to viability review is inappropriate and we request revised methodology to ensure that only the larger, multi-phase schemes will be subject to review. The proposed method of overage payment calculation is currently vague. During the consultation process there is a need for the provision of appropriate calculation methodology and clarification of the timing of such a review.</p> <p>Monitoring & Enforcement: note that the Council has identified that it may charge for the Council to undertake monitoring. As you will be aware the High Court appeal decision in the case of Oxfordshire CC vs Secretary for Communities and Local Government (2015) EWHC 186 (Admin) held that a Planning Inspector had not misinterpreted Regulation 122 of the CIL Regulations 2010 in determining that a local planning authority was not entitled to fees for administering / monitoring planning obligations in a S106 agreement. The High Court ruled on the grounds that there was nothing in the wording of the TCPA 1990, the Planning Act 2008, the CIL Regulations, the NPPF or the NPPG which suggested that authorities should or even could claim administration /</p>	<p>to the text to acknowledge that the SPD will need to be reviewed should the Council adopt a CIL Charging Schedule (or other alternative) in the future.</p> <p>Relationship to CIL: Further clarification has been added to the text of the SPD.</p> <p>Monitoring Fees: Fees can be sought pursuant to Section 111 of the Local Government Act 1972 and Section 1 of the Localism Act 2011.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Viability will be assessed in accordance with Government advice.</p> <p>Cemeteries: Details such as plot densities and costs will vary on a site by site basis therefore it is difficult for the SPD to stipulate such figures.</p> <p>Community Hall Facilities: Appendix 11 gives costs for a mid-sized hall. Paragraph 4.57 gives an indication of</p>
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		<p>monitoring fees as part of planning obligations. As such the potential for a request towards monitoring should be removed from the SPD.</p> <p>Affordable Housing: The SPD will need to take account of the Local Plan Partial Review upon its adoption, and the requirements set out therein are likely to have important implications in respect of scheme viability. The SPD should therefore reflect that flexibility will need to be allowed for in applying the requirements of the SPD.</p> <p>Para 4.39 - Viability constraints may also impact upon the ability of a scheme to provide policy compliant S106 contributions, and S106 contributions should be referenced as being subject to reduction along with affordable housing. Para 4.22 - If the Council proposes to adopt a standardised approach to residual value assessment, the proposed methodology must be published and made available for consultation.</p> <p>Cemeteries: Where onsite provision is to be made as part of allocations, it will be important to ensure that contributions are not also sought on these elements to prevent double counting. The methodology for calculating contributions towards cemeteries is relatively complex and further clarity is required in relation to the factors included within the calculation as follows:</p> <ul style="list-style-type: none"> • Where reference is made to the ‘number of burial plots required to 2031’, clarity should be provided over what geographical scale this relates to. Is this for the wider District, settlement or site? It should be clear how this figure will be calculated, including whether the same approach is to be applied in respect of sites allocated to meet the unmet housing needs of Oxford City and those in relation to the needs of Cherwell itself. • The ‘average number of plots per hectare’ should be defined. • Where reference is made to ‘population growth’ again it should be clear where this figure will be derived from. • An indication of the ‘cost’ should be provided. <p>Community Hall Facilities & Community Development: Paragraph 4.57 confirms that the “thresholds for provision of community facilities on site is normally a population that supports a minimum community facility of 345 sq m [emphasis added]” on the basis that 0.185 sq m is required per</p>	<p>the minimum size of hall that maybe acceptable on site.</p> <p>Health & Wellbeing: Revised figures and standards have been added to the SPD following advice from OCCG. Other comments have been noted but it is not considered necessary to amend the SPD.</p> <p>The Partial Review of the Cherwell Local Plan, once adopted, will set out the detailed policies and requirements to meet Oxford’s unmet housing need. In addition, detailed development briefs will be prepared for the strategic housing allocations proposed in the Partial Review Plan.</p> <p>Other comments in relation to infrastructure have been noted. The Council will only require S106 contributions that are CIL compliant.</p> <p>It is not considered necessary to amend the SPD.</p>
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		<p>person. However, Appendix 11 sets a contribution per person based on the costs of providing a community facility of 691 sq m. This cost does not appear to relate to the 345sqm figure set out at paragraph 4.57. Clarity is sought as to the correct calculation. Appendix 12 sets out the level of contributions which will be sought towards funding community development workers. This is set out in terms of funding the number of FTE required over a set period, however no indication of costs is provided. It is understood that contributions will not be sought from developments of less than 100 new dwellings, and will only be sought on a case by case basis. Given the restrictions on pooling of contributions, it will be important that the Council ensures that contributions sought are from the largest of developments and appropriately addresses where separate applications are submitted for individual phases of wider developments. As currently drafted concern is raised as to whether this obligation would meet the relevant tests. Where developments are closely related to, and integrated with existing settlements, such a contribution may not be required and it will be important that the Council provides appropriate justification when this contribution is requested.</p> <p>Community Safety & Policing: Whilst Appendix 14 provides approximate costs associated community safety / CCTV, no indication of costs or how contributions towards policing will be calculated, is provided.</p> <p>Education: Appendix 15 refers to contributions towards education which may be sought via Section 106 obligations and CIL contributions. Further clarity is required to determine the difference between these two potential contributions to ensure no ‘double dipping’ and to ensure compliance with the Community Infrastructure Levy Regulations 2010 (as amended).</p> <p>Health & Wellbeing: Whilst the floorspace per GP is provided, the cost for this floorspace and an indication of the average GP list size is not provided. An indication of costs cannot therefore be deduced.</p> <p>Indoor Sport and Recreation and Open Space, Play Facilities, Outdoor Sport and Recreation: The Council should ensure that the SPD is reviewed alongside any additional / changes to policies which</p>	
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		<p>may arise as a consequence of new evidence relating to this requirement.</p> <p>Waste: The contributions towards waste are noted. It is also noted that paragraph 4.156 provides design guidance for communal bin stores. We would question whether this SPD is the correct mechanism for advising on this given it is a design matter, not a financial contribution. If this guidance is to remain within the document, it would be prudent to allow flexibility for negotiations where these criteria cannot be met.</p> <p>Summary: Are concerned that the document is lacking in detail, failing to provide the calculations for a number of calculations. We also wish to highlight the importance of ensuring due regard is given to ensuring the SPD can be applied to both the allocations to meet the needs of Cherwell District and those to meet the needs of Oxford City. It will be important for the Council to consider the implications of the various contributions it is seeking given the potential implications these will have on scheme viability and the deliverability of the housing requirements.</p>	
S106-A-023	Framptons on behalf of Catesby Estates Plc	<p>It is submitted that the SPD as presently drafted is unacceptable and not in accordance with national planning policy and guidance. The SPD states at paragraph 2.4 that “work has also commenced on the production of the Cherwell Local Plan 2011-2031 (Part 2): Development Management Policies and Sites”. It is the Part 2 Plan which should provide the development plan policy basis for all planning obligations. This SPD is attempting to circumvent proper examination of the policy basis for seeking specific planning obligations, which should take place within the formal context of the development plan making process. Developers, and indeed the public, are prejudiced by the approach presently being taken to seek to provide a justification for Planning Obligations outwith proper scrutiny within a development plan.</p> <p>Introduction: A statement should be included within the introduction of the SPD to ensure that the statutory test applies to any S106 at the point of determination of a planning application. It is evident that for some obligations reliance is made upon average ‘household size for</p>	<p>The SPD does not introduce new policy. The adopted Cherwell Local Plan 2011-2031 sets the planning framework up to 2031 with the SPD providing a further level of detail to guide development.</p> <p>Definition of ‘major’ development – This has been clarified in the SPD text.</p> <p>Security & Timing of Payments: These requirements are based on legal advice.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only</p>

	<p>Oxfordshire'. Appendix 1 refers to this average household size, albeit Appendix 1 is not referred to in the text of the report. It is submitted that where a planning obligation may be justified, based on average household size, the average household size within Cherwell District should be the appropriate factor.</p> <p>Security & Timing of Payments: The SPD refers to 'additional monitoring and enforcement costs'. This appears unlawful in the context of the Court Ruling Oxfordshire County Council V Secretary of State DCLG and others [2015] EWHC 186. A unilateral Undertaking cannot require the Council to issue an invoice, hence paragraph 3.22 needs amendment.</p> <p>Monitoring & Enforcement: Para 3.30 and 3.31 – The substance of this paragraph is at odds with the Court ruling referred to above.</p> <p>Apprenticeships and Skills The principle of this obligation is not in accordance with national planning policy. It is not clear how built development to meet development need is unacceptable, unless a provision is made for 2.5 apprenticeships per 50 dwellings.</p> <p>Community Hall Facilities: The SPD introduces an accessibility standard of 800m walking distance for facilities. As stated above SPDs should not be used to add unnecessarily to the financial burdens on development and should not be used to set rates or charges which have not been established through development plan policy. Therefore this should not become a proscribed measure of acceptability. Rather reference should be made to 'having regard to' the accessibility standard.</p> <p>Community Safety and Policy: The SPD makes reference to 'major residential and commercial developments' without a definition of 'major'. At paragraph 4.67 the SPD provides a threshold for Community Development contributions as 100 dwellings, such a definition is required throughout the SPD.</p> <p>Education: The SPD has introduced the concept that the developer may be requested to pay a 'contribution towards the cost of providing transport for children to school'. It is submitted that such a demand is not a reasonable cost to be placed upon a development.</p> <p>Health and Wellbeing: This section recognises that 'primary care</p>	<p>seek a planning obligation that meets the 3 tests set out in CIL Regulation 122. Education and Transport requirements are based on detailed advice from OCC.</p> <p>Transport: Planning Applications are required to submit Transport Assessments which set out the impact of development and hence mitigation that may be necessary</p> <p>Monitoring Fees: Fees can be sought pursuant to Section 111 of the Local Government Act 1972 and Section 1 of the Localism Act 2011.</p> <p>Other comments have been noted but it is not considered necessary to amend the SPD</p>
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S106-A-024	Oxfordshire County Council	<p>Oxfordshire County Council supports the preparation of a Developer Contributions SPD. Incorporation of our previous comments is appreciated and we welcome the opportunity to comment further. Since the previous consultation, OCC has commenced work on the preparation of a Developer Guide which will provide detailed information concerning the contributions that the County seeks from developers. Public consultation on this document will take place early in the New Year. It is therefore important that Cherwell’s SPD and OCC’s Developer Guide are appropriately interlinked and cross-referenced. Annex 1 (separate attachment) contains suggested track changes and comments on the main document. Annex 2 contains suggested track changes and comments on the SPD appendices.</p> <p>Main points:</p> <ul style="list-style-type: none"> • It is requested that detail on indices used for contributions sought 	<p>The comments from OCC are noted.</p> <p>References to the Developer Guide have been added to the SPD.</p> <p>A paragraph on Strategic Waste Management has been added to the SPD.</p> <p>There is a pressing need to adopt the Developer Contributions SPD. The current Draft Planning Obligations SPD (July 2011) is out of date. Not progressing the new SPD will create</p>

		<p>on behalf of OCC and detail on education infrastructure contribution calculations are left to OCC’s Developer Guide.</p> <ul style="list-style-type: none"> • Suggested wording in relation to strategic waste management contributions (for Household Waste Recycling Centres) has been added to the main document. • The population figures in Appendix 1 derived from OCC’s Survey of New Housing (2008) are soon to be updated. The results of an updated survey of new housing are currently being collated and are due to be published in 2018. Given that the outcome of the Government’s CIL review is also due to be published during 2018, CDC should consider whether to postpone adoption of the SPD so that these revisions can be incorporated. This would also be more in line with the timescales for the publication of OCC’s Developer Guide. 	<p>uncertainty about the Councils’ requirements for developer contributions.</p>
<p>S106-A-025</p>	<p>Canal & River Trust</p>	<p>We own and manage the Oxford Canal and the adjacent towpath which runs the length of the District on a north–south alignment and is a designated conservation area. The waterway pass through both urban and rural locations and is a historic, natural and cultural asset which forms part of the strategic and local green infrastructure network, linking urban and rural communities as well as habitats. Our waterways contribute to the health and well-being of local communities and economies, creating attractive and connected places to live, work, volunteer and spend leisure time. Waterside development by third parties will place extra liabilities and burdens upon the canal infrastructure in relation to on-going management and maintenance costs. For example, the use of canals for drainage and flood alleviation purposes and the on-going maintenance costs for maintaining not only attractive ‘waterway settings’ but sustainable transport routes used by the future occupiers of such development which place an increasingly heavy burden on the Trust.</p> <p>The Trust generally seeks to maintain its assets in a “steady state”, and this is based on current usage. Where new development has the</p>	<p>These comments have been noted.</p> <p>It is considered that the additional references to the canal are not necessary in the context of the paragraphs quoted.</p> <p>The comments relating to specific projects will be reviewed in the context of the Council’s IDP (Infrastructure Delivery Plan).</p>

		<p>likelihood to increase usage we consider that it is reasonable to request a financial contribution from developers to mitigate this impact by, for example upgrading an access / towpath surface to a standard which is more durable and thus able to accommodate increased usage.</p> <p>Within the draft SPD the canal is only specifically mentioned under ‘Public Realm and Public Art’ (Para 4.1.28) and Flood Risk (Para 4.86). However, this does not recognise the unique multi-functional nature of the canal network. To ensure that applicants / developers are fully aware of the multi-functional nature of the canal network and the need to mitigate the impacts of their development additional references to the canal within the draft SPD should be included. In addition to the current references, as outlined above, the canal should be included in Air Quality- para 4.27; Health and Wellbeing- para 4.89; Nature Conservation & biodiversity – para 4.118; Open Space, Play Facilities, Outdoor Sport & Recreation - para 4.122 and Transport & Access – pg36</p> <p>Whilst not an exhaustive list the works that will be required to support proposed developments include; the towpath within the Banbury area, for safe off-road walking and cycling, plus links northwards out to the new Country Park; towpath improvements to create a traffic-free route from the Oxford Parkway station into the centre of Oxford; towpath improvements from Bankside development into the town centre, including a replacement bridge; improving towpaths as part of the pedestrian / cycle networks; towpath upgrades near Lower Heyford and providing ecological mitigation works. Waterside development and regeneration schemes by third parties though are exploiting the waterside settings to maximise development value uplift generated by waterside location, yet these third-party schemes are not always being obliged to contribute to the development, improvement, restoration and maintenance of waterways. It should therefore be recognised that enhancements / improvements to the towpaths are necessary for reasons not just related to Public Realm and Public Art. Improvements may involve more than towpath resurfacing works, the improvement of existing access points may also be required to support</p>	
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		<p>proposed developments and the increased use of the canal network. In addition, widening and improvements to the tow path (and subsequently the canal bank) may be required along with dredging and vegetation management should widening be required to support additional use. To encourage and support additional use of the canal for cyclists additional signage may also be required in pinch points to highlight that pedestrians have priority. Interpretation along the canal, with circular walks etc could also be required to support additional leisure use. Enhancements such as the removal of graffiti and measures to reduce any further instances of vandalism should also be incorporated as these would further enhance the attractiveness of the use of the canal corridor.</p>	
S106-A-026	Boyer Planning on behalf of Redrow Homes and Wates Developments	<p>Purpose & Context: We consider that this draft SPD is not sufficiently clear about its context and purpose. We are concerned that the Council is seeking to adopt an SPD on planning obligations without a clear decision on whether and when it will proceed with the process to adopt CIL. It is also not clear if the provisions of the document are intended to apply as an interim measure until CIL is put in place or if this SPD is intended to sit alongside an adopted CIL. This needs to be clarified. It would be logical to frame this SPD as providing a policy basis for S106 agreements specifically in the absence of CIL.</p> <p>Pooling Restrictions: The draft SPD does not deal with the question of how essential infrastructure is to be delivered in the absence of CIL and in the context of the pooling restrictions that will limit and control S106 agreements under the CIL Regulations. We consider this issue needs to be specifically and thoroughly addressed to ensure that major development can proceed with the necessary supporting infrastructure. Some of the provisions within the draft SPD appear to directly contravene the pooling restrictions.</p> <p>Viability: Para 3.13 - The SPD should therefore be clearer in stating that it is only in circumstances where development will be unacceptable in planning terms without a planning obligation that the viability of that obligation is not a determining issue. Even in these circumstances, the</p>	<p>Relationship to CIL: Further clarification has been added to the text of the SPD.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Viability will be assessed in accordance with Government advice.</p> <p>Pooling Restrictions: The SPD clearly outlines the regulations relating to ‘pooling’ and the limitations that this brings.</p> <p>Open Space: The open space standards are set out in the adopted Cherwell Local Plan. The SPD cannot amend these.</p>

		<p>NPPF states (para 176) that “The need for such safeguards should be clearly justified through discussions with the applicant, and the options for keeping such costs to a minimum fully explored, so that development is not inhibited unnecessarily”. We consider the wording of the SPD on this issue should be revised to more accurately reflect the NPPF provisions cited above.</p> <p>Affordable Housing: The requirement for affordable housing provision in Bicester at a rate of 30% appears to pass the tests of Section 106 planning obligations and is therefore considered to be reasonable, although it should be clearly stated in the SPD that this is subject to site specific assessment and viability considerations. Paragraph 4.14 of the draft SPD states that “housing sites of at least 400 dwellings will be expected to provide a minimum of 45 self-contained extra care dwellings as part of the overall mix”. The evidence base for this level of provision should however be made clear so that there is a clear justification for such a specific policy requirement.</p> <p>Apprenticeships & Skills: Are concerned that the imposition of these requirements is not necessary to make proposed development acceptable in planning terms. It is not clear how, in principle, these requirements would be “directly related to a development” as the tests require, or how they would be defined and assessed to be “fairly and reasonably related in scale and kind to the development”. Whilst Appendix 13 to the draft SPD sets out some background information to this proposed requirement, this concentrates on the level of need for such provision rather than the question of why it should fall upon development proposals to address this need. Appendix 13 sets out thresholds to trigger these requirements and the required level of provision related to numbers of dwellings or commercial floorspace. However, it does not state how these thresholds and quantities are derived or justified and the basis for such provision is therefore inadequate. Therefore, these SPD requirements do not appear to pass the tests of Section 106 planning obligations set out in paragraph 204 of the National Planning Policy Framework and we would suggest they be</p>	<p>Community Safety: The requirements go beyond scheme design therefore they are appropriate for the SPD.</p> <p>Education: The requirements in the SPD reflect the requirements of OCC, as the Education Authority. The SPD addresses the provision of a new facility to serve multiple developments. No change is required.</p> <p>Apprenticeship & Skills: The Council’s requirements have recently been supported at appeal by a Government appointed inspector.</p> <p>Community Development: The requirements set out in the SPD are based on the Council’s 2017 Cherwell Community Spaces and Development Study.</p> <p>Health & Wellbeing: These standards have been updated following new advice from OCCG.</p> <p>It is considered that the wording in the SPD is compliant with all the relevant Government advice and legislation.</p> <p>Other comments have been noted but</p>
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		<p>deleted from the document.</p> <p>Community Hall Facilities: We support the principle of providing community facilities in the context of major development proposals. The draft SPD specifies, at paragraph 4.54, a requirement of 0.185 sq m per person. Whilst this could be a starting point for assessing the requirement, we consider that it must be applied flexibly in the light of the level of demand for a community facility, taking account of the type of facility that is required and its accommodation / floorspace needs.</p> <p>Community Development: We note the requirement for developers to fund a community development worker but consider that this does not pass the test of being “necessary to make the development acceptable in planning terms”. Further, if this requirement is to demonstrate that it is “directly related to the development” and “fairly and reasonably related to the development” it will require further justification. The level of this requirement is set out in Appendix 12 to the SPD but this does not provide the necessary justification. If and when this is provided, we consider that the specified level of funding must be flexible and based on any specific needs arising from the development and subject to negotiation.</p> <p>Community Safety & Policing: The SPD refers to new residential development contributing towards policing. Whilst, it is necessary and appropriate for development to address the requirements of “secured by design” and, in the case of non-residential development, to CCTV provision, it is not justified to require contributions to the general policing of the community as this cost is met by Government through general taxation. This requirement would not meet the tests set out in paragraph 104 of the NPPF and should be deleted.</p> <p>Education: The requirement for major residential developments to contribute towards the provision of education infrastructure, where there is not enough spare capacity in existing appropriate schools to meet the needs generated by the development, appears to pass the tests of Section 106 planning obligations and is therefore considered to be reasonable in principle. Paragraph 4.21 of the draft SPD is helpful in</p>	<p>it is not considered necessary to amend the SPD</p>
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		<p>acknowledging the need to take account of existing school capacity and the number of available places at existing schools in determining the education contributions to be made by developers. However, Appendix 3 that deals with the calculation of education contributions, does not acknowledge that existing school capacity needs to be taken into account, nor define or provide guidance on the means of doing this. Otherwise, the tables provided in Appendix 3 of the draft SPD appear to provide a reasonable basis to calculate contributions but these must be subject to regular review based on the latest demographic information and may need to be varied if the formulae do not fit the characteristics of a particular site. Given that pupil generation per dwelling varies according to the number of bedrooms per dwelling, the extent of contributions for any particular scheme will be dependent upon the housing mix. It is important to recognise that for outline applications, housing mix will usually be indicative. Therefore the wording of a S106 must be sufficiently flexible to allow the sums to be paid to be determined once the precise mix is known and approved as part of Reserved Matters applications. We note that Appendix 3 states that where a development creates all or part of the need for a new school, a different level of contribution reflecting the actual estimated cost for the new school or part thereof will be applied. However, it is unlikely that the capacity of any new school on site will exactly match the need for school places arising from the development. The SPD should acknowledge the need for assessment and negotiation on a site by site basis where a school is to be provided as part of the scheme as these circumstances do not lend themselves to a formulaic approach.</p> <p>Health & Wellbeing: the draft SPD provides no guidance to determine how existing capacity is to be assessed and taken into account. It does not provide any guidance on the level of contributions per dwelling to match the specific guidance provided for education provision. The lack of such guidance, ideally in the form of an additional appendix to the SPD, could cause delay and uncertainty in the consideration and determination of major schemes where any care requirement for primary or secondary</p>	
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		<p>health care will have to be determined from consultation with NHS trusts. Therefore, whilst the principle of the requirement to address healthcare needs is accepted, the SPD does not pass the tests of Section 106 planning obligations set out in paragraph 204 of the NPPF as it does not provide the basis to assess how the required contributions would be fairly and reasonably related in scale and kind to the development.</p> <p>Indoor Sport & Recreation: The evidence base must be up-to-date and reliance on this existing out of date evidence base does not provide the Council with the basis to meet the relevant tests. Furthermore, neither the draft SPD nor its supporting Appendix set out how existing indoor sport and recreational provision is to be taken into account in the assessment of the required contribution. This is a basic requirement as contributions should only be sought where the need generated by the development cannot be met by existing provision (as acknowledged by paragraph 4.103 of the draft SPD). An up-to-date evidence base should therefore be provided which should be the subject of further consultation prior to setting these requirements.</p> <p>Nature Conservation & Biodiversity: It is agreed that the long term management and maintenance of this mitigation will normally be secured by a S106 agreement subject to this requirement being flexibly worded to ensure it passes the tests of Section 106 planning obligations set out in paragraph 204 of the NPPF.</p> <p>Open Space, Play Facilities, Outdoor Sport & Recreation: The evidence base for this contribution cannot be considered up-to-date and should not form a basis for the Open Space, Play Facilities, Outdoor Sport and Recreation negotiations. In order to progress this part of the developer contributions SPD, it is therefore clear that an up-to date evidence base is required which will be subject to further consultation to ensure compliance with the relevant tests and robustness at appeal.</p> <p>Para 4.37 - There is no certainty provided as to when or how commercial development could trigger a contribution being sought and how that assessment and judgement would be made. It is also not clear how any such contribution would be calculated or how or who would assess</p>	
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		<p>whether the development ‘is likely to generate demand’. Until such information is provided there is no evidence base to justify requirements related to commercial development and we therefore propose that this reference be deleted until such information can be made available. Appendix 4 provides details on the Standards of Provision sought for outdoor recreation. There is however, no evidence or justification to support any of the figures sought. There is no clarity either within the S106 SPD or within the Policy BSC11 as to exactly how the policy would be applied to larger strategic sites which require significant on-site open space provision (despite paragraph B.165 of the supporting text stating that, ‘Detailed guidance on the implementation of this policy is set out in the Planning Obligations Draft SPD...’)</p> <p>Public Realm & Public Art: As a matter of principle, it is not clear how the provision of public art is needed to make development acceptable in planning terms. Whilst such provision may be desirable, it cannot be considered necessary and, the SPD requirement does not appear to pass the tests of Section 106 planning obligations set out in paragraph 204 of the NPPF.</p> <p>Transport & Access: We have commented above on the fact that paragraphs 4.146 and 4.147 contravene pooling restrictions and should therefore be modified or removed from the document. the reference to ‘strategic transport schemes’ is not clear and further clarification should be provided to identify which schemes from the IDP will require contributions from proposed development sites and on what basis. Detailed references are made regarding the IDP. Overall, we consider the IDP needs to be much clearer in defining schemes, specifying the source of funding, the timescale for delivery and how pooling restrictions will be avoided. The reference at paragraph 4.145 to direct infrastructure provision being taken into account within planning obligations is welcomed. It is considered that the current level of detail regarding potential S106 contributions towards transport and access proposals is insufficient.</p>	
S106-A-027	Turley on behalf of	Recommend that the SPD includes a review mechanism whereby the	Further clarification has been added

	<p>Bovis Homes Ltd</p>	<p>Council commits to reviewing the document should they choose to progress CIL in the future.</p> <p>Viability: Para 3.13 - statement is regarded as very general, generating uncertainty in respect of the policies which the Council may seek to obtain despite a proven lack of viability. In line with the NPPF, we request that further definition should be provided in respect of those policies which the Council regards as being in need of protection despite the potential for such policies to push schemes into a position where it is not possible to provide competitive returns to a willing land owner and willing developer. Para 3.15 - In line with PPG provisions, a review of viability should be reserved for large scale, multi-phased schemes, as follows: "...where a scheme requires phased delivery over the medium and longer term, changes in the value of development and changes in costs of delivery may be considered. Forecasts, based on relevant market data, should be agreed between the applicant and local planning authority wherever possible." The proposed overall approach to viability review is inappropriate and we request revised methodology to ensure that only the larger, multi-phase schemes will be subject to review. The proposed method of overage payment calculation is currently vague. During the consultation process there is a need for the provision of appropriate calculation methodology and clarification of the timing of such a review.</p> <p>Affordable Housing: Bovis previously recommended that 'Starter Homes' be removed from the list of Affordable Housing types on the basis that the necessary secondary legislation was not in place to permit legal delivery. We therefore support where reference to Starter Homes has now been removed from the SPD, however it is still included at paragraph 4.4 of the SPD. This should be removed also.</p> <p>Para 4.39 - Viability constraints may also impact upon the ability of a scheme to provide policy compliant S106 contributions, and S106 contributions should be referenced as being subject to reduction along with affordable housing. Para 4.22 - If the Council proposes to adopt a standardised approach to residual value assessment, the proposed</p>	<p>to the text to acknowledge that the SPD will need to be reviewed should the Council adopt a CIL Charging Schedule (or other alternative) in the future.</p> <p>Relationship to CIL: Further clarification has been added to the text of the SPD.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Viability will be assessed in accordance with Government advice.</p> <p>Cemeteries: Details such as plot densities and costs will vary on a site by site basis therefore it is difficult for the SPD to stipulate such figures.</p> <p>Health & Wellbeing: Revised, more detailed requirements have been added to the SPD.</p> <p>Community Hall & Development: The requirements set out in the SPD are based on the Council's 2017 Cherwell Community Spaces and Development Study.</p>
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		<p>permanent building at the point of 50% of units being completed. This may not be viable and should be subject to agreement as part of Section 106 discussions.</p>	
<p>S106-A-028</p>	<p>Framptons on behalf of the Donger Family</p>	<p>It is submitted that the SPD as presently drafted is unacceptable and not in accordance with national planning policy and guidance. The SPD states at paragraph 2.4 that “work has also commenced on the production of the Cherwell Local Plan 2011-2031 (Part 2): Development Management Policies and Sites”. It is the Part 2 Plan which should provide the development plan policy basis for all planning obligations. This SPD is attempting to circumvent proper examination of the policy basis for seeking specific planning obligations, which should take place within the formal context of the development plan making process. Developers, and indeed the public, are prejudiced by the approach presently being taken to seek to provide a justification for Planning Obligations outwith proper scrutiny within a development plan.</p> <p>Introduction: A statement should be included within the introduction of the SPD to ensure that the statutory test applies to any S106 at the point of determination of a planning application. It is evident that for some obligations reliance is made upon average ‘household size for Oxfordshire’. Appendix 1 refers to this average household size, albeit Appendix 1 is not referred to in the text of the report. It is submitted that where a planning obligation may be justified, based on average household size, the average household size within Cherwell District should be the appropriate factor.</p> <p>Security & Timing of Payments: The SPD refers to ‘additional monitoring and enforcement costs’. This appears unlawful in the context of the Court Ruling Oxfordshire County Council V Secretary of State DCLG and others [2015] EWHC 186. A unilateral Undertaking cannot require the Council to issue an invoice, hence paragraph 3.22 needs amendment.</p> <p>Monitoring & Enforcement: Para 3.30 and 3.31 – The substance of this paragraph is at odds with the Court ruling referred to above.</p> <p>Apprenticeships and Skills The principle of this obligation is not in</p>	<p>The SPD does not introduce new policy. The adopted Cherwell Local Plan 2011-2031 sets the planning framework up to 2031 with the SPD providing a further level of detail to guide development.</p> <p>Definition of ‘major’ development – This has been clarified in the SPD text.</p> <p>Security & Timing of Payments: These requirements are based on legal advice.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122. Education and Transport requirements are based on detailed advice from OCC.</p> <p>Transport: Planning Applications are required to submit Transport Assessments which set out the impact of development and hence mitigation that may be necessary</p> <p>Monitoring Fees:</p>

		<p>accordance with national planning policy. It is not clear how built development to meet development need is unacceptable, unless a provision is made for 2.5 apprenticeships per 50 dwellings.</p> <p>Community Hall Facilities: The SPD introduces an accessibility standard of 800m walking distance for facilities. As stated above SPDs should not be used to add unnecessarily to the financial burdens on development and should not be used to set rates or charges which have not been established through development plan policy. Therefore this should not become a proscribed measure of acceptability. Rather reference should be made to ‘having regard to’ the accessibility standard.</p> <p>Community Safety and Policy: The SPD makes reference to ‘major residential and commercial developments’ without a definition of ‘major’. At paragraph 4.67 the SPD provides a threshold for Community Development contributions as 100 dwellings, such a definition is required throughout the SPD.</p> <p>Education: The SPD has introduced the concept that the developer may be requested to pay a ‘contribution towards the cost of providing transport for children to school’. It is submitted that such a demand is not a reasonable cost to be placed upon a development.</p> <p>Health and Wellbeing: This section recognises that ‘primary care practices are run as independent businesses’ and suggests a mechanism should be included to recover funds paid to Practices, if the business does not continue for 15 years. As an ‘independent business’ particular care is needed in demanding contributions for increasing the size of existing Practices or building new practices. If new buildings are required to provide primary care then practices should pay a market rent for the accommodation. The SPD should not proscribe a particular agreement of a financial payment to Cherwell District Council</p> <p>Open Space, Sport and Recreation: The SPD suggests that the LPA may seek contributions for commercial development as the ‘working population increases’. There is a risk of double counting and there will be a tenuous link between employees and the user of public open space. Insufficient evidence has been provided in the SPD to justify the basis of</p>	<p>Fees can be sought pursuant to Section 111 of the Local Government Act 1972 and Section 1 of the Localism Act 2011.</p> <p>Other comments have been noted but it is not considered necessary to amend the SPD.</p>
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		<p>such an obligations</p> <p>Transport and Access: The SPD states that ‘all new developments in the District will be required to provide financial and or in-kind contributions to mitigate the transport mitigation of the development’. This is not in accordance with the Framework at Paragraph 32 and appears to be a ‘tax’ on new development.</p>	
S106-A-029	Framptons	<p>It is submitted that the SPD as presently drafted is unacceptable and not in accordance with national planning policy and guidance. The SPD states at paragraph 2.4 that “work has also commenced on the production of the Cherwell Local Plan 2011-2031 (Part 2): Development Management Policies and Sites”. It is the Part 2 Plan which should provide the development plan policy basis for all planning obligations. This SPD is attempting to circumvent proper examination of the policy basis for seeking specific planning obligations, which should take place within the formal context of the development plan making process. Developers, and indeed the public, are prejudiced by the approach presently being taken to seek to provide a justification for Planning Obligations outwith proper scrutiny within a development plan.</p> <p>Introduction: A statement should be included within the introduction of the SPD to ensure that the statutory test applies to any S106 at the point of determination of a planning application. It is evident that for some obligations reliance is made upon average ‘household size for Oxfordshire’. Appendix 1 refers to this average household size, albeit Appendix 1 is not referred to in the text of the report. It is submitted that where a planning obligation may be justified, based on average household size, the average household size within Cherwell District should be the appropriate factor.</p> <p>Security & Timing of Payments: The SPD refers to ‘additional monitoring and enforcement costs’. This appears unlawful in the context of the Court Ruling Oxfordshire County Council V Secretary of State DCLG and others [2015] EWHC 186. A unilateral Undertaking cannot require the Council to issue an invoice, hence paragraph 3.22 needs amendment.</p> <p>Monitoring & Enforcement: Para 3.30 and 3.31 – The substance of this</p>	<p>The SPD does not introduce new policy. The adopted Cherwell Local Plan 2011-2031 sets the planning framework up to 2031 with the SPD providing a further level of detail to guide development.</p> <p>Definition of ‘major’ development – This has been clarified in the SPD text.</p> <p>Security & Timing of Payments: These requirements are based on legal advice.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Education and Transport requirements are based on detailed advice from OCC.</p> <p>Transport: Planning Applications are required to submit Transport Assessments which set out the impact</p>

	<p>paragraph is at odds with the Court ruling referred to above.</p> <p>Apprenticeships and Skills The principle of this obligation is not in accordance with national planning policy. It is not clear how built development to meet development need is unacceptable, unless a provision is made for 2.5 apprenticeships per 50 dwellings.</p> <p>Community Hall Facilities: The SPD introduces an accessibility standard of 800m walking distance for facilities. As stated above SPDs should not be used to add unnecessarily to the financial burdens on development and should not be used to set rates or charges which have not been established through development plan policy. Therefore this should not become a proscribed measure of acceptability. Rather reference should be made to 'having regard to' the accessibility standard.</p> <p>Community Safety and Policy: The SPD makes reference to 'major residential and commercial developments' without a definition of 'major'. At paragraph 4.67 the SPD provides a threshold for Community Development contributions as 100 dwellings, such a definition is required throughout the SPD.</p> <p>Education: The SPD has introduced the concept that the developer may be requested to pay a 'contribution towards the cost of providing transport for children to school'. It is submitted that such a demand is not a reasonable cost to be placed upon a development.</p> <p>Health and Wellbeing: This section recognises that 'primary care practices are run as independent businesses' and suggests a mechanism should be included to recover funds paid to Practices, if the business does not continue for 15 years. As an 'independent business' particular care is needed in demanding contributions for increasing the size of existing Practices or building new practices. If new buildings are required to provide primary care then practices should pay a market rent for the accommodation. The SPD should not proscribe a particular agreement of a financial payment to Cherwell District Council</p> <p>Open Space, Sport and Recreation: The SPD suggests that the LPA may seek contributions for commercial development as the 'working population increases'. There is a risk of double counting and there will be</p>	<p>of development and hence mitigation that may be necessary</p> <p>Monitoring Fees: Fees can be sought pursuant to Section 111 of the Local Government Act 1972 and Section 1 of the Localism Act 2011.</p> <p>Other comments have been noted but it is not considered necessary to amend the SPD</p>
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		<p>a tenuous link between employees and the user of public open space. Insufficient evidence has been provided in the SPD to justify the basis of such an obligations</p> <p>Transport and Access: The SPD states that ‘all new developments in the District will be required to provide financial and or in-kind contributions to mitigate the transport mitigation of the development’. This is not in accordance with the Framework at Paragraph 32 and appears to be a ‘tax’ on new development.</p>	
<p>S106-A-030</p>	<p>Pegasus Group on behalf of the Dorchester Group</p>	<p>Multiple Paragraphs: The draft SPD contains a number of references to ‘major’ development, however it is not evidently clear as to what constitutes major development for the purposes of the document. Although it is anticipated that ‘major’ will be defined as per The Town and Country Planning (Development Management Procedure) Order 2015, no such reference is currently found within the draft SPD.</p> <p>Para 1.15 –Relationship between CIL and Planning Obligations: Reference should be made to the NPPF as a material consideration when determining the viability of proposed obligations. NPPF paragraphs 173 to 177 ‘Ensuring Viability and Deliverability’ should be directly referenced. This would be consistent with the referencing of the NPPF at para 1.17 of the draft SPD and the approach adopted elsewhere in the document.</p> <p>Para 2.5 – Policy Framework: Alongside the Infrastructure Development Plan, obligations must be supported by a robust and up to date evidence base, if the statutory tests set out in CIL Regulation 122 are to be met. In addition reference should be made to NPPF Paragraph 177, which sets out a requirement for the Council to demonstrate that there is a reasonable prospect that planned infrastructure can be delivered in a timely fashion within the associated construction and implementation stages of development.</p> <p>Para 3.3 -3.4 – Planning Obligations: In bringing forward strategic development sites such as Heyford Park, it is common for applications to be made by a number of different landowners at different times. In ensuring that appropriate strategic infrastructure is provided and achieved in an equitable and timely fashion, the Council should</p>	<p>Relationship to CIL: Further clarification has been added to the text of the SPD.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122.</p> <p>Viability will be assessed in accordance with Government advice.</p> <p>Definition of ‘major’ development – This has been clarified in the SPD text.</p> <p>Monitoring Fees: Fees can be sought pursuant to Section 111 of the Local Government Act 1972 and Section 1 of the Localism Act 2011.</p> <p>Community Hall & Development: The requirements set out in the SPD are based on the Council’s 2017 Cherwell</p>

