

AGENDA FOR THE EXECUTIVE

Date: Monday, 7 January 2013

Time: 6:00 pm

Venue: Collingwood Room - Civic Offices

Executive Members:

Councillor S D T Woodward, Policy, Strategy and Finance (Executive Leader)

Councillor T M Cartwright, Public Protection (Deputy Executive Leader)

Councillor B Bayford, Health and Housing

Councillor K D Evans, Strategic Planning and Environment

Councillor Mrs C L A Hockley, Leisure and Community

Councillor L Keeble, Streetscene



1. Apologies for Absence

2. Minutes (Pages 1 - 6)

To confirm as a correct record the minutes of the meeting of Executive held on 3 December 2012.

3. Executive Leader's Announcements

4. Declarations of Interest

To receive any declarations of interest from members in accordance with Standing Orders and the Council's Code of Conduct.

5. Petitions

6. Deputations

To receive any deputations, of which notice has been lodged.

7. Minutes / References from Other Committees

To receive any reference from the committees or panels held.

Matters for Decision in Public

Note: Where an urgent item of business is raised in accordance with Part 3 of the Constitution, it will be considered with the relevant service decisions as appropriate.

8. Leisure and Community

To consider and reach a decision on the following.

Key Decision

(1) Localism Act 2011 - Assets of Community Value (Pages 7 - 22)

A report by the Director of Community.

Non-Key Decision

(2) Fareham Park Project - A Corporate Priority (Pages 23 - 38)

A report by the Director of Community.

9. Strategic Planning and Environment

To consider and reach a decision on the following matters:

Non-Key Decision(s)

(1) Draft Development Sites and Policies Plan: Further Consultation on Policy for Solent Breezes (Pages 39 - 46)

A report by the Director of Planning and Environment.

(2) Titchfield Conservation Area Character Appraisal & Management Strategy (Pages 47 - 106)

A report by the Director of Planning and Environment.

(3) New Community North of Fareham: Design Code Programme (Pages 107 - 112)

A report by the Director of Planning and Environment.

(4) Collective Energy Switching (Pages 113 - 118)

A report by the Director of Planning and Environment.

(5) Consultation on Planning Performance and the Planning Guarantee (Pages 119 - 152)

A report by the Director of Planning and Environment.

10. Policy Strategy and Finance

To consider and reach a decision on the following matters:

Key Decision(s)

(1) Finance Strategy, Capital Programme, Revenue Budget and Council Tax 2013/14 (Pages 153 - 166)

A report by the Director of Finance and Resources

(2) Commercial Property Investment Acquisition Strategy (Pages 167 - 178)

A report by the Director of Finance and Resources

(3) Local Council Tax Support Scheme 2013/14 (Pages 179 - 202)

A report by the Director of Finance and Resources

Non-Key Decision

(4) Disposal of Land Adjoining 268 Brook Lane (Pages 203 - 208)

A report by the Director of Finance and Resources

P GRIMWOOD
Chief Executive Officer

www.fareham.gov.uk

28 December 2012

**For further information please contact:
Democratic Services, Civic Offices, Fareham, PO16 7AZ
Tel: 01329 236100**

democraticservices@fareham.gov.uk

FAREHAM

BOROUGH COUNCIL

**Minutes of the
Executive
(to be confirmed at the next meeting)**

*Minutes of a meeting held on 3 December 2012
in the Collingwood Room, Civic Offices, Fareham*

Present: Councillor S D T Woodward - Policy, Strategy and Finance
(Executive Leader)
Councillor T M Cartwright - Public Protection (Deputy Leader)
Councillor B Bayford - Health and Housing
Councillor K D Evans - Strategic Planning and Environment
Councillor L Keeble - Streetscene

Also in attendance, Councillors:

Councillor Mrs M E Ellerton (Chairman of Health & Housing Policy Development and Review Panel)
Councillor Mrs K Mandry (Chairman of Public Protection Policy Development and Review Panel)
Councillor Swanbrow (Chairman of Scrutiny Board)

Public Session

1. APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor Mrs C L A Hockley.

2. MINUTES

RESOLVED that the minutes of the meeting of the Executive held on 15 November 2012 ([x-121105-m](#) refers) be confirmed and signed as a correct record.

3. EXECUTIVE LEADER'S ANNOUNCEMENTS

(1) Infrastructure for Growth workshop

The Executive Leader advised members that the Council had been invited to participate in an Infrastructure for Growth workshop being arranged by the Centre for Cities group in partnership with IBM, in relation to the New Community North of Fareham. The workshop follows the IBM Start Summit which took place in October and will place the spotlight on infrastructure investment as a vehicle for urban growth. Speakers at the workshop include senior representatives from Whitehall, local government, businesses and the infrastructure industry.

RESOLVED that the Executive Member for Strategic Planning and Environment (Councillor K Evans) be appointed to attend the Infrastructure for Growth workshop, in Manchester, on 11 December 2012.

(2) Fareham Town Centre Action Plan Update

The Executive Leader reminded members of the actions to maintain the vibrancy of Fareham town centre initially discussed at the business breakfast held in July 2012, and agreed in principle by the Executive in September 2012, following the £100,000 Government grant funding awarded (High Street Innovation Fund) and Council matched funding agreed. The following brief update on progress on delivery of the Action Plan was given by the Executive Leader as follows:

Town centre parking - removal of the £25 charge for parking longer than 5 hours in pay on foot car parks had been implemented and a revised parking strategy was to be considered later in the meeting (see minute 10(1) below);

Signage - proposals for improved and refreshed signage in car parks in preparation with the potential for part-funding by Hampshire County Council being explored;

Streetscene - a range of improvements are to be investigated and implemented including new seating and cycle racks, a new multi-functional permanent structure for markets and a scheme for delivering improvements to building facades is being developed;

Information - a dedicated website for Fareham Town Centre is being developed;

Encouraging new business - discussions are underway with the Chamber of Commerce and local enterprise groups to determine the most effective support that can be provided and which may include a business skills training programme to meet the needs of new retailers and a mentoring scheme; and

Development Sites and Policies Plan - the Town Centre chapter included in the Draft Development Sites and Policies Plan includes a draft policy designed to facilitate more cafe and restaurant use in the Henry Cort area.

The Executive Leader ended by confirming that a further business breakfast would be held in January 2013 to update local businesses on progress and to seek views on the above actions. A report would also be brought to Executive early in 2013 to give an update on the Plan and seek approval