	<p>ensure that obligations are secured in a comprehensive and holistic manner from all applicants and landowners.</p> <p>Para 3.5 Pre-Application Discussions: If Head of Terms have been agreed as part of comprehensive pre-application discussions, it is expected that no further requests for additional contributions will be made of the applicant during the consideration of a related formal planning application, except in exceptional circumstances.</p> <p>Para 3.13 – Viability: In line with NPPF paragraph 173, planning obligations should not be pursued if their achievement would knowingly negate the ability of the development to be brought forward. It is suggested that reference to the use of an ‘overage’ clause should be inserted at this paragraph.</p> <p>Para 3.16 – Viability: In the event that an independent review of viability assessments is required by a mutually appointed external consultant, the cost of such review should be met equally by the Council and the applicant.</p> <p>Para 3.20 – Security and Timing of Payments: Although the draft SPD sets out a timetable for the developer to provide advance notice of intent to pay financial contributions and request a relevant invoice from the Council, there is no formal timetable within which the Council are obliged to provide such an invoice. In seeking to ensure that the applicant is not penalised for late payments through delays incurred by the Council, flexibility should be incorporated into approach set out in paras 3.17-3.22</p> <p>Para 3.23 – Security and Timing of Payments: In providing a transparent audit trail for receipt of financial contributions, formal acknowledgement on the payment of financial obligations should also be provided from the Council to the applicant.</p> <p>Para. 3.30 – Monitoring and Enforcement: Contributions towards the costs of monitoring compliance with planning conditions or obligations do not meet the CIL tests set out in Regulation 122. Appeal decisions are quoted to support this view.</p> <p>Para 4.9, 4.13, 4.19 – Affordable Housing: The requirement for affordable housing provision at Heyford Park is set out within Policy</p>	<p>Community Spaces and Development Study.</p> <p>Affordable Housing: The need for negotiation is highlighted in the SPD.</p> <p>Local Management Organisations: This requirement reflects corporate policy.</p> <p>Other comments have been noted, including those relating to waste and public art, but it is not considered necessary to amend the SPD. Many are site specific.</p>
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		<p>Villages 5, with a requirement of at least 30%.</p> <p>4.16 Affordable Housing Standards: The NPPG states that if Local Authorities wish to set additional technical standards above housing and accessibility standards prescribed by Building Regulations, this should be done via appropriate local plan policies, which in turn are supported by a firm evidence base (NPPG Paragraph:002 Reference ID:56-002-20160519). The adopted Cherwell Local Plan does not contain such a policy and thus this requirement should be removed. Appropriate space and accessibility standards should be a matter for negotiation rather than be set via predetermined and non-evidential standard.</p> <p>Paras. 4.64-4.65 – Community Development. See Also Appendix 12: Contributions towards the costs of Community Development Workers do not meet the CIL tests set out in Regulation 122. Appeal decisions are quoted to support this view.</p> <p>Para. 4.72 – Community Safety and Policing See also Appendix 14: It is agreed that financial obligations towards police staff salaries are not CIL compliant.</p> <p>Para 4.89 – Health and Well Being: Policy Villages 5 requires the development of Heyford Park to include on site health care facilities</p> <p>Para. 4.117 – Nature Conservation: Reference should be made to the ability to secure biodiversity gains through a combination of both on-site enhancements and off-site financial obligations</p> <p>Para. 4.127 – Local Management Organisations for Open Space Management See also Appendix 8: Open space and recreation provision has been maintained and operated successfully at Heyford Park via the use of management companies. A requirement to introduce express approval by a Parish Council before a management company can be used, is considered to be both inflexible and unnecessary.</p> <p>Paras 4.128-4.137- Public Art: As noted by the Appeal Inspector in Appeal Decision APP/C3105/W/16/3163551, the Cherwell Infrastructure Delivery Plan contains no reference to the expenditure of a public art contribution and does not therefore provide a firm evidence base on which to request such a contribution.</p>	
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		<p>Paras 4.149 -4.150 – Waste: Contributions towards the costs of providing recycling and domestic refuse do not meet the CIL tests set out in Regulation 122. Similarly, financial contributions towards capital investment in the expansion of the existing waste collection service are not CIL compliant and are more correctly funded through council tax receipts from a new resident population</p>	
<p>S106-A-031</p>	<p>Framptons on behalf of Hallam Land Management Ltd</p>	<p>It is submitted that the SPD as presently drafted is unacceptable and not in accordance with national planning policy and guidance. The SPD states at paragraph 2.4 that “work has also commenced on the production of the Cherwell Local Plan 2011-2031 (Part 2): Development Management Policies and Sites”. It is the Part 2 Plan which should provide the development plan policy basis for all planning obligations. This SPD is attempting to circumvent proper examination of the policy basis for seeking specific planning obligations, which should take place within the formal context of the development plan making process. Developers, and indeed the public, are prejudiced by the approach presently being taken to seek to provide a justification for Planning Obligations outwith proper scrutiny within a development plan.</p> <p>Introduction: A statement should be included within the introduction of the SPD to ensure that the statutory test applies to any S106 at the point of determination of a planning application. It is evident that for some obligations reliance is made upon average ‘household size for Oxfordshire’. Appendix 1 refers to this average household size, albeit Appendix 1 is not referred to in the text of the report. It is submitted that where a planning obligation may be justified, based on average household size, the average household size within Cherwell District should be the appropriate factor.</p> <p>Security & Timing of Payments: The SPD refers to ‘additional monitoring and enforcement costs’. This appears unlawful in the context of the Court Ruling Oxfordshire County Council V Secretary of State DCLG and others [2015] EWHC 186. A unilateral Undertaking cannot require the Council to issue an invoice, hence paragraph 3.22 needs amendment.</p> <p>Monitoring & Enforcement: Para 3.30 and 3.31 – The substance of this</p>	<p>The SPD does not introduce new policy. The adopted Cherwell Local Plan 2011-2031 sets the planning framework up to 2031 with the SPD providing a further level of detail to guide development.</p> <p>Definition of ‘major’ development – This has been clarified in the SPD text.</p> <p>Security & Timing of Payments: These requirements are based on legal advice.</p> <p>Infrastructure Requirements: The SPD is clear that the Council will only seek a planning obligation that meets the 3 tests set out in CIL Regulation 122</p> <p>Education and Transport requirements are based on detailed advice from OCC.</p> <p>Transport: Planning Applications are required to submit Transport Assessments which set out the impact</p>

	<p>paragraph is at odds with the Court ruling referred to above.</p> <p>Apprenticeships and Skills The principle of this obligation is not in accordance with national planning policy. It is not clear how built development to meet development need is unacceptable, unless a provision is made for 2.5 apprenticeships per 50 dwellings.</p> <p>Community Hall Facilities: The SPD introduces an accessibility standard of 800m walking distance for facilities. As stated above SPDs should not be used to add unnecessarily to the financial burdens on development and should not be used to set rates or charges which have not been established through development plan policy. Therefore this should not become a proscribed measure of acceptability. Rather reference should be made to 'having regard to' the accessibility standard.</p> <p>Community Safety and Policy: The SPD makes reference to 'major residential and commercial developments' without a definition of 'major'. At paragraph 4.67 the SPD provides a threshold for Community Development contributions as 100 dwellings, such a definition is required throughout the SPD.</p> <p>Education: The SPD has introduced the concept that the developer may be requested to pay a 'contribution towards the cost of providing transport for children to school'. It is submitted that such a demand is not a reasonable cost to be placed upon a development.</p> <p>Health and Wellbeing: This section recognises that 'primary care practices are run as independent businesses' and suggests a mechanism should be included to recover funds paid to Practices, if the business does not continue for 15 years. As an 'independent business' particular care is needed in demanding contributions for increasing the size of existing Practices or building new practices. If new buildings are required to provide primary care then practices should pay a market rent for the accommodation. The SPD should not proscribe a particular agreement of a financial payment to Cherwell District Council</p> <p>Open Space, Sport and Recreation: The SPD suggests that the LPA may seek contributions for commercial development as the 'working population increases'. There is a risk of double counting and there will be</p>	<p>of development and hence mitigation that may be necessary</p> <p>Monitoring Fees: Fees can be sought pursuant to Section 111 of the Local Government Act 1972 and Section 1 of the Localism Act 2011.</p> <p>Other comments have been noted but it is not considered necessary to amend the SPD</p>
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		<p>a tenuous link between employees and the user of public open space. Insufficient evidence has been provided in the SPD to justify the basis of such an obligations</p> <p>Transport and Access: The SPD states that ‘all new developments in the District will be required to provide financial and or in-kind contributions to mitigate the transport mitigation of the development’. This is not in accordance with the Framework at Paragraph 32 and appears to be a ‘tax’ on new development.</p>	
S106-A-032	Framptons on behalf of db symmetry	<p>While a Local Planning Authority may encourage the engagement of apprenticeships during the construction period and during operation of a development, it is considered that causing such provision as a planning obligation fails the statutory tests for a planning obligation. It is difficult to envisage how a built development could be argued to be objectionable from a land use planning consideration, other than in circumstances where a presented amount of apprenticeships are made available. Furthermore, it should be recognised that a developer often has no direct control over the appointment of personnel by a contractor or occupier. The Framework makes clear that investment in business should not be overburdened by the combined requirements of planning policy expectations (Framework 21). This obligation fails to respect national planning policy and is considered to be unlawful.</p>	<p>Paragraph 19 of the NPPF states that the Government’s commitment to ensuring that the planning system does everything it can to support sustainable economic growth.</p> <p>In a recent appeal decision - APP/C3105/W/16/3163551, the inspector concluded that such a requirement was CIL compliant.</p>

**Strategic Environmental Assessment Screening Opinion for the Cherwell District
Council Developer Contributions Supplementary Planning Document.**

SEA Directive Criteria Schedule 1 of Environmental Assessment of Plans and Programmes Regulations 2004	Summary of significant effects Scope and influence of the document	Is the Plan likely to have a significant environmen tal effect? Y/N
1. Characteristics of the SPD having particular regard to:		
(a) The degree to which the SPD sets out a framework for projects and other activities, either with regard to the location, nature, size or operating conditions or by allocating resources.	The SPD sets out CDC's approach to seeking developer contributions in relation to planning application decisions. They are normally used where an aspect of the development cannot be controlled by imposing a planning condition or by the use of other statutory controls. The SPD does not allocate resources but it does provide guidance on where resources should be directed.	N
(b) The degree to which the SPD influences other plans and programmes including those in a hierarchy.	The SPD does not influence other development plan documents. The SPD is in general conformity with the Development Plan.	N
(c) The relevance of the SPD for the integration of environmental considerations in particular with a view to promoting sustainable development.	The SPD promotes sustainable development in accordance with the NPPF and Local Plan policies.	N
(d) Environmental problems relevant to the SPD.	The Cherwell Local Plan Part 1 SA identified a number of objectives for the Plan. The SPD performs positively against these SA objectives as it provides for developer contributions towards infrastructure related to these objectives.	N
(e) The relevance of the SPD for the implementation of Community legislation on the environment (for example plans and programmes related to waste management or water protection).	The SPD is not directly relevant to the implementation of environmental plans such as the Oxfordshire Joint Municipal Waste Strategy.	N
2. Characteristics of the effects and area likely to be affected having particular regard to:		
(a) The probability, duration, frequency and reversibility of the effects.	The SPD does not allocate sites or contain formal development plan policies. It adds detail to the	N

	adopted Cherwell Local Plan Part 1 which was subject to an SA.	
(b)The cumulative nature of the effects of the SPD.	The SPD does not allocate sites or contain formal development plan policies. It adds detail to the adopted Cherwell Local Plan Part 1 which was subject to an SA. The SPD will have a positive contribution as it provides for developer contributions towards infrastructure which will help meet the SA objectives.	N
(c)The trans boundary nature of the effects of the SPD.	A Habitats Regulation Assessment was undertaken for the Cherwell Local Plan Part 1 and concluded that growth in the Local Plan will not lead to any significant effect on the Oxford Meadows Special area of Conservation (SAC) alone or in combination with other projects. The SPD does not allocate sites or contain formal development plan policies. Trans-boundary effects will not be significant.	N
(d)The risks to human health or the environment (e.g. due to accident).	No significant risks to human health or the environment have been identified in the SPD preparation.	N
(e)The magnitude and spatial extent of the effects (geographic area and size of the population likely to be affected) by the SPD.	The SPD relates to the whole of Cherwell District but it does not allocate sites or contain formal development plan policies.	N
(f)The value and vulnerability of the area likely to be affected by the SPD due to: <ul style="list-style-type: none"> • Special natural characteristics or cultural heritage • Exceeded environmental quality standards or limit values • Intensive land use. 	The SPD does not allocate sites or contain formal development plan policies. It adds detail to the Cherwell Local Plan Part 1 which was subject to a Sustainability Appraisal during its production.	N
(g)The effects of the SPD on areas or landscapes which have recognised national Community or international protected status.	The SPD does not allocate sites or contain formal development plan policies. It adds detail to the Cherwell Local Plan Part 1 which was subject to a sustainability appraisal during its production.	N

Name of officer producing the screening opinion	Christina Cherry
Date of assessment	18 January 2018

Person requesting Screening Opinion	N/A
Conclusion of assessment	Is an SEA required? NO
Name of officer approving the Screening Opinion	David Peckford Deputy Manager-Planning Policy & Growth Strategy Cherwell District Council
Date of approval	18 January 2018

Summary of responses from statutory consultees

Consultee	Summary of response	Date of consultation	Date of response
Environment Agency	No comments to make	23/11/2017	19/12/2017
Natural England	There are unlikely to be significant environmental effects from the proposed plan.	23/11/2017	20/12/2017
Historic England	Agree that an SEA is not required.	23/11/2017	20/12/2017

Developer Contributions Supplementary Planning Document (SPD)

2nd Consultation Draft November 2017

Cherwell District Council

SUPERSEDED
FOR REFERENCE
ONLY

2ND CONSULTATION DRAFT

NOVEMBER 2017

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1. INTRODUCTION

Purpose of this Document

- 1.1. The purpose of this Developer Contributions Supplementary Planning Document (SPD) is to set out Cherwell District Council's approach to seeking Section 106 planning obligations.
- 1.2. This guidance does not cover every possible circumstance and/or obligation that may need to be taken into account, but it provides a clear indication of the Council's essential requirements from new development in respect of the provision of infrastructure, community facilities and services. It will enable developers to understand planning obligation requirements and costs from an early stage in the development process and to make appropriate provision when formulating costs and undertaking financial appraisals.
- 1.3. Since the introduction of the Community Infrastructure Levy Regulations 2010 (as amended) ('CIL Regulations'), developers are expected to contribute towards the provision of infrastructure through a combination of mechanisms: paying a levy through CIL (if adopted at local level), S106 obligations, planning conditions and S278 highway contributions.
- 1.4. The CIL Regulations mean that since 6 April 2015 the use of Section 106 obligations has become more restricted, with the Council only able to pool a maximum of five separate obligations (entered into on or after 6 April 2010) for a specific infrastructure project or a type of infrastructure.
- 1.5. The CIL Regulations have recently been the subject of review by Central Government. The CIL Review Group was established by the former Communities Secretary and former Minister for Housing and Planning in November 2015. The purpose of the review was to *'Assess the extent to which CIL does or can provide an effective mechanism for funding infrastructure, and to recommend changes that would improve its operation in support of the Government's wider housing and growth objectives.'* The report was submitted to Government in October 2016 and published in March 2017. It is anticipated that an announcement on the Government's response to this review will be made in the 2017 Autumn Statement.
- 1.6. The timing and scope of the Government's review is outside the control of the Council. The guidance in this document is provided within the parameters of existing regulations and adopted local plan policies.

- 1.7. Appendix 15 details the types of infrastructure that will be covered by S106 planning obligations and what will be covered by CIL if a CIL charging schedule is adopted by the Council in the future. The position on CIL will be reviewed in the light of the Government's Autumn Statement 2017 and the responses to consultation on the draft SPD.

What are Planning Obligations?

- 1.8. A planning obligation is secured by either a deed of agreement or a unilateral undertaking made under planning legislation (Section 106 of the Town and Country Planning Act 1990 (as amended)) in association with a planning permission for new development. It is normally applied to aspects of development that cannot be controlled by imposing a planning condition or by the use of other statutory controls. Planning obligations are legally binding and enforceable if planning permission is granted. They also run with the land. They can cover almost any relevant issue such as types of infrastructure or services and future maintenance.
- 1.9. Planning obligations should only be used where it is not possible to address the unacceptable impact of development through a planning condition (NPPF¹, para. 203).
- 1.10. In addition, CIL Regulation 122 states that the use of planning obligations should only be sought where they meet all of the following three tests:
- They are necessary to make a development acceptable in planning terms
 - They are directly related to a development
 - They are fairly and reasonably related in scale and kind to the development.

What is CIL?

- 1.11. CIL is a tariff charged on new development that the Council can choose to adopt to support the provision of infrastructure. Once adopted CIL is fixed, non-negotiable and enforceable.
- 1.12. To introduce CIL the Council must set a CIL rate or rates in a Charging Schedule, and follow two stages of consultation and an Examination in Public prior to adoption and implementation of CIL. The Council has consulted on both a Preliminary Draft and Draft CIL Charging Schedule. Work has however since been 'paused' on CIL pending the outcome of the Government's review of CIL. Further guidance from the Government is awaited.

¹ National Planning Policy Framework

Relationship between CIL and Planning Obligations

- 1.13. The Government currently intends CIL to provide for infrastructure to support development rather than specifically to make individual development proposals acceptable in planning terms. Government guidance indicates that site specific mitigation will still be sought through the use of planning obligations.
- 1.14. CIL Regulations 122 and 123 place limits on the use of planning obligations and makes the planning obligations policy tests (para. 1.10 above) a statutory requirement. These two regulations seek to avoid overlaps between CIL and planning obligations and to limit the pooling of planning obligations towards infrastructure provision that could be funded by CIL. The Government's intention is for local authorities to operate CIL and planning obligations in a complementary way.
- 1.15. The Council will ensure, in accordance with the advice in the National Planning Policy Guidance (NPPG) when seeking contributions that, their combined total impact does not threaten the viability of the sites and scale of development identified in the Development Plan.
- 1.16. The NPPG states that in making decisions, the local planning authority will need to understand the impact of planning obligations on a proposal. Where an applicant is able to demonstrate to the satisfaction of the local planning authority that the planning obligation would cause the development to be unviable, the local planning authority should be flexible in seeking planning obligations. This is particularly relevant for affordable housing contributions which are often the largest item sought on housing developments. These contributions should not be sought without regard to individual scheme viability. The financial viability of the individual scheme should be carefully considered.
- 1.17. The NPPG goes on to state that assessing viability should lead to an understanding of the scale of planning obligations which are appropriate. However, the NPPF is clear that where safeguards are necessary to make a particular development acceptable in planning terms, and these safeguards cannot be secured, planning permission should not be granted for unacceptable development.

Planning Conditions

- 1.18. Planning conditions cannot require the transfer of land ownership or the payment of monies. They are attached to a planning permission and set out details or required standards, timeframes, and works which must be carried out at prescribed stages in

the development process. They may also require further details to be submitted in order to make a proposal acceptable.

- 1.19. NPPF paragraph 206 states that planning conditions should only be attached to a planning permission where they are necessary, relevant to planning and to the development to be permitted, enforceable, precise and reasonable in all other respects.

Section 278 Agreements

- 1.20. Section 278 Agreements allow developers to enter in to a legal agreement with the Highway Authority (usually Oxfordshire County Council) to fund alterations or improvements to the public highway where these are of benefit to the public.
- 1.21. The pooling restriction on planning obligations does not apply to S278 agreements. However, the CIL regulations prohibit CIL being spent on a highway scheme where a S278 agreement has been made.

2. POLICY FRAMEWORK

National Level

- 2.1. The statutory framework for planning obligations is set out in Section 106 of the Town and Country Planning Act 1990 (as amended); Regulations 122 and 123 of the Community Infrastructure Levy Regulations 2010 (as amended). The Council will also treat the government's guidance contained in the National Planning Policy Framework (NPPF) as a material consideration, particularly paragraphs 203 to 205.

Local Level

- 2.2. The statutory Development Plan for the District currently comprises:
- The adopted Cherwell Local Plan 2011-2031 (Part1)(adopted July 2015 & incorporating Policy Bicester 13 re-adopted in December 2016)
 - The retained saved policies of the adopted Cherwell Local Plan 1996
 - The adopted Minerals and Waste Local Plan (Part 1 – Core Strategy) (adopted September 2017)
 - The saved policies of the Oxfordshire Minerals and Waste Local Plan 1996
 - 'Made' Neighbourhood Plans (Hook Norton Neighbourhood Plan 2014-2031 & Bloxham Neighbourhood Plan 2015-2031 and any others 'made' during the lifetime of this SPD).

- 2.3. The adopted Cherwell Local Plan Part 1 contains the strategic policies covering the District and includes land allocated for housing and employment development at Bicester, Banbury and the former RAF Upper Heyford.
- 2.4. A Partial Review of the Cherwell Local Plan Part 1 is in preparation which seeks to contribute to addressing the unmet objectively assessed housing need from elsewhere in the Oxfordshire Housing Market Area (HMA), particularly from Oxford City. A proposed submission plan was published for public consultation on 17 July 2017 with comments invited until 10 October 2017. Work has also commenced on the production of Cherwell Local Plan 2011-2031 (Part 2): Development Management Policies and Sites.
- 2.5. Other key planning policy documents include:
- Supplementary Planning Documents (SPDs). SPDs expand upon and provide further detail to policies in Development Plan Documents.
 - The Infrastructure Delivery Plan (IDP). The IDP is a live document adjusted over time and contains the infrastructure required to support **Policy INF 1: Infrastructure** of the adopted Cherwell Local Plan Part 1. An IDP was appended to the adopted Local Plan. IDP updates can be found on the Council's website.
- 2.6. The Council's Local Development Scheme sets out the programme for the preparation of the key planning policy documents.

Bicester Garden Town

- 2.7. In 2014 the Government announced that Bicester had achieved Garden Town status after the Council had successfully demonstrated plans to meet the necessary criteria of providing affordable homes, schools and jobs while preserving the countryside.
- 2.8. Since then an initial grant has been awarded to fund the necessary feasibility studies for the implementation of the Garden Town as set out in the adopted Cherwell Local Plan Part 1.

Healthy New Towns

- 2.9. In 2015 the Government launched its Healthy New Towns Programme. This programme offers to radically re-think how we live, and takes an ambitious look at improving health through the built environment.

- 2.10. In 2016 Bicester was successful in being selected as one of the 10 exemplar healthy new towns. The Bicester Healthy New Town Programme aims to enable people who live or work in Bicester to live healthier lives and to prevent ill health in the future. The two key priorities for the programme are:
- To reduce the number of people who are overweight or obese because it is the cause of so many health problems.
 - To reduce the number of people who feel socially isolated because that has an important impact on mental well-being.
- 2.11. The built environment has a role to play in supporting health and well-being of communities in the whole of Cherwell District and it is a Council priority to ensure new developments supports this aim.

3. PROCEDURES

General Approach

- 3.1 The Developer Contributions SPD once adopted will comprise the Council's current approach to planning contributions.
- 3.2 Although the scope for securing S106 planning obligations has been reduced since April 2015 due to the pooling restrictions, it is expected that planning obligations will still be sought for:
- Affordable housing; and
 - Infrastructure which is required to mitigate the direct impact of a development. It should, however, be noted that this is a general guide and development proposals will continue to be assessed on a case by case basis with the individual circumstances of each site being taken in to consideration when identifying infrastructure requirements.

Planning Obligations

- 3.3 The Local Planning Authority (LPA) will assess each application to determine if a planning obligation is needed and if so what it should address. It will do this in consultation with other public bodies responsible for infrastructure provision. Oxfordshire County Council, for example, is a major provider of services and infrastructure.
- 3.4 The LPA, and other key agencies, will use planning obligations to:
- Secure general planning requirements that are necessary to allow the development to be permitted and where this cannot be achieved by way of planning conditions;

- Ensure that there is a satisfactory infrastructure to allow the development to proceed and that the infrastructure provided will be maintained; and
- Offset relevant adverse impacts, for example, on the environment, education, social, recreational and community facilities and transport that arise from the development where the development might otherwise have been refused because of those adverse impacts.

Pre-Application Discussions

- 3.5 As part of any pre-application discussions the LPA will seek to agree the requirements and Heads of Terms for any planning obligation.
- 3.6 It is the Council's strong preference, where applications and associated planning obligations are more complex, that negotiations occur, and agreement on Heads of Terms is achieved, prior to the submission of a planning application. Pre-application discussions can help to resolve potential problems and issues which may otherwise delay the determination of a planning application.
- 3.7 It is a local validation requirement that draft Heads of Terms accompany any application that requires a planning obligation.
- 3.8 A planning performance agreement can be a useful tool to focus pre-application discussions on the issues that will need to be addressed throughout the course of preparing and determining a planning application, and the timescales and resources that are likely to be required.

Unilateral Undertakings

- 3.9 In cases where a planning obligation is only dealing with financial contributions the LPA will encourage developers to make a unilateral undertaking and to make the relevant contributions on the granting of planning permission and/or at different stages of development.
- 3.10 This approach allows applicants for small schemes to reduce the legal costs and avoid potential delays often associated with legal agreements. The Council provides a standard form for a unilateral undertaking and this can be found on its website.

Cross Boundary Applications

- 3.11 Where an application site falls partly in another local planning authority area the Council will, as far as possible, work to coordinate proportionate planning obligation

requirements with that authority. If however, agreement cannot be reached, the Council will seek obligations for the portion of the site that falls within the District.

Viability

- 3.12 A key objective of this SPD is to alert applicants of the likely level of planning obligations that can be expected from proposed developments well in advance of any planning application being submitted. The developer can then factor these requirements in to any potential land transaction and/or scheme as early as possible in the development process and certainly prior to any grant of planning permission.
- 3.13 The LPA recognises that financial viability is a material consideration. In exceptional circumstances it may be necessary for the Council to prioritise the securing of particular developer contributions having regard to the Development Plan, the needs of the locality and the particular characteristics of the site and its locality. However, there may be circumstances in which the material Development Plan policies and/or the needs arising from proposed development are such that contributions will be sought even if a viability assessment accepted by the Council demonstrates that the development would not be viable with the required contributions.
- 3.14 Where a disagreement arises about financial viability and the planning obligations sought, the applicant will be expected to provide the Council with clear and transparent evidence to support their case. In most instances this will involve the Council reaching an understanding based on a detailed open book financial appraisal, undertaken by an independent assessor. Where there are significant financial issues arising for other public bodies responsible for providing infrastructure (including Oxfordshire County Council), the LPA will expect that body to be actively involved in this assessment process and conclusions. The Council will require this evidence prior to the granting of planning permission.
- 3.15 Section 106 Agreements can deal with issues of viability. For example, a developer may set out their 'predicted profitability levels'. It will be a requirement of the S106 Agreement for there to be a second viability appraisal at some point during the course of the development. If the results of this second viability appraisal show, for example:
- That the predicted profitability levels have increased then the Council will have a right to an overage, i.e. a further payment/provision of infrastructure or affordable housing to that already secured in the S106 Agreement;
 - That the predicted profitability levels have stayed the same, then there will be nothing further to do with the S106 Agreement;

- That the predicted profitability levels have decreased, then the Council will negotiate further with the applicant concerning planning obligations.

3.16 All costs incurred by the Council in financial appraisal and viability assessment are to be met by the applicant.

Security and Timing of Payments

3.17 Financial contributions (apart from legal costs, which are usually paid prior to the completion of the agreement, and standard administration charges) will need to be paid prior to the implementation of planning permission or in accordance with a programme of agreed staged payments.

3.18 Prior to the making of a Planning Obligation, the developer should identify the financial contributions payable and the corresponding triggers or payment dates as specified in the agreement.

3.19 Approximately 21 days prior to reaching a trigger or payment date, the developer should notify the Council of their intention to pay the financial contribution. If the developer notifies the Council of their intention to pay the financial contribution after the trigger or payment date has elapsed then late payment interest will be charged at a rate of 4% above the standard base rate or as otherwise stated in the Planning Obligation. In such circumstances, the applicant may also become liable for additional monitoring and enforcement costs.

3.20 The Council will then calculate the total financial contribution payable including any interest and/or indexation due and will provide a copy of this calculation to the developer. This calculation will be valid for a period of 14 days from the date of issue unless otherwise agreed in writing. If the calculation has not been agreed within 14 days and is shown to be arithmetically correct following the resolution of any dispute, then late payment interest will be charged as per paragraph 3.19 above.

3.21 Once the developer has agreed the calculation, the Council will issue an invoice to the developer for the agreed sum. The invoice issued will be subject to the Council's standard payment terms.

3.22 The Council will not accept payment of any financial contribution unless accompanied by a valid invoice.

- 3.23 Upon receipt, financial contributions will be held in a specific account before being transferred to the relevant internal departments or third parties (e.g. other public sector body, parish council etc.) responsible for spending the contribution.
- 3.24 The S106 agreement will include a clause detailing how and when any unspent funds will be refunded. Given that a unilateral undertaking, necessarily, does not have the Council as a party, there cannot be any obligations on the Council to return any unspent monies.
- 3.25 All receipts and spending of financial contributions will be recorded and monitored by the Council's Head of Development Management.
- 3.26 Please note that financial contributions payable to Oxfordshire County Council (i.e. those relating to highways and education and relevant administrative and monitoring fees) will be subject to a different process and developers are advised to contact the Oxfordshire County Council Developer Funding Team (developer.funding@oxfordshire.gov.uk) for further information.

Fees

- 3.27 The Council's legal costs of preparing the Planning Obligation will be borne by the developer. These costs will be based on an hourly rate and will depend upon the complexity of the agreement and the length of time taken to settle the draft and proceed to completion. The Council will therefore require developers to provide a 'cost undertaking' to pay for the Council's reasonable fees.
- 3.28 The Council's reasonable legal fees will need to be met even if the planning obligation is not completed.
- 3.29 Standard unilateral undertakings will be subject to an administration charge covering legal costs and if necessary the transfer of money to third parties.

Monitoring and Enforcement

- 3.30 The Council monitors all Planning Obligations and will work with developers to ensure that financial contributions and non-financial obligations are delivered on-time. Monitoring fees may be charged in order to undertake such work, given that S106 Agreements/Unilateral Undertakings are made pursuant not just to section 106 of the Town and Country Planning Act 1990 (as amended) but also to section 111 of the Local Government Act 1972 and section 1 of the Localism Act 2011.

- 3.31 Where there is evidence of non-compliance with a Planning Obligation (such as the non-payment of financial contributions, failure to comply with an obligation, or failure to notify the Council of a due payment or event as required), the Council will seek to recover all reasonable administration costs incurred. This could include, for example, site visits, the recovery of any unpaid monies and/or correspondence.
- 3.32 If it is clear that matters within the planning obligation are not being complied with, the Head of Development Management will instruct the Council's Legal Service to take appropriate action to secure compliance. This could include for example, seeking a court injunction.
- 3.33 Where a formula has been set for the calculation of contribution levels, any cost figures used will be updated regularly to take account of inflation and are the sums required at the time of negotiation.
- 3.34 All payment levels will be subject to an inflation factor (often RPI or CPI) adjusted according to the fluctuations between the date of the obligation and the quarter period in which payment is due to the District Council. The County Council will also adjust payments to it but these might be subject to different measures of inflation.

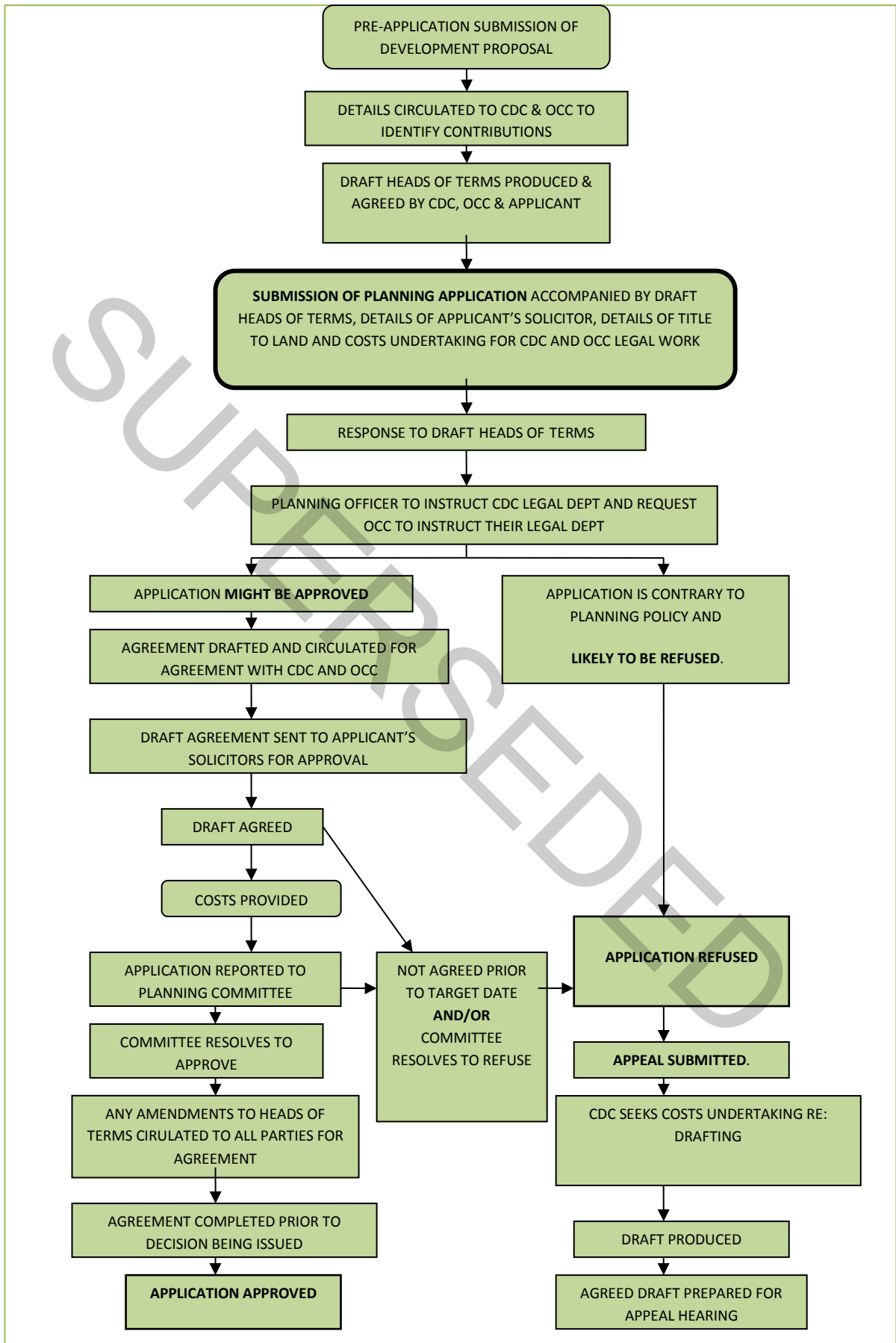
Indexation

- 3.35 Financial contributions are based upon the costs of infrastructure. Financial contributions will therefore be indexed (i.e. index-linked to inflation) to ensure that they retain their original 'real value'. The base date and appropriate index to be applied will be set out in the legal agreement.

Dispute Resolution

- 3.36 Schedule 13 of the Housing and Planning Act 2016 introduced amendments to the Town and Country Planning Act 1990 by the insertion of a new Schedule 9A which will give the Secretary of State the power to appoint someone to resolve issues that are holding up the completion of a planning obligation. Please note that, at the time of publication of this SPD, this provision is not yet in force.
- 3.37 Figure 1 overleaf provides an overview of the Planning Obligation process

Figure 1: Planning Obligation Process



4. SPECIFIC PLANNING OBLIGATION GUIDANCE BY TYPE

4.1. This section gives specific advice for various types of infrastructure commonly required by the Council to support development. However, as stated previously, it does not cover every circumstance and/or obligation that may be needed to make a development acceptable in planning terms. In all cases the LPA will ensure that the infrastructure sought complies with the three tests in CIL Regulation 122.

4.2. Appendix 15 offers a guide to the types of infrastructure to be covered by S106 planning obligations and what will be covered by CIL (or a similar replacement infrastructure levy) if it is introduced by the Council in the future.

Affordable Housing

4.3. Cherwell District has a high level of need for affordable housing. The Council's Housing Strategy 2012-17 recognises the need for affordable homes, and aims to ensure that Cherwell is well-placed to maximise investment by registered providers and to respond to opportunities as they arise.

4.4. The NPPF defines affordable housing as social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market.

4.5. The various types of affordable housing can be described as follows:

Social Rented Housing

4.6. Rented housing owned and managed by local authorities and registered social landlords, for which guideline target rents are determined through the national rent regime. It may also include rented housing owned or managed by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Homes and Communities Agency as a condition of grant.

Affordable Rented Housing

4.7. Rented housing provided by a registered provider of social housing, that has the same characteristics as social rented housing except that it is outside the national rent regime, but is subject to other rent controls that require it to be offered to eligible households at a rent of up to 80% of local market rents.

Intermediate Housing

4.8. Housing at prices and rents above those of social rent, but below market price or rents and which meet the criteria set out above but does not include affordable rented housing. These can include shared equity products or other low cost homes for sale such as;

- Shared Equity
- Shared Ownership
- Discount Sale

Requirements & Thresholds

4.9. Policy BSC 3 of the adopted Cherwell Local Plan Part 1 requires the following provision:

- At Banbury and Bicester all proposed developments that include 11 or more dwellings (gross), will be expected to provide at least 30% of new homes as affordable homes on site.
- At Kidlington and elsewhere, all proposed developments that include 11 or more dwellings (gross), or which would be provided on sites suitable for 11 or more dwellings (gross), will be expected to provide at least 35% of new housing as affordable homes on site.
- Financial contributions in lieu of on – site provision will only be acceptable in exceptional circumstances.
- Where there is a requirement that part of an affordable home should be provided, a financial contribution of equivalent value will be required for that part only. Otherwise, financial contributions in lieu of on-site provision will only be acceptable in exceptional circumstances.

4.10. The adopted Cherwell Local Plan requires all qualifying developments to provide 70% of the affordable housing as affordable/social rented dwellings and 30% as other forms of intermediate housing. Social rented housing will be particularly supported in the form of extra care or other supported housing. It is expected that these requirements will be met without the use of social housing grant or other grant.

4.11. In calculating any affordable housing contribution the Council will apply 'vacant building credit' to qualifying developments. Guidance on qualifying developments will be provided by the Council's Strategic Housing Team.

Housing Mix

4.12. Adopted Local Plan policy BSC4 sets out the Council's housing mix requirements. In general there is a need to provide a mix of housing to reflect the needs of an ageing population, a growth in smaller households and the demand for family housing.

- 4.13. In all qualifying developments the mix of housing will be negotiated having regard to the Council's most recent evidence and evidence from developers on local market conditions.
- 4.14. Extra Care Dwellings will be important in meeting the needs of an older population. They comprises self-contained accommodation for older and disabled people which enables independent living by providing a range of support facilities on the premises and 24 hour care services. Housing sites of at least 400 dwellings will be expected to provide a minimum of 45 self-contained extra care dwellings as part of the overall mix. However, if the Council agrees that extra care housing would not be desirable in a particular location an equivalent amount of alternative specialist housing (use class C3) for older people will be required. All proposals will be expected to provide affordable housing in accordance with policy BSC3.
- 4.15. In some cases the Council may also seek to secure a small number of more specialist housing units which will provide accommodation for those with support needs. These will be sought in areas which are deemed to be appropriate and in discussions with applicants at an early stage.

Affordable Housing Standards

- 4.16. Any registered provider will normally request that 50% of the affordable rented housing required will be built to Building Regulations Requirements M4(2) Category 2: accessible and adaptable dwellings. In addition, 1% of the affordable housing should be built to Building Regulation Requirement M4(2) Category 3: Wheelchair User Dwelling. This requirement will be assessed on a site by site basis in discussion with the developer.
- 4.17. It is expected that all affordable housing provided under a rented tenure will be built to the nationally described space standards. Intermediate housing which is deemed to be low cost home ownership should be built to the same or better space standards including garden sizes as the equivalent market housing on the site.
- 4.18. It is expected that where appropriate affordable housing should not be clustered in any more than 10 units of one tenure and 15 units of multiple affordable tenures with no contiguous boundary of the clusters. This is expected in the first instance and schemes should be developed with this in mind. However the Council will be flexible and pragmatic on this clustering approach when considering certain site constraints or scheme densities.

Viability

- 4.19. The Council will seek the provision of affordable housing on all qualifying developments in accordance with Policy BSC 3. However, if developers consider that the Council's policy requirements on affordable housing give rise to development viability issues they will need to fully justify their reasons. A detail of how the Council will assess viability issues is set out in Section 3 above.

Commuted Sum Calculations

- 4.20. Local Plan policy BSC3 states that only in exceptional circumstances will the Council accept commuted sums in lieu of on-site provision.
- 4.21. In the event that the Council accepts a commuted sum in lieu of on-site provision it will be calculated on the basis of the mix of tenures and sizes that the Council considers would have been appropriate for the site. The sum should be of a 'broadly equivalent value' of the developer/landowner contribution if the affordable housing was provided on site. The commuted payment will be based on a sum equal to the difference between an Open market Value (OMV) and Affordable Housing Value (AHV).
- 4.22. Calculations are made as follows:
Residual value with 100% market housing minus residual value with the affordable housing requirement based on current policy = equivalent commuted sum.

Cherwell Local Plan 2011-2031: Partial Review – Oxford's Unmet Housing Need

- 4.23. In July 2017 the Council published its Proposed Submission Partial Review Plan. This is a focused Plan to provide Cherwell's share of the unmet housing needs of Oxford to 2031. It identifies a number of development sites with specific affordable housing requirements. Supported by a viability assessment the emerging policies in the Plan seek to meet Oxford City's requirements for 50% of its housing to be provided as affordable homes.
- 4.24. Oxford's Local Plan, its Housing Strategy and the Oxfordshire Housing Market Assessment (2014) describe the city's housing needs in detail. As Oxford's affordable housing need is so high the emerging Partial Review prescribes the mix of housing sizes needed for the defined 'affordable' element of the new housing supply. It also requires a higher level of affordable rent/social rented accommodation (80% of the total affordable housing requirement) than Cherwell's 70% requirement.

- 4.25. The affordable housing standards required by the policies in the Partial Review will be applied to section 106 negotiations once they have been adopted.

Further Advice

- 4.26. Detailed advice on the provision of affordable housing is available by contacting the Council's Strategic Housing Team.

Air Quality

- 4.27. Promoting sustainable development is a key focus of the adopted Cherwell Local Plan. The need to consider the effects of development on air quality, and how they can contribute towards improvements, is identified as a key challenge to ensuring sustainable development. Commuters in Cherwell travel relatively long distances and reducing travel by car and managing traffic congestion is a major challenge. Maximising the opportunity to shift from dependency on cars to sustainable modes of transport is also identified.
- 4.28. Policy SLE 4 includes a requirement for new developments to provide financial and/or in-kind contributions to mitigate the transport impacts of development. All development where reasonable to do so, should facilitate the use of sustainable modes of transport to make the fullest possible use of public transport, walking and cycling. Encouragement will be given to solutions which support reductions in greenhouse gas emissions and reduce congestion.
- 4.29. In March 2017 the Council approved an Air Quality Action Plan (AQAP) as part of its statutory duties required by the Local Air Quality framework. It outlines the actions to be taken to improve air quality in the District between 2017 and 2020.
- 4.30. There are four Air Quality Management Areas (AQMAs) in the District where air quality does not meet national air quality objectives for nitrogen dioxide. These concentrations are largely related to road traffic emissions.

Requirements and Thresholds

- 4.31. All new development within or immediately adjacent to Local AQMAs may be subject to section 106 agreements which require the implementation of measures to offset increases in local pollutant emissions, and /or make an appropriate financial contribution towards improvement measures or air quality monitoring.

- 4.32. The following mitigation measures may be required
- Measures during the construction of new development including dust control, site monitoring and plant emissions;
 - Improved access to public transport;
 - The provision of on and off site facilities for cycling and walking;
 - The management of car parking;
 - Traffic management;
 - Road infrastructure;
 - Green Travel Plans;
 - Monitoring of air pollution.
- 4.33. Financial contributions may also be appropriate for cumulative developments, particularly where further study is required to assess potential cumulative air quality impacts arising from a number of developments in close vicinity.
- 4.34. The Council will calculate the contribution sought based on the scale of the development and the trip generation for different uses.
- 4.35. The list of the current Local AQMAs and the actions required are set out in the Council's Air Quality Action Plan which can be viewed on its website.

Apprenticeships and Skills

- 4.36. Securing the economic future of the District is the main priority of the adopted Cherwell Local Plan Part 1. The main focus of the Plan is strengthening the local economy, job creation, inward investment and company growth, as well as building cohesive communities. In particular, the Plan notes that as relatively large numbers of people in Cherwell are without qualifications and basic skills the level of education and training needs to improve. The Plan contains five strategic objectives for developing a sustainable economy. Strategic Objective 3 (SO3) aims, amongst other things, to support an increase in skills and innovation. Furthermore, paragraph B14 states that the Council will support proposals to strengthen the skills base of the local economy which will include the promotion of local training providers.
- 4.37. The need to increase the number of apprenticeships locally is picked up by both the Oxfordshire Local Economic Partnership (OxLEP) and the South East Midlands Economic Partnership (SEMLEP). OxLEP's Strategic Economic Plan 2016 is committed to delivering 1150 more apprenticeships to 2020 within Oxfordshire. The SEMLEP Strategic Economic Plan 2015-2020 is seeking just over 94,000 apprenticeship starts within the SEMLEP area. Of these, it is anticipating that 7017 will be created within the

Cherwell District. It notes in particular that there is a shortage of skills and an aging workforce in the construction sector across the SEMLEP area and that there are significant opportunities for jobs growth in these sectors.

- 4.38. The Council approved an Interim Position Statement on Planning Obligations for Construction Apprenticeships and Skills in April 2016. This document provides detailed advice and guidance on the Council's approach to securing construction apprenticeships and skills through the planning system. For ease of reference this document is reproduced at Appendix 13.
- 4.39. It states that the Council will seek the provision of a stated target number of new construction apprenticeships (or apprenticeship starts) as part of a required Employment, Skills and Training Plan (ESTP) for each proposal for new development. The ESTP will be secured by S106 agreement.
- 4.40. A second key area of employment, skills and training for which S106 agreements will be sought is the 'end user phase' of large commercial development. S106 agreements will be used by the Council to support/provide the training and skills needed by local people to access the new job opportunities created by the development's end user. The ESTP, referred to above, will therefore also be required to address this end user phase.
- 4.41. Appendix 13 sets out the type of development and the thresholds on development that will trigger this requirement. However, if proposed developments fall below these thresholds and developers still wish to provide new construction apprenticeships, the Council will support them in doing so.

Cemeteries

- 4.42. The adopted Cherwell Local Plan Part 1 highlights a key community challenge for both Banbury and Bicester as being the need to provide additional burial site provision. Policy Bicester 9 and Policy Banbury 13 both make provision for additional burial site provision in their respective settlements. Both policies also state that developer contributions will be sought from new developments in the towns towards the establishment of such a facility.
- 4.43. In terms of need, the Local Plan Inspector appointed to examine the submission Cherwell Local Plan observed in relation to Policy Banbury 13, that: *'This policy confirms the local requirement for new burial site provision in Banbury with contributions from major new housing schemes to provide funding to facilitate an extension to the existing cemetery, subject to suitable ground conditions being*

demonstrated. The evidence of need is unquestioned and therefore the policy is soundly based and requires no modification.'

- 4.44. In relation to Policy Bicester 9 the Inspector stated *'This policy confirms the urgent local requirement for a new burial site of around 4has in Bicester. It is consistent with the current expectation that it can be provided as part of the Policy BIC 1 scheme, with funding contributions from other housing developments in the locality to help secure delivery. The evidence of need is clear and unquestioned and therefore policy is soundly based and requires no modifications.'*
- 4.45. At Bicester it is anticipated that a site will be provided within the North West Bicester development area (Policy Bicester 1). At Banbury an extension to the north of the existing cemetery at Southam Road was granted planning permission in 2015 (planning application reference 15/01194/F).
- 4.46. Requirements for additional cemetery space will also be identified in the emerging Partial Review of the adopted Cherwell Local Plan, and the Cherwell Local Plan Part 2.

Thresholds and Contributions

- 4.47. All major new residential developments will be expected to contribute to the provision of new, or the expansion of existing, cemeteries and their maintenance where the need generated by the development cannot be met by existing provision and a scheme has been identified to meet that need.
- 4.48. At Banbury and Bicester the Town Councils in association with the District Council are pursuing schemes for new /extended provision. Specific costs will therefore be available for individual schemes.
- 4.49. Financial contributions will be sought for land acquisition and maintenance on a site by site basis where there is an identified need and the contributions sought will be dependent upon site circumstances (eg ground conditions) and commensurate to the need generated by the development.
- 4.50. In those limited cases where a development is of a scale that necessitates a new cemetery, developers will need to carry out consultation with the local population, and consider national guidance and best practice prior to design and implementation of cemeteries.
- 4.51. The methodology to be used in the calculation of contributions is as follows:

- a) Number of burial plots required to 2031 divided by the average number of plots per hectare = area of land required.
- b) Cost (including land purchase cost (unless land given free of charge), drainage, paths, fencing and storage facilities) of cemetery provision multiplied by % attributable to population growth.
- c) Divided by population growth = cost per person
- d) Multiplied by the average occupancy per dwelling type (2.49) = per dwelling cost (1 bed, 2 bed, 3 bed, 4+ bed)

Community Hall Facilities

- 4.52. Policy BSC 12 of the adopted Cherwell Local Plan sets out the Council's overall approach to the provision of new or extended community hall facilities.
- 4.53. In 2016/2017 the Council commissioned a 'Cherwell Community Spaces and Development Study (CCSDS) to provide evidence and policy proposals to inform community development and community indoor space provision in relation to new housing developments. An interim CCSDS was published in January 2016 and the study was completed in 2017.
- 4.54. The CCSDS Study recommends a local minimum standard of provision for community hall facilities required to meet the needs of the residents generated by new development. This minimum standard is 0.185m² per person.

Thresholds and Contributions

- 4.55. The local planning authority will expect all major residential developments to contribute towards the provision of new community facilities or the improvement/expansion of existing facilities where there is not enough spare capacity in existing appropriate facilities to meet the needs generated by the development. This may include financial contributions and/or the provision of land and buildings to enable new community facilities to be provided, or for existing facilities to be extended or improved.
- 4.56. Where on site provision is required, the LPA will expect the developer to design and gain the necessary planning consents to a specification agreed by the LPA. The developer will then be expected to build the facility in accordance with the approved scheme. A commuted sum for the future maintenance of the facility will also be sought.

- 4.57. The threshold for provision of community facilities on site is normally a population that supports a minimum community facility of 345m² to include a main hall, kitchen, toilets and adequate storage. Where new development is taking place that demands a larger space then the opportunity should be taken to provide a range of spaces for a wider range of activities.
- 4.58. The Council's accessibility standard is 800m walking distance for facilities in urban areas, and a 15 minute drive time for residents in rural areas. On-site provision may therefore be sought for smaller developments depending upon the proximity of existing community centres. The size of the on-site provision will be commensurate with the scale of the development. This will be assessed on a case by case basis.
- 4.59. Where new development gives rise to a need for additional indoor community provision (but not a new freestanding facility) financial contributions will be sought for either off-site provision or the improvement/upgrading of existing facilities where appropriate schemes have been identified. Those needs will be assessed on a pro-rata basis using the standards set out in Appendix 11
- 4.60. The appropriate contribution is calculated by reference to the expected population in the development and the facilities required to support the population, multiplied by a standardised cost for the provision of the facility. Where contributions are sought for the expansion or improvement of existing facilities then the costs applying to the proposed improvements will apply.

Community Development

- 4.61. Community development is a key objective of the adopted Cherwell Local Plan. Strategic Objective SO10 seeks to provide sufficient accessible, good quality services, facilities and infrastructure, to meet health, education, transport, open space, sport, recreation, cultural, social and other community needs, reducing social exclusion and poverty, addressing inequalities in health, and maximising well-being.
- 4.62. Strategic Objective SO14 seeks to create more sustainable communities by providing high quality, locally distinctive and well-designed environments which increase the attractiveness of Cherwell's towns and villages as places to live and work and which contribute to the well-being of residents.
- 4.63. These objectives are further supported by the statement in paragraph B.86 that the Council wishes to ensure that new development fully integrates with existing settlements to forge one community, rather than separate communities.

- 4.64. Evidence gathered in preparing the 2017 Cherwell Community Spaces Development Study (CCSDS) strongly endorses the value of having a community development worker available at an early stage in a new development to 'kick start' the process of bringing people together, developing new activities and putting in place the building blocks of a strong community.
- 4.65. The Council will therefore seek financial contributions towards the provision of community development workers for major residential developments.

Thresholds

- 4.66. The threshold for contributions will generally be where a new community building is required to meet the needs of the new development, where the development is likely to give rise to a large new community, or where there may be issues of integration with existing communities.
- 4.67. Contributions will therefore not be sought from developments of less than 100 new dwellings.

Contributions

- 4.68. Contributions will be sought on a case by case basis to fund support from a community development worker. The levels of contributions sought are set out in Appendix 12
- 4.69. In addition to contributions towards a staffing resource, contributions will be sought towards a community development fund.

Community Safety & Policing

- 4.70. The supporting text to the adopted Cherwell Local Plan Part 1 states that the Council will ensure that new developments, area renewal and town centre expansions are safe places to live, work and visit by using tools such as 'secured by design' and by requiring provision of appropriate community safety and police infrastructure where required.
- 4.71. Thames Valley Police (TVP) is the police force that covers the Cherwell area. TVP operate a police model based upon the creation of Local Police Areas (LPAs). At present the Cherwell Local Police Area has a population of approximately 141,900 made up of 56,700 households (source: 2011 Census). This population generates an annual total of circa 32,500 incidents that require Police action. These are not

necessarily all 'crimes' but are calls to the 999 handling centre which require a police response.

4.72. TVP have advised that the anticipated planned growth in the District will place a significant extra demand on existing resources. The Council will therefore require all major residential and commercial developments, where required and where appropriate, to contribute towards the delivery of the following items of infrastructure to serve new developments and mitigate against their impact upon existing policing resources.

- Staff Set Up Costs – the cost of equipping and setting up new officers required to police new communities and neighbourhoods (not salary).
- Provision of New Vehicles and Bikes – the purchase of new fleet vehicles and bicycles.
- Premises – contributions towards the adaption/alterations or extension of existing premises for new officers to base themselves or work out of.
- Mobile IT – provision of suitable kit and equipment to enhance the mobility and flexibility of officers when working.
- Radio Capacity – additional demand will lead to an additional impact upon existing capacity of infrastructure.
- ANPR Cameras – Automatic Number Plate Recognition Cameras aid in detection but also prevent crime. Funding for the strategic placement of these cameras either in or close to new housing development will be sought where appropriate.
- Control Room and PND Capacity – At present police control room handling is at capacity at peak times. Contributions towards improving the capacity of the existing infrastructure may be required.

4.73. Requirements and contributions will be assessed on a site by site basis when a specific need or item of infrastructure that is directly related to the development is identified.

4.74. The costs relating to the proposed infrastructure items or area-based initiatives will be applied proportionately to the size or the potential occupancy of the development.

4.75. Further advice on the level of contributions sought for community safety/CCTV provision by development type can be found in Appendix 14.

Education

(Including primary, secondary, pre-school, further education and special needs education)

- 4.76. The NPPF (para' 72) states that the Government attaches great importance to ensuring that a sufficient choice of school places is available to meet the needs of existing and new communities. This approach is further developed in the adopted Cherwell Local Plan Part 1 (Policy BSC 7) which seeks the provision of educational facilities throughout the District to accommodate population growth.
- 4.77. Oxfordshire County Council (OCC) has a statutory responsibility to ensure there are sufficient school and childcare places available for local children and young people living within the county of school age and whose parents wish their children to be educated by the state. It is important that these places are available within a reasonable travel distance for all those of school age occupying new residential development. The County Council produces an annual Pupil Place Plan² which sets out how school provision is expected to change over the next few years including anticipated requirements for new schools and school extensions linked to planned housing growth.

Planning Obligation Requirements

- 4.78. The LPA will expect all residential developments to contribute towards the provision of education infrastructure where there is not enough spare capacity in existing appropriate schools to meet the needs generated by the development. This may include financial contributions and/or the provision of land and buildings to enable new schools to be provided or for existing schools to be extended. A list of planned projects is set out in the Council's IDP which is updated on a yearly basis.
- 4.79. Developments which are of such a scale as to require the provision of a new school will be expected to fully fund the smallest feasible scale of school which would be sufficient to accommodate the projected pupil generation. Where a new school is serving the needs of multiple developments, the cost of the school will be shared proportionately across the relevant developments, subject to the constraints of the CIL regulations.
- 4.80. In some cases the most appropriate scale of new school may be less than the projected pupil generation, in which case the development may also be required to fund expansion of existing schools, where this is necessary.

² Oxfordshire Pupil Place plan 2016-2020

- 4.81. Subject to approval by the Council and Oxfordshire County Council the direct delivery of schools by developers may also be considered acceptable.
- 4.82. Decisions as to whether or not there is sufficient spare capacity in a school are made with reference to current and forecast numbers on the roll and school capacity. Empty places at a school do not necessarily equate to there being excess capacity at that school. Any assessment of adequate and appropriate capacity will not normally include temporary accommodation.
- 4.83. In circumstances where it is not possible to provide school places within a reasonable walking distance an additional contribution towards the cost of providing transport for children to school may be required. The contribution will reflect the cost of providing the transport for a defined period of time.
- 4.84. This requirement will apply to all urban and rural residential developments which are likely to generate demand for school places. Contributions will not be sought towards educational infrastructure from developments of studio or one bed dwellings, institutional accommodation exclusively for undergraduate students or from sheltered/elderly housing and other specialist housing developments where children will not live.
- 4.85. Further advice on the method of calculations and the expected costs are set out in Appendix 2 and Appendix 3 respectively.

Flood Risk

- 4.86. There are extensive areas in the District that have been identified as being at risk of flooding. Flood risk arises from rivers, canals, sewers, surface water and ground water.
- 4.87. Policies ESD 6 and ESD 7 of the adopted Cherwell Local Plan seek to manage and reduce flood risk by using a sequential approach to development. Developers will therefore need to demonstrate that account has been taken of flood risk from all sources, and that the proposed development incorporates mitigation and management measures appropriate to the use and location. The Council also requires developers to improve water efficiency and reduce surface water run-off through the use of a range of Sustainable Drainage Systems (SUDs).
- 4.88. Flood defence measures that are deemed necessary to a development to mitigate specific impacts of that development, (including SUDs) will normally be sought through a planning condition. However, in certain circumstances a section 106 agreement may be required.

Health & Wellbeing

- 4.89. Policy BSC 8 of the adopted Cherwell Local Plan Part 1 sets out the Council's approach to securing health and well-being throughout the District. In addition, the Bicester Healthy New Town Programme aims to enable people who live or work in Bicester to live healthier lives and to prevent ill health in the future.
- 4.90. Improving public health, safety and individual wellbeing is also an overarching transport goal of Oxfordshire County Council's LTP4. This will be achieved by increasing levels of walking and cycling, reducing transport emissions, reducing casualties, and enabling inclusive access to jobs, education, training and services.
- 4.91. New residential development will be expected to contribute towards the provision of additional health care infrastructure generated by its population growth where there is insufficient existing capacity, well located to serve the development. This may include financial contributions and/or the provision of land and buildings to enable the provision of doctor's surgeries and other health facilities to serve the local population, or the upgrading or extension of existing facilities in some locations.
- 4.92. An on-site new facility would not normally be required unless a need is generated by a patient population of 8,000 or more and only then if other nearby practices lack the capacity to expand. On smaller residential sites and where the new development increases demand on existing facilities, the need for new provision is likely to be replaced by extending existing facilities.

Contributions

- 4.93. The LPA will seek a financial contribution towards the improvement and/or extension of existing facilities where appropriate schemes are identified on a site by site basis.
- 4.94. Guidance has been developed on the appropriate sizes for general medical services accommodation. These sizes are based on the number of GPs expected to practice from the premises and therefore, using the average list sizes per GP for Oxfordshire, the number of new patients provided for can be calculated.
- 4.95. Using this information and known development costs it is possible to estimate the cost of provision of the additional floorspace made necessary by new development. The additional floorspace required at an existing surgery per additional GP is approximately 118m².
- 4.96. The calculation of the cost per patient is as follows:

Floorspace per GP X Cost of floorspace per m² = Cost of GP
Cost of GP/GP average list size = Cost per patient

- 4.97. As primary care practices are run as independent businesses an appropriate mechanism is needed to ensure that any facilities paid by developer contributions remain in community use for at least 15 years. As such any funds secured towards the provision of extensions/improvements or new facilities will be the subject of an agreement with the individual practices.
- 4.98. Any practice that benefits in this manner will be required to repay the funds if the practice does not continue for 15 years after the facilities have been provided.

Indoor Sport and Recreation

- 4.99. Policy BSC12 of the adopted Cherwell Local Plan Part 1 sets out the Council's overall approach to provision and enhancement of indoor sport and recreation.
- 4.100. The Council's PPG17 Indoor Sports and Recreational Facilities Assessment 2006 identified the current and future deficiencies in provision and contain recommendations as to how these deficiencies can be met.
- 4.101. The Council is currently undertaking a review of the District's indoor sport and recreation provision. If this additional analysis work results in amendments to the Council's standards, they will be updated in the Cherwell Local Plan Part 2. Once in place, Local Plan Part 2 standards will replace Appendix 9.
- 4.102. The PPG17 Assessment recommended local minimum standards of provision and these are set out in Appendix 9.
- 4.103. New development that generates a need for sport and recreation facilities that cannot be met by existing provision will be expected to contribute towards the provision of new facilities or the improvement/expansion of existing facilities.
- 4.104. Where on site provision is required, the LPA will expect the developer to design and gain the necessary planning consents to a specification, in accordance with Sport England requirements, and agreed by the LPA. The developer will then be expected to build the facility in accordance with the approved scheme. A commuted sum for the future maintenance of the facility will also be sought in the event that the facility is transferred to the Council.

Thresholds

- 4.105. The threshold for provision of indoor sport and recreation facilities on-site is a population that supports a 4 court facility or 683m² of floor space. i.e. 12648 people or 5080 dwellings if the average occupancy is 2.49 per dwelling. (based on the adopted standard of 0.315 badminton courts per 1000 population)

Contributions

- 4.106. If on-site provision is not possible, or appropriate, or where the development falls below the threshold, financial contributions will be sought for either off-site provision or the improvement/upgrading of existing facilities where appropriate schemes have been identified.
- 4.107. Costs relating to the proposed improvements will be proportionate to the size or potential occupancy of the development. The levels of contributions will be reduced where the developer makes appropriate provision on-site of particular services or facilities.
- 4.108. The appropriate contribution is calculated by reference to the expected population in the development and the facilities required to support the population, multiplied by a standardised cost for the provision of the facility. Where contributions are sought for the expansion or improvement of existing facilities then the costs applying to the proposed improvements will apply.
- 4.109. Further detailed advice can be found in Appendix 9.

Nature Conservation & Biodiversity

- 4.110. Policies ESD10 and ESD11 of the adopted Cherwell Local Plan Part 1 sets out the Council's approach to the protection and enhancement of biodiversity and the natural environment, including Conservation Target Areas.
- 4.111. Relevant habitat and species surveys and their associated reports will be required to measure the biodiversity impact following the locally adopted Defra Offsetting Metrics and submitted to accompany planning applications which may affect a site of known, or potential, biodiversity value or the biodiversity/natural environment of the local area.
- 4.112. In addition to identifying biodiversity impacts, biodiversity surveys and reports should identify opportunities to deliver biodiversity enhancements.

- 4.113. Detailed advice for preparing a biodiversity survey can be found in Oxfordshire County Council's guidance entitled 'Biodiversity and Planning in Oxfordshire' which is available on its website.
- 4.114. Where mitigation for the ecological impacts of a development can be achieved on-site, the LPA would normally secure this through a planning condition. Arrangements for the long term management and maintenance of this mitigation will normally be secured by a S106 agreement. In certain circumstances the LPA may seek a Local Ecological Management Plan, or equivalent, through a planning condition.
- 4.115. Thames Valley Environmental Records Centre has identified ten Conservation Target Areas (CTAs) in the District. They have been identified to focus work to restore biodiversity at a landscape scale through the maintenance, restoration and creation of UK Biodiversity Action Plan (BAP) priority habitats.
- 4.116. General targets for maintenance, restoration and creation of habitats have been set for each area. These will be achieved through a combination of biodiversity project work undertaken by a range of organisations, agri-environment schemes and biodiversity enhancements secured in association with development. These targets are in the process of being made more specific in terms of the amount of each habitat type to be secured within each CTA.
- 4.117. Where on-site mitigation or compensation cannot be achieved contributions may be sought towards a scheme that closely offsets the impact of the development, and which also meets the aims of the Council's BAP.
- 4.118. The Council will generally seek to fund biodiversity enhancements via a section 106 agreement. This is based on the Council's position that biodiversity offsets should not be classified as infrastructure³ because they do not enable the development to function, nor do they provide any facility to those living within or using the new development. This means that the pooling of more than 5 contributions towards one project or plan is possible.

Open Space, Play Facilities, Outdoor Sport & Recreation

- 4.119. Proposals for new development will be expected to contribute to open space, sport and recreation provision in accordance with Policies BSC10, BSC11 and BSC12 of the adopted Cherwell Local Plan Part 1.

³ Defra communication to Warwickshire County Council (02/11/2015)

- 4.120. The evidence base for these policies is the District's PPG17 Open Space, Sport and Recreational Facilities Needs Assessment, Audit and Strategy 2006, the subsequent Green Spaces and Playing Pitch Strategies 2008 and the Open Space Update 2011. The Council has now commissioned studies to update this information. Should these studies result in amendments to the open space standards, these standards will be updated in the Cherwell Local Plan Part 2.

Local Standards and Thresholds

- 4.121. The Council's strategies referred to above establish the current and future deficiencies in open space, sport and recreation provision together with recommendations as to how these deficiencies should be met. The Strategies recommend local minimum standards of provision and these are embodied in the adopted Cherwell Local Plan Part 1. They are set out in Appendix 4 for ease of reference. The Local Plan also includes qualitative standards of provision.
- 4.122. Obligations will only be sought in cases where the proposed development will result in a net increase in demand for recreational facilities. If the development is for a purpose which is unlikely to generate demand then no contribution will be sought. The LPA may, however, seek contributions from applicants for commercial development as working population increases as a result of commercial development can add to demand for facilities. People travelling in to the District for work will often use facilities close to their place of work.
- 4.123. On-site provision will be sought, in the first instance, in accordance with the minimum standards set out in Appendix 4. Detailed guidance on the Council's specification and design requirements for different types of open space/facility can be requested from the Council's Street Scene and Landscape Services Section. Agreement will be sought with the relevant town or parish council on the equipment to be purchased.
- 4.124. If the proposed development results in an increase in demand for recreational facilities, and the developer is unable to provide open space as part of the development, and there are identified shortfalls in the area, the LPA will seek a financial contribution towards off-site provision. This may include contributions to the improvement/enhancement of existing areas/facilities where appropriate schemes have been identified.
- 4.125. A list of deficiencies in open space, sport and recreation and priorities by Ward is set out in the Council's PPG17 Assessment – Open Space, Sport and Recreational Facilities Needs Assessment Audit and Strategy 2006, the subsequent Green Spaces and Playing Pitch Strategies 2008, and the Open Space Update 2011. Updated information will be published by the Council as it becomes available.

- 4.126. Commuted sums for maintenance of the open space or play facility will also be sought. This sum will be based on the LPA's actual maintenance costs, to cover the future maintenance of open space, sport, and recreation and play facilities, together with a sum to cover management costs for a 15 year period. A multiplier is used to account for the costs which will vary over the 15 year period and the 'discount effect' of a lump sum up front. In some instances a capital sum contribution for the build out of provision may be deemed necessary. The Council's 2016/2017 commuted sum requirements are set out in Appendix 6. These are subject to annual updates. Further detailed information and specifications can be accessed by contacting the Council's Street Scene and Landscape Services Section.

Local Management Organisations for Open Space Management

- 4.127. It is the Council's strong preference that public open space, outdoor sports pitches and play areas on new developments continue to be adopted by the Council in agreement with the relevant town or parish council with a commuted sum. The Council will only consider a local management organisation proposed by a developer if it meets the list of conditions set out in Appendix 8 and has the agreement of the relevant town or parish council.

Public Realm and Public Art

- 4.128. The public realm and public art can play an important role in enhancing the character of an area, enriching the environment and improving the overall quality of space. Public realm relates to all those parts of the built environment, either publicly or privately owned, located between and within buildings that are publicly accessible such as all streets, squares, and other rights of way as well as open spaces and parks, watercourses and canals. High quality design and good management of the public realm is essential in creating successful and vibrant places and help to integrate new development in to the surrounding area. It can help to establish an identity for an area making it memorable and providing useful landmarks, particularly if it draws inspiration from local themes or associations.
- 4.129. One of the core principles of the NPPF is to take account of and support local strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs. It states that it is important to plan positively for the achievement of high quality and inclusive design for all development, including individual buildings, public and private spaces and wider area development schemes. It also advocates planning policies and decisions aimed at achieving places which promote, inter alia, safe and accessible developments,

containing clear and legible pedestrian routes, and high quality public space, which encourages the active and continual use of public areas.

- 4.130. The Government's Planning Practice Guidance (PPG) (para 018) states that 'Public art and sculpture can play an important role in making interesting and exciting places that people enjoy using'.
- 4.131. Policy ESD 15 of the adopted Local Plan states that the conservation of the historic environment and securing high quality urban design are very important in protecting and enhancing the character of the District and ensuring that Cherwell is an attractive place to live and work.
- 4.132. Other adopted policies seek to support the District's town centres and to maintaining their vitality and viability and their associated infrastructure to create vibrant retail environments. In particular Policy Bicester 5 seeks to strengthen Bicester Town Centre. Similarly Policy Banbury 7 and Policy Kidlington 2 set out similar aims for Banbury and Kidlington respectively.
- 4.133. The adopted Banbury Masterplan SPD establishes a strategic vision for Banbury with a strong economy and vibrant and attractive town centre. It identifies areas for public realm, street, junction, environmental and public art improvements.
- 4.134. The adopted Kidlington Masterplan SPD establishes a strategic vision for the village in line with the adopted Local Plan. Key themes explored include opportunities to improve the public realm within the village centre, improvements to Oxford Road and the village gateways. Work is progressing on the Bicester Masterplan with one of its aims being to improve the character and appearance of the centre of Bicester and the public realm.

Contributions

- 4.135. Contributions will be sought towards the creation and/or enhancement of the public realm in the vicinity of new development where the proposed development will have a direct relationship with a public realm improvement scheme identified in the Council's IDP.
- 4.136. The level of financial contributions will reflect the character and scope of the works required and will be negotiated on a case-by case basis.
- 4.137. Financial contributions will be sought for public realm and public art projects listed in the Council's IDP which is updated on an annual basis.

Transport & Access

- 4.138. Oxfordshire County Council is the local highway authority and is responsible for the management and maintenance of the adopted highway network within the District.
- 4.139. The County Council is also the local transport authority. It produces the Oxfordshire Local Transport Plan and has various responsibilities for public transport. It is also the traffic authority responsible for traffic management and road safety. It has further responsibilities in relation to school transport and public rights of way.
- 4.140. The Oxfordshire Local Transport Plan provides the strategic framework for transport in the County. It sets out likely transport infrastructure requirements and priorities for Cherwell aimed at tackling congestion, promoting sustainable travel, safer roads, improving public health and wellbeing, and improving the street environment. Specific schemes and projects are set out in the Council's Infrastructure Delivery Plan and the Oxfordshire Infrastructure Strategy.
- 4.141. The Council's strategy, as set out in the adopted local plan, for managing growth is to locate development in sustainable locations and identify appropriate and deliverable measures to meet the transport needs of the District.

Planning Obligation Requirements

- 4.142. All new developments in the District will be required to provide financial and/or in-kind contributions to mitigate the transport impacts of the development. This will support delivery of the infrastructure and services needed to facilitate travel by sustainable modes. It will also enable improvements to be made to the local and strategic road and rail networks.
- 4.143. Where there is likely to be a transport impact the LPA will require the submission of a Transport Assessment. The type and level of any contributions towards transport infrastructure provision will be considered in the Transport Assessment and negotiated with the Highway Authority.
- 4.144. Detailed technical pre-application discussions with Oxfordshire County Council on the transport assessment are essential for major developments.
- 4.145. Direct infrastructure provision, financial and other contributions (including those for bus services) towards mitigating measures will be included in a planning obligation. The implementation of any physical changes to the highway network required to accommodate, or mitigate, the effects of a proposal will be managed through a

highways agreement with the Highway Authority. For major schemes it will be necessary to define the highways agreements at the time planning permission is granted. In such cases the highways agreement will be referred to in, and linked to, the planning agreement. This will ensure certainty and transparency of implementation requirements and costs for all parties.

- 4.146. In addition to local transport mitigation, S106 contributions will be required for strategic transport schemes (identified in the IDP) related to cumulative growth using the following formula (subject to the constraints of planning legislation):

X = Cost of Scheme(s)

Y = Held/Committed funding

Z = Local Growth Funding/Alternative Funding

E = Expected Growth

$$\text{S106 Contribution} = (X - Y - Z) \div E$$

- 4.147. As denoted by 'E', where a scheme (to which a strategic transport contribution is requested) serves the needs of multiple developments, the cost of the scheme will be shared proportionately across the relevant developments.
- 4.148. The LPA may also require the preparation, agreement and implementation of a Travel Plan to mitigate the impact of the development on the transport system and environment. This will be a standard requirement for major developments and, depending on the nature of the development, the Plan may be secured by either a condition or planning obligation. Travel Plans for major development will normally include targets for modes of travel to and from the site and monitoring arrangements. There will be a need for financial commitments and incentives and/or penalties for non-compliance.

Waste

Waste Collection Containers and Recycling Banks

- 4.149. The Council is committed to a strategy of minimising domestic waste sent for disposal through the development of recycling services and the reduction and reuse of materials. The Council will seek contributions for the provision of sorting facilities to deal with domestic waste at source. Each new dwelling will be provided with appropriate containers and the collected materials will be taken away to a recycling centre.

- 4.150. The Council's current waste collection service is currently working at full capacity therefore future new development will need capital investment to ensure the service to the customer meets all the requirements set out below.
- 4.151. Building Regulations 2000 (as amended by SI 2001/3335) H6 sets out the following planning requirement:
- Adequate provision shall be made for the storage of solid waste.
 - Adequate means of access shall be provided;
 - For people in the building to the place of storage and from the place of storage to the collection point.

Policy Framework

- 4.152. The NPPF paragraph 7 notes that planning has an environmental role, including the need to minimise waste and pollution and mitigate and adapt to climate change including moving to a low carbon economy.
- 4.153. The Cherwell Low Carbon Environmental Strategy, published in December 2011, seeks to deliver the objectives of the Cherwell Community Plan through the protection and enhancement of the local environment in terms of Waste minimisation, reuse and recycling.
- 4.154. Every residential dwelling requires (2017 prices):
- 1 X blue wheeled bin for the collection of dry recyclable material (£20) at the current size of 240 litre
 - 1 X green wheeled bin for collection of residual waste (£20) at the current size of 180 litre
 - 1 X brown wheeled bin for the collection of garden and food waste material (£20) at the current size of 240 litre
 - 1 X brown kitchen caddy for the collection of food waste (£4) and transferral into the brown garden and food waste bin
 - Capital investment in waste collection vehicles to service the new development (£42).
- 4.155. Where blocks of flats are proposed, waste collection should be through the use of communal collection containers or through provision of individual bins held in a communal location.
- 4.156. Communal bins stores should not be provided for groups of houses unless they are serviced by a private road. Communal bins should be housed in a covered storage area and the following issues should be taken into account: -

- Bin stores should be built to a specification that ensures they do not detract from the visual aspects of the local environment.
- Stores should be no more than 5 metres from the kerbside or point where the vehicle would stop (vehicle access has to be proven rather than assumed)
- To provide sufficient space for residents to deposit their waste, a minimum of 1m must be provided in front of the containers
- Where more than one bin is to be placed in a storage area, the bins must be positioned so that they can be easily accessed without users having to move other bins. In short they must not be ranked or more than one deep
- A door or gate of a minimum opening of 1600mm should also be provided. Smaller doors for residents use can be provided in addition to this requirement
- Doors should open outwards, but not over the public highway or parking spaces
- A path leading from the kerbside to the bin store should be provided, with a minimum width of 1.5m. The path should be level or a gentle slope and should not contain steps
- Stores should not be behind gates or security barriers that would prevent them being emptied
- The structure must be robust enough to withstand everyday use
- Stores should not be behind designated parking bays or require the movement of containers past or through legally parked cars
- Communal bin compounds should be far enough away from housing units so as to reduce the impact of noise during bin use and collection but sufficiently close for easy use. Eliminating the need for collection vehicles to reverse will also assist in keeping noise to a minimum
- Dropped kerbs should be provided.

4.157 Bin storage areas should be a minimum 1.8 square metres per dwelling for houses/bungalows and 1.4 square metres per dwelling for flats or multi occupancy properties.

4.158. Local recycling banks or 'bring sites' shall be provided for recyclables not separated in domestic waste collection, such as glass and clothing. Recycling banks must include at least:

- 2 x Green glass banks
- 1 x Brown glass bank
- 2 x Clear glass bank
- 1 x Textile bank

- 4.159. Recycling banks (bring sites) are required to serve approximately every 500 dwellings. For residential developments a financial contribution towards the capital cost of providing collection banks shall be sought. Recycling banks (bring sites) currently require the provision of 5 containers at a cost of £500 each. This equates to a cost of £5.00 per dwelling.

Size of Development	Contribution per dwelling
Developments between 1 and 199 dwellings	£106.00 for bin and collection vehicle provision. £5.00 towards recycling banks
Developments over 200 dwellings	£106.00 for bin and collection vehicle provision. £5.00 towards recycling banks. On-site provision of recycling bank including provision of land.

- 4.160 Where on-site contributions are required if this cannot genuinely be provided, a financial contribution equivalent to the cost of providing and equipping a local bring site shall be paid to the Council.
- 4.161 Waste and recycling bin contributions will be sought on occupation of new dwellings. The provision of recycling bring sites will be sought as early in the development as possible to serve the residents of the development.
- 4.162 The Council's Environmental Services department will be able to provide further advice on the Council's requirements.

Developer Contributions Supplementary Planning Document (SPD)

2nd Consultation Draft November 2017

Cherwell District Council

APPENDICES

Appendix 1: Population Figures

This appendix sets out the assumed population generation rates per dwelling for Oxfordshire. The average occupancy rate per dwelling for the whole of Oxfordshire is 2.49. This assumes that an average development would contain 15% one bed dwellings, 30% two bed dwellings, 40% three bed dwellings, and 15% four bed dwellings. (Source: SHMA 2014).

Average Occupancy per Dwelling

Dwelling Type	One Bed	Two Bed	Three Bed	Four Bed
All Ages	1.28	1.85	2.88	3.96

(Source: OCC)

The above occupancy rates will be applied to all residential development proposals of 399 dwellings and below. For larger developments an excel based model known as POPCAL 10 will be used to calculate a detailed population profile associated with the proposed development.

Average Pupil Generation per Dwelling

School Category	One Bed	Two Bed	Three Bed	Four Bed
Primary (4-10)	0.00	0.17	0.39	0.51
Secondary (11-15)	0.00	0.09	0.23	0.35
Sixth Form	0.00	0.01	0.03	0.07

(Source: OCC)

A reduction of 15% to the pupil generation rates has been applied to take account of pupils who will be educated in the independent sector. The sixth form rates have been discounted further to account for pupils leaving school before the sixth form.

Appendix 2: Indices used for Contributions Sought on behalf of OCC

Contributions sought on behalf of OCC will be index-linked to maintain the real value of the payments.

Indexation will be applied using the formula:

$$\text{Index Linked Contribution} = \text{Revised Index Value}^{**} \div (\text{Principal Amount} \times \text{Base Index Value}^*)$$

* A base date for contributions is established in this Guide and within the planning obligation. Using this base date a precise value within a particular index can be found.

** The date that the contribution is indexed to will be identified within the planning obligation. This will usually be the date of payment. Using this revised date a precise value within a particular index can be identified.

The table below sets out the indices that will be used.

Contribution Type	Index Name	Source	Notes
Transport contributions (excluding Public Transport Services)	Baxter	The Dept for Business, Innovation & Skills	This index is a composite index comprising the following weighted indices from the Civil Engineering Formula '1990 Series' Index 1: Labour & Supervision (25%) Index 2: Plant & Road Vehicles (25%) Index 3: Aggregates (30%) Index 9: Coated Macadam & Bitumous Products (30%)
Public Transport Services Contributions	RPIX	ONS	RPIX is a measure of inflation in the UK. It is equivalent to the Retail Price Index (RPI) excluding mortgage interest payments.
All Other contributions	Tender Price Index of Public Sector Building (Non-housing) PUBSEC (incorporating SE	The Dept for Business, Innovation & Skills	The PUBSEC index is compiled from bills of quantities of accepted tenders forwarded from

	location factor)		Government Departments. The Index is an indicator of the trend in accepted tender prices for constructing public sector works in Great Britain. The results are published quarterly.
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SUPERSEDED

Appendix 3: Education Infrastructure: Calculation of Contributions

Contributions for educational infrastructure will be calculated by multiplying the net increase in the forecast number of pupils (of the appropriate age) moving in to the new housing by the 'cost per pupil' of the required additional infrastructure.

Average Pupil Generation per Dwelling

School Category	One Bed	Two Bed	Three Bed	Four Bed
Primary (4-10)	0.00	0.17	0.39	0.51
Secondary (11-15)	0.00	0.09	0.23	0.35
Sixth Form	0.00	0.01	0.03	0.07

These rates are derived from the Oxfordshire Survey of New Housing (2008).

A reduction of 15% to the pupil generation rates has been applied to take account of pupils who will be educated in the independent sector. The sixth form rates have been discounted further to account for pupils leaving school before the sixth form.

Based on the current percentage of pupils being educated in Special Educational Needs (SEN) schools in Oxfordshire 1.1% of the total pupils generated by the development will need to be educated in a SEN school (the majority of pupils with a statement of special educational needs are educated in 'mainstream' schools).

The table below sets out the standard cost per pupil of providing an extension to an existing facility. These standard costs will be used unless there is a specific scheme cost or where a new school is required. The figures are from the Department for Education (DfE) and have been adjusted for Oxfordshire using the DfE published location factors.

Table1: Cost per pupil for extensions to existing facilities

	Total Cost per Pupil for Extensions (3Q15)
Primary	£12,688
Secondary	£19,194
Sixth Form	£20,484
SEN	£36,684

To give an indication of the contributions which may be necessary to address the impact of proposals the cost per pupil for extensions to existing facilities is multiplied by the pupil generation rates per dwelling to reach the contributions per dwelling shown below.

Table2: Contribution per dwelling

	1 Bed	2 bed	3 Bed	4+ bed
Primary	£0	£2157	£4948	£6471
Secondary	£0	£1727	£4415	£6718
Sixth Form	£0	£205	£615	£1434

If a development creates all or part of the need for a new school a different level of contribution reflecting the actual estimated cost for the new school or part thereof will be applied. Where the development substantially necessitates a new school, developers will be expected to provide at nil cost to the education provider a suitable site (both in terms of size and location) which is fully serviced, fully decontaminated and remediated. The costs of providing and equipping a new school including playing fields/sport facilities will be calculated by reference to the county council's adopted primary and secondary school briefs together with relevant government advice. These requirements will be negotiated on a site by site basis.

SUPERSEDED

Appendix 4: Local Standards of Provision – Outdoor Recreation.

Type of Provision	Quantitative Standard	Accessibility Standard	Minimum Size of Provision	Threshold for On-Site Provision
General green space (parks & gardens/natural semi-natural/amenity green space)	2.4ha per 1000 urban dwellers	5 minute walk (amenity open space) (400m)	200sqm	10 urban dwellings
	2.74ha per 1000 rural/urban dwellers	15 minute walk other (1200m)		6 rural/urban edge dwellings
Play space (combining provision for younger and older children including MUGAs)	0.78ha per 1000 people	5 minutes walk (400m) except for NEAPs	LAP – 100sqm activity zone; 400sqm including buffer	10 dwellings (for a LAP)
		15 minute walk (1200m)	LEAP – 400sqm activity zone; 3600sqm including buffer	50 dwellings (for a LEAP and LAP)
			NEAP – 1000sqm activity zone; 8500sqm including buffer	100 dwellings for a NEAP and LEAPs/LAPs
			NB: In some cases a combined all-age area of play will be preferable to provision of LAPs/LEAPs/NEAPs.	
Outdoor sports provision (combining tennis courts, bowling greens, golf courses and playing pitches) (to be accompanied by changing facilities where appropriate)	1.13ha per 1000 people	Football, rugby, cricket: 10 minute walk (800m) urban areas, 10 minute travel time (8km) rural areas Tennis courts: 15 minute walk (1200m) urban areas, 15 minute	0.12ha	65 dwellings

Type of Provision	Quantitative Standard	Accessibility Standard	Minimum Size of Provision	Threshold for On-Site Provision
		travel time (12km) rural areas Bowling greens, golf courses: 15 minute travel time (12km) Hockey: 20 minute travel time.		
Allotments	0.37ha per 1000 people	10 minute walk (800m)	0.2ha	275 dwellings

Appendix 5: Summary of demand for open space, sport and recreational facilities by development type

Type of Green space	Houses	Flats	Bedsits	Hostels	Sheltered Accom	V. Sheltered accom	Care homes	Student accom
Parks and gardens	yes	yes	yes	yes	yes	no	no	yes
Natural/semi natural green space	yes	yes	yes	yes	yes	no	no	yes
Amenity green space	yes	yes	yes	yes	yes	no	no	yes
Play provision	yes	yes	no	no	no	no	no	no
MUGAs	yes	yes	no	no	no	no	no	yes
Tennis courts	yes	yes	yes	yes	no	no	no	yes
Bowling greens	yes	yes	yes	yes	yes	no	no	yes
Golf courses	yes	yes	yes	yes	no	no	no	yes
Allotments	yes	yes	yes	yes	yes	no	no	yes
Pitches	yes	yes	yes	yes	no	no	no	yes

Appendix 6: Commuted Sums for Children's Play Space, Sports Pitches, Public Open Space

The commuted sums for capital infrastructure are based on current contractor costs. The landscape maintenance rates are taken from the annually updated competitive rates of the Council's landscape maintenance contract. (quoted sums from 2016/2017)

Each provision is multiplied by the current multiplier to commute the payment over a 15 year period

Current Inflation Figure = CPI 0.5%

Current Multiplier - 15

Play Areas – Maintenance Provision	Total Cost (£)
LAP – Equipped (400m ²)	27501.52
LAP – Free Play Zone (400m ²)	12394.26
LEAP (3600m ²)	108761.69
LEAP/LAP Combined (4000m ²)	121492.13
NEAP (9500m ²)	249994.49
NEAP/LEAP Combined (13100m ²)	350435.88

Play Areas – Capital Provision	Total Cost (£)
LAP – Equipped (400m ²) Local Area for Play (fencing, furniture, surfacing & signage)	20779.15
LAP – Free Play Zone (400m ²) Local Area for Play (fencing, furniture, path surfacing & signage)	10882.91
LEAP (3600m ²) Local Equipped Area for Play (play equipment, fencing, furniture, surfacing & signage)	60783.45
LEAP/LAP – Combined (4000m ²) Local Equipped Area for Play (play equipment, fencing, furniture, surfacing & signage)	74723.30
NEAP (8500m ²) Neighbourhood Equipped Area for Play (play equipment, MUGA, fencing, furniture, surfacing & signage)	240326.82

Outdoor Sports Facilities – Maintenance Provision	Total Cost (£)
Tennis/netball/basketball court	27468.25
Bowling Green	173303.86
Cricket Square	53197.08
Football Pitch - Senior	70195.95
Football Pitch - Junior	61589.12
Synthetic Pitch – 400mm 3G (130m x 90m)	111638.94
Pavilions	
2 changing room – Tennis & Bowls	43164.75
2 changing room – Football – 1 pitch	41338.67
4 changing room – Football – 2 pitches	55084.05
6 changing room – Football – 3 pitches	71871.57

Outdoor Sports Facilities – Capital Provision	Total Cost (£)
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Tennis/netball/basketball court	40903.50
Bowling Green	122449.20
Cricket square	43267.93
Football pitch - Senior	77647.64
Football pitch - Junior	62670.80
Synthetic pitch – 40mm 3G (130m x 90m)	582900.00
Pavilion	
2 changing room – Tennis & Bowls	431648.51
2 changing room – Football – 1 pitch	413392.68
4 changing room – Football – 2 pitches	550840.50
6 changing room – Football – 3 pitches	718715.70

Green Infrastructure – Maintenance Provision	Total Cost (£)
Public Open Space (cost per hectare)	93222.18 (per m ² – 9.32)
Hedge Maintenance (cost per 1000 Lnm)	14354.42 (per m ² – 14.35)
New Woodland Area Maintenance (cost per 1000m ²)	23233.59 (per m ² – 23.23)
Mature Woodland Area Maintenance (cost per 1000m ²)	4629.23 (per m ² – 4.63)
Mature Tree Management (cost per 10 trees)	3348.23

Green Infrastructure – Capital Provision	Total Cost (£)
Public Open Space (cost per hectare)	110829.85
Hedge Planting (cost per 1000Lnm)	6051.91
New woodland planting (cost per 1000m ²)	6545.57

Water Feature – Maintenance Provision	Total Cost (£)
Pond maintenance (per 500m ²)	21904.28 (per m ² – 43.81)
Ditch maintenance (per 500 m ²)	16290.05 (per m ² – 32.58)
Stream Maintenance (per 500m ²)	8969.63 (per m ² – 17.94)
Balancing Pond maintenance (per 500m ²)	5812.92 (per m ² – 11.63)

Allotments – Maintenance Provision	Total Cost (£)
Allotment Areas (cost per hectare)	42190.84 (per m ² – 4.22)
Allotments – Capital Provision	
Allotment Areas (cost per hectare)	255713.11

Off- Site Contributions	Total Cost (£)
In lieu of Children’s Play Facilities – Developments (10+ dwellings)	23068.62 (per dwelling – 2306.86)

In lieu of Sports Pitch provision- Developments (10+ dwellings)	20170.30 (per dwelling- 2017.03)
In lieu of Open Space Provision- Developments (10+ dwellings)	14262.65 (per dwelling- 1426.27)

SUPERSEDED

Appendix 7: Open Space, Sport and Recreation: Process and Procedures for Applications where On-Site Provision is Required.

Pre-application

The LPA will identify the on-site open space, sport (indoor/outdoor), recreation and play provision required, and the planning obligation (including commuted sums/rates) that is required.

The LPA will identify requirements in consultation with the appropriate Parish and Town Councils. Normally Town and Parish Councils are the preferred custodians and providers of open space, play, sport and recreation facilities and they will be expected to take ownership or adopt the facilities. In exceptional cases Town and Parish Councils may not be willing or able to take ownership or adoption and in these cases the LPA will proceed on the basis that the District Council will be responsible for the long term ownership, management and maintenance after transfer.

Where possible any options for off-site provision will be identified at this stage.

Application

The same procedure for Pre-application applies. At this stage the LPA will seek the agreement of Parish and Town Councils to the concept and layout of the open space, sport (indoor/outdoor), recreation and play provision prior to the granting of planning permission. Their commitment to future ownership or adoption will also be expected.

At application stage specific proposals must be identified and defined to support preparation of planning obligation documents.

Approval of Submitted Open Space, Sport, Recreation and Play Proposals (Construction Details)

Conditions and planning obligations will require the developer to submit detailed proposals to the LPA for approval. These proposals must include detailed drawings, specifications, guarantees (transferable) and maintenance specifications to BS/EN standards. The LPA will provide formal approval to the developer once internal consultations are completed, or seek amendments to the open space, sport, recreation and play proposals, as necessary.

Approvals will be managed as follows:

- The LPA will discharge the conditions/obligations when open space, sport, recreation and play provision details are deemed acceptable by the Council.
- It is important to note that the development must not commence until there has been submitted to and approved by the LPA a scheme (including a phased programme [on large developments]) for the laying out, hard and soft landscaping and equipping of the open space, sport, recreation and play provision including, supporting changing accommodation.
- The planting, turfing and seeding to the open space, sport, recreation and play provision is to take place during the first planting season following the commencement of development [or phase of development]. The setting out of the landscaping and equipping of the open space, sport, recreation and play provision is to be in accordance with the approved scheme to the satisfaction of the LPA.

- The Developer is required to notify the LPA on the commencement and completion of the open space, sport, recreation and play provision, and must maintain the provision to its original standard for a period of twelve months following its completion, as certified by the LPA, replacing items (including surfaces) which are defective in the opinion of the LPA in accordance with the approved details contained in the scheme, and replacing any trees or shrubs which may die, are removed or become seriously damaged or diseased with others of similar size and species to the satisfaction of the LPA, The Developer is to carry on maintaining the open space, sport, recreation and play provision and supporting changing accommodation until these facilities are transferred, and to give access to the LPA's officers to enter to the area/s to carry out inspections.
- The LPA is to be notified by the developer on the commencement and completion of the open space, sport, recreation and play provision and supporting changing accommodation and the LPA will inspect the development at the following stages:
 - a) setting out,
 - b) drainage,
 - c) equipment installation,
 - d) surfacing; and
 - e) planting (including grass / wildflower seeding)

The developer is to ensure that a report is to be provided by a recognised body certifying that the construction is adequate for the intended use and submitted to the LPA.

Monitoring Development

The Developer is to provide an indicative timetable of on-site operations including indicative dates for the stages of construction and completion of the open space, sport, recreation and play provision to the LPA for the Council's coordinated monitoring of the open space, sport, recreation and play provision and supporting changing accommodation. It is necessary for the Developer to advise the LPA when the laying out of the open space, sport, recreation and play provision is taking place.

The LPA will monitor the commencement of development, compliance with conditions and planning obligations.

The LPA will endeavour to carry out inspections within 5 working days of notification by the developer at the stages listed above with the aim of ensuring that works are satisfactory, to identify remedial works when necessary and areas completed in accordance with the approved plan. Records will be kept on monitoring sheets of all inspections, and minutes of site meetings.

Enforcement (before practical completion)

The LPA will take enforcement action on conditions and obligations, should it be necessary, and will ensure good record keeping as evidence and provide expert witness statements, if required.

Practical Completion

The Developer must arrange for satisfactory Royal Society for the Prevention of Accidents (RoSPA) inspections and the subsequent reports to be forwarded to the LPA. They must also obtain transferable

guarantees for equipment which must also be sent to the LPA. For natural sports pitches or courts a satisfactory post completion 'fit for purpose' report from a recognised body, such as the Sports Turf Research Institute (STRI) or a member of the Sports and Play Construction Association (SAPCA), will be required. The Developer is to provide two sets of as-built drawings for the LPA. The LPA will carry out inspections of the completed open space, sport, recreation and play provision and inform the Developer of any defects in writing. The Developer must correct the defects as soon as possible and inform the LPA's planning department when the defects have been remedied, as early as possible. The LPA will then issue certificates of practical completion, detailing outstanding items of work, copies of which to be provided to the Developer and contractor.

The Developer is to confirm to the LPA that remedial works to defects are complete. Once the LPA has inspected the remedial works and found them to be satisfactory the LPA will then confirm that all works are complete in accordance with the approved plans and the open space, sport, recreation and play provision is acceptable for adoption.

The LPA will check and revise commuted sum calculations, if required (in cases where a schedule of rates was given by the District Council and shown in the planning obligation).

The Developer must ensure that the play areas/MUGAs are opened for use once practical completion is granted. Insurance cover must be provided by developer until formal transfer by the District. The developer should provide signs at each facility providing contact details for the public to report any defects. Joint monitoring of the open space, sport, recreation and play provision by the Developer and the Council is necessary to ensure the sites are safe for use. The LPA will consider any proposed change to the twelve month liability period by the Developer and agree to any changes in writing, if appropriate.

A twelve month maintenance period is required for open space and play provision to ensure that landscape features become established prior to the areas being transferred.

On sports pitches a minimum of two years is required before transfer from the date of seeding and completion to allow for establishment of the pitches.

Final Completion

The LPA will undertake an inspection of the open space, sport, recreation and play provision one month before the expiry of the twelve month defects period. The developer is to bring the space, sport, recreation and play provision up to the adoptable standard. The developer shall also provide the LPA with a post installation inspection and safety audit from a RoSPA -approved expert for play areas and informal open space. For sports pitches or courts a satisfactory post completion report from a recognised body such as STRI or SAPCA member will be required.

If all areas are satisfactory the LPA will issue certificates of final completion to the Developer.

Transfer

The Developer will start the legal transfer to the LPA, accompanied by an appropriate contribution towards its maintenance after adoption. This contribution will normally be in the form of a commuted sum, to cover 15 years maintenance, secured through a planning obligation document.

The LPA's finance section is to set up a new accounting code for each commuted sum. This will be specifically linked to the planning application reference number. All payments are to be made to the

LPA (by cheque or BACS) under the designated code with details of the application reference number and accompanied by a breakdown of capital and maintenance contributions.

The receiving LPA's Legal Team will complete the transfer of the open space, sport, recreation and play provision to the LPA on receipt of the commuted sum. On completion of the legal transfer the LPA will take over the maintenance responsibility. The LPA will then proceed to transfer or lease the provision to the relevant town or parish council along with any commuted sum balances.

Developer Responsibilities for maintenance of open space, sport, recreation and play facilities.

The long term maintenance of open space, sport, recreation and play facilities is critical to ensure that they achieve and maintain their maximum potential benefit and value. In the case of new housing developments, the developer will be required to make provision for the appropriate amount and type of open space, sport, recreation and play provision, plus supporting changing accommodation.

The developer is to submit to the LPA management plans and maintenance schedules to ensure that the soft/green areas of open space, sport, recreation and play facilities are established successfully for the benefit of the community and biodiversity. The maintenance specification is to be written and implemented in accordance with the relevant EN/BS standards.

Maintenance of Sports Pitches

The Developer's Contractor will be responsible for the maintenance of the grass sward for 2 years from the date of practical completion. A maintenance specification is to be submitted to the LPA. This maintenance specification must comply with industry best practice.

Maintenance of Play Areas and MUGAs

The Developer's Contractor will be responsible for the maintenance of the play areas and MUGAs for 12 months from the date of practical completion. A maintenance specification is to be submitted to the LPA and must comply with industry best practice.

Maintenance of Open Space and Recreation Areas

The Developer's Contractor will be responsible for the maintenance of open space and recreation areas for 12 months from the date of practical completion. A maintenance specification is to be submitted to the LPA and must comply with industry best practice.

Appendix 8: Local Management Organisation Requirements

NOTE: It is the Council's strong preference that public open space, outdoor sports pitches and play areas on new developments continue to be adopted by the Council in conjunction with the relevant town or parish council with a commuted sum. The Council will only consider a local management organisation proposed by a developer if it meets the list of conditions set out below and has the agreement of the relevant town or parish council.

- Provide a method statement of how the funding will be provided to the Management Company to cover maintenance costs in perpetuity.
- Provide a method statement of how capital funding for replacement items/unforeseen costs will be generated.
- The Council's twice yearly inspection costs will be paid as a commuted sum for the first fifteen years for monitoring the management company's maintenance standards.
- Confirmation that the standards of maintenance will be identical to the standard set out in the Council's Technical Specifications for Landscape and Cleansing Operations.
- Confirmation that a diminishing bond will be put in place to cover the Council's costs of maintenance and management of the site , to be available for the council to draw upon if standards delivered by the management company do not match those set out in the Council's Technical Specifications.
- Confirmation that the Council has the step in rights if the management company let standards drop below the standards set out in the Council's Technical Specification along with the rights to recover costs.
- Confirmation that at no point will the service charges levied on residents increase the rents for affordable housing above 80% of the open market rents as published by the Home and Communities Agency (HCA), where affordable rents are in place.
- Confirmation that all public open space, outdoor sports pitches and play areas remain accessible and usable by the general public in perpetuity.
- If the management company goes in to administration, confirmation that title deeds of all public open space, outdoor sports or play areas transfer to the Council as the provider of last resort.

Appendix 9: Local Standards of provision – Indoor Recreation

Facility Type	Local Quantity Standard per 1000 Population
Sports Hall	0.315 badminton courts
Swimming Pool	9.31 m ²
Squash Courts	0.059 courts
Health & Fitness	5.28 stations
Indoor Bowls	0.045 rinks
STPs	0.046 pitches
Athletics Tracks	0.0012 8 Lane facility
Community Centre	185m ²

Sports Hall

There is a need for 0.315 badminton courts (sports hall) or 53.78m² per 1000 people (or 0.054m² per person). This figure is based on the area of a four court hall plus circulation, reception and changing space (683m²). The cost of construction is £2251 per m² plus land costs and VAT (at 2016). The cost per person for sports hall provision is therefore £121.56 plus land costs and VAT.

Swimming Pool

There is a need for 9.31m² of swimming pool area per 1000 people or 0.0931m² per person. The cost of construction of a new build swimming pool, using average of Swim 25 commercial product and RICS Building Cost Information Service construction costs, would be £2,296 per m² plus land costs and VAT (at 2010). The cost per person for swimming pool provision is therefore £213.76 plus land costs and VAT.

Appendix 10: On-Site Community Facilities and Indoor Sport Provision: Process and Procedures

The LPA will identify the on-site indoor sport and/or community centre provision required and will provide the developer with a specification for the floor space and the facilities that need to be provided on site. At application stage specific proposals must be identified and defined to support the preparation of planning obligation documents.

Conditions and planning obligations will require the developer to submit detailed proposals to the LPA for approval. These proposals must include detailed drawings, specifications and guarantees (transferable). The LPA will provide formal approval to the developer once internal consultations are completed, or seek amendments to the proposals as necessary.

The developer will construct the building/facility in accordance with the approved details and ownership of the building/facility will be transferred to the Council following a satisfactory final inspection. The Council may subsequently transfer the ownership to the relevant parish authority or a suitable community association. In exceptional circumstances the Council may accept alternative management arrangements for the facility. These circumstances will be assessed on a case by case basis.

The timing of provision of the facility will be negotiated on a case by case basis but the size of the development and proximity to existing facilities will be a determining factor. In the case of the community hall provision a suitable temporary facility should be available to the residents on completion of the 100th dwelling.

Appendix 11: Community Hall Facilities

In accordance with the recommendation of the 2017 CCDS Study a required community hall facility standard of 0.185m² per person will be applied.

Capital Costs for Provision of New/Extended Community Hall Facility

	Capital Cost	Capital Cost/m2	Cost per person
1 storey	£1,600,000	£2,315	£428
2 storey	£1,820,000	£2,633	£488
Hard landscaping	£331,000		£89
Soft landscaping	£10,000		£3
TOTAL			£520 (1-storey)
			£580 (2-storey)
Horizontal extension to existing community hall		£2,920	
Refurbishment of existing community hall		£2,482	

Costs are correct at 2017

Calculations are based on the construction of a 691sqm building.

The cost estimates are inclusive of main contractor preliminaries, overheads and profit, project/design team fees and client contingencies.

Contributions towards the maintenance of the facility will also be sought. This will cover a 15 year period following the transfer of the facility to the LPA (or community association). A list of typical maintenance tasks and costs is set out below:

Annual Costs (Repeated Each Year)
Fire alarms and extinguishers
Intruder alarms
Boiler service and gas safety
Water monitoring and legionella
Emergency light maintenance
Lift maintenance
Miscellaneous repairs
Business rates
Water rates
Insurance
Gas
Electricity
One off costs
Electrical testing
Internal decoration
Replacement boiler/water heaters
Replacement extract fans
Replacement external lighting
Replacement shower fittings
Replacement light fittings

Appendix 12: Community Development

On development sites in excess of 100 new dwellings, developers are expected to provide the costs of employing a community development worker as follows:

100>250 homes: 0.4 FTE for 1 year

250> 500 homes: 0.4 FTE for 2 years

500> 1000 homes: 0.8 FTE for 2 years

1000+ homes: 0.8 FTE for 2.5 years.

Community Development Workers should be in place once a certain threshold of new homes have been built. This threshold will be established on a case by case basis.

Appendix 13: Apprenticeships & Skills

Draft Cherwell District Council Interim Position Statement on Planning Obligations for Construction Apprenticeships and Skills, April 2016

1.0 Background

- 1.1 The Government has made a commitment to 3 million new apprenticeship starts in England between 2015 and 2020¹. Apprenticeships are full time paid jobs which incorporate on and off the job training. A successful apprentice will receive a nationally recognised qualification on completion of their contract. Public sector bodies will be required to employ apprentices and set targets to increase apprenticeship numbers². There are over 200 different types of apprenticeship currently available in England, through existing apprenticeship frameworks. Apprentices can receive qualifications ranging from that equivalent to 5 GCSE passes to that equivalent to a degree.
- 1.2 | Cherwell District Council (CDC) ~~has~~ pledged during 2016-2017 to “continue to support skills development, apprenticeships and job clubs in order to help support local employment and reduce the number of young people not in education, employment or training”³. In particular CDC is keen to increase the number of apprenticeships and related skills that come forward through the construction of new development areas in the District. This aspiration is in line with the latest report from the Construction Skills Network which forecasts that in the south east region alone, 1730 construction jobs are expected to be created every year over the next 5 years, but skills shortages are beginning to emerge⁴.
- 1.3 Oxfordshire in general and the Cherwell District in particular, are experiencing a large increase in construction to provide new homes and jobs for the area. However there is a shortage of skilled construction workers to support this growth. The table below shows the trends over the last four years. Construction apprenticeships are decreasing. They made up 6.6% of the total in 2011/12 and falling to 4.1% in 14/15. Furthermore labour market information gathered by the Oxfordshire Local Enterprise Partnership (OXLEP) has shown that within the local construction sector, it is the elementary construction occupations that are most in demand⁵.

Construction, Planning and the Built Environment	2011/12	2012/13	2013/14	2014/15, Q4 provisional
Count of construction apprenticeship starts	300	250	170	180
% of all apprenticeships	6.6%	5.6%	4.4%	4.1%

Source: Economy and Skills, Oxfordshire County Council.

- 1.4 The need to increase the number of apprenticeships locally is picked up by both the Oxfordshire Local Economic Partnership (OXLEP) and the South East Midlands Economic Partnership (SEMLEP). OXLEP’s Strategic Economic Plan is committed to delivering 1150

¹ Apprenticeships Policy, England 2015: House of Commons Library Briefing Paper 03052, 20 January 2016 page 3

² Op. cit. page 3

³ Cherwell District Council Performance Pledges 2016-2017

⁴ Construction Skills Network South East Report 2016-2020

⁵ Oxfordshire Labour Market Information Summer 2014, Oxfordshire Skills Board Page 39more apprenticeships

to 2020 within Oxfordshire⁶. The SEMLEP Strategic Economic Plan is seeking just over 94,000 apprenticeship starts within the SEMLEP area between 2015 and 2020. Of these, it is anticipating that 7017 will be created within the Cherwell District⁷. It notes in particular that there is a shortage of skills and an aging workforce in the construction sector across the SEMLEP area and that there are significant opportunities for jobs growth in these sectors across the SEMLEP area⁸.

- 1.5 Cherwell District Council's Economic Development Strategy (CDCEDS) identifies the provision of apprenticeships as one way to help people into employment⁹. In essence, the growth envisaged in the Cherwell District Council Local Plan Part 1 (July 2015) will both benefit from a healthy supply of construction apprentices as well as providing an ideal environment to support the training of new entrants to the construction trades. In respect of North West Bicester, the CDCEDS seeks to implement the NW Bicester Economic Strategy as one of the means to provide, encourage and support skills needed to develop NW Bicester and cites local apprenticeships as an outcome of this initiative¹⁰.
- 1.6 This note will set out the national and local planning policy context before describing the approach to be taken in the negotiation of construction (and related trades) apprenticeships for planning applications for certain categories of new development by Cherwell District Council. It is intended that this note will operate as informal guidance which will eventually help inform a relevant policy within the Cherwell District Council Local Plan Part 2 and the Planning Contributions Supplementary Planning Document, which are currently in the early stages of preparation.

2.0 National Planning Policy Context

2.1 The National Planning Policy Framework March 2012 (NPPF)

The Framework is predicated on ensuring that the planning system promotes sustainable development. The Framework notes that there are 3 dimensions to sustainable development and that the planning system should correspondingly perform an environmental role, a social role and an economic role¹¹. In terms of the economic role, the NPPF notes that pursuing sustainable development involves "making it easier for jobs to be created in cities, towns and villages."¹² It further notes that "plans and decisions need to take local circumstances into account, so that they respond to the different opportunities for achieving sustainable development in different areas."¹³

- 2.2 Under the heading "Building a strong, competitive economy" the NPPF states that "the Government is committed to securing economic growth in order to create jobs and prosperity..."¹⁴ It continues by stating that the Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth and that

⁶ OxLEP Strategic Economic Plan March 2014, page 42

⁷ SEMLEP Strategic Economic Plan 2015-2020, Table B SEMLEP Apprenticeship Data, Page 25

⁸ Op cit. paragraph 2.5.19, page 26

⁹ Economic Development Strategy for Cherwell, North Oxfordshire 2011-2016, Cherwell District Council, pages 32, 45

¹⁰ Op Cit. page 47

¹¹ NPPF (March 2012) paragraph 7

¹² NPPF (March 2012) paragraph 9

¹³ NPPF (March 2012) paragraph 10

¹⁴ NPPF (March 2012) paragraph 18

planning should operate to encourage this. It concludes the paragraph by stating that significant weight should be placed on the need to support economic growth through the planning system.¹⁵

2.3 In terms of how apprenticeships can be delivered through the planning system, CDC proposes that this is achieved through planning obligations attached to planning consents, whichever is the most appropriate depending on the individual circumstances of each application and site. In drafting conditions and agreements, CDC will take account of the NPPF and Planning Practice Guidance.

2.4 Eco Towns Supplement to Planning Policy Statement 1 July 2009 (SPPS1)

The SPPS1 specifically applies to the North West Bicester site. In a similar way to the NPPF, there are no explicit references to the provision of apprenticeships in the Supplement. However section ET10 Employment states that an economic strategy should be produced to accompany planning applications *for eco towns that demonstrate how access to work will be achieved. One of the supporting documents accompanying the NW Bicester Masterplan submitted by A2 Dominion is the NW Bicester Economic Strategy (21 March 2014) which contains a commitment to apprenticeships. This will be explored in more detail in the section below which deals with the local planning policy context.*

3.0 Local Planning Policy Context

3.1 The Cherwell Local Plan 2011-2031 Part 1 (adopted July 2015)

Securing the economic future of the District is the main priority of the Local Plan¹⁶. The main focus of the Plan is strengthening the local economy, job creation, inward investment and company growth, as well as building cohesive communities.¹⁷ In particular, the Plan notes that relatively large numbers of people in Cherwell are without qualifications and basic skills, so the level of education and training needs to improve¹⁸. The Plan contains 5 strategic objectives for developing a sustainable local economy including SO5 which aims to “.....support an increase in skills and innovation....¹⁹”. The Plan notes that “there will also need to be promotion of local training providers, an improvement of the relationships between companies and schools, colleges and the universities....²⁰”. However there are no strategic policies that deal with the provision of apprenticeships / increasing skills in the workforce as these are detailed policy areas more appropriately covered in the Cherwell Local Plan Part 2.

3.2 However the supporting text to Policy Bicester 1: North West Bicester Eco-Town states that an economic strategy will be required and there should be local sourcing of labour, including providing apprenticeships during construction²¹. Policy Bicester 1 itself repeats the requirement for an economic strategy to be prepared to support planning applications for the site and amongst other matters, to demonstrate how access to work will be achieved.

¹⁵ NPPF (March 2012) paragraph 19

¹⁶ CDC Local Plan 2011-2031 Part 1, July 2014, paragraph ix Executive Summary.

¹⁷ Op cit. paragraph 1.66

¹⁸ Op cit. paragraph A14

¹⁹ Op cit. page 31

²⁰ Op cit. paragraph B14

²¹ Op cit. paragraph C39

3.3 North West Bicester Supplementary Planning Document (adopted February 2016)

The North West Bicester Supplementary Planning Document amplifies Policy Bicester 1 of the Local Plan Part 1. Under Development Requirement 5- Employment, it states that employment proposals for NW Bicester will be required to “support apprenticeship and training initiatives”. In Section 6 Delivery, the SPD states that “employment opportunities and facilities to support job creation providing a mix of uses and access to job opportunities” should be taken into account to deliver the masterplan vision through the submission of planning applications. It further states that contributions towards local employment, training and skills will be required through legal agreements from developers²².

3.4 NW Bicester Masterplan: Economic Strategy (March 2014)

In line with Section ET10 of the PPS1 Supplement and Policy Bicester 1 of the Cherwell Local Plan this Economic Strategy has been prepared by SQW on behalf of the promoters of the NW Bicester site to support the NW Bicester Masterplan. Figure 3-2 sets out the contribution the NW Bicester site will make to local economic objectives. It states that “NW Bicester will support the expansion of education and training opportunities in Bicester by increasing demand and the sponsorship of apprenticeships, for example in eco construction”. It notes that NW Bicester will create a long term (20+ year) demand for local skills relating to eco construction.

3.5 Paragraph 5.6 of the Economic Strategy states that “training programmes, including apprenticeships, will be provided to ensure local residents and firms can acquire the necessary skills for NW Bicester, but that these skills will also be in increasing demand elsewhere as construction standards improve and retrofit programmes are rolled out”.

3.6 Finally, Table 6-1 Economic Development Action Plan consolidates all of the above statements by setting out that OCC and CDC will develop a Bicester wide apprenticeship strategy for all the development in Bicester of which NW Bicester is a part. It further states that apprenticeship schemes will be agreed with developers, the local colleges and other suitable local training providers.

4.0 **How this Guidance will be applied**

4.1 Approach

Cherwell Council will seek to apply this Guidance across its entire administrative area. It will seek the provision of a stated target number of new construction apprenticeships (or apprenticeship starts) as part of a required Employment, Skills and Training Plan (ESTP) for each proposal for new development, to be secured via S106 agreement as explained in paragraph 2.3 above. CDC is keen that the submission of ESTPs should not be unduly onerous for developers, hence an ESTP framework is provided for information at Appendix A to this Document. This can be reproduced by developers and completed by filling in the relevant numbers.

4.2 This Guidance will apply to the types of new development and subject to the thresholds set out in the table below. However if proposed developments fall below these thresholds but developers would still like to provide new construction apprenticeships, then the Council will

²² North West Bicester Supplementary Planning Document (adopted March 2016), page 54.

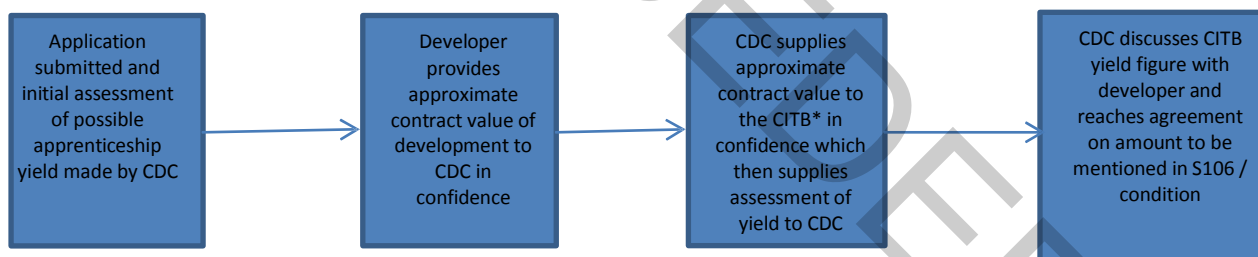
encourage and seek to support them in doing so. As the number of stated new apprenticeships will be expressed in planning obligations as a stated target to be achieved, if developers and / or their contractors are able and willing to exceed these, then the Council will encourage them to do so.

Type of Proposed New Development	Threshold	Indicative number of apprenticeships to be achieved
Housing (Use Class C3)	50 units	2.5 apprenticeships per 50 units
Non-residential uses	1000 sq m of floorspace	3 apprenticeships per 1000 sq m of floorspace
Utilities and highways infrastructure applications	None	Subject to discussion with developers on a case by case basis

4.3 In essence, while Cherwell District Council is keen to achieve an increase in new construction apprenticeship opportunities in the District through the planning system, it also considers that such arrangements need to be arrived at through discussion and agreement with developers, rather than imposed in a top-down fashion. It will be counter-productive if the numbers of construction apprenticeships required by CDC are unrealistic because they are actually unable to be achieved.

4.4 Process

The purpose of the information in the above table is to provide guidance for developers and will be the starting point in discussions with developers about the amount of apprenticeships each application could yield. This is because the Council understands that each site’s circumstances will vary and that apprenticeship yield largely relates to development cost / contract value. CDC envisages the approach to agreeing the apprenticeship yield from each relevant application could follow the process such as the one set out in the diagram below:



* CITB = Construction Industry Training Board

4.5 This process has already been piloted successfully with 3 planning applications which form part of the NW Bicester development.

5.0 Approach to S106 Agreements

5.1 S106 Agreement Clauses

S106 agreements will require applicants (or their successors in title) to submit an Employment Skills and Training Plan in line with the specimen framework attached to the

agreement (and included as Annex A of this document) before implementation of the development. S106 agreements will require this to be approved by CDC in writing prior to implementation and for the applicants (or successors in title) to be guided by the contents.

- 5.2 S106 agreements will also require that the ESTP sets out the arrangements by which the applicants will provide the stated target number of agreed construction (and related trades) apprenticeships and will support the applicant to use The Apprenticeship and Training Company Ltd or other equivalent approach. Apprenticeship Training Agencies (ATAs) are organisations that directly employ apprentices and operate as the apprentice's day-to-day workplace manager. They coordinate the apprentice's training and pay the associated training costs. The host employer (i.e. where the apprentice will have his/her on-site placement) pays a fee which covers the cost of their salary (which will be at least the National Minimum Wage Rate), plus a management fee to cover the ATA's costs (which includes HR and payroll provision and the management of the off-site training provision). Therefore ATAs support businesses who want to take on apprentices by dealing with the administration associated with hiring or employing an apprentice. Appendix B of this Guidance provides further information about The Apprenticeship and Training Company Ltd (to be finalised).
- 5.3 S106 agreements will require that all of the apprenticeship opportunities secured through these means are initially advertised within the administrative area of the District Council and if there are no such suitable persons, to people residing in Oxfordshire and then the surrounding locality (e.g. Milton Keynes, Aylesbury, Northamptonshire).

6.0 Conclusion

- 6.1 Increasing the number of new apprenticeships in England is a high profile Government objective. Cherwell District Council supports this aspiration. The amount of new development taking place in the District over the next 20 years or so, coupled with the evidenced shortage of construction skills provides both an incentive and opportunity to secure the provision of new construction related apprenticeships through the land use planning system. Although the national planning policy guidance does not refer to apprenticeships specifically, it makes it clear that it is the business of the planning system to promote and support economic growth through the provision of jobs and that significant weight should be attached to the need for the planning system to support sustainable economic growth.
- 6.2 The Cherwell District Council Local Plan Part 1 as well as CDC's Economic Strategy contain strategic aspirations relating to the need to support an increase in skills and training within the District. These are expressed in more detail in Local Plan Policy Bicester 1 and the NW Bicester Eco Town SPD which both specifically refer to the need for an economic strategy to support NW Bicester and that it should contain provisions to support apprenticeship and training initiatives - which it does so. This guidance anticipates the further detailed policy approach to be contained in Local Plan Part II which will relate to new development sites across the District.
- 6.3 CDC is anticipating that developers will generally support the approach being promoted in this Guidance as an important and progressive initiative designed both to increase the number of local skilled construction operatives available to support the building industry, as well as promoting the construction trades generally as a valuable future career path for young people.

Appendix 14: Community Safety/ CCTV Provision

Table 1: Levels of Contribution Sought

Priority	Level of Contribution
Priority 1	Seeking on-site provision of an appropriate number of CCTV cameras to monitor areas considered to be of high risk.
Priority 2	Relevant permissions to erect infrastructure, such as aerials, to facilitate transmission of images.
Priority 3	To install ducting to facilitate self-provide fibres
Priority 4	Where predominantly retail to contribute an agreed sum to monitoring and maintenance.
Priority 5	New development will be expected to contribute towards the provision of additional on-site infrastructure for at least a period of 10 years.

Crime impacts all development, however, retail and evening leisure uses usually have the greatest impact. Table 2 illustrates the measures likely to be considered appropriate for the type of development proposed.

Table 2:

Development Type	Priority/ Measure
Large Retail	1,2,3,4,5
Drinking Establishments	1,2
Nightclubs	1,2
Hot Food Takeaway	1,2
Local Retail	1,2,3
Large scale public open space	1,2,3

Table 2 is indicative only. Developments may include all, or only part of these elements. Specific requirements are therefore subject to negotiation following impact assessments by the police and partners.

Table 3: Guidance on Costs

Priority	Level of Contribution	Costs
Priority 1	Seeking on-site provision of an appropriate amount of CCTV cameras sufficient to monitor areas considered by police and partners to be of high risk as part of new development.	Cameras = £3,000 approx. This includes brackets and aerials
Priority 2	Relevant permissions to erect infrastructure such as aerials	Subject to planning permissions

	to facilitate transmission of images.	
Priority 3	To install ducting to facilitate self-provide fibres	Insignificant as ducting can be provided early in the construction process.
Priority 4	Where predominantly retail to contribute an agreed sum to monitoring and maintenance	Monitoring can range from £1,000 to £2000 per camera per annum. Where there are a large number of cameras the fee is negotiable. Maintenance would be approximately £300 per camera per annum.
Priority 5	New development will be expected to contribute towards the provision of additional onsite infrastructure for at least a period of 10 years.	The longevity of the provision is dependent upon the figures in Priority 4 being extended for at least 10 years.

Appendix 15: Guide to Funding Mechanisms by Infrastructure Type

NOTE: The Council is not currently (October 2017) proceeding with the introduction of a CIL Charging Schedule. This table therefore only gives an indication of the appropriate funding mechanisms *should* the Council adopt CIL in the future.

Type	CIL	S106	Condition	S278
Housing				
Affordable Housing		✓		
Commuted offsite payments for the provision of affordable housing		✓		
Extra Care Housing		✓		
Transport (includes PRow)				
Site specific Highway and Access Impacts		✓		✓
Non-site specific Highway improvements	✓	✓		
Site specific sustainable transport		✓		✓
Non-site specific sustainable transport	✓	✓		
Highways Depots	✓			
Education				
On site Education (Primary, Secondary, 6 th Form, Special Educational Needs)		✓		
Education (Primary, Secondary, 6 th Form, Special Educational Needs)	✓	✓		
Onsite early years and childcare provision		✓		
Early years and childcare provision	✓	✓		
Skills and Training				
Apprenticeships		✓	✓	
Utilities				
Sustainable Urban Drainage Systems		✓	✓	
On site provision of Refuse bins, recycling banks/'bring in' sites		✓	✓	
Off-site provision of Recycling banks/'bring in' sites	✓			
Strategic Waste Management (WRC)	✓	✓		
Strategic Flood Defence	✓	✓	✓	
Enhancements to the sewerage network beyond that covered by the Water Industry Act and sewerage undertakers (*)	✓			
Fire and Rescue	✓	✓		
Community safety and policing				
Onsite provision of community safety and policing infrastructure		✓		
Off-site Community safety and policing infrastructure	✓			
Health				

Type	CIL	S106	Condition	S278
Onsite provision of health infrastructure		✓		
Off-site provision of health infrastructure	✓			
Air Quality				
Measures during construction of new development including dust control, site monitoring and plan emissions		✓	✓	
Indoor sport, recreation and community facilities				
Onsite Community centre/hub		✓		
Offsite Community centre/hub	✓			
Community Development Funding	✓	✓		
Site specific Indoor Sports		✓		
Indoor Sports	✓	✓		
Integrated Youth Support Service	✓			
Libraries	✓	✓		
Day care Provision for the Elderly	✓			
Adult Learning	✓	✓		
Museum Resource Centre (MRC)	✓	✓		
Open space recreation and Biodiversity				
Site specific Open space, play space, outdoor sport, allotments, recreation and landscaping		✓		
Country parks, open space, play space, outdoor sport, allotments, recreation and landscaping	✓	✓		
Cemeteries	✓	✓		
Onsite Nature Conservation and Biodiversity		✓	✓	
Nature Conservation and Biodiversity	✓	✓		
Sustainable Construction		✓	✓	
Public Realm				
Site specific Public Art & Public Realm		✓	✓	
Heritage				
Archaeology			✓	
Heritage-related projects	✓	✓		

Cherwell District Council

Executive

5 February 2018

<p>Draft Corporate Strategy Corporate Strategy and Revenue and Capital Budgets 2018/19</p>

Report of Executive Director – Finance and Governance and Interim Director

This report is public

Purpose of report

The Council is required to produce a balanced budget for 2018/19 as the basis for calculating its level of Council Tax. It has to base that budget on its plans for service delivery during the year, recognising any changes in service demand that may arise in future years.

The proposed budget and business plan for 2018/19, including the new cycle of growth strategies, are presented as an integrated report to demonstrate that the Council adopts a strategic approach to managing all of its resources, ensuring that the delivery of the Council's priorities for the district directs the allocation of financial resources.

1.0 Recommendations

The meeting is recommended:

- 1.1 To recommend the 2018/19 Corporate Strategy to Full Council (detailed in **Appendix 2**) and to delegate authority to the Interim Director, in consultation with the Leader of the Council to make any minor amendments to the plan as required before consideration by Full Council.
- 1.2 To consider and approve the draft budget in the context of the Council's service objectives and strategic priorities.
- 1.3 To approve and recommend the balanced budget to Full Council.
- 1.4 To note the impact of the proposed budget on reserves and recommend the reserves 2018/19 to full council, see **Appendix 5**.
- 1.5 To note the latest Medium Term Revenue Plan (MTRP) for 2017/18 to 2022/23, at **Appendix 6**; this will be the basis of the work of the Budget Planning Committee for the following year.

- 1.6 To recommend, subject to any further changes Members may wish to include tonight, the updated draft revenue budget for adoption by Full Council on 26 February 2018.
- 1.7 To consider and recommend a Council Tax increase to Full Council.
- 1.8 To recommend to full council the proposed 2018/19 capital programme set out in **Appendix 8**.
- 1.9 To delegate authority to the Executive Director – Finance and Governance, in consultation with the Lead Member for Financial Management to amend the contributions to or from general fund balances to allow the Council Tax to remain at the level recommended to Full Council following the announcement of the final settlement figures, any changes relating to Business Rates or as a result of any financial implications arising from recommendation 1.7, above.

2.0 Introduction

- 2.1 The proposed Corporate Strategy and Budget for 2018/19 are presented as an integrated report demonstrating that the Council adopts a strategic approach to managing all of its resources, ensuring that the delivery of the Council's priorities for the district directs the allocation of financial resources.
- 2.2 This report sets out the draft Corporate Strategy, which the Revenue and Capital budgets for 2018/19 are formulated from. The Corporate Strategy and budgets will be considered and approved by the Executive on the 5 February 2018 and will then form the basis of the council tax setting report which is due to be considered by Full Council on the 26 February 2018.
- 2.2 The report considers the impact of the provisional local government finance settlement, which was announced on 19 December 2017, on its Corporate Strategy, Budget and the Medium Term Revenue Plan.
- 2.3 The Council is in the final year of a five year Corporate Strategy, which will be reviewed and refreshed for 2019/20. The content of the plan has remained largely the same however the presentation of the plan has been updated. It is now represented as a “plan on a page” and will be supported by the key measures and KPI's that will demonstrate the successful delivery of the Plan.
- 2.4 Throughout the autumn and winter officers have been preparing the budget in line with the Corporate Strategy and budget guidelines approved by the Executive at its meeting of the 2 October 2017. A copy of the guidelines is included at **Appendix 1**.

3.0 Report Details

Corporate Strategy 2018/19

- 3.1 **Appendix 2** sets out the Corporate Strategy for 2018/19, which is derived from the Council's five year strategy. These inform the development of the annual budget and direct operational Service Plans for all services. This plan was considered and supported by the Overview and Scrutiny Committee on 23 January 2018.

- 3.2 The five year Business Strategy, the Medium-term Financial Strategy, the Annual Corporate Strategy, individual service plans and ultimately the appraisal targets of all individual employees demonstrate that the council has a clear and robust “golden thread” between resource availability and delivery of the council’s agreed strategic priorities. This is, in times of austerity, fundamental and will help us to provide effective leadership to all of our residents and businesses. It will also demonstrate that we are adopting a more mature and commercially aware approach to running our council.
- 3.3 The integration of services and management structures have created a single organisation on the inside, serving the two councils on the outside. This has recognised the similarities between the two Council areas, but also allowed sufficient flexibility to service the differences and unique elements of each.
- 3.4 The Corporate Strategy for 2018/19 recognises that continuing convergence and represents a joint plan for the two councils, in the form of a single “Plan on a Page”. **(See Appendix 2)**
- 3.5 The content of the plan represents a “light touch” review, broadly continuing with the themes and priorities within the two Councils’ five year strategic plans, but updating, where appropriate to align with emerging issues and challenges across the area.
- 3.6 A combined vision for the area articulates our overall ambition:-
“Great places to live, work, visit and invest”
- 3.7 Our three joint strategic themes break this vision down into the key areas of focus for the plans:-
- Protected, Green & Clean
 - Thriving Communities & Wellbeing
 - District of Opportunity & Growth
- 3.8 Priority workstreams within each of the strategic themes then start to articulate how we will deliver our ambitions
- 3.9 The delivery of the plan is underpinned and enabled through a joint organisational plan, illustrated on the Plan on a Page, as three pillars, representing the basis upon which we will continue to develop our organisation :-
- Operational Excellence – will ensure sound financial management, corporate governance and use of resources
 - Public value – will focus on the quality of the services and solutions that we provide to our broad range of customers and stakeholders
 - Best Council to work for – recognises that the services we provide rely on great people and effective, sustainable partnerships
- 3.10 The Corporate Strategy forms the basis of the Council’s performance management framework and progress will be reported quarterly.
- 3.11 Operational service plans set out detailed performance measures and targets for the forthcoming year. These will be finalised after Council has adopted the budget and Corporate Strategy.

- 3.12 Any Corporate Strategy needs to recognise and articulate the risks the organisation faces in being able to deliver the plan. A new Leadership Risk Register has been developed to align to the Corporate Strategy and is set out at **Appendix 3**.
- 3.13 As with the Financial and Performance information, this will be reviewed and reported into Committee on a regular cycle

Provisional Local Government Finance Settlement

- 3.14 On the 19 December 2017, the Secretary of State for Communities and Local Government, the Rt Hon Sajid Javid MP made a statement on the provisional local government finance settlement for 2018/19. The final settlement is likely to be announced towards the end of January 2018.
- 3.15 The provisional settlement contained no major changes related to the existing Medium Term Settlement, which has a further two years (2018/19 and 2019/20) to run. It also confirmed that the changes to New Homes Bonus scheme would be introduced as agreed i.e. a four year scheme with a baseline of 0.4%.
- 3.16 The relevant changes that were introduced included agreeing the 20% increase for planning fees, albeit that these must be used for service improvements and a 1% increase in the maximum Council Tax increase to 3%.
- 3.17 The settlement proposes RSG, Business Rates Baseline Funding and New Homes Bonus (NHB) for the next two years, until the revised 100% Business Rates Scheme can be introduced.
- 3.18 There were announcements regarding the new scheme, which included a consultation on the proposed "Fair Funding Review." This will form part of the new funding regime and along with a reset in growth will be used to "fairly" redistribute Business Rates to Local Authorities.
- 3.19 As with any redistribution methodology there will be winners and losers. Given the Council has generated significant growth and there will likely be a shift of resources for Social Care and geographical deprivation. We are likely to end up a loser on the redistribution, there is however likely to be a damping mechanism in place which restricts the amount that is lost.
- 3.20 Whilst the settlement itself did not result in changes for 2018/19 the Valuation Office Agency has revised the data on the change in rateable value between rating lists. This has impacted upon the tariffs and top ups, which affects the level of pooled business rates. The impact on Cherwell is an increase of £25k on the estimated pooled rates.

Fees and Charges 2018/19

- 3.21 The current proposed fees and charges for 2018/19 are attached at **Appendix 4** they have been completed in line with the budget guidelines and will form part of the 2018/19 budget book.
- 3.22 Although fees and charges produce significant income for the Council, there are factors that influence the Council's ability to set fees and charges: Some are set by Statute, others are set to break-even and some are outsourced to third parties.

- 3.23 This leaves the Council with fewer discretionary fees and charges to set, and this, in turn, reduces the impact on the overall budget.

Statutory fees and charges

Certain fees and charges are set by Government, and are outside the Council's control, for example planning application fees, and others, such as fees and charges related to gambling are subject to review by the Gambling Commission and the Department for Culture, Media and Sport.

Requirement to break-even

These are fees and charges which are set under regulations that place a requirement to break-even on the Council, for example building control fees and licensing. In these cases the charges are reviewed following completion of the expenditure budget so that a full assessment of break-even can be undertaken.

Fees and charges retained by third parties

The agreements that the Council has for leisure management include provisions to allow the management company to retain the income collected. In this case increases in fees and charges are linked to RPI in January each year.

Discretionary fees and charges

These are the fees and charges which the Council is free to set without restriction from legislation or regulation. Of the total income from fees and charges shown on the attached sheets, which exclude statutory charges, totalling £800,000, approximately half is discretionary. This is made up largely of sports and leisure and waste fees and charges.

Draft Revenue Budget

- 3.24 The initial Medium Term Revenue Plan (MTRP) for 2018/19 showed a funding gap of £0.45m. The budget presented in this report follows significant work by officers and the Budget Planning Committee in order to arrive at a balanced budget position. Table 1 (next page) shows the draft General Fund Revenue Budget for consideration by the Executive.

Table 1 - Revenue Budget 2018/19	Original Budget 2017/18	Proposed Budget 2018/19	Movement	Movement
	£000	£000	£000	%
EXPENDITURE				
Chief Executive	187	250	63	33
Wellbeing				
Communities	1,542	1,584	42	3
Leisure and Sport	3,638	3,564	(74)	(2)
Housing	2,091	2,038	(53)	(3)
Sub Total	7,271	7,186	(85)	(1)
Place & Growth				
Planning Policy and Development	1,407	1,444	37	3
Economy and Regeneration	1,692	1,513	(180)	(11)
Sub Total	3,099	2,957	(142)	(5)
Environment				
Environmental Services	5,170	5,886	716	14
Environmental Health and Licensing	(207)	16	223	(108)
Sub Total	4,963	5,902	939	19
Finance and Governance				
Law and Governance	1,130	1,198	68	6
Finance and Procurement	1,482	1,751	269	18
Property, Investment and Contract Management	(558)	(3,787)	(3,229)	579
Sub Total	2,054	(838)	(2,892)	(141)
Customers and Service Development				
IT Services	2,809	2,762	(47)	(2)
Strategic Marketing and Communication	317	326	9	3
HR, OD and Payroll	401	678	277	69
Performance and Transformation	526	594	68	13
Sub Total	4,053	4,360	307	8
NET COST OF SERVICES	21,627	19,817	(1,810)	(8)
Transfers to/from Reserves	(1,887)	3,451	5,338	(283)
Interest Payments	0	2,074	2,074	0
Interest on Investments	(1,954)	(2,935)	(981)	50
Pension Costs - Historic	4,985	257	(4,728)	(95)
Capital Charges	(4,002)	(4,002)	0	0
NET BUDGET REQUIREMENT	18,769	18,662	(107)	(1)
FUNDING				
Formula Grant Equivalent				
Business Rates Baseline	(3,564)	(3,673)	(109)	(3)
Revenue Support Grant	(1,105)	(637)	468	42
Sub Total	(4,669)	(4,310)	359	8
Grants Awarded				
Transfer to Parish Councils for CTRS	349	349	0	0
New Homes Bonus	(4,468)	(4,009)	459	10
Sub Total	(4,119)	(3,660)	459	11
Business Rates Growth				
Retained Business Rates	(2,231)	(2,600)	(369)	(17)
Pooling Gain	(1,562)	(910)	652	42
Renewable Energy	(213)	(287)	(74)	(35)
S31 Inflation Cap	0	(108)	(108)	(100)
NNDR Collection Fund Deficit	648	(223)	(871)	134
Sub Total	(3,358)	(4,128)	(770)	(23)
Council Tax Income				
Baseline	(6,377)	(6,377)	0	0
Taxbase increase	0	(129)	(129)	(100)
Council Tax Increase	0	0	0	0
Collection Fund	(246)	(58)	188	76
Sub Total	(6,623)	(6,564)	59	1
TOTAL INCOME	(18,769)	(18,662)	107	1
(SURPLUS) / DEFICIT	0	(0)	(0)	0

- 3.25 In order to balance the budget from the initial MTRP, further reductions in costs and increases in income were taken into account. The main drivers for this are summarised in Table 2 below and these adjustments have resulted in a balanced budget.

Table 2: Adjustments to proposed budget 2018/19

Movement Summary	£000
Employee Costs	380
Contracts and General Inflation	200
Major Pressures / Savings / Income	
Recycling Contract	600
Castle Quay & Property Management	(2,895)
Other Savings	(95)
Change to Net Cost of Services	(1,810)
Use of Reserves - NHB and Pension	610
Interest Paid - CQ & GH	2,074
Investment Income	(981)
Budget Requirement	(107)

Funded by	£000
Reduction in Formula Grant	359
Reduction in New Homes Bonus	459
Increase in Business Rates	(770)
Reduction in Council Tax	59
Net Funding Increase	107

Reserves 2018/19

- 3.26 The Budget Planning Committee reviews reserves as part of the budget monitoring process, the impact, on reserves, of the proposed budget are shown at **Appendix 5**. The proposed use of existing earmarked reserves and contributions to reserves are highlighted in the appendix.

Proposal for Council Tax 2018/19

- 3.27 The current level of council tax is £123.50 p.a. at Band D. This has been the level of Council Tax for the last 8 years.
- 3.28 The table below sets out details of potential Council Tax increases of 0%, 1%, 2% and 3% and their impact upon the Band D and Budget 18/19.

	0%	1%	2%	3%
Band D	123.5	124.7	126.0	127.2
Taxbase	52,681.6	52,681.6	52,681.6	52,681.6
Income	£6,506,178	£6,571,239	£6,636,301	£6,701,363
Increase		£65,062	£130,124	£195,185

3.29 The Committee will need to make a recommendation on the proposed level of Council Tax increase for 2018/19.

The Future – Medium Term Financial Strategy 2019/20 to 2022/23

3.30 The coming years will present further challenges, which in the main will result from the move towards the 100% Business Rates regime from 2020/21. The actions the Council has taken in recent years with investments in Graven Hill, Castle Quay and Crown House allied to the strong track record and commitment in delivering efficiencies place it in a strong position to be successful in the Medium Term.

3.31 It is of course important not to become complacent especially given the level of uncertainty surrounding funding from 2020/21. The forward planning together with the joint working with South Northamptonshire Council (and any other partners that we collaborate with), combined with our commitment to identifying alternative sources of income and commercial practice to provide financial independence strengthens our position to meet the forecast challenges of future years. The Council will update its MTRP forecast to be included in the 2018/19 budget book and this is shown at **Appendix 6**.

Capital Programme 2018/19

3.32 A list of capital bids is attached at **Appendix 7** together with the detailed bid appraisal forms.

3.33 A proposed capital programme for five years from 2017/18 is attached as **Appendix 8**. This includes bids submitted for 2017/18 and the six items that are included on a five year rolling programme:

- Disabled Facilities Grants
- Discretionary Grants for Domestic Properties
- Vehicle Replacement Programme
- East West Rail Contribution
- Hardware and Software Replacement Programme
- Business Systems Replacement Programme

Capital Financing

Capital Expenditure and Financing	2017/18 Revised	2018/19 Estimate	2019/20 Estimate	2020/21 Estimate	2021/22 Estimate	2022/23 Estimate
	£m	£m	£m	£m	£m	£m
Total Expenditure	106.7	74.1	21.7	1.8	1.8	1.8
Capital Receipts	1.1	1.1	1.1	10.7	1.1	1.1
Government Grants	0.4	0.4	0.4	0.4	0.4	0.4
Revenue - MRP	0.0	1.5	1.5	1.5	1.5	1.5
Borrowing	105.2	71.1	18.7	-10.8	-1.2	-1.2
Total Financing	106.7	74.1	21.7	1.8	1.8	1.8

Treasury Management Strategy 2018/19

- 3.34 There is a significant increase in interest on balances as a result of the Council's decision to set up, and invest in the Graven Hill Company. Interest payable by Graven Hill to the Council in 2018/19 is estimated at £1.249m. In addition a commitment fee of £0.661m is also payable, giving total income of £1.91m from the project in 2018/19.
- 3.35 The Council's investment income budget for 2018/19 has been compiled on the basis of close tracking of actual and likely interest rates and with the help of external advice. The emphasis has been on investments with the least risk for the Council's money and this, along with the continued low interest rates on offer and the agreed use of capital receipts has led to continuing low levels of investment income built into the budget. In budgetary terms this is prudent and places the Council at less risk of exposure in-year. A revised Treasury Management Strategy is attached as Appendix 9 and has been recommended to Full Council by the Accounts, Audit and Risk Committee.

4.0 Conclusion and Reasons for Recommendations

- 4.1 The above narrative alongside the appendices represents the draft business, risk register and budget for 2018/19 for approval by the Executive. If agreed, they will be recommended to Full Council on the 26 February and be considered alongside the setting of the 2018/19 Council Tax.

5.0 Consultation

Public Consultation

- 5.1 The development of the Council's Corporate Strategy and budget is shaped by undertaking public consultation including using the Citizen's Panel and an annual customer satisfaction survey.
- 5.2 In addition, the draft budget has been available on the Council's consultation portal for comment.

Other Consultation

- 5.3 As part of our commitment to a whole Council approach to the setting of the budget and our priorities for the year ahead, the Council's Overview and Scrutiny Committee has been invited to help shape the proposed Corporate Strategy for 2017/18.
- 5.4 During its meeting on 18 January 2017, Scrutiny Committee offered a number of suggested changes to the draft Corporate Strategy for 2017/18 which have subsequently been considered and incorporated.
- 5.5 The Budget Planning Committee has considered the budget through its meetings during July 2016 to February 2017.
- 5.6 The corporate values, forming part of the operational excellence strategy have been the subject of consultation with the Managers' Forum and Unison.

6.0 Alternative Options and Reasons for Rejection

- 6.1 This report presents a draft analysis of the Council's revenue and capital budget and Corporate Strategy for 2018/19. They will be presented together to the Executive on 5 February and Full Council on the 26 February to support the setting of the Council Tax at the same meeting.
- 6.2.1 It is a legal requirement to set a balanced budget and the recommendations as set out and directed by the Corporate Strategy represent what is believed to be the best way of achieving this.
- 6.2.2 Members could decide not to agree the recommendations or to present alternative budget proposals but that would run counter to the detailed budget setting process that has taken place as part of the formulation of this budget.

7.0 Implications

Financial and Resource Implications

- 7.1 The financial effects of the revenue budget are identified in the report. The new capital schemes are detailed in Appendix 6. Any decisions made in relation to on-going expenditure or income in the budget for 2018/19 will have repercussions in future years when current forecasts indicate the financial environment is likely to become increasingly difficult. The Council has a statutory duty to set a balanced budget and could be subject to the intervention of the Secretary of State if it failed to do so.

Comments checked by:

Cecilie Booth, Interim Assistant Director of Finance, 01295 221731

cecilie.booth@cherwellandsouthnorthants.gov.uk

Legal Implications

- 7.2. The Council is legally required to set a balanced budget which the recommendations will achieve if recommended by Executive and approved by Full Council. Due consideration of external responses to consultation is also required and I am informed has taken place as part of the budget process.

Comments checked by:
Nigel Bell, Interim Legal Services Manager, 01295 221687
nigel.bell@cherwellandsouthnorthants.gov.uk

Risk Management

- 7.3 The Corporate Strategy and Budget position are reflected with the new Leadership Risk register, which is attached to the report as **Appendix 3**. The register reflects that where there are significant risks these are being managed and mitigated appropriately. The risk register is updated on a regular basis and reported to the Accounts, Audit and Risk Committee.

Comments checked by:
Louise Tustian, Team Leader - Strategic Intelligence and Insight Team 0129 221786
louise.tustian@cherwellandsouthnorthants.gov.uk

Equality and Diversity

- 7.4 Impact assessments will be carried out in advance of setting the 2018/19 budget.

Comments checked by:
Caroline French, Business Transformation Project Officer, 01295 221586
caroline.french@cherwellandsouthnorthants.gov.uk

8.0 Decision Information

Key Decision

Financial Threshold Met: Yes

Community Impact Threshold Met: Yes

Wards Affected

Not applicable

Links to Corporate Plan and Policy Framework

Enhancing the Council Performance

Lead Councillors

Councillor Barry Wood, Leader of the Council &
Councillor Tony Ilott – Lead Member for Financial Management

Document Information

Appendix No	Title
Appendix 1	Budget Guidelines 2018/19
Appendix 2	Corporate Strategy 2018/19
Appendix 3	Risk Register 2018/19
Appendix 4	Fees and Charges 2018/19
Appendix 5	Use of Reserves 2018/19
Appendix 6	MTRP 2017/18 to 2022/23
Appendix 7	New Capital Bids 2018/19
Appendix 8	Capital Programme 2018/19 – 2022/23
Appendix 9	Treasury Management Strategy 2018/19
Background Papers	
None	
Report Author	Paul Sutton, Executive Director – Finance and Governance Richard Ellis – Interim Director

GUIDELINES FOR THE PREPARATION OF THE 2018/19 BUDGET

Principles

- Protect Frontline Services
- Focus attention on corporate and service priorities and improving performance
- Maximise joint working potential and commercialisation income
- Maximise procurement opportunities and contract negotiations

These budget guidelines have been developed within a consistent corporate framework to ensure:

- implementation of agreed savings and efficiency proposals
- resources are allocated to Council priorities
- inappropriate competition between services for resource allocations is minimised
- a transparent method for charging a fair cost between internal Council services.

The guidelines are designed to positively encourage managers and elected members to do the following:

- bring forward ideas and options to make more effective use of existing resources, clearly identifying how the ideas may develop over a 3-year period, including any requirements for pump priming money.
- link the budget setting process to Service Plans and the requirement for the identification of options, which will produce efficiency savings.
- focus attention on corporate and service priorities and improving performance.

Budget Deliverables

1. Prepare and submit draft revenue estimates for 2018/19 and the next 4 years (5 year forecast) which fully reflect the service priority and consultation event findings and match the current duration of the MTRP.
2. Prepare and submit a draft 5 year capital programme. All schemes to carry a full project appraisal including strategic objective, priority, value for money assessment, and details of any revenue impacts. In particular the phasing of expenditure over the life of the project, so as to minimize slippage. All capital project appraisals will be validated by the Budget Planning Committee. All schemes previously approved to start in 2018/19 and onwards will be carried through for consideration.
3. The 2017/18 outturn, adjusted to take account of the full year effect of savings identified in setting the 2017/18 budget, and one off items will be assumed to be the “**base budget**”.

Budget Timetable

The revenue and capital budget is agreed by full Council before 11 March each year. The 2018/19 budget will be considered at Council in February 2018.

Revenue Budget Guidelines

Income

In building income budgets it is essential that a realistic assessment of income achievement is undertaken. Budget holders should use their knowledge of past trends and current market conditions in assessing income levels for the future and the scope for increases in fees and charges.

It is important to look at not only financial information but also non-financial information such as activity data on customer usage and trends to help build realistic income estimates.

Variations to the existing approved budget for income must be clearly identified and explained.

Variations in fees and charges need to be considered taking into account the Council's priorities and objective to ensure that proposals are consistent with these priorities and objectives.

Growth

- It is the aspiration that the net impact of all growth items should be **ZERO**.
- Growth arising from changes in legislation / regulation or service planning will **ONLY** be allowed if it is fully funded by transferring resources within the same service or from within the same Directorate. Any such transfer either within the same service or the same Directorate can only come from demonstrably lower priority services. A growth proforma should be completed detailing full requirements.

Financial assumptions - should be used in estimating changes in expenditure and income over the medium term.

- Provide for general inflation in 2018/19 on all expenditure (excl payroll) and fees and charges as per forecasts in our MTRP model and will be used in the budget module as below:

CPI Forecast (OBR) %		Budget %	
2018	2.3%	2018/19	2.5%
2019	2.0%	2019/20	2.5%
2020	2.0%	2020/21	2.5%
2021	2.0%	2021/22	2.5%
2022	unavailable	2022/23	2.5%

Current CPI (August 2017) per the ONS is 2.7%.

- Payroll – payroll inflation is included at the following levels:

Year	%
2018/19	2.0%
2019/20	2.0%
2020/21	2.0%
2021/22	2.0%
2022/23	2.0%

- Interest rates should be forecasted as below:

Year	Arlingclose forecast
2018/19	0.25%
2019/20	0.25%
2020/21	0.25%
2021/22	unavailable
2022/23	unavailable

The Bank of England is now forecasting an increase in rates to 0.5% for the short to medium term.

All financial indices above are subject to further review in the budget process and may be subject to change.

Budget Process: Base Budget Review and Savings

The budget for 2018/19 will be based on the same methodology as for 2017/18. Directorates will not be asked to take their base budget and prepare a range of savings options of up to 20%, instead this year the process will be based on a Base Budget Review (BBR).

The BBR will still use historical data, but will not have the presumption that the service **NEEDS** the same resources and budgets.

The following factors will be used to produce a 3-year Directorate budget:

- Trend Analysis – variance review of the last three years expenditure / income to identify any that should be captured in the budget.
- In Year Monitoring – what does the current budget monitoring identify in terms of variances that should be captured in the budget;
- Challenge – Finance staff will work with budget holders using the the above tools to provide support and challenge to ensure budgets are based upon need.

Efficiencies from Joint Working

In the last 10 years the Council has successfully generated efficiency savings from across the organisation to limit the impact on front line services and set a year on year balanced budget.

Government cuts and service pressures are expected to continue well into the medium term and in millions not thousands. This cannot be sustained through a

continuation of driving traditional efficiency savings. The Council must adopt new ways of delivering more collaborative and commercial services if it to continue to be sustainable in the medium term and delivering high quality services.

The Council continues to develop joint working with South Northamptonshire Council and has established a Teckal company to deliver the Revenues and Benefits Service at both Council's. It is anticipated that this model will also be applicable to other services.

This incremental approach is designed to ensure that there are sufficient solutions and savings being generated to balance the budget in the short and medium term.

Commercialisation

The need for a more commercial perspective to existing services where appropriate has been identified but there must also be a drive to new and innovative ways of generating income. The Transformation Workstreams are already in place and a number of workstream savings have been included in the budget for 2017/18.

With interest rates at historically low levels, the Council has explored options for better use of cash held. Such commercial opportunities are designed to produce a return significantly higher than market interest rates.

Capital programme Guidelines

- Capital resources are reducing over the life of the MTRP. The development of 5-year rolling capital programme and resources should be drawn up within the context of the following objectives:
 1. The generation of additional reserves and balances, with appropriate contingencies.
 2. Opportunities to invest to save.
 3. Maintaining Council assets and the Council's infrastructure to agreed standards.
- A capital project appraisal is required for each bid and this will be validated by the Budget Planning Committee who will make recommendations for schemes to be included in the 2018/19 capital programme. All schemes previously approved to start in 2018/19 and onwards will be carried through for consideration.

Procurement

When setting both the 2018/19 budget and future years, regard should be given to the Corporate Procurement Strategy and the Council's Contract Procedure rules. In particular, budgets and projections should be based on Corporate and agreed framework contracts. Further advice and guidance can be obtained from the Council's Procurement Team.

Risk

The budget process is fundamental to the Council's financial management regime and Members need to be assured that all pertinent issues are properly considered when making key decisions on the Council's future finances.

In drawing up revenue budget proposals, risk assessments should be undertaken to test the robustness of proposals and to identify key factors which may impact on the proposals put forward. Where appropriate action plans should be put in place to manage/mitigate the risks identified – this may include a risk provision within the budget which can be calculated by your service accountant.

With a Revenue Budget covering all the Council's services and activities of over £18m, the potential for an issue to be missed or not considered properly will always be there. The budget process is designed to minimise this risk and throughout the process there are frequent meetings with Joint Management Team and Executive to progress any changes and developments.

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**Joint Corporate Strategy
2018-19**

**“Protected, Green
& Clean”**



**South
Northamptonshire
Council**

“Two Councils, one organisation”



**DISTRICT COUNCIL
NORTH OXFORDSHIRE**

**“Great places to live,
work, visit & invest”**

**Thriving
Communities
& Wellbeing**

**“District of
Opportunity
& Growth”**

**Deliver the Masterplans for key economic centres:
Bicester/Banbury/Kidlington/Brackley/Towcester/Silverstone**

Shared Organisational Plan

Operational Excellence
Rigorous Financial Management
Income optimisation
Commercial & Procurement excellence
Effective Governance
Alternative Delivery Vehicles

Public Value
24/7 access to services
Right first time, every time
Service at point of need
Efficient & effective services
Customer Service Excellence

Best Council to work for
Sustainable relationships with key partners
Culture of Innovation & Creativity
Effective People service
Employer of choice
Enabled through digitisation
Corporate Social responsibility

“Here to Serve”

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Cherwell District and South Northants Councils – Leadership Risk Register as at 17/01/18

Risk Scorecard – Residual Risks						
		Probability				
		1 - Remote	2 - Unlikely	3 - Possible	4 - Probable	5 - Highly Probable
Impact	5 - Catastrophic					
	4 - Major		L04			
	3 - Moderate		L03	L01, L02, L06, L08, L10	L05, L07	L09
	2 - Minor					
	1 - Insignificant					

Level of risk	How the risk should be managed
High Risk (16-25)	Requires active management to manage down and maintain the exposure at an acceptable level. Escalate upwards.
Medium Risk (10 -15)	Contingency Plans - a robust contingency plan may suffice together with early warning mechanisms to detect any deviation from the profile.
Low Risk (1 – 9)	Good Housekeeping - may require some risk mitigation to reduce the likelihood if this can be done cost effectively, but good housekeeping to ensure that the impact remains low should be adequate. Re-assess frequently to ensure conditions remain the same.

Risk Definition	
Strategic	Risks that are significant in size and duration, and will impact on the reputation and performance of the Council as a whole, and in particular, on its ability to deliver on its strategic priorities
Operational	Risks to corporate systems or processes that underpin the organisation’s overall governance, operation and ability to deliver services

Ref	Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment (Fully effective) (Partially effective) (Not effective)	Risk owner	Risk manager	Residual risk level (after existing controls)			Direct'n of travel	Mitigating actions (to address control issues)	Comments	Last updated
			Probability	Impact	Rating					Probability	Impact	Rating				
L01	Financial resilience – Failure to react to external financial shocks, new policy and increased service demand. Poor investment and asset management decisions.	<ul style="list-style-type: none"> Reduced medium and long term financial viability Reduction in services to customers Continued reliance on central govt (RSG) and therefore reduced opportunity for independent decision making Reduced financial returns (or losses) on investments/assets Inability to deliver financial efficiencies Inability to deliver commercial objectives (increased income) Poor customer service and satisfaction Increased complexity in governance arrangements Lack of officer capacity to meet service demand 	4	4	16	<ul style="list-style-type: none"> Medium Term Revenue Plan reported regularly to members. Efficiency plan in place and balanced medium term Highly professional, competent, qualified staff Good networks established locally, regionally and nationally National guidance interpreting legislation available and used regularly Members aware and are briefed regularly Participate in Northamptonshire Finance Officers and Oxfordshire Treasurers' Association's work streams Programme management approach being taken Treasury management policies in place Investment strategies in place Regular financial and performance monitoring in place Independent third party advisers in place Regular bulletins and advice received from advisers Property portfolio income monitored through financial management arrangements on a regular basis Asset Management Strategy in place and embedded. Transformation Programme in place to deliver efficiencies and increased income in the future 	Fully Fully Partially Fully Partially Partially Fully Partially Fully Partially Partially Fully Partially Partially	Paul Sutton	AD Finance & Proc	3	3	9	<ul style="list-style-type: none"> AD Finance and Governance to be recruited asap. Investment strategy for both authorities to be approved in 18/19 budget cycle. Timeliness and quality of budget monitoring particularly property income and capital to be improved. Project with Civica is ongoing. Asset Management Strategy to be reviewed and refreshed in the new year. 			

Ref	Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Risk owner	Risk manager	Residual risk level (after existing controls)			Direct'n of travel	Mitigating actions (to address control issues)	Comments	Last updated
			Probability	Impact	Rating					(Fully effective) (Partially effective) (Not effective)	Probability	Impact				
L02	Statutory functions – Failure to meet statutory obligations and policy and legislative changes are not anticipated or planned for.	<ul style="list-style-type: none"> Legal challenge Loss of opportunity to influence national policy/legislation Financial penalties Reduced service to customers 	3	4	12	<ul style="list-style-type: none"> Embedded system of legislation and policy tracking In place, with clear accountabilities, reviewed regularly by Directors Clear accountability for responding to consultations with defined process to ensure Member engagement National guidance interpreting legislation available and used regularly Risks and issues associated with Statutory functions incorporated into Directorate Risk Registers and regularly reviewed Clear accountability for horizon scanning, risk identification/categorisation/escalation and policy interpretation in place Robust Committee forward plans to allow member oversight of policy issues and risk management, including Scrutiny and Audit Internal Audit Plan risk based to provide necessary assurances Strong networks established locally, regionally and nationally to ensure influence on policy issues Senior Members aware and briefed regularly in 1:1s by Directors 	Partially Fully Fully Partially Partially Partially Fully Partially	Yvonne Rees	Richard Ellis	3	3	9	•	<ul style="list-style-type: none"> Establish corporate repository and accountability for policy/legislative changes Review Directorate/Service risk registers Ensure Committee forward plans are reviewed regularly at CEDR level Ensure Internal Audit plan focusses on key leadership risks Develop stakeholder map, with Director responsibility allocated for managing key relationships Standardise agendas for Director/PFH 1:1s 		
L03	Lack of Management Capacity - Delays to completing the management restructure reduces capacity at management level	<ul style="list-style-type: none"> Financial impact due to use of agency staff Inability to deliver council's plans Inability to realise commercial opportunities or efficiencies Reduced resilience and business continuity Reduced staff morale and uncertainty may lead to loss of good people 	3	4	12	<ul style="list-style-type: none"> Rigorous and aggressive assessment and recruitment timetable for senior management roles Arrangements in place to source appropriate interim resource if needed Delegations to Chief Exec agreed to ensure timely decisions HR/Specialist resource in place to support recruitment process and manage implications Ongoing programme of internal communication 	Fully Fully Fully Fully	Yvonne Rees	Richard Ellis	2	3	6	•	<ul style="list-style-type: none"> Discussions with Penna to ensure rapid response should interim resource be required AD HR/OD briefed and leading the process Communications to be delivered by CEO 		

Ref	Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment (Fully effective) (Partially effective) (Not effective)	Risk owner	Risk manager	Residual risk level (after existing controls)			Direct'n of travel	Mitigating actions (to address control issues)	Comments	Last updated
			Probability	Impact	Rating					Probability	Impact	Rating				
L04	CDC & SNC Local Plans - Failure to ensure sound local plans are submitted on time for each District.	<ul style="list-style-type: none"> Inappropriate growth in inappropriate places Negative (or failure to optimise) economic, social, community and environmental gain Negative impact on each council's ability to deliver its strategic objectives Increased costs in planning appeals Possible financial penalties through not delivering forecasted New Homes Bonus 	3	5	15	<ul style="list-style-type: none"> Local Development Schemes are in place at each Council which detail the timeframes and deliverables to underpin the work Resources are in place to support delivery including QC support for each Local Plan. For issues which are solely within the control of SNC or CDC policies, plans and resources are in place Work is at Reg 19 on Cherwell Partial Review, preparing submission plan for Feb 2018 sign off and to re-commence in 2018 on Local Plan part 2. Work is advancing to Reg 19 stage On South Northants Local Plan part 2 on issues for reps, policies and development control policies. Statements of Community Involvement are in place. 	Fully Partially Partially Fully Fully Fully	Adrian Colwell	Andy Darcy (SNC) David Peckford (CDC)	2	4	8	•	<ul style="list-style-type: none"> Regular review meetings on progress and critical path review at each Council Regular Portfolio briefings and political review LDS updated as required Additional evidence commissioned as required Need to review resources at CDC to speed up Local Plan part 2. 		
L05	Business Continuity - Failure to ensure that critical services can be maintained in the event of an incident	<ul style="list-style-type: none"> Inability to deliver key services to customers/residents Financial loss 	4	4	16	<ul style="list-style-type: none"> Business continuity strategy in place Services prioritised and recovery plans reflect the requirements of critical services ICT disaster recovery arrangements in place Incident management team identified in Business Continuity Strategy All services undertake annual business impact assessments and update plans 	Partially Partially Partially Partially Partially	Ian Davies	Jackie Fitzsimons	4	3	12	•	<ul style="list-style-type: none"> All individual service BC plans recently updated Corporate BC to be reviewed Testing to be programmed BC solutions between both councils to be further developed Corporate ownership and governance to sit at CEDR 		

Ref	Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment (Fully effective) (Partially effective) (Not effective)	Risk owner	Risk manager	Residual risk level (after existing controls)			Direct'n of travel	Mitigating actions (to address control issues)	Comments	Last updated
			Probability	Impact	Rating					Probability	Impact	Rating				
L06	Partnering - Failure to build the necessary partnership relationships to deliver our strategic plan. Failure to ensure the necessary governance of third party relationships (council businesses, partners, suppliers)	<ul style="list-style-type: none"> Poor service delivery Inability to deliver council's plans and outcomes for communities Legal challenge Financial loss Inability to partner in the future Reduced opportunity for inward investment in the future 	4	4	16	<ul style="list-style-type: none"> Stakeholder Map, allocating responsibility for key relationships at Director/PFH level Regular review and sharing of partnership activity/engagement at CEDR/BPM meetings Robust governance/contract management framework in place for key third party relationships Training and development of senior officers/members to fulfil their responsibilities with partner organisations 	Not Partially Partially Partially	Yvonne Rees	Richard Ellis	3	3	9	•	<ul style="list-style-type: none"> Develop stakeholder Map Standard agenda item at CEDR Develop governance guidelines for all key third party relationships Review existing arrangements/ contracts to ensure appropriate governance 		
L07	Emergency Planning (EP) - Failure to ensure that the local authority has plans in place to respond appropriately to a civil emergency fulfilling its duty as a category one responder	<ul style="list-style-type: none"> Inability of council to respond effectively to an emergency Unnecessary hardship to residents and/or communities Risk to human welfare and the environment Legal challenge Potential financial loss through compensation claims Ineffective Cat 1 partnership relationships 	4	4	16	<ul style="list-style-type: none"> Emergency plan reviewed quarterly and on activation Dedicated Emergency Planning Officer in post to review, test and exercise plan and to establish, monitor and ensure all elements are covered Added resilience from cover between shared Public Protection Team as officers with appropriate skill JMT regularly attend Civil Emergency training Twice yearly mock emergency exercises conducted to ensure readiness On-call rota established for Duty Emergency Response Co-ordinators (JMT) Full participation in LRF activities 	Partially Fully Fully Partially Partially Partially Not	Ian Davies	Jackie Fitzsimons	4	3	12	•	<ul style="list-style-type: none"> To be updated when new management structure is in place New call out arrangements to be established New annual training regime for GS&B officers to be set up Training monitoring to be developed through new HR/Payroll system Member training for disaster recovery and comms 		

Ref	Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment (Fully effective) (Partially effective) (Not effective)	Risk owner	Risk manager	Residual risk level (after existing controls)			Direct'n of travel	Mitigating actions (to address control issues)	Comments	Last updated
			Probability	Impact	Rating					Probability	Impact	Rating				
L08	Health and safety - Failure to comply with health and safety legislation, corporate H&S policies and corporate H&S landlord responsibilities	<ul style="list-style-type: none"> Fatality, serious injury & ill health to employees or members of the public Criminal prosecution for failings Financial loss due to compensation claims Enforcement action – cost of regulator (HSE) time Increased sickness absence Increased agency costs Reduction in capacity impacts service delivery 	4	5	20	<ul style="list-style-type: none"> Robust Health & Safety policies and Corporate H&S arrangements in place as part of an Integrated H&S Management System Clearly identified accountability and responsibilities for Health and Safety established at all levels throughout the organisation Corporate H&S Manager & H&S Officer in post to maintain the H&S Management System & provide competent H&S advice & assistance to managers & employees Directorate Health & Safety Improvement Plans established with embedded reporting and recording arrangements in place Proactive monitoring of Health & Safety performance management internally Proactive monitoring of Health & Safety performance management externally Effective training regime in place for all staff Positive Health & Safety risk aware culture Corporate Health & Safety meeting structure in place for co-ordination and consultation Corporate body & Member overview of Health & Safety performance via appropriate committee Assurance that third party organisations subscribe to and follow Council Health & Safety guidelines and are performance managed where required 	Partially Not Fully Not Partially Fully Partially Partially Fully Fully Partially	Paul Sutton	Mark Wills	3	3	9	<ul style="list-style-type: none"> Corporate H&S Policy to be developed & implemented across the organisation to ensure that roles & responsibilities at all levels are discharged effectively. Policy to be developed following restructure. Update key Corporate H&S arrangements which are out-of-date. Directorate H&S Improvement Plans to be produced Expand scope of internal audits to cover all elements of the H&S Management System Management of H&S training programme to be developed and rolled out. Robust training already in place in Environmental Services Good awareness in higher risk areas of the business, e.g. Environmental Services. However other areas need improved awareness of risk assessment process Reviews of leases and performance monitoring to be reviewed to satisfy the Councils providers/ contractors are managing significant risks. 	<p>OHSAS 18001 Health & Safety Management System accreditation achieved through Exova BM Trada. Annual surveillance visits undertaken to supplement main accreditation visits.</p> <p>CEDR Meeting receives quarterly updates from Corporate H&S Manager. Relevant updates taken to appropriate committee.</p>		

Ref	Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment (Fully effective) (Partially effective) (Not effective)	Risk owner	Risk manager	Residual risk level (after existing controls)			Direct'n of travel	Mitigating actions (to address control issues)	Comments	Last updated
			Probability	Impact	Rating					Probability	Impact	Rating				
L09	Cyber Security - If there is insufficient security with regards to the data held and IT systems used by the councils and insufficient protection against malicious attacks on council's systems then there is a risk of: a data breach, a loss of service, cyber-ransom.	<ul style="list-style-type: none"> Service disruption Financial loss / fine Prosecution – penalties imposed Individuals could be placed at risk of harm Reduced capability to deliver customer facing services Unlawful disclosure of sensitive information Inability to share services or work with partners Loss of reputation 	4	5	20	<ul style="list-style-type: none"> File and Data encryption on computer devices Managing access permissions and privileged users through AD and individual applications Consistent approach to information and data management and security across the councils Effective information management and security training and awareness programme for staff Password security controls in place Robust information and data related incident management procedures in place Appropriate robust contractual arrangements in place with all third parties that supply systems or data processing services Appropriate plans in place to ensure ongoing PSN compliance Adequate preventative measures in place to mitigate insider threat, including physical and system security Insider threat mitigated through recruitment and line management processes 	<p>Fully</p> <p>Fully</p> <p>Partially</p> <p>Partially</p> <p>Fully</p> <p>Partially</p> <p>Partially</p> <p>Fully</p> <p>Partially</p> <p>Partially</p>	Claire Taylor	Tim Spiers	3	5	15	<ul style="list-style-type: none"> We are working with a security company to review our cyber security status and achieve the cyber essentials + accreditation This work is underway and the outcomes are expected in February 2018 This will provide an action plan against any control issues identified Cyber-security was reviewed by Internal Audit in May 2017 and will be reviewed again in April 2018. HR also have actions to complete regarding recruitment and processes identified by Internal Audit. The IT Transformation Programme includes migrating server rooms to external data centre which will increase physical security. As part of this work improved monitoring solutions will also be implemented. The Councils will also be completing the annual independent IT security health check in quarter 1 2018. 	Cyber security incidents are inevitable. The only way to manage this risk is to have effective controls and mitigations in place including audit and review.		

Ref	Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment (Fully effective) (Partially effective) (Not effective)	Risk owner	Risk manager	Residual risk level (after existing controls)			Direct'n of travel	Mitigating actions (to address control issues)	Comments	Last updated
			Probability	Impact	Rating					Probability	Impact	Rating				
L10	Safeguarding the vulnerable (adults and children) - Failure to follow our policies and procedures in relation to safeguarding vulnerable adults and children or raising concerns about their welfare	<ul style="list-style-type: none"> Increased harm and distress caused to vulnerable individuals and their families Council could face criminal prosecution Criminal investigations potentially compromised Potential financial liability if council deemed to be negligent 	3	4	12	<ul style="list-style-type: none"> Safeguarding lead in place and clear lines of responsibility established Safeguarding Policy and procedures in place Information on the intranet on how to escalate a concern Staff training - new whole staff shared approach being launched in the summer Safer recruitment practices and DBS checks for staff with direct contact Action plan developed by CSE Prevention group as part of the Community Safety Partnership Local Safeguarding Children's Board Northamptonshire (LSCBN) pathways and thresholds Data sharing agreement with other partners Attendance at Children and Young People Partnership Board (CYPPB) Annual Section 11 return complied for each council Engagement with Joint Agency Tasking and Co-ordinating Group (JATAC) and relevant Oxfordshire County Council (OCC) safeguarding sub group Engagement at an operational and tactical level with relevant external agencies and networks 	<p>Fully</p> <p>Fully</p> <p>Partially</p> <p>Partially</p> <p>Partially</p> <p>Fully</p> <p>Partially</p> <p>Fully</p> <p>Fully</p> <p>Fully</p> <p>Partially</p>	Ian Davies	Nicola Riley	3	3	9	<ul style="list-style-type: none"> Ongoing internal awareness campaigns Ongoing external awareness campaigns Annual refresher and new training programmes Training monitoring to be developed through new HR/Payroll system 			

Public Protection, Environmental Health, Licensing and Building Control

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes	
Public Protection and Environmental Health						
(i) Animal Boarding Establishment Licence	£110.00	£110.00	£0.00	0.0%	These fees have not been increased in 2018/19 as they were reviewed in 17/18 to align closer to SNC fees. As a result of the findings from the Hemmings case, the fees are to be reviewed in 18/19 with a view to changes taking place in 2019/20.	
(ii) Pet Shop Licence	£110.00	£110.00	£0.00	0.0%		
(iii) Riding Establishment Licence	£149.00	£149.00	£0.00	0.0%		
(iv) Dog Breeding Establishment Licence	£138.00	£138.00	£0.00	0.0%		
(v) Skin Piercing (a) Registration Fee	£96.00	£96.00	£0.00	0.0%		
(v) Skin Piercing (b) Registration of Premises	£151.00	£151.00	£0.00	0.0%		
(vi) Dangerous Wild Animals Licence	£198.00	£198.00	£0.00	0.0%		
(vii) Zoo Licence	£565.00	£565.00	£0.00	0.0%		
Variation of scrap metal dealers license type Collector - Dealer	£200.00	£200.00	£0.00	0.0%		
Variation of scrap metal dealers license - Admin, change of name or replacement	£100.00	£100.00	£0.00	0.0%		
Scrap metal dealers site	£455.00	£455.00	£0.00	0.0%	This fee relates to part 8 of the Anti Social Behaviour Act 2003.	
Scrap metal collectors license	£270.00	£270.00	£0.00	0.0%		
Investigation of high hedges complaint	£360.00	£360.00	£0.00	0.0%		
Food Export/Hygiene Certificates (without inspection)	£42.00	£43.00	£1.00	2.3%	Fees have been increased in line with inflation	
Food Export/Hygiene Certificates (with inspection)	£103.00	£105.00	£2.00	1.9%		
Food Hygiene Rating Scheme Rescore Visit	£260.00	£265.00	£5.00	1.9%		
Food Surrender Certificates	£116.00	£118.50	£2.50	2.1%		
Copies of Food Premises Register (a) Single Entry	£3.50	£3.57	£0.07	2.0%		
Copies of Food Premises Register (b) Full Register	£300.00	£306.00	£6.00	2.0%		
Factual Statements for Civil Proceedings	£145.00	£148.00	£3.00	2.0%		
Reports provided under the Environmental Information Regulations	£145.00	£148.00	£3.00	2.0%		
Contaminated land enquiry	£60.00	£62.00	£2.00	3.2%		The fee is discretionary to cover our admin costs for providing the information. It is the same at both councils and is charged per hour or part thereof.
Water Sampling Fees:						Fees has been increased in line with inflation
Lab Fees	£80.00	£82.00	£2.00	2.4%		
Regulation 10	£105.00	£107.00	£2.00	1.9%		
Pools	£30.00	£31.00	£1.00	3.2%		
Courier and Admin charges	£30.00	£31.00	£1.00	3.2%		

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
Health Protection - Food Safety					
Level 2 Food Safety in Catering Course					
Taught Course	£71.00	£71.00	£0.00	0.0%	No increase 18/19 as no increase in resources planned by supplier and hourly rate calculated on cost recovery
Taught - Voluntary Groups	£40.00	£41.00	£1.00	2.4%	Proof required from candidate.
Taught - Unemployed	£40.00	£41.00	£1.00	2.4%	Proof required from candidate.
E-learning (all level 2 courses)	£25.00	£25.00	£0.00	0.0%	New course not previously provided. No increase 18/19 as no increase planned from supplier
Level 3 Food Hygiene Course					
Taught Course	£0.00	£283.00	£283.00	100.0%	New course not previously provided.
E-learning (all level 3 courses)	£150.00	£150.00	£0.00	0.0%	No increase 18/19 as no increase planned from supplier
Water sampling					
Approved premises	£62.50	£64.00	£1.50	2.3%	Fee increased in line with inflation
Other					various subject to quote
Food Hygiene Rating Scheme rescore visit	£260.00	£265.00	£5.00	1.9%	Fee increased in line with inflation
Cost recovery - Commercial & Business Support					
Basic cost recovery (qualified officer)	£0.00	£68.00	£68.00	100.0%	New cost not previously provided. (Includes recharges)
Full cost recovery (qualified officer)	£0.00	£75.00	£75.00	100.0%	New cost not previously provided (includes recharges, management, admin and marketing)
Mileage cost per mile	£0.00	£0.52	£0.52	100.0%	New cost not previously specified
Licensing					
Street Trading consent charges are as follows:-					
12 month period	£3,120.00	£1,120.00	£-2,000.00	-178.6%	New Policy introduced in Jan 17. All streets in CDC now consent streets resulting in one standard fee pro rata'd across the year. This fee is also due to be reviewed as a result of the Hemmings case with a view to changing the fee in 2019/20
6 month period	£2,185.00	£560.00	£-1,625.00	-290.2%	
3 month period	£1,405.00	£280.00	£-1,125.00	-401.8%	
1 month period	£940.00	£940.00	£0.00	0.0%	
Table and Chairs consent charges are as follows:-					
12 month period	£15.20	£15.20	£0.00	0.0%	Per chair, up to a maximum charge of £141 per year

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
Gambling Act 2005 – Maximum Charges are set by legislation.	Various	Various			Statutory Fee - Fees have been set taking into account all possible maximum costs that could be associated with any application. Therefore it is likely that RPI would be our only option for increase unless there are any specific increases above RPI to costs. Any increase in fees must be forwarded to Gambling Commission and Department for Culture Media & Sports for review and scrutiny so any increases must be defensible. (Gambling Act 2005)
<u>Private Hire and Hackney Carriage DRIVER Fees and Charges</u>					
Grant of licence	£185.00	£193.00	£8.00	4.1%	
Renewal of existing licence	£170.00	£170.00	£0.00	0.0%	
DBS (was CRB) check and DVLA check	£49.00	£49.00	£0.00	0.0%	These fees have not been increased in
Medical approval	£20.00	£20.00	£0.00	0.0%	2018/19 as a result of the findings from the
Knowledge Test	£25.00	£25.00	£0.00	0.0%	Hemmings case, the fees are to be reviewed
Re take of Knowledge test	£25.00	£25.00	£0.00	0.0%	in 18/19 with a view to changes taking place
Cost of badge/ replacement badge	£25.00	£25.00	£0.00	0.0%	in 2019/20.
Cost of replacement paper licence	£10.50	£10.50	£0.00	0.0%	
Disability Awareness Training	£65.00	£65.00	£0.00	0.0%	If a booked training session is not attended
Safeguarding Awareness Training	£15.00	£15.00	£0.00	0.0%	and no notice is given (set by an external training provider)
					Set by external training provider

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
<u>Hackney Carriage VEHICLE Fees and Charges</u>					
Grant of licence	£350.00	£350.00	£0.00	0.0%	These fees have not been increased in 2018/19 as a result of the findings from the Hemmings case, the fees are to be reviewed in 18/19 with a view to changes taking place in 2019/20.
Renewal of existing licence (vehicles less than 7 years old)	£225.00	£225.00	£0.00	0.0%	
Replacement licence plate	£15.00	£15.00	£0.00	0.0%	
Replacement bracket	£15.00	£15.00	£0.00	0.0%	
Re inspection/missed appointment fee	£25.00	£25.00	£0.00	0.0%	
Change of vehicle only	£110.00	£110.00	£0.00	0.0%	
Transfer of licensee only	£55.00	£55.00	£0.00	0.0%	
Change of vehicle and licensee	£135.00	£135.00	£0.00	0.0%	
<u>Private Hire VEHICLE Fees and Charges</u>					
Grant of new licence	£240.00	£240.00	£0.00	0.0%	These fees have not been increased in 2018/19 as a result of the findings from the Hemmings case, the fees are to be reviewed in 18/19 with a view to changes taking place in 2019/20.
Renewal of licence	£210.00	£210.00	£0.00	0.0%	
Renewal of licence for vehicle 7 years old or over	£245.00	£245.00	£0.00	0.0%	
Internal Plate Replacement	£0.00	£10.00	£10.00	100.0%	
Plate or bracket replacement	£15.00	£20.00	£5.00	25.0%	
Cost of replacement paper licence	£10.50	£10.50	£0.00	0.0%	
Change of vehicle only	£100.00	£100.00	£0.00	0.0%	
Transfer of licensee only	£55.00	£55.00	£0.00	0.0%	
Change of vehicle and licensee	£125.00	£125.00	£0.00	0.0%	
<u>Private Hire OPERATOR Fees and Charges</u>					
Operator – first application	£120.00	£120.00	£0.00	0.0%	These fees have not been increased in 2018/19 as a result of the findings from the Hemmings case, the fees are to be reviewed in 18/19 with a view to changes taking place in 2019/20.
Operator – renewal fee and for one vehicle only	£85.00	£85.00	£0.00	0.0%	
For each additional vehicle	£20.00	£20.00	£0.00	0.0%	
Missed appointment fee	£25.00	£25.00	£0.00	0.0%	
<u>Mobile Home Sites Fees</u>					
<u>New Application</u>					
1 to 10 pitches	£290.00	£290.00	£0.00	0.0%	These fees have not been increased in 2018/19 as a result of the findings from the Hemmings case, the fees are to be reviewed in 18/19 with a view to changes taking place in 2019/20.
11 to 30 pitches	£420.00	£420.00	£0.00	0.0%	
31 to 99 pitches	£550.00	£550.00	£0.00	0.0%	
100 or more pitches	£680.00	£680.00	£0.00	0.0%	

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
Annual Fee					
1 to 10 pitches	£225.00	£225.00	£0.00	0.0%	These fees have not been increased in 2018/19 as a result of the findings from the Hemmings case, the fees are to be reviewed in 18/19 with a view to changes taking place in 2019/20.
11 to 30 pitches	£290.00	£290.00	£0.00	0.0%	
31 to 99 pitches	£350.00	£350.00	£0.00	0.0%	
100 or more pitches	£420.00	£420.00	£0.00	0.0%	
Transfer/amendment	£160.00	£160.00	£0.00	0.0%	
Replacement paper licence	£10.50	£10.50	£0.00	0.0%	Charges set on a case by case basis
Lodging rules	£55.00	£55.00	£0.00	0.0%	
Enforcement					
Building Control					
Building Control Income	£338,000.00	£339,000.00	£1,000.00	0.3%	Fee Increase applied 1/12/17
Naming and Numbering	£0.00	£25,000.00	£25,000.00	100.0%	New income stream of estimated £25k approved by CDC Lead Member + existing income stream of £1602
Dangerous Structures	£0.00	£2,500.00	£2,500.00	100.0%	Nominal sum for recovery of expenditure when making buildings safe

Statutory Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes (18-19)
<u>Public Protection and Environmental Health</u>					
Water Sampling Fees:					
Large/Commercial use supplies (each assessment at £52/hour)	£500.00	£500.00	£0.00	0.0%	Dependant upon parameters, can charge up to the statutory maximum. Fees set in private Water Supplies Regulation (England) 2016
<u>Service</u>					
Risk assessment (each assessment at £52/hour)	£500.00	£500.00	£0.00	0.0%	Dependant upon parameters, can charge up to the statutory maximum. Fees set in private Water Supplies Regulation (England) 2016
Sampling (each visit)	£100.00	£100.00	£0.00	0.0%	Fees set in private Water Supplies Regulation (England) 2016
Investigation	£100.00	£100.00	£0.00	0.0%	Fees set in private Water Supplies Regulation (England) 2016
Granting an authorisation	£100.00	£100.00	£0.00	0.0%	Fees set in private Water Supplies Regulation (England) 2016
<u>Analysing a sample</u>					
Taken under regulation 10	£25.00	£25.00	£0.00	0.0%	Fees set in private Water Supplies Regulation (England) 2016
Taken during Check monitoring	£100.00	£100.00	£0.00	0.0%	dependant upon parameters, can charge up to the statutory maximum. Fees set in private Water Supplies Regulation (England) 2016
Taken during Audit monitoring	£500.00	£500.00	£0.00	0.0%	dependant upon parameters, can charge up to the statutory maximum Fees set in private Water Supplies Regulation (England) 2016

Leisure Centres

NORTH OXFORDSHIRE ACADEMY ATP BANBURY

Discretionary Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>60 Minutes Hire</u>					
Senior Match	£72.45	£74.25	£1.80	2.4%	These fees are all set by the Council and increased by inflation
Junior Match	£36.15	£37.05	£0.90	2.4%	
Senior Match Block Booking*	£60.40	£61.90	£1.50	2.4%	
Junior Match Block Booking*	£30.15	£30.90	£0.75	2.4%	
Senior Training Whole Pitch	£52.35	£53.65	£1.30	2.4%	
Senior Training Half Pitch	£32.50	£33.30	£0.80	2.4%	
Senior Training Whole Pitch Block Booking*	£43.65	£44.75	£1.10	2.5%	
Senior Training Half Pitch Block Booking*	£27.10	£27.80	£0.70	2.5%	
Junior Training Whole Pitch	£28.10	£28.80	£0.70	2.4%	
Junior Training Half Pitch	£16.35	£16.75	£0.40	2.4%	
Junior Training Whole Pitch Block Booking*	£23.35	£23.95	£0.60	2.5%	
Junior Training Half Pitch Block Booking*	£13.65	£14.00	£0.35	2.5%	
<u>90 Minutes Hire</u>					
Senior Match	£108.65	£111.35	£2.70	2.4%	
Junior Match	£54.35	£55.70	£1.35	2.4%	
Senior Match Block Booking*	£90.55	£92.80	£2.25	2.4%	
Junior Match Block Booking*	£45.30	£46.45	£1.15	2.5%	
Senior Training Whole Pitch	£78.50	£80.45	£1.95	2.4%	
Senior Training Half Pitch	£48.40	£49.60	£1.20	2.4%	
Senior Training Whole Pitch Block Booking*	£65.45	£67.10	£1.65	2.5%	
Senior Training Half Pitch Block Booking*	£40.35	£41.35	£1.00	2.4%	
Junior Training Whole Pitch	£41.95	£43.00	£1.05	2.4%	
Junior Training Half Pitch	£24.30	£24.90	£0.60	2.4%	
Junior Training Whole Pitch Block Booking*	£34.95	£35.85	£0.90	2.5%	
Junior Training Half Pitch Block Booking*	£20.25	£20.75	£0.50	2.4%	

NORTH OXFORDSHIRE ACADEMY ATP FOR KEYHOLDERS

Discretionary Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>60 Minutes Hire</u>					
Senior Match	£60.00	£61.50	£1.50	2.4%	These fees are all set by the Council and increased by inflation
Junior Match	£22.75	£23.30	£0.55	2.4%	
Senior Match Block Booking*	£50.00	£51.25	£1.25	2.4%	
Junior Match Block Booking*	£19.00	£19.50	£0.50	2.6%	
<u>90 Minutes Hire</u>					
Senior Match	£87.05	£89.25	£2.20	2.5%	
Junior Match	£33.05	£33.90	£0.85	2.5%	
Senior Match Block Booking*	£72.60	£74.40	£1.80	2.4%	
Junior Match Block Booking*	£27.55	£28.25	£0.70	2.5%	

NORTH OXFORDSHIRE ATHLETICS TRACK BANBURY

<u>Fixtures</u>					
Non Cherwell Based Clubs	£56.85	£58.30	£1.45	2.5%	These fees are all set by the Council and increased by inflation
Non Cherwell Based Clubs – Block Booking*	£47.35	£48.55	£1.20	2.5%	
Cherwell Clubs – Seniors	£43.40	£44.50	£1.10	2.5%	
Cherwell Clubs – Seniors Block Booking*	£36.15	£37.05	£0.90	2.4%	
Cherwell Clubs – Juniors	£34.35	£35.20	£0.85	2.4%	
Cherwell Clubs – Juniors Block Booking*	£28.55	£29.30	£0.75	2.6%	
<u>Casual Hirers (Mondays and Wednesdays Only)</u>					
Seniors	£2.60	£2.65	£0.05	1.9%	
Seniors Block Booking*	£2.20	£2.25	£0.05	2.2%	
Juniors	£1.45	£1.50	£0.05	3.3%	
Juniors Block Booking*	£1.25	£1.30	£0.05	3.8%	
<u>Training Rate</u>					
Seniors	£45.15	£46.30	£1.15	2.5%	
Seniors Block Booking*	£37.60	£38.55	£0.95	2.5%	
Juniors	£23.25	£23.85	£0.60	2.5%	
Juniors Block Booking*	£19.40	£19.90	£0.50	2.5%	
<u>Pavilion/Changing/Club Room Hire</u>					
Pavilion/Changing/Club Room Hire	£17.35	£17.80	£0.45	2.5%	
Pavilion/Changing/Club Room Hire – Block Booking*	£15.25	£15.65	£0.40	2.6%	

WOODGREEN LEISURE CENTRE

Discretionary Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>Bowling*</u>					
Member Rink peak (2 hours)	£3.25	£3.30	£0.05	1.5%	
Public Play	£2.80	£2.85	£0.05	1.8%	
Link Play (per hour)	£1.50	£1.55	£0.05	3.2%	
Learners (2 hours)	£3.60	£3.70	£0.10	2.7%	
Disabled (per hour)	£1.50	£1.55	£0.05	3.2%	
Membership Adult	£46.40	£47.45	£1.05	2.2%	
Membership Junior	£27.40	£28.00	£0.60	2.1%	
Junior Member peak (2 hours)	£1.70	£1.75	£0.05	2.9%	
Junior Non Member peak (2 hours)	£3.50	£3.60	£0.10	2.8%	
<u>Bowls area Hire</u>					
Hire (e.g. wedding)	£1,655.00	£1,700.00	£45.00	2.6%	
<u>Activities</u>					
Nifty Fifties (10 for 8)	£22.80	£23.20	£0.40	1.7%	
Nifty Fifties	£2.85	£2.90	£0.05	1.7%	
Nifty Fifties (Link)	£1.45	£1.45	£0.00	0.0%	
<u>Room Hire</u>					
Meeting Room*	£15.00	£15.25	£0.25	1.6%	
<u>Spectator – Dryside only</u>					
Adult	£1.15	£1.15	£0.00	0.0%	
Junior	£0.85	£0.85	£0.00	0.0%	
Senior Citizen	£0.85	£0.85	£0.00	0.0%	
<u>Swimming</u>					
Adult	£4.05	£4.10	£0.05	1.2%	
Junior	£2.70	£2.75	£0.05	1.8%	
Senior Citizen	£2.70	£2.75	£0.05	1.8%	
Early Bird	£4.05	£4.10	£0.05	1.2%	
Adult Lunchtime	£4.05	£4.10	£0.05	1.2%	
Junior/Senior Lunchtime	£2.70	£2.75	£0.05	1.8%	
Family Ticket (2 adults, up to 3 children)	£12.70	£12.95	£0.25	1.9%	

Woodgreen fees are set by Parkwood but need to be approved by a lead member of the Council

Discretionary Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>Pool Hire (per hour)</u>					
Main Pool	£126.00	£128.50	£2.50	1.9%	Woodgreen fees are set by Parkwood but need to be approved by a lead member of the Council
Club Hire	£43.50	£44.45	£0.95	2.1%	
Gala	£158.00	£161.00	£3.00	1.9%	
Party Hire	£160.00	£162.00	£2.00	1.2%	
Expressions Gym					
Gym membership monthly direct debit Fixed	£39.00	£39.00	£0.00	0.0%	Expressions Gym Fees are set by Parkwood but need to be approved by a lead member of the Council
Gym membership monthly direct debit Flexi	£44.00	£44.00	£0.00	0.0%	
Corporate Gym membership direct debit Fixed	£37.00	£37.00	£0.00	0.0%	
Corporate Gym membership direct debit Flexi	£39.00	£39.00	£0.00	0.0%	
Casual Gym membership	£9.30	£9.40	£0.10	1.1%	
Gym Induction (casual)	£18.00	£18.50	£0.50	2.7%	

COOPER SCHOOL, BICESTER

Discretionary Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>Sports Hall Hire – 55 Minutes</u>					
Senior	£48.90	£50.15	£1.25	2.5%	
Junior	£29.20	£29.95	£0.75	2.5%	
Senior Block Booking*	£40.75	£41.75	£1.00	2.4%	
Junior Block Booking*	£24.35	£24.95	£0.60	2.4%	
<u>Badminton Court</u>					
Senior	£10.70	£10.95	£0.25	2.3%	
Junior	£5.30	£5.45	£0.15	2.8%	
Senior Block Booking*	£8.95	£9.20	£0.25	2.7%	
Junior Block Booking*	£4.40	£4.50	£0.10	2.2%	
<u>ATP – 60 Minutes</u>					
Senior Whole Pitch	£56.95	£58.40	£1.45	2.5%	
Senior Half Pitch	£37.40	£38.35	£0.95	2.5%	
Senior Quarter Pitch	£31.25	£32.05	£0.80	2.5%	
Senior Whole Pitch Block Booking*	£47.45	£48.64	£1.19	2.4%	
Senior Half Pitch Block Booking*	£31.15	£31.95	£0.80	2.5%	
Senior Quarter Pitch Block Booking*	£26.05	£26.70	£0.65	2.4%	
Junior Whole Pitch	£47.90	£49.10	£1.20	2.4%	
Junior Half Pitch	£29.80	£30.55	£0.75	2.5%	
Junior Quarter Pitch	£20.90	£21.45	£0.55	2.6%	
Junior Whole Pitch Block Booking*	£39.95	£40.95	£1.00	2.4%	
Junior Half Pitch Block Booking*	£24.85	£25.50	£0.65	2.5%	
Junior Quarter Pitch Block Booking*	£17.40	£17.85	£0.45	2.5%	
<u>Hockey Club – Whole Pitch</u>					
Senior Match – 90 Minutes	£100.25	£102.75	£2.50	2.4%	
Senior Training – 60 Minutes	£57.20	£58.65	£1.45	2.5%	
Senior Match – 90 Minutes Block Booking*	£83.60	£85.70	£2.10	2.5%	
Senior Training – 60 Minutes Block Booking*	£47.70	£48.90	£1.20	2.5%	
Junior Match – 90 Minutes	£52.25	£53.55	£1.30	2.4%	
Junior Training – 60 Minutes	£33.80	£34.65	£0.85	2.5%	
Junior Training – 60 Minutes Block Booking*	£43.55	£44.65	£1.10	2.5%	
	£28.15	£28.85	£0.70	2.4%	

These fees are set by the Council and increased by inflation

Discretionary Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
Performance Hall					
Hire charge (per hour)	£30.30	£31.05	£0.75	2.4%	These fees are set by the Council and increased by inflation
Hire charge with tiered seating	£60.60	£62.10	£1.50	2.4%	
Events hire including seating/lighting/stage	to be agreed on application	to be agreed on application			

SPICEBALL LEISURE CENTRE

Contract Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>Spectator</u>					
Adult	£1.00	£1.00	£0.00	0.0%	
Junior	£1.00	£1.00	£0.00	0.0%	
Senior Citizen	£1.00	£1.00	£0.00	0.0%	
<u>Swimming</u>					
Adult	£4.00	£4.10	£0.10	2.4%	
Junior	£2.60	£2.70	£0.10	3.7%	
Senior Citizen	£2.60	£2.70	£0.10	3.7%	
Early Bird	£4.00	£4.10	£0.10	2.4%	
Adult Lunchtime	£4.00	£4.10	£0.10	2.4%	
Junior Lunchtime	£2.60	£2.70	£0.10	3.7%	
Senior Lunchtime	£2.60	£2.70	£0.10	3.7%	
<u>Sports Hall (per hour)</u>					
Badminton Court Peak	£11.30	£11.35	£0.05	0.4%	Spiceball fees are set by Parkwood but need to be approved by a lead member of the Council
Badminton Court Off Peak	£9.05	£9.10	£0.05	0.5%	
Half Hall Peak	£50.00	£51.50	£1.50	2.9%	
Half Hall Off Peak	£40.00	£41.20	£1.20	2.9%	
<u>Squash Courts (per 40 mins)</u>					
Peak	£8.50	£8.60	£0.10	1.2%	
Off Peak	£7.30	£7.30	£0.00	0.0%	
<u>Table Tennis (per hour)</u>					
Adult	£6.50	£6.60	£0.10	1.5%	
Junior	£3.25	£3.30	£0.05	1.5%	
<u>Fitness Suite (55 mins)</u>					
Casual Peak	£9.30	£9.40	£0.10	1.1%	
Casual Off Peak	£7.80	£7.90	£0.10	1.3%	
Induction	£18.00	£18.50	£0.50	2.7%	
Sauna/Steam	£7.50	£7.70	£0.20	2.6%	

Contract Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>Main Pool</u>					
Main Pool	£90.00	£92.00	£2.00	2.2%	Spiceball fees are set by Parkwood but need to be approved by a lead member of the Council
Trainer Pool	£65.00	£67.00	£2.00	3.0%	
Gala Main Pool	£120.00	£122.50	£2.50	2.0%	
Gala Trainer Pool	£90.00	£92.50	£2.50	2.7%	
<u>GP Referral Scheme</u>					
GP Referral 1	£3.85	£3.95	£0.10	2.5%	

KIDLINGTON AND GOSFORD LEISURE CENTRE

Contract Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>Spectator</u>					
Adult	£1.00	£1.00	£0.00	0.0%	
Junior	£1.00	£1.00	£0.00	0.0%	
Senior Citizen	£1.00	£1.00	£0.00	0.0%	
<u>Swimming</u>					
Adult	£4.00	£4.10	£0.10	2.4%	
Junior	£2.60	£2.70	£0.10	3.7%	
Senior Citizen	£2.60	£2.70	£0.10	3.7%	
<u>Sports Hall (per 55 mins)</u>					
Badminton Court Casual Peak	£11.30	£11.35	£0.05	0.4%	
Badminton Court Casual Off Peak	£9.05	£9.10	£0.05	0.5%	
Main Hall Casual Peak	£50.00	£51.50	£1.50	2.9%	
Main Hall Casual Off Peak	£40.00	£41.20	£1.20	2.9%	
<u>Squash Courts (per 40 mins)</u>					
Casual Peak	£8.50	£8.60	£0.10	1.2%	
Casual Off Peak	£7.30	£7.30	£0.00	0.0%	
<u>Table tennis (per Hour)</u>					
Adult	£6.50	£6.60	£0.10	1.5%	Kindlington and Gosford fees are set by Parkwood but need to be approved by a lead member of the Council
Junior	£3.25	£3.30	£0.05	1.5%	
<u>Fitness Suite (per 55 mins)</u>					
Peak	£9.30	£9.40	£0.10	1.1%	
Off Peak	£7.80	£7.90	£0.10	1.3%	
Induction	£18.00	£18.50	£0.50	2.7%	
Sauna/Steam	£7.50	£7.70	£0.20	2.6%	
<u>Astroturf</u>					
Whole Casual	£73.50	£75.80	£2.30	3.0%	
2/3rds Casual	£53.50	£55.15	£1.65	3.0%	
1/3rd Casual	£33.50	£34.55	£1.05	3.0%	
Tennis	£6.50	£6.50	£0.00	0.0%	
<u>GP Referral Scheme</u>					
GP Referral 1	£3.85	£3.95	£0.10	2.5%	
<u>KGSC Annual Swim Pass</u>					
Parish Card	£48.00	£49.50	£1.50	3.0%	

BICESTER LEISURE CENTRE

Contract Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>Spectator</u>					
Adult	£1.00	£1.00	£0.00	0.0%	
Junior	£1.00	£1.00	£0.00	0.0%	
Senior Citizen	£1.00	£1.00	£0.00	0.0%	
<u>Swimming</u>					
Adult	£4.00	£4.10	£0.10	2.4%	
Junior 3-18yrs	£2.60	£2.70	£0.10	3.7%	
Senior Citizen	£2.60	£2.70	£0.10	3.7%	
Early Birds	£4.00	£4.10	£0.10	2.4%	
<u>Sports Hall (per 55 mins)</u>					
Badminton Court Casual Peak	£11.30	£11.35	£0.05	0.4%	
Badminton Court Casual Off Peak	£9.05	£9.10	£0.05	0.5%	
Badminton Block Booking* Peak	£12.45	£12.50	£0.05	0.4%	
Badminton Block Booking* Off Peak	£10.00	£10.00	£0.00	0.0%	
Main Hall Casual Peak	£50.00	£51.50	£1.50	2.9%	
Main Hall Casual Off Peak	£40.00	£41.20	£1.20	2.9%	
Main Hall Block Booking* Peak	£55.00	£56.65	£1.65	2.9%	
Main Hall Block Booking* Off Peak	£44.00	£45.30	£1.30	2.9%	
<u>Activity Hall</u>					
Activity Hall Block Booking*	£45.00	£46.00	£1.00	2.2%	
<u>Squash Courts (per 40 mins)</u>					
Casual Peak	£8.50	£8.60	£0.10	1.2%	
Casual Off Peak	£7.30	£7.30	£0.00	0.0%	
Block Booking* Peak	£9.35	£9.45	£0.10	1.1%	
Block Booking* Off Peak	£8.05	£8.05	£0.00	0.0%	
<u>Table Tennis (per hour)</u>					
Adult	£6.50	£6.60	£0.10	1.5%	
Junior	£3.25	£3.30	£0.05	1.5%	
<u>Fitness Suite (55 mins)</u>					
Induction	£18.00	£18.50	£0.50	2.7%	
Peak	£9.30	£9.40	£0.10	1.1%	
Off Peak	£7.80	£7.90	£0.10	1.3%	
Sauna/Steam	£7.50	£7.70	£0.20	2.6%	

Bicester Leisure Centre fees are set by Parkwood but need to be approved by a lead member of the Council

Contract Fees and Charges	Fees 17-18 (incl. VAT)	Proposed Fee 18-19 (incl. VAT)	Actual Increase	% Increase	Notes
<u>Main Pool</u>					
Main Pool Block Booking*	£90.00	£92.00	£2.00	2.2%	
<u>Astroturf</u>					
Football (Adult)	£40.00	£41.00	£1.00	2.4%	Bicester Leisure Centre fees are set by Parkwood but need to be approved by a lead member of the Council
Football (Junior up to 7:15pm)	£30.00	£30.90	£0.90	2.9%	
Football (Adult) Block Booking*	£41.50	£43.30	£1.80	4.2%	
Football (Jnr up to 7:15pm) Block Booking*	£33.00	£34.00	£1.00	2.9%	
<u>GP Referral Scheme</u>					
GP Referral 1	£3.85	£3.95	£0.10	2.5%	

Elections

Discretionary Fees & Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
Confirmation of Entry on Register	£10.00	£10.00	£0.00		Nominal charge for corresponding with electors.

Statutory Fees & Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
Sale of Electoral Register (statutory charges)					
Full Register					
Data - plus £5 per thousand or part thereof	£20.00	£20.00	0	0.0%	
Paper - plus £5 per thousand or part thereof	£10.00	£10.00	0	0.0%	
Edited Register					
Data - plus £1.50 per thousand or part thereof - plus	£20.00	£20.00	0	0.0%	Representation of People (England & Wales) (Amendment) Regulations 2001
Paper - plus £5 per thousand or part thereof - plus £	£10.00	£10.00	0	0.0%	
Sale of Marked Registers (statutory)					
Data - plus £1 per thousand or part thereof	£10.00	£10.00	0	0.0%	
Printed - plus £2 per thousand or part thereof	£10.00	£10.00	0	0.0%	

Environmental Services

Discretionary Fees and Charges	Fees 17-18 (exclu VAT)	Proposed Fee 18-19 (exclu VAT)	Actual Increase	% Increase	Notes
Removal of Abandoned Vehicle	£27.00	£27.00	£0.00	0.0%	**Statutory Service - Refuse Disposal Amenity Act 1978 - price can increase but little take up due to price of scrap metal**
Special Collections - Clearout (Garden waste or waste package)	£50.00	£50.00	£0.00	0.0%	Price increased in 2017/18, charge to cover running costs, price to remain the same to increase take up
Special Collections - Any (3 Items Collected)	£16.00	£18.00	£2.00	11.1%	Increased charge to cover running costs, no price increase since approx 2014/15
New: Special Collections - Any (3 Items Collected) During Blitz Weeks	£0.00	£6.00	£6.00	100.0%	New discounted service/charge to part cover costs on "blitz" weeks
Blue & Brown Wheeled Bins	£30.00	£30.00	£0.00	0.0%	Revised charge introduced September 16, charge to cover container costs - purchase price stagnant
240L Additional Green Bin - Annual Charge	£90.00	£90.00	£0.00	0.0%	New charge introduced September 16, charge to cover container costs - purchase price stagnant
Bundles of 25 Trade Waste Sacks	£50.00	£55.00	£5.00	9.1%	Price increased to encourage trade bin take up
Bundles of 25 Trade Recycling Sacks	£29.50	£35.00	£5.50	15.7%	Price increased to encourage trade bin take up
COMMERCIAL REFUSE COLLECTION - PER LIFT					
240 litre bin	£6.25	£6.75	£0.50	7.4%	Charge increased to cover increased disposal and collection costs, make small margin. Prices checked against competitors. Prices mirror charges at
360 litre bin	£8.50	£9.00	£0.50	5.6%	
660 litre bin	£12.75	£13.00	£0.25	1.9%	
1100 litre bin	£17.85	£18.25	£0.40	2.2%	
COMMERCIAL RECYCLING COLLECTION - PER LIFT					
240 litre bin	£3.25	£3.75	£0.50	13.3%	Charge increased to cover increased disposal and collection costs, make small margin. Prices checked against competitors. Prices mirror charges at SNC
360 litre bin	£4.75	£5.25	£0.50	9.5%	
660 litre bin	£6.75	£7.25	£0.50	6.9%	
1100 litre bin	£8.95	£9.50	£0.55	5.8%	

Discretionary Fees and Charges	Fees 17-18 (exclu VAT)	Proposed Fee 18-19 (exclu VAT)	Actual Increase	% Increase	Notes
COMMERCIAL FOOD RECYCLING - PER LIFT					
120 litre bin	£3.00	£3.00	£0.00	0.0%	Charges to remain same as little take up of service
240 litre bin	£4.25	£4.25	£0.00	0.0%	Charges to remain same as little take up of service
Schedule II Collections - Schools					
240L Wheeled Bin Package	£104.00	£120.00	£16.00	13.3%	Charges increased to cover increased disposal and collection costs and to make small margin. Prices checked against competitors, no price increase for number of years.
360L Wheeled Bin Package	£156.00	£170.00	£14.00	8.2%	
660L Wheeled Bin Package	£260.00	£270.00	£10.00	3.7%	
1100L Wheeled Bin Package	£364.00	£375.00	£11.00	2.9%	
Trade Glass Collection (set of 3 bells)	£60.00	£60.00	£0.00	0.0%	Charges to remain the same as little take up of service
Bundles of 25 Biodegradable Garden Waste Sacks	£10.00	£12.00	£2.00	16.7%	Price increase to reflect increase in purchase price, no increase since approx 2014/15
Roll of 52 Compostable Liners	£2.50	£2.50	£0.00	0.0%	charges to remain the same to encourage use of liners in kitchen caddys/recycling of food waste

Discretionary Fees and Charges	Fees 17-18 (exclu VAT)	Proposed Fee 18-19 (exclu VAT)	Actual Increase	% Increase	Notes
<u>Environmental Protection</u>					
Rats & Mice, Per consultation - 3 visits (free of charge to residents who are 60 years of age and over)	£38.33	£40.00	£1.67	4.2%	Price increase to cover new contractor costs
Fleas, , cockroaches ants, carpet beetles, and other household insects	£39.58	£45.00	£5.42	12.0%	Price increase to cover new contractor costs and small handling fee on top, charges mirrored at SNC
Bedbugs	£75.00	£75.00	£0.00	0.0%	No increase due to costs incurred from contractor
Wasps Nests	£39.58	£40.00	£0.42	1.1%	Price increase to cover new contractor costs and small handling fee on top, charges mirrored at SNC
Fine for stray dogs during office hours	£66.50	£66.50	£0.00	0.0%	To recover costs incurred through kennels, no price increase from kennels in 2018/19
Fine for stray dogs outside office hours	£138.50	£138.50	£0.00	0.0%	To recover costs incurred through kennels, no price increase from kennels in 2018/19
Kennel Costs (per day/part of)	£16.50	£16.50	£0.00	0.0%	To recover costs incurred through kennels, no price increase from kennels in 2018/19
Bin emptying charge	£1.40	£1.40	£0.00	0.0%	Price to remain the same due to large increase in 2015/16
<u>MOT's</u>					
Class IV for Trade, Staff and Account Customers	£48.00	£45.00	-£3.00	-6.7%	Maximum charge set by government, no amendment for a number of years.
Class IV for General Public	£50.00	£50.00	£0.00	0.0%	
Class V for Trade, Staff and Account Customers	£53.00	£50.00	-£3.00	-6.0%	Reduction in charges is to encourage staff, trade and account customers
Class V for General Public	£55.00	£55.00	£0.00	0.0%	
Class VII for Trade, Staff and Account Customers	£53.00	£50.00	-£3.00	-6.0%	usage of the MOT bay at Thorpe Lane Depot
Class VII for General Public	£55.00	£55.00	£0.00	0.0%	

Statutory Fees and Charges	Fees 16-17 (exclu VAT)	Proposed Fee 17-18 (exclu VAT)	Actual Increase	% Increase	Notes
<u>Environmental Protection</u> Process Registration and annual subscription (various)	various	various			

Car Parking

The Council specifically retained the right to set car parking charges for all of the car parks which are subject to the APCOA contract as this was a politically sensitive priority – the approach will be that APCOA will submit recommended approaches to how they think charges could be set so as to maximise profitability of the car parks but it remains entirely at the Council's discretion whether to accept those recommendations or to retain existing fee structures or to go in an entirely different direction

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
<u>Banbury Short Stay</u> <i>(Charges apply 8am-7pm. Free Parking after 7pm)</i>					
Market Place Monday To Saturday					
0 -30 minutes	£0.80	£0.80	£0.00	0.0%	
0 - 1 hour	£1.20	£1.20	£0.00	0.0%	
Market Place Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Horsefair West Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
Horsefair West Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Calthorpe Street West (part) Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
Calthorpe Street West (part) Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Calthorpe Street East Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
Calthorpe Street East Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
South Bar East (part) up to Calthorpe Street Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
South Bar East (part) up to Calthorpe Street Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
North Bar East Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
North Bar East Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
The Mill Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
The Mill Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Chamberlaine Court Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
Chamberlaine Court Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Bridge Street (Blue Badge Holders Only) Monday To Saturday	£0.00	£0.00	£0.00	0.0%	
Bridge Street (Blue Badge Holders Only) Sunday and Bank Holidays	£0.00	£0.00	£0.00	0.0%	
Free of charge up to maximum stay permitted					

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
Banbury Long Stay (<i>charges apply 8am-7pm. Free Parking after 7pm</i>)					
Riverside Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
3 - 4 Hours	£2.80	£2.80	£0.00	0.0%	
Day rate up to 7pm	£3.50	£3.50	£0.00	0.0%	
Riverside Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
South Bar East and West Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
3 - 4 Hours	£2.80	£2.80	£0.00	0.0%	
Day rate up to 7pm	£3.50	£3.50	£0.00	0.0%	
South Bar East and West Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
North Bar West Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
3 - 4 Hours	£2.80	£2.80	£0.00	0.0%	
Day rate up to 7pm	£3.50	£3.50	£0.00	0.0%	
North Bar West Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Calthorpe Street West Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
3 - 4 Hours	£2.80	£2.80	£0.00	0.0%	
Day rate up to 7pm	£3.50	£3.50	£0.00	0.0%	
Calthorpe Street West Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
Windsor Street Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
3 - 4 Hours	£2.80	£2.80	£0.00	0.0%	
Day rate up to 7pm	£3.50	£3.50	£0.00	0.0%	
Windsor Street Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Spiceball North Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
3 - 4 Hours	£2.80	£2.80	£0.00	0.0%	
Day rate up to 7pm	£3.50	£3.50	£0.00	0.0%	
Spice Ball North Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Bolton Road Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
3 - 4 Hours	£2.80	£2.80	£0.00	0.0%	
Day rate up to 7pm	£3.50	£3.50	£0.00	0.0%	
Bolton Road Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Compton Road Monday To Saturday					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
1 - 2 Hours	£1.60	£1.60	£0.00	0.0%	
2 - 3 Hours	£2.20	£2.20	£0.00	0.0%	
3 - 4 Hours	£2.80	£2.80	£0.00	0.0%	
Day rate up to 7pm	£3.50	£3.50	£0.00	0.0%	
Compton Road Sunday and Bank Holidays					
0 - 1 hour	£0.80	£0.80	£0.00	0.0%	
Compton Road (Coaches only) - no charge	£0.00	£0.00	£0.00	0.0%	
Drop Off - Pick Up Points					(Charges apply 8am-7pm. Free Parking after 7pm)
Bridge Street (all week)					
0 - 15 minutes	£0.30	£0.30	£0.00	0.0%	
Horsefair East - Coaches Drop Off/Pick Up - no charge	£0.00	£0.00	£0.00	0.0%	

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
<u>Bicester Short Stay</u> <i>(Charges apply 8am-7pm. Free Parking after 7pm)</i>					
Market Square Monday To Saturday					
0 - 30 Minutes	£0.60	£0.60	£0.00	0.0%	
0 - 1 Hour	£1.10	£1.10	£0.00	0.0%	
Market Square Sunday and Bank Holidays					
0 - 1 Hour	£0.60	£0.60	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Claremont Monday To Saturday					
0 - 1 hour	£0.60	£0.60	£0.00	0.0%	
1 - 2 Hours	£1.20	£1.20	£0.00	0.0%	
2 - 3 Hours	£1.70	£1.70	£0.00	0.0%	
Claremont Sunday and Bank Holidays					
0 - 1 hour	£0.60	£0.60	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Chapel Brook Monday To Saturday					
0 - 1 hour	£0.60	£0.60	£0.00	0.0%	
1 - 2 Hours	£1.20	£1.20	£0.00	0.0%	
2 - 3 Hours	£1.70	£1.70	£0.00	0.0%	
Chapel Brook Sunday and Bank Holidays					
0 - 1 hour	£0.60	£0.60	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
Victoria Road Monday To Saturday					
0 - 1 hour	£0.60	£0.60	£0.00	0.0%	
1 - 2 Hours	£1.20	£1.20	£0.00	0.0%	
2 - 3 Hours	£1.70	£1.70	£0.00	0.0%	
Victoria Road Sunday and Bank Holidays					
0 - 1 hour	£0.60	£0.60	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	
<u>Bicester Long Stay</u>					
Cattle Market Monday To Saturday					
0 - 1 hour	£0.60	£0.60	£0.00	0.0%	
1 - 2 Hours	£1.20	£1.20	£0.00	0.0%	
2 - 3 Hours	£1.70	£1.70	£0.00	0.0%	
3 - 4 Hours	£2.20	£2.20	£0.00	0.0%	
Day rate up to 7pm	£2.50	£2.50	£0.00	0.0%	
Cattle Market Sunday and Bank Holidays					
0 - 1 hour	£0.60	£0.60	£0.00	0.0%	
Over 1 hour £1.00 flat rate	£1.00	£1.00	£0.00	0.0%	

Discretionary Fees and Charges	Fees 17-18 (excl. VAT)	Proposed Fee 18-19 (excl. VAT)	Actual Increase	% Increase	Notes
<u>Kidlington Short Stay</u> Curtis Place (all week) - no charge	£0.00	£0.00	£0.00	0.0%	
<u>Kidlington Long Stay</u> Curtis Place (all week) - no charge	£0.00	£0.00	£0.00	0.0%	

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CDC Earmarked Reserves

APPENDIX 5

Earmarked Reserves	Service Owner	Draft Accounts 31-Mar-2017	Transfer In	Transfer Out	Year End Review of Reserves	Estimated Balance 31-Mar-2018 Post Review	Budget Use of Reserves 2018/19	Budget Cont'ns to Reserves 2018/19	Estimated Balance 31-Mar-19
		£000	£000	£000	£000	£000	£000	£000	£000
General Fund:									
Building Control	Tony Brummell	(100)		76		(24)			(24)
Capacity Funding	Jenny Barker	(157)		157		0		(2)	(2)
Country Park Reserve	Kevin Larner	(100)				(100)			(100)
Elections	James Doble	(109)				(109)	8		(101)
Environmental Warranties	Paul Sutton	(1,000)				(1,000)			(1,000)
Graven Hill Equalisation Reserve	Paul Sutton	0				0		(1,529)	(1,529)
Hanwell Fields Open Space	Adrian Colwell	(79)				(79)			(79)
Home Improvement Agency	Tim Mills	(234)	(34)			(268)	40		(228)
Housing Reserve	Joanne Barrett	(91)	(23)	46	(31)	(99)		(25)	(124)
Work in Default reserve	Tim Mills	(100)				(100)			(100)
Joint External Bid-writer	Jenny Barker	(19)		11		(8)			(8)
Licensing	Nicolas Sutcliffe	(129)				(129)			(129)
Local Plan Charges	Adrian Colwell	(75)	(463)	370	168	0			0
NHS - Affordable Housing	Joanne Barrett	(577)	(278)			(855)	58	(271)	(1,068)
NHS - Economic Development	Adrian Colwell	(2,665)	(2,095)	118		(4,642)		(1,869)	(6,511)
NHS - Superfast Broadband	Adrian Colwell	(727)				(727)			(727)
Planning Control	Andy Preston	(350)	(92)	94	227	(121)		(90)	(211)
Corporate Projects	Paul Sutton	(514)		200	225	(89)			(89)
Retained Business Rates	Mandy Anderson	(2,205)		568		(1,637)			(1,637)
Sainsbury's Primary Authority	Jackie Fitzsimons	(55)				(55)			(55)
Self Insurance	Paul Sutton	(160)				(160)			(160)
Transformation and Commercial	Paul Sutton	(313)			305	(8)		(200)	(208)
VAT Deminimus	Paul Sutton	(500)				(500)			(500)
Welfare Reform	Belinda Green	(99)		42		(57)			(57)
Wheeled Bin Replacements	Ed Potter	(37)				(37)			(37)
Contributions to Health Bus	Nicola Riley	(40)				(40)			(40)
Performance Reward Grant ABG	Jackie Fitzsimons	(21)				(21)			(21)
Heat Network	Jenny Barker	(50)				(50)			(50)
Devolution Viability Work	James Doble	(12)	(22)	34		0			0
Healthy New Towns	Ian Davies	(20)		7		(13)			(13)
Horton General Towns	Ian Davies	(150)				(150)			(150)
Museum development	Ian Davies	(30)		15		(15)			(15)
Pensions Deficit	Paul Sutton	(3,396)		3,053		(343)		(1,675)	(2,018)
NEW Strategic Intelligence studies	Richard Ellis	0	(10)		10	0			0

Earmarked Reserves	Service Owner	Draft Accounts 31-Mar-2017	Transfer In	Transfer Out	Year End Review of Reserves	Estimated Balance 31-Mar-2018 Post Review	Budget Use of Reserves 2018/19	Budget Cont'ns to Reserves 2018/19	Estimated Balance 31-Mar-19
		£000	£000	£000	£000	£000	£000	£000	£000
New Car Parks APCOA Consultants fees	Ian Davies	0	(15)		15	0			0
NEW Art Development	Ian Davies	0	(80)	80		0			0
NEW Business Support Admin	Ian Davies	0	(15)			(15)	15		0
GF Earmarked Reserves		(14,114)	(3,127)	4,871	919	(11,451)	121	(5,661)	(16,991)
Earmarked Reserves from Grants & Contributions									
Area Based Grant	Rakesh Kumar	(83)				(83)			(83)
Bicester Fields Main Park	Adrian Colwell	(97)				(97)			(97)
Brighter Futures - Skills Reward Grant	Nicola Riley	(66)		44		(22)			(22)
Bicester Garden Town	Jenny Barker	(1,197)		629		(568)	433	(81)	(216)
Bicester Youth Bus	Jackie Fitzsimons	(65)				(65)			(65)
Broadfield Road Yarnton Sports	Sharon Bolton	(4)				(4)			(4)
Courtyard Youth Arts	Nicola Riley	(39)				(39)			(39)
Dovecote Milcombe	Adrian Colwell	(56)		35		(21)			(21)
East Town Revenue	Jenny Barker	(472)		282	160	(30)		(150)	(180)
Emergency Planning	Jackie Fitzsimons	(40)				(40)			(40)
Green Deal Pioneer Places	Jenny Barker	(67)				(67)			(67)
Homelessness Prevention	Joanne Barrett	(70)				(70)			(70)
New Burdens Grant	Paul Sutton	(248)				(248)			(248)
Housing and Planning Initiatives	Adrian Colwell	(322)				(322)			(322)
PCC - Community Safety Grant	Jackie Fitzsimons	(64)				(64)			(64)
Thames Valley Police	Jackie Fitzsimons	(86)				(86)			(86)
Sportivate Grant	Sharon Bolton	(33)				(33)			(33)
Active Women Grant	Sharon Bolton	(22)				(22)			(22)
Corporate Training	Paula Goodwin	0				0			0
Credit Union Development Officer	Joanne Barratt	(23)	23			0			0
Laburnham Cres Ambrosden	Adrian Colwell	(38)				(38)			(38)
Reserves - Grants & Contributions		(3,092)	23	990	160	(1,919)	433	(231)	(1,717)
Total Earmarked Reserves		(17,206)	(3,104)	5,861	1,079	(13,370)	554	(5,892)	(18,708)
General Fund		(2,906)				(2,906)			(2,906)
Total Reserves		(20,112)	(3,104)	5,861	1,079	(16,276)	554	(5,892)	(21,614)

MEDIUM TERM REVENUE PLAN - 2017/18 - 2022/23

	2017-18	2018-19	2019-20	2020-21	2021/22	2022/23
	£000	£000	£000	£000	£000	£000
EXPENDITURE						
Approved base budget	19,538	21,627	19,817	20,545	21,639	22,743
Unavoidable pressures						
Salaries	813	886	880	884	889	889
New Recycling Contract	56	600	250	0	0	0
Contracts and General Inflation	0	200	205	210	215	220
Total budget pressures	869	1,686	1,335	1,094	1,104	1,109
Additional Income & One-off Items						
Bicester Projects (Reserve Funded)	857	(250)	(607)	0	0	0
Planning Salaries (Reserve Funded)	94	(94)	0	0	0	0
Revenues & Benefits (Reserve Funded)	200	(200)	0	0	0	0
Other items (Reserve Funded)	57	(57)	0	0	0	0
Castle Quay & Property Management	0	(2,895)	0	0	0	0
Total Budget Changes	1,208	(3,496)	(607)	0	0	0
Joint Business Case Changes						
Customer Services	(10)	0	0	0	0	0
Public Protection	(11)	0	0	0	0	0
ICT - 3-way to 2-way (available Dec)	120	0	0	0	0	0
Revenues & Benefits	(134)	0	0	0	0	0
Community & Leisure Services	(44)	0	0	0	0	0
Property & Investment	149	0	0	0	0	0
Planning Policy	16	0	0	0	0	0
Design and Conservation	(12)	0	0	0	0	0
Housing	(34)	0	0	0	0	0
Strategic Information and Insight	(28)	0	0	0	0	0
Total Joint Business Case Savings	12	0	0	0	0	0
NET COST OF SERVICES	21,627	19,817	20,545	21,639	22,743	23,852
Transfers to/from reserves	(2,477)	3,451	3,920	2,392	2,213	2,153
Transfers to General Fund Balance	590	0	0	0	0	0
Interest on Investments - Payments	0	2,074	2,074	2,074	2,074	2,074
Interest on Investments - Income	(1,954)	(2,935)	(2,935)	(2,935)	(2,935)	(2,935)
Pension Costs - Historic	4,985	257	275	2,000	2,000	2,000
Depreciation Adjustment	(4,002)	(4,002)	(4,002)	(4,002)	(4,002)	(4,002)
NET BUDGET REQUIREMENT	18,769	18,662	19,877	21,168	22,093	23,142

MEDIUM TERM REVENUE PLAN - 2017/18 - 2022/23

	2017-18 £000	2018-19 £000	2019-20 £000	2020-21 £000	2021/22 £000	2022/23 £000
FUNDING						
Business Rates Baseline	(3,564)	(3,673)	(3,755)	(6,755)	(6,890)	(7,028)
Revenue Support Grant	(1,105)	(637)	(114)	0	0	0
Formula grant equivalent	(4,669)	(4,310)	(3,869)	(6,755)	(6,890)	(7,028)
Transfer to Parish Councils - CTRS	349	349	349	349	349	349
New Homes Bonus	(4,468)	(4,009)	(4,563)	(4,604)	(4,339)	(4,305)
	(4,119)	(3,660)	(4,214)	(4,255)	(3,990)	(3,956)
Business Rates:						
Retained Business Rates	(2,231)	(2,600)	(3,184)	(438)	(669)	(364)
Pooling Gain	(1,562)	(910)	(637)	0	0	0
Renewable Energy	(213)	(287)	(296)	(305)	(314)	(324)
S.31 Inflation Cap	0	(108)	(108)	0	0	0
NNDR Collection Fund Deficit / (surplus)	648	(223)	(200)	(200)	(200)	(200)
	(3,358)	(4,128)	(4,425)	(943)	(1,183)	(888)
	(12,146)	(12,098)	(12,508)	(11,953)	(12,063)	(11,872)
Council Tax income						
Baseline	(6,219)	(6,377)	(6,506)	(6,619)	(6,734)	(6,851)
Taxbase increase	(158)	(129)	(113)	(115)	(117)	(119)
Council Tax Increase	0	0	0	0	0	0
Collection Fund	(246)	(58)	(150)	(150)	(150)	(150)
TOTAL INCOME	(18,769)	(18,662)	(19,277)	(18,837)	(19,064)	(18,992)
FUNDING GAP	(0)	(0)	600	2,331	3,029	4,150

Appendix 7

Project	Portfolio Holder	Sponsor	Service Lead	Capital Spend Profile								Total Capital Cost	Ongoing Revenue Impact
				2018/19				2019/20	2020/21	2021/22	2022/23		
				Q.1	Q.2	Q.3	Q.4						
				£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000		
Orchard Way Arcade - Structural Work Improvements	Cllr Lynn Pratt	Paul Sutton	Chris Hipkiss	0	50	45	0	0	0	0	0	95	0
Retained Land External Works	Cllr Lynn Pratt	Paul Sutton	Chris Hipkiss	50	50	50	30	0	0	0	0	180	0
Thorpe Place Industrial Units Improvement Works	Cllr Lynn Pratt	Paul Sutton	Chris Hipkiss	50	50	50	25	0	0	0	0	175	0
Thorpe Way Industrial Units Improvement Works	Cllr Lynn Pratt	Paul Sutton	Chris Hipkiss	0	50	50	45	0	0	0	0	145	0
Horsefair Banbury - Replacement of Public Paved Areas plus associated works	Cllr Lynn Pratt	Paul Sutton	Chris Hipkiss	0	50	50	0	0	0	0	0	100	0
Thorpe Lane Depot - Renewal of Tarmacadam, Drainage plus associated works	Cllr Lynn Pratt	Paul Sutton	Chris Hipkiss	0	0	55	55	0	0	0	0	110	0
All Properties - EPC Certification plus Compliance Works	Cllr Lynn Pratt	Paul Sutton	Chris Hipkiss	20	20	0	0	0	0	0	0	40	0
Cherwell Community Fund	Cllr Kieron Mallon	Ian Davies	Nicola Riley	40	10	40	10	100	100	0	0	300	0
Replacement of Floodlights at Coopers Sports Facility	Cllr George Reynolds	Ian Davies	Sharon Bolton	0	65	0	0	0	0	0	0	65	0
Container & Bin Replacement	Cllr Debbie Pickford	Ed Potter	Ian Upstone, Brendan Bodger, Paul Almond	8	8	4	0	0	0	0	0	20	0
Banbury Market Improvements	Cllr Debbie Pickford	Ed Potter	Paul Almond	20	0	0	0	0	0	0	0	20	3
Public Conveniences	Cllr Debbie Pickford	Ed Potter	Brendan Bodger	0	10	20	20	200	0	0	0	250	3
Vehicle Lifting Equipment (Workshop)	Cllr Debbie Pickford	Ed Potter	Stuart Cruickshank	30	0	0	0	0	0	0	0	30	1

Project	Portfolio Holder	Sponsor	Service Lead	Capital Spend Profile								Total Capital Cost	Ongoing Revenue Impact
				2018/19				2019/20	2020/21	2021/22	2022/23		
				Q.1	Q.2	Q.3	Q.4						
				£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000		
Vehicle Replacement Programme	Cllr Debbie Pickford	Ed Potter	Stuart Cruickshank	35	0	0	0	240	0	0	0	275	8
Build Phase 1b	Cllr John Donaldson	Jane Norman	Jane Norman	0	650	500	725	1845	(2,500)	0	0	1,220	(57)
Build Phase 2	Cllr John Donaldson	Jane Norman	Jane Norman	0	1,500	3,000	2,000	4500	(7,200)	0	0	3,800	(167)
Upgrade & enhancements to Abris Housing System	Cllr John Donaldson	Ian Davies	Joanne Barrett	0	33	0	0	33	0	0	0	66	0
Housing & Asset IT system (50% CDC - 50% SNC)	Cllr John Donaldson	Ian Davies/ Paul Sutton	Joanne Barrett, Jane Norman & Chris Hipkiss	0	0	25	25	0	0	0	0	50	0
Land and Property Harmonisation	Cllr Mike Kerford-Byrnes	Claire Taylor / Adrian Colwell	Rakesh Kumar	73	33	33	28	33	0	0	0	200	0
Customer Excellence and Digital Transformation (50/50 split to CDC/SNC)	Cllr George Reynolds / Mike Kerford-Byrnes	Claire Taylor	Natasha Barnes & Tim Spiers	10	30	35	10	0	0	0	0	85	0
Unified Communications (including Customer Services) (50/50 split to CDC/SNC)	Cllr Mike Kerford-Byrnes	Claire Taylor	James Tarrant	95	10	10	10	0	0	0	0	125	0
				431	2,619	3,967	2,983	6,951	(9,600)	0	0	7,351	(209)

Proposed Capital Programme - 2018/19 - 2022/23

Project Description	Year Approved	Project Owner	2017/18					2018/19				2019/20	2020/21	2021/22	2022/23	Total	
			Slippage B/Fwd	New Projects	Total Approved	Adjustments	Total	Existing Capital Projects	New Bids	Adjustments	Total						
			£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000						
Executive Director of Wellbeing																	
Biomass Heating for Bicester Leisure Centre	2012/13	Sharon Bolton	14		14											14	
Customer Self-Service Portal and CRM Solution	2014/15	Natasha Barnes	80		80											80	
The Hill Youth & Community Centre	2015/16	Jane Norman	849		849											849	
Whitelands Farm Sports Ground	2016/17	Sharon Bolton	998		998	140		1,138								1,138	
Community Centre Refurbishments	2013/14	Nicola Riley	84		84	60		144								144	
Solar Photovoltaics at Sports Centre	2013/14	Sharon Bolton	80		80			80								80	
Football Development Plan in Banbury	2013/14	Sharon Bolton	20		20			20								20	
North Oxfordshire Academy Astro turf	2014/15	Sharon Bolton	150		150			150								150	
Stratfield Brake Repair Works	2014/15	Sharon Bolton	22		22			22								22	
Sports Centre Modernisation Programme	2007/08	Sharon Bolton	86		86			86								86	
Bicester Leisure Centre Extension	2016/17	Sharon Bolton	149		149			149								149	
Spiceball Leisure Centre Bridge Re-surfacing	2016/17	Sharon Bolton	30		30			30								30	
Empty Homes - Work-in-default (Recoverable)	2014/15	Ian Davies	100		100			100								100	
Woodgreen - Condition Survey Works	2015/16	Liam Didcock	9		9			9								9	
Disabled Facilities Grants	Annual	Ian Davies	493	375	868	930		1,798	375	(375)			375	375	375	2,923	
Discretionary Grants for Domestic Properties	Annual	Ian Davies	340	275	615			615	275				275	275	275	1,715	
Bicester Leisure Centre - Access Road Improvements	2017/18	Sharon Bolton		33	33			33								33	
Cooper School Performance Hall - Roof, Floor & Seating	2017/18	Sharon Bolton		136	136			136								136	
North Oxfordshire Academy - Astro Turf Pitch Replacement	2017/18	Sharon Bolton		340	340			340								340	
North Oxfordshire Academy - Replacement Floodlights	2017/18	Sharon Bolton		95	95			95								95	
North Oxfordshire Academy - Sports Pavilion Improvements	2017/18	Sharon Bolton		20	20			20								20	
Replacement Booking System	2017/18	Sharon Bolton		60	60			60								60	
Car Parks Improvement Project	2017/18	Ian Davies		650	650			650								650	
Cherwell Community Fund	2018/19	Ian Davies			0			0		100			100			300	
Coopers Sports Facility Floodlights	2018/19	Ian Davies			0			0		65			65			65	
Community Services Total			3,504	1,984	5,488	1,130		6,618	650	165	(375)	440	750	750	650	0	9,208
Upgrade & Enhancements to Abrisas Housing System		Joanne Barrett								33			33			66	
Housing			0	0	0	0	0	0	0	33	0	0	33	0	0	66	
Executive Director of Place and Growth																	
Bicester Community Building	-	Adrian Colwell	94		94	145		239								239	
NW Bicester Eco Business Centre	2016/17	Adrian Colwell	3,726		3,726	575		4,301								4,301	
East West Railways	2015/16	Scott Barnes	580	290	870			870	290				290	290	290	2,030	
Bicester Regeneration Projects Total			4,400	290	4,690	720		5,410	290	0	0	290	290	290	0	6,570	
Build Programme	2012/13	Jane Norman	4,790	4,829	9,619			9,619								9,619	
Build Phase 1b	2018/19	Jane Norman								1,875			1,875	1,845	(2,500)	1,220	
Build Phase 2	2018/19	Jane Norman								6,500			6,500	4,500	(7,200)	3,800	
Regeneration			4,790	4,829	9,619	0	0	9,619	0	8,375	0	8,375	6,345	(9,700)	0	0	14,639
Executive Director of Environment																	
Glass Bank Recycling Scheme	2012/13	Ed Potter	8		8			8								8	
Energy Efficiency Projects	2014/15	Ed Potter	20		20			20								20	
Off Road Parking Facilities	2015/16	Ed Potter	18		18			18								18	
Vehicle Replacement Programme	Annual	Ed Potter	128	959	1,087			1,087	740				740	620	700	750	3,897
Wheeled Bin Replacement Scheme	2016/17	Ed Potter	170		170			170								170	
Urban Centre Electricity Installations	2016/17	Ed Potter	30		30			30								30	
Container Bin Replacement	2018/19	Ed Potter								20			20			20	
Banbury Market Improvements	2018/19	Ed Potter								20			20			20	
Public Conveniences	2018/19	Ed Potter								50			50	200		250	
Vehicle Lifting Equipment (Workshop)	2018/19	Ed Potter								30			30			30	
Vehicle Replacement Programme	2018/19	Ed Potter								35			35	240		275	

Project Description	Year Approved	Project Owner	2017/18					2018/19				2019/20	2020/21	2021/22	2022/23	Total
			Slippage B/Fwd	New Projects	Total Approved	Adjustments	Total	Existing Capital Projects	New Bids	Adjustments	Total					
			£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000					
Environmental Services Total			374	959	1,333	0	1,333	740	155	0	895	1,060	700	750	0	4,738
Executive Director of Finance and Governance																
HR / Payroll System replacement	2015/16	Paul Sutton	37		37		37				0					37
Graven Hill	-	Paul Sutton	13,148		13,148		13,148	600			600	13,000				26,748
Finance and Governance Total			13,185	0	13,185	0	13,185	600	0	0	600	13,000	0	0	0	26,785
Land & Property Harmonisation	2018/19	Rakesh Kumar			0		0		167		167	33				200
Law and Governance Total			0	0	0	0	0	0	167	0	167	33	0	0	0	200
Condition Survey Works - Solihull	2013/14	Chris Hipkiss	101		101		101				0					101
Bradley Arcade Roof Repairs - Solihull	2014/15	Chris Hipkiss	88		88		88				0					88
Improvements to Amenities to Orchard Way Shops - Solihull	2011/12	Chris Hipkiss	22		22		22				0					22
Orchard Way Shopping Arcade - front service area - Solihull	2015/16	Chris Hipkiss	288		288		288				0					288
Bicester Cattle Market Car Park Phase 2	2011/12	Chris Hipkiss	90		90		90				0					90
Thorpe Lane Depot - CCTV Replacement - Solihull	2015/16	Chris Hipkiss	25		25		25				0					25
Banbury Museum - Refurbishment Programme - Solihull	2016/17	Chris Hipkiss	38		38		38				0					38
Community Buildings - Remedial Works - Solihull	2016/17	Chris Hipkiss	150		150		150				0					150
Spiceball Riverbank Reinstatement	2016/17	Chris Hipkiss	50		50		50				0					50
Bolton Road Car Park	2016/17	Chris Hipkiss	74		74		74				0					74
Banbury Health Centre - Refurbishment of Ventilation, Heating & Cooling Systems	2017/18	Chris Hipkiss	0	270	270		270				0					270
Thorpe Way Industrial estate - Roof & Roof Lights	2017/18	Chris Hipkiss	0	100	100		100				0					100
Retail Unit A4 Pioneer Square Bicester	2017/18	Chris Hipkiss		135	135		135				0					135
Castle Quay 1 & 2	2017/18	Paul Sutton		500	500	68,000	68,500	62,000			62,000					130,500
Housing and IT Asset System - joint CDC/SNC	2018/19	Chris Hipkiss							50		50					50
Orchard Way - external decorations plus associated works and roof coverings to stairwells	2018/19	Chris Hipkiss			0		0		95		95					95
Retained Land - tarmac/walling works	2018/19	Chris Hipkiss			0		0		180		180					180
Thorpe Place Industrial Units - external painting, tarmac and door replacement	2018/19	Chris Hipkiss			0		0		175		175					175
Thorpe Way Industrial Units - external painting, tarmac and door replacement	2018/19	Chris Hipkiss			0		0		145		145					145
Horswefair Banbury - renewal of paving/trees to footpath areas between Highway and Car Park also around public toilets	2018/19	Chris Hipkiss			0		0		100		100					100
Thorpe Lane Depot - tarmac and drainage works to main yard	2018/19	Chris Hipkiss			0		0		110		110					110
All properties - EPC certification plus Compliance Works	2018/19	Chris Hipkiss			0		0		40		40					40
Property & Investments Total			926	1,005	1,931	68,000	69,931	62,000	895	0	62,895	0	0	0	0	132,826
Executive Director of Customers & Service Development																
Land & Property Harmonisation	2014/15	Tim Spiers	6	77	83		83				0					83
5 Year Rolling HW / SW Replacement Prog	Annual	Tim Spiers	0	50	50	(50)	0	50			50	50	50	50		200
Business Systems Harmonisation Programme	Annual	Tim Spiers	0	40	40	(11)	29	40			40	40	40	40		189
Upgrade to Uninterrupted Power Supply & Back up - Solihull	2014/15	Tim Spiers	337		337	50	387				0					387
Visualfiles Upgrade	2013/14	Tim Spiers	0		0	11	11				0					11
Microsoft Licensing Agreement	2015/16	Tim Spiers	0		0		0	110			110					110
IT Strategy Review	2017/18	Tim Spiers	139		139		139				0					139
Customer Excellence & Digital Transformation	2018/19	Tim Spiers					0		85		85					85
Unified Communications (inc Customer Services)	2018/19	James Tarrant					0		125		125					125
Information Technology Total			482	167	649	0	649	200	210	0	410	90	90	90	0	1,329
Capital Total			27,661	9,234	36,895	69,850	106,745	64,480	10,000	(375)	74,105	21,601	(7,870)	1,780	0	196,361

Cherwell District Council

Treasury Management Strategy Statement 2018/19, including Prudential Indicators & MRP Statement

Introduction

In 2013 the Council adopted the Chartered Institute of Public Finance and Accountancy's *Treasury Management in the Public Services: Code of Practice 2011 Edition* (the CIPFA Code) which requires the Council to approve a treasury management strategy before the start of each financial year. CIPFA published a new version of this Code in December 2017 and although local authorities do not need to formally adopt the new Code they are required by law to have regard to it.

In addition, the Department for Communities and Local Government (CLG) issued revised *Guidance on Local Authority Investments* in March 2010 that requires the Council to approve an investment strategy before the start of each financial year.

This report fulfils the Council's legal obligation under the *Local Government Act 2003* to have regard to both the CIPFA Code and the CLG Guidance.

The Council has borrowed and invested substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk are therefore central to the Council's treasury management strategy.

Revised strategy: In accordance with the CLG Guidance, the Council will be asked to approve a revised Treasury Management Strategy Statement should the assumptions on which this report is based change significantly. Such circumstances would include, for example, a large unexpected change in interest rates, in the Council's capital programme or in the level of its investment balance.

External Context

Economic background: The major external influence on the Council's treasury management strategy for 2018/19 will be the UK's progress in negotiating its exit from the European Union and agreeing future trading arrangements. The domestic economy has remained relatively robust since the surprise outcome of the 2016 referendum, but there are indications that uncertainty over the future is now weighing on growth. Transitional arrangements may prevent a cliff-edge, but will also extend the period of uncertainty for several years. Economic growth is therefore forecast to remain sluggish throughout 2018/19.

Consumer price inflation reached 3.0% in September 2017 as the post-referendum devaluation of sterling continued to feed through to imports. Unemployment continued to fall and the Bank of England's Monetary Policy Committee judged that the extent of spare capacity in the economy seemed limited and the pace at which the economy can grow without generating inflationary pressure had fallen over recent years. With its inflation-control mandate in mind, the Bank of England's Monetary Policy Committee raised official interest rates to 0.5% in November 2017.

In contrast, the US economy is performing well and the Federal Reserve is raising interest rates in regular steps to remove some of the emergency monetary stimulus it has provided for the past decade. The European Central Bank is yet to raise rates, but has started to taper its quantitative easing programme, signalling some confidence in the Eurozone economy.

Credit outlook: High profile bank failures in Italy and Portugal have reinforced concerns over the health of the European banking sector. Sluggish economies and fines for pre-crisis behaviour continue to weigh on bank profits, and any future economic slowdown will exacerbate concerns in this regard.

Bail-in legislation, which ensures that large investors including local authorities will rescue failing banks instead of taxpayers in the future, has now been fully implemented in the European Union, Switzerland and USA, while Australia and Canada are progressing with their own plans. In addition, the largest UK banks will ringfence their retail banking functions into separate legal entities during 2018. There remains some uncertainty over how these changes will impact upon the credit strength of the residual legal entities.

The credit risk associated with making unsecured bank deposits has therefore increased relative to the risk of other investment options available to the Council; returns from cash deposits however remain very low.

Interest rate forecast: The Council's treasury adviser Arlingclose's central case is for UK Bank Rate to remain at 0.50% during 2018/19, following the rise from the historic low of 0.25%. The Monetary Policy Committee re-emphasised that any prospective increases in Bank Rate would be expected to be at a gradual pace and to a limited extent.

Future expectations for higher short term interest rates are subdued and on-going decisions remain data dependant and negotiations on exiting the EU cast a shadow over monetary policy decisions. The risks to Arlingclose's forecast are broadly balanced on both sides. The Arlingclose central case is for gilt yields to remain broadly stable across the medium term. Upward movement will be limited, although the UK government's seemingly deteriorating fiscal stance is an upside risk.

A more detailed economic and interest rate forecast provided by Arlingclose is attached at **Appendix A**.

For the purpose of setting the budget, it has been assumed that new investments will be made at an average rate of 0.35%, and that new long-term loans will be borrowed at an average rate of 1.66%.

Local Context

On 31st December 2017, the Council held £34m of borrowing and £12m of investments. This is set out below.

	Actual Portfolio £m	Average Rate %
External borrowing:		
Public Works Loan Board	21	1.84
Local authorities	13	0.79
Total external borrowing	34	1.45
Treasury investments:		
Banks & building societies (unsecured)	2.7	0.30
Money Market Funds	9.3	0.33
Total treasury investments	12	0.32
Net debt	22	

Forecast changes in these sums are shown in the balance sheet analysis in table 1 below.

Table 1: Balance sheet summary and forecast

	31.3.17 Actual £m	31.3.18 Estimate £m	31.3.19 Forecast £m	31.3.20 Forecast £m	31.3.21 Forecast £m
General Fund CFR	33.2	152.4	202.5	244.2	254.4
Less: External borrowing *	0	-92	-21	-21	-21
Internal (over) borrowing	33.2	60.4	181.5	223.2	223.4
Less: Usable reserves	-21.5	-22	-22	-22	-22
Less: Working capital	-29.4	-29	-29	-29	-29
Investments (or New borrowing)	17.7	-9.4	-130.5	-172.2	-182.4

* shows only loans to which the Council is committed and excludes optional refinancing

The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while usable reserves and working capital are the underlying resources available for investment. The Council's earlier strategy had been to maintain borrowing and investments below their underlying levels, sometimes known as internal borrowing. However, the Council has an increasing CFR due to the capital programme, but minimal investments and will therefore be required to borrow significant amounts over the forecast period.

The CFR position at 31.3.2018 reflects the equity shareholding in and loans to subsidiaries, alongside other capital expenditure, including the purchase of CQ1.

CIPFA's *Prudential Code for Capital Finance in Local Authorities* recommends that the Council's total debt should be lower than its highest forecast CFR over the next three years. Table 1 shows that the Council expects to comply with this recommendation during 2018/19.

Borrowing Strategy

The Council currently holds £34 million of loans, an increase of £34 million on the previous year, as part of its strategy for funding the capital programme. The balance sheet forecast in table 1 shows that the Council expects to borrow up to £101m in 2018/19. The Council may also borrow additional sums to pre-fund future years' requirements, providing this does not exceed the authorised limit for borrowing of £225 million.

Objectives: The Council's chief objective when borrowing money is to strike an appropriately low risk balance between securing low interest costs and achieving certainty of those costs over the period for which funds are required. The flexibility to renegotiate loans should the Council's long-term plans change is a secondary objective.

Strategy: Given the significant cuts to public expenditure and in particular to local government funding, the Council's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio. With short-term interest rates currently much lower than long-term rates, it is likely to be more cost effective in the short-term to borrow some of the Council's loans as short-term loans.

By doing so, the Council is able to reduce net borrowing costs. The benefits of short-term borrowing will be monitored regularly against the potential for incurring additional costs by deferring borrowing into future years when long-term borrowing rates are forecast to rise modestly. Arlingclose will assist the Council with this 'cost of carry' and breakeven analysis. Its output may determine whether the

Council borrows additional sums at long-term fixed rates in 2018/19 with a view to keeping future interest costs low, even if this causes additional cost in the short-term.

Alternatively, the Council may arrange forward starting loans during 2018/19, where the interest rate is fixed in advance, but the cash is received in later years. This would enable certainty of cost to be achieved without suffering a cost of carry in the intervening period.

In addition, the Council may borrow further short-term loans to cover unplanned cash flow shortages.

Sources of borrowing: The approved sources of long-term and short-term borrowing are:

- Public Works Loan Board (PWLB) and any successor body
- any institution approved for investments (see below)
- any other bank or building society authorised to operate in the UK
- UK public and private sector pension funds (except Oxfordshire County Council Pension Fund)
- capital market bond investors
- UK Municipal Bonds Agency plc and other special purpose companies created to enable local authority bond issues

Other sources of debt finance: In addition, capital finance may be raised by the following methods that are not borrowing, but may be classed as other debt liabilities:

- operating and finance leases
- hire purchase
- Private Finance Initiative
- sale and leaseback

The Council has easy access to long-term borrowing from the PWLB but will investigate other sources of finance, such as local authority loans and bank loans, that may be available at more favourable rates.

Municipal Bonds Agency: UK Municipal Bonds Agency plc was established in 2014 by the Local Government Association as an alternative to the PWLB. It plans to issue bonds on the capital markets and lend the proceeds to local authorities. This will be a more complicated source of finance than the PWLB for two reasons: borrowing authorities will be required to provide bond investors with a joint and several guarantee to refund their investment in the event that the agency is unable to for any reason; and there will be a lead time of several months between committing to borrow and knowing the interest rate payable. Any decision to borrow from the Agency will therefore be the subject of a separate report to full Council.

Short-term and variable rate loans: These loans leave the Council exposed to the risk of short-term interest rate rises and are therefore subject to the limit on the net exposure to variable interest rates in the treasury management indicators below.

Debt rescheduling: The PWLB allows authorities to repay loans before maturity and either pay a premium or receive a discount according to a set formula based on current interest rates. Other lenders may also be prepared to negotiate premature redemption terms. The Council may take advantage of this and replace some loans with new loans, or repay loans without replacement, where this is expected to lead to an overall cost saving or a reduction in risk.

Investment Strategy

The Council holds short-term invested funds for liquidity purposes, representing income received in advance of expenditure plus balances and reserves held. In the past 12 months, the Council's investment balance has ranged between £1.4 and £56.7 million. As a net borrower for the foreseeable future, investment balances held will be at modest levels and held primarily for liquidity purposes.

Objectives: Both the CIPFA Code and the CLG Guidance require the Council to invest its funds prudently, and to have regard to the security and liquidity of its investments before seeking the highest rate of return, or yield. The Council's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk of receiving unsuitably low investment income. Where balances are expected to be invested for more than one year, the Council will aim to achieve a total return that is equal or higher than the prevailing rate of inflation, in order to maintain the spending power of the sum invested.

Strategy: Given the increasing risk and low returns from short-term unsecured bank investments, the Council would aspire to diversify into more secure and/or higher yielding asset classes. However, given the low level of funds available for longer-term investment and the high liquidity requirements, the Council's surplus cash is likely to remain invested in short-term bank deposits and call accounts, money market funds, and deposits with other local authorities.

Approved counterparties: The Council may invest its surplus funds with any of the counterparty types in table 2 below, subject to the cash limits (per counterparty) and the time limits shown.

Table 2: Approved investment counterparties and limits

Credit rating	Banks unsecured	Banks secured	Government	Corporates	Registered Providers
UK Govt	n/a	n/a	£ Unlimited 50 years	n/a	n/a
AAA	£3m 5 years	£5m 20 years	£5m 50 years	£3m 20 years	£3m 20 years
AA+	£3m 5 years	£5m 10 years	£5m 25 years	£3m 10 years	£3m 10 years
AA	£3m 4 years	£5m 5 years	£5m 15 years	£3m 5 years	£3m 10 years
AA-	£3m 3 years	£5m 4 years	£5m 10 years	£3m 4 years	£3m 10 years
A+	£3m 2 years	£5m 3 years	£5m 5 years	£3m 3 years	£3m 5 years
A	£3m 13 months	£5m 2 years	£5m 5 years	£3m 2 years	£3m 5 years
A-	£3m 6 months	£5m 13 months	£5m 5 years	£3m 13 months	£3m 5 years
None	£1m 6 months	n/a	£5m 25 years	£10m* 5 years	£3m 5 years
Pooled funds	£5m per fund				

This table must be read in conjunction with the notes below

Credit rating: Investment limits are set by reference to the lowest published long-term credit rating from Fitch, Moody's or Standard & Poor's. Where available, the credit rating relevant to the specific

investment or class of investment is used, otherwise the counterparty credit rating is used. However, investment decisions are never made solely based on credit ratings, and all other relevant factors including external advice will be taken into account.

Banks unsecured: Accounts, deposits, certificates of deposit and senior unsecured bonds with banks and building societies, other than multilateral development banks. These investments are subject to the risk of credit loss via a bail-in should the regulator determine that the bank is failing or likely to fail. See below for arrangements relating to operational bank accounts.

Banks secured: Covered bonds, reverse repurchase agreements and other collateralised arrangements with banks and building societies. These investments are secured on the bank's assets, which limits the potential losses in the unlikely event of insolvency, and means that they are exempt from bail-in. Where there is no investment specific credit rating, but the collateral upon which the investment is secured has a credit rating, the higher of the collateral credit rating and the counterparty credit rating will be used to determine cash and time limits. The combined secured and unsecured investments in any one bank will not exceed the cash limit for secured investments.

Government: Loans, bonds and bills issued or guaranteed by national governments, regional and local authorities and multilateral development banks. These investments are not subject to bail-in, and there is an insignificant risk of insolvency. Investments with the UK Central Government may be made in unlimited amounts for up to 50 years.

Corporates: Loans, bonds and commercial paper issued by companies other than banks and registered providers. These investments are not subject to bail-in, but are exposed to the risk of the company going insolvent. Loans to unrated companies will only be made following an external credit assessment or as part of a diversified pool in order to spread the risk widely.

Registered providers: Loans and bonds issued by, guaranteed by or secured on the assets of registered providers of social housing, formerly known as housing associations. These bodies are tightly regulated by the Homes and Communities Agency and, as providers of public services, they retain the likelihood of receiving government support if needed.

Pooled funds: Shares in diversified investment vehicles consisting of the any of the above investment types, plus equity shares and property. These funds have the advantage of providing wide diversification of investment risks, coupled with the services of a professional fund manager in return for a fee. Short-term Money Market Funds that offer same-day liquidity and very low or no volatility will be used as an alternative to instant access bank accounts, while pooled funds whose value changes with market prices and/or have a notice period will be used for longer investment periods.

Bond, equity and property funds offer enhanced returns over the longer term, but are more volatile in the short term. These allow the Council to diversify into asset classes other than cash without the need to own and manage the underlying investments. Because these funds have no defined maturity date, but are available for withdrawal after a notice period, their performance and continued suitability in meeting the Council's investment objectives will be monitored regularly. Investments in these funds will only be undertaken after careful analysis of cash balances available for the medium to long term and after advice from the Council's treasury advisor.

Operational bank accounts: The Council may incur operational exposures, for example through current accounts, collection accounts and merchant acquiring services, to any UK bank with credit ratings no lower than BBB- and with assets greater than £25 billion. These are not classed as investments, but are still subject to the risk of a bank bail-in, and balances will therefore be kept below £50,000 per bank wherever possible e.g. except for overnight balances where funds are received during the day and it is too late to transfer to another counterparty. The Bank of England has stated that in the event of

failure, banks with assets greater than £25 billion are more likely to be bailed-in than made insolvent, increasing the chance of the Council maintaining operational continuity.

Risk assessment and credit ratings: Credit ratings are obtained and monitored by the Council's treasury advisers, who will notify changes in ratings as they occur. Where an entity has its credit rating downgraded so that it fails to meet the approved investment criteria then:

- no new investments will be made,
- any existing investments that can be recalled or sold at no cost will be, and
- full consideration will be given to the recall or sale of all other existing investments with the affected counterparty.

Where a credit rating agency announces that a credit rating is on review for possible downgrade (also known as "rating watch negative" or "credit watch negative") so that it may fall below the approved rating criteria, then only investments that can be withdrawn on the next working day will be made with that organisation until the outcome of the review is announced. This policy will not apply to negative outlooks, which indicate a long-term direction of travel rather than an imminent change of rating.

Other information on the security of investments: The Council understands that credit ratings are good, but not perfect, predictors of investment default. Full regard will therefore be given to other available information on the credit quality of the organisations in which it invests, including credit default swap prices, financial statements, information on potential government support and reports in the quality financial press. No investments will be made with an organisation if there are substantive doubts about its credit quality, even though it may meet the credit rating criteria.

When deteriorating financial market conditions affect the creditworthiness of all organisations, as happened in 2008 and 2011, this is not generally reflected in credit ratings, but can be seen in other market measures. In these circumstances, the Council will restrict its investments to those organisations of higher credit quality and reduce the maximum duration of its investments to maintain the required level of security. The extent of these restrictions will be in line with prevailing financial market conditions. If these restrictions mean that insufficient commercial organisations of high credit quality are available to invest the Council's cash balances, then the surplus will be deposited with the UK Government, via the Debt Management Office or invested in government treasury bills for example, or with other local authorities. This will cause a reduction in the level of investment income earned, but will protect the principal sum invested.

Specified investments: The CLG Guidance defines specified investments as those:

- denominated in pound sterling,
- due to be repaid within 12 months of arrangement,
- not defined as capital expenditure by legislation, and
- invested with one of:
 - the UK Government,
 - a UK local authority, parish council or community council, or
 - a body or investment scheme of "high credit quality".

The Council defines "high credit quality" organisations and securities as those having a credit rating of A-or higher that are domiciled in the UK or a foreign country with a sovereign rating of AA+ or higher. For money market funds and other pooled funds "high credit quality" is defined as those having a credit rating of A- or higher.

Non-specified investments: Any investment not meeting the definition of a specified investment is classed as non-specified. The Council does not intend to make any investments denominated in foreign currencies, nor any that are defined as capital expenditure by legislation, such as company shares. Non-specified investments will therefore be limited to long-term investments, i.e. those that are due to mature 12 months or longer from the date of arrangement, and investments with bodies and schemes not meeting the definition on high credit quality. Limits on non-specified investments are shown in table 3 below.

Table 3: Non-specified investment limits

	Cash limit
Total long-term investments	£10m
Total investments without credit ratings or rated below A- (except UK Government and local authorities)	£10m
Total investments (except pooled funds) with institutions domiciled in foreign countries rated below AA+	£5m
Investments with other organisations*	£10m
Total non-specified investments	£25m

*Investments with other organisations would include investment opportunities with small and medium sized enterprises (SMEs) and other businesses and entities across the UK. Because of the higher perceived credit risk of SMEs, such investments may provide considerably higher rates of return. An external credit assessment will be undertaken and appropriate advice will be sought (where available) before any investment decision is made.

Investment limits: In order that the Council's revenue reserves available to cover investment losses are not unduly put at risk in the case of a single default, the maximum that will be lent to any one organisation (other than the UK Government) will be £10 million. A group of banks under the same ownership will be treated as a single organisation for limit purposes. Limits will also be placed on fund managers, investments in brokers' nominee accounts, foreign countries and industry sectors as below. Investments in pooled funds and multilateral development banks do not count against the limit for any single foreign country, since the risk is diversified over many countries.

Table 4: Investment limits

	Cash limit
Any single organisation, except the UK Central Government	£10m each
UK Central Government	unlimited
Any group of organisations under the same ownership	£10m per group
Any group of pooled funds under the same management	£10m per manager
Negotiable instruments held in a broker's nominee account	£10m per broker
Foreign countries	£10m per country
Registered providers	£10m in total
Unsecured investments with building societies	£10m in total
Loans to unrated corporates	£10m in total
Money Market Funds	£15m in total

Liquidity management: The Council uses in-house cash flow forecasting software to determine the maximum period for which funds may prudently be committed. The forecast is compiled on a prudent basis to minimise the risk of the Council being forced to borrow on unfavourable terms to meet its financial commitments. Limits on long-term investments are set by reference to the Council's medium term financial plan and cash flow forecast.

Non-Treasury Investments

Although not classed as treasury management activities and therefore not covered by the CIPFA Code or the CLG Guidance, the Council may also purchase property for investment purposes and may also make loans and investments for service purposes, for example in shared ownership housing, as loans to local businesses and landlords, or as equity investments and loans to the Council's subsidiaries.

Such loans and investments will be subject to the Council's normal approval processes for revenue and capital expenditure and need not comply with this treasury management strategy.

The Council's existing non-treasury investments (excluding property) at 31 December 2017 are shown below:

	Actual £m	Average Rate %
Non-treasury investments (excluding property):		
Shares in subsidiaries	24.8	-
Loans to subsidiaries	26.8	7.5%
Total non-treasury investments	51.6	

Variations to Investment Strategy

Delegated authority is granted to the Chief Finance Officer, in consultation with the Lead Member for Financial Management and the Chairman of Accounts, Audit and Risk Committee, to amend the lending criteria and counterparty limits detailed above as required to ensure that investments can continue to be made in a rapidly changing financial environment and the security of investments are maximised if this is deemed to be the most appropriate course of action.

Treasury Management Indicators

The Council measures and manages its exposures to treasury management risks using the following indicators.

Interest rate exposures: This indicator is set to control the Council's exposure to interest rate risk. The upper limits on fixed and variable rate interest rate exposures, expressed as the proportion of net principal borrowed will be:

	2017/18	2018/19	2019/20
Upper limit on fixed interest rate exposure	100%	100%	100%
Upper limit on variable interest rate exposure	100%	100%	100%

Fixed rate investments and borrowings are those where the rate of interest is fixed for at least 12 months, measured from the start of the financial year or the transaction date if later. All other instruments are classed as variable rate.

These limits have deliberately been set at 100% so they don't restrict the Council's ability to investigate all options.

Maturity structure of borrowing: This indicator is set to control the Council's exposure to refinancing risk. The upper and lower limits on the maturity structure of fixed rate borrowing will be:

	Upper	Lower
Under 12 months	100%	0%
12 months and within 24 months	100%	0%
24 months and within 5 years	100%	0%
5 years and within 10 years	100%	0%
10 years and above	100%	0%

Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date on which the lender can demand repayment.

The upper and lower limits as shown above provide the scope to accommodate new loan(s) in the most appropriate maturity band at the time of borrowing.

Principal sums invested for periods longer than 364 days: The purpose of this indicator is to control the Council's exposure to the risk of incurring losses by seeking early repayment of its investments. The limits on the long-term principal sum invested to final maturities beyond the period end will be:

	2018/19	2019/20	2020/21
Limit on principal invested beyond year end	£5m	£5m	£5m

Other Items

There are a number of additional items that the Council is obliged by CIPFA or CLG to include in its Treasury Management Strategy.

Policy on the use of financial derivatives: Local authorities have previously made use of financial derivatives embedded into loans and investments both to reduce interest rate risk (e.g. interest rate collars and forward deals) and to reduce costs or increase income at the expense of greater risk (e.g. LOBO loans and callable deposits). The general power of competence in Section 1 of the *Localism Act 2011* removes much of the uncertainty over local authorities' use of standalone financial derivatives (i.e. those that are not embedded into a loan or investment).

The Council will only use standalone financial derivatives (such as swaps, forwards, futures and options) where they can be clearly demonstrated to reduce the overall level of the financial risks that the Council is exposed to. Additional risks presented, such as credit exposure to derivative counterparties, will be taken into account when determining the overall level of risk. Embedded derivatives, including those present in pooled funds and forward starting transactions, will not be

subject to this policy, although the risks they present will be managed in line with the overall treasury risk management strategy.

Financial derivative transactions may be arranged with any organisation that meets the approved investment criteria. The current value of any amount due from a derivative counterparty will count against the counterparty credit limit and the relevant foreign country limit.

Investment training: The needs of the Council's treasury management staff for training in investment management are assessed regularly as part of the staff appraisal process, and additionally when the responsibilities of individual members of staff change.

Staff regularly attend training courses, seminars and conferences provided by Arlingclose and CIPFA. Relevant staff are also encouraged to study professional qualifications from CIPFA, the Association of Corporate Treasurers and other appropriate organisations.

Investment advisers: The Council has appointed Arlingclose Limited from April 2017 as treasury management advisers and receives specific advice on investment, debt and capital finance issues. The Council receives regular news, markets and regulatory updates and holds twice-yearly client review meetings.

Investment of money borrowed in advance of need: The Council may, from time to time, borrow in advance of need, where this is expected to provide the best long-term value for money. Since amounts borrowed will be invested until spent, the Council is aware that it will be exposed to the risk of loss of the borrowed sums, and the risk that investment and borrowing interest rates may change in the intervening period. These risks will be managed as part of the Council's overall management of its treasury risks.

The total amount borrowed will not exceed the authorised borrowing limit of £225 million. The maximum period between borrowing and expenditure is expected to be two years, although the Council is not required to link particular loans with particular items of expenditure.

Financial Implications

The budget for treasury investment income in 2018/19 is £42k, based on an average investment portfolio of £12 million at an interest rate of 0.35%. The budget for debt interest paid in 2018/19 is £2.1 million, based on an average debt portfolio of £62.6 million at an average interest rate of 1.66%. If actual levels of investments and borrowing, and actual interest rates differ from those forecast, performance against budget will be correspondingly different.

Other Options Considered

The CLG Guidance and the CIPFA Code do not prescribe any particular treasury management strategy for local authorities to adopt. The Chief Finance Officer, having consulted the Lead Member for Financial Management and the Chairman of Accounts, Audit and Risk Committee, believes that the above strategy represents an appropriate balance between risk management and cost effectiveness. Some alternative strategies, with their financial and risk management implications, are listed below.

Alternative	Impact on income and expenditure	Impact on risk management
Invest in a narrower range of counterparties and/or for shorter times	Interest income will be lower	Lower chance of losses from credit related defaults, but any such losses may be greater

Invest in a wider range of counterparties and/or for longer times	Interest income will be higher	Increased risk of losses from credit related defaults, but any such losses may be smaller
Borrow additional sums at long-term fixed interest rates	Debt interest costs will rise; this is unlikely to be offset by higher investment income	Higher investment balance leading to a higher impact in the event of a default; however long-term interest costs may be more certain
Borrow short-term or variable loans instead of long-term fixed rates	Debt interest costs will initially be lower	Increases in debt interest costs will be broadly offset by rising investment income in the medium term, but long-term costs may be less certain
Reduce level of borrowing	Saving on debt interest is likely to exceed lost investment income	Reduced investment balance leading to a lower impact in the event of a default; however long-term interest costs may be less certain

Prudential Indicators 2018/19

The Local Government Act 2003 requires the Council to have regard to the Chartered Institute of Public Finance and Accountancy's *Prudential Code for Capital Finance in Local Authorities* (the Prudential Code) when determining how much money it can afford to borrow. The objectives of the Prudential Code are to ensure, within a clear framework, that the capital investment plans of local authorities are affordable, prudent and sustainable, and that treasury management decisions are taken in accordance with good professional practice. To demonstrate that the Council has fulfilled these objectives, the Prudential Code sets out the following indicators that must be set and monitored each year.

Estimates of Capital Expenditure: The Council's planned capital expenditure and financing may be summarised as follows.

Capital Expenditure and Financing	2017/18 Revised £m	2018/19 Estimate £m	2019/20 Estimate £m	2020/21 Estimate £m
Total Expenditure	119.2	52.0	43.6	21.7
Capital Receipts	0	0	0	9.6
Government Grants	0.4	0.4	0.4	0.4
Revenue - MRP	0	1.5	1.5	1.5
Borrowing	118.8	50.1	41.7	10.2
Total Financing	119.2	52.0	43.6	21.7

Estimates of Capital Financing Requirement: The Capital Financing Requirement (CFR) measures the Council's underlying need to borrow for a capital purpose.

Capital Financing Requirement	31.03.18 Revised £m	31.03.19 Estimate £m	31.03.20 Estimate £m	31.03.21 Estimate £m
Total CFR	152.4	202.5	244.2	254.4

The CFR is forecast to rise by £221.2m over the next four years as capital expenditure financed by debt outweighs resources put aside for debt repayment.

Gross Debt and the Capital Financing Requirement: In order to ensure that over the medium term debt will only be for a capital purpose, the Council should ensure that debt does not, except in the short term, exceed the total of capital financing requirement in the preceding year plus the estimates of any additional capital financing requirement for the current and next two financial years. This is a key indicator of prudence.

Debt	31.03.18 Revised £m	31.03.19 Estimate £m	31.03.20 Estimate £m	31.03.21 Estimate £m
Borrowing/Total Debt	101.4	151.5	193.2	203.4

Total debt is expected to remain below the CFR during the forecast period.

Operational Boundary for External Debt: The operational boundary is based on the Council's estimate of most likely (i.e. prudent but not worst case) scenario for external debt. It links directly to the Council's estimates of capital expenditure, the capital financing requirement and cash flow requirements, and is a key management tool for in-year monitoring. Other long-term liabilities comprise finance lease, Private Finance Initiative and other liabilities that are not borrowing but form part of the Council's debt.

Operational Boundary	2017/18 Revised £m	2018/19 Estimate £m	2019/20 Estimate £m	2020/21 Estimate £m
Borrowing/Total Debt	195	205	205	205

Authorised Limit for External Debt: The authorised limit is the affordable borrowing limit determined in compliance with the Local Government Act 2003. It is the maximum amount of debt that the Council can legally owe. The authorised limit provides headroom over and above the operational boundary for unusual cash movements.

Authorised Limit	2017/18 Limit £m	2018/19 Limit £m	2019/20 Limit £m	2020/21 Limit £m
Borrowing/Total Debt	215	225	225	225

Ratio of Financing Costs to Net Revenue Stream: This is an indicator of affordability and highlights the revenue implications of existing and proposed capital expenditure by identifying the proportion of the revenue budget required to meet financing costs, net of investment income.

Ratio of Financing Costs to Net Revenue Stream	2017/18 Revised %	2018/19 Estimate %	2019/20 Estimate %	2020/21 Estimate %
General Fund	1.9	10.4	13.8	15.9

Incremental Impact of Capital Investment Decisions: This is an indicator of affordability that shows the impact of capital investment decisions on Council Tax levels. The incremental impact is the difference between the total revenue budget requirement of the current approved capital programme and the revenue budget requirement arising from the capital programme proposed.

Incremental Impact of Capital Investment Decisions	2018/19 Estimate £	2019/20 Estimate £	2020/21 Estimate £
General Fund - increase in annual band D Council Tax	-	-	-

The additional income generated by the proposed capital programme is expected to exceed the additional financing costs so will not require an increase in Council Tax.

Adoption of the CIPFA Treasury Management Code: The Council adopted the Chartered Institute of Public Finance and Accountancy's *Treasury Management in the Public Services: Code of Practice 2011 Edition* in 2013. It fully complies with the Codes recommendations.

Annual Minimum Revenue Provision Statement 2018/19

Where the Council finances capital expenditure by debt, it must put aside resources to repay that debt in later years. The amount charged to the revenue budget for the repayment of debt is known as Minimum Revenue Provision (MRP), although there has been no statutory minimum since 2008. The Local Government Act 2003 requires the Council to have regard to the Department for Communities and Local Government's *Guidance on Minimum Revenue Provision* (the CLG Guidance) most recently issued in 2012.

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

The CLG Guidance requires the Council to approve an Annual MRP Statement each year, and recommends a number of options for calculating a prudent amount of MRP. The following statement incorporates options recommended in the Guidance as well as locally determined prudent methods.

For unsupported capital expenditure incurred after 31st March 2008, MRP will be determined by charging the expenditure over the expected useful life of the relevant asset in equal instalments, starting in the year after the asset becomes operational. MRP on purchases of freehold land will be charged over 50 years. MRP on expenditure not related to fixed assets but which has been capitalised by regulation or direction will be charged over 20 years.

For capital expenditure loans to third parties that are repaid in instalments of principal, the Council will make nil MRP, but will instead apply the capital receipts arising from principal repayments to reduce the capital financing requirement instead.

Capital expenditure incurred during 2018/19 will not be subject to a MRP charge until 2019/20.

Based on the Council's latest estimate of its Capital Financing Requirement on 31st March 2018, the budget for MRP has been set as follows:

	31.03.2018 Estimated CFR £m	2018/19 Estimated MRP £
Unsupported capital expenditure after 31.03.2008	98.5	1.5
Loans to other bodies repaid in instalments	53.9	Nil
Total General Fund	152.4	1.5

Appendix A - Arlingclose Economic & Interest Rate Forecast November 2017**Underlying assumptions:**

- In a 7-2 vote, the MPC increased Bank Rate in line with market expectations to 0.5%. Dovish accompanying rhetoric prompted investors to lower the expected future path for interest rates. The minutes re-emphasised that any prospective increases in Bank Rate would be expected to be at a gradual pace and to a limited extent.
- Further potential movement in Bank Rate is reliant on economic data and the likely outcome of the EU negotiations. Policymakers have downwardly assessed the supply capacity of the UK economy, suggesting inflationary growth is more likely. However, the MPC will be wary of raising rates much further amid low business and household confidence.
- The UK economy faces a challenging outlook as the minority government continues to negotiate the country's exit from the European Union. While recent economic data has improved, it has done so from a low base: UK Q3 2017 GDP growth was 0.4%, after a 0.3% expansion in Q2.
- Household consumption growth, the driver of recent UK GDP growth, has softened following a contraction in real wages, despite both saving rates and consumer credit volumes indicating that some households continue to spend in the absence of wage growth. Policymakers have expressed concern about the continued expansion of consumer credit; any action taken will further dampen household spending.
- Some data has held up better than expected, with unemployment continuing to decline and house prices remaining relatively resilient. However, both of these factors can also be seen in a negative light, displaying the structural lack of investment in the UK economy post financial crisis. Weaker long term growth may prompt deterioration in the UK's fiscal position.
- The depreciation in sterling may assist the economy to rebalance away from spending. Export volumes will increase, helped by a stronger Eurozone economic expansion.
- Near-term global growth prospects have continued to improve and broaden, and expectations of inflation are subdued. Central banks are moving to reduce the level of monetary stimulus.
- Geo-political risks remains elevated and helps to anchor safe-haven flows into the UK government bond (gilt) market.

Forecast:

- The MPC has increased Bank Rate, largely to meet expectations they themselves created. Future expectations for higher short term interest rates are subdued. On-going decisions remain data dependant and negotiations on exiting the EU cast a shadow over monetary policy decisions.
- Our central case for Bank Rate is 0.5% over the medium term. The risks to the forecast are broadly balanced on both sides.
- The Arlingclose central case is for gilt yields to remain broadly stable across the medium term. Upward movement will be limited, although the UK government's seemingly deteriorating fiscal stance is an upside risk.

	Dec-17	Mar-18	Jun-18	Sep-18	Dec-18	Mar-19	Jun-19	Sep-19	Dec-19	Mar-20	Jun-20	Sep-20	Dec-20	Average
Official Bank Rate														
Upside risk	0.00	0.00	0.00	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.19
Arlingclose Central Case	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Downside risk	0.00	0.00	0.00	0.00	0.00	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.15
3-month LIBID rate														
Upside risk	0.10	0.10	0.10	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.22
Arlingclose Central Case	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Downside risk	-0.10	-0.10	-0.15	-0.15	-0.15	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.20
1-yr LIBID rate														
Upside risk	0.15	0.15	0.20	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.27
Arlingclose Central Case	0.70	0.70	0.70	0.70	0.80	0.80	0.80	0.80	0.80	0.80	0.80	0.80	0.80	0.77
Downside risk	-0.15	-0.20	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.15	-0.26
5-yr gilt yield														
Upside risk	0.20	0.25	0.25	0.25	0.30	0.35	0.35	0.35	0.35	0.35	0.35	0.35	0.40	0.32
Arlingclose Central Case	0.75	0.75	0.80	0.80	0.80	0.85	0.90	0.90	0.95	0.95	1.00	1.05	1.10	0.89
Downside risk	-0.20	-0.20	-0.25	-0.25	-0.25	-0.35	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	-0.33
10-yr gilt yield														
Upside risk	0.20	0.25	0.25	0.25	0.30	0.35	0.35	0.35	0.35	0.35	0.35	0.35	0.40	0.32
Arlingclose Central Case	1.25	1.25	1.25	1.25	1.25	1.30	1.30	1.35	1.40	1.45	1.50	1.55	1.55	1.36
Downside risk	-0.20	-0.25	-0.25	-0.25	-0.25	-0.30	-0.35	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	-0.33
20-yr gilt yield														
Upside risk	0.20	0.25	0.25	0.25	0.30	0.35	0.35	0.35	0.35	0.35	0.35	0.35	0.40	0.32
Arlingclose Central Case	1.85	1.85	1.85	1.85	1.85	1.90	1.90	1.95	1.95	2.00	2.05	2.05	2.05	1.93
Downside risk	-0.20	-0.30	-0.25	-0.25	-0.30	-0.35	-0.40	-0.45	-0.50	-0.50	-0.50	-0.50	-0.50	-0.38
50-yr gilt yield														
Upside risk	0.20	0.25	0.25	0.25	0.30	0.35	0.35	0.35	0.35	0.35	0.35	0.35	0.40	0.32
Arlingclose Central Case	1.70	1.70	1.70	1.70	1.70	1.75	1.80	1.85	1.90	1.95	1.95	1.95	1.95	1.82
Downside risk	-0.30	-0.30	-0.25	-0.25	-0.30	-0.35	-0.40	-0.45	-0.50	-0.50	-0.50	-0.50	-0.50	-0.39

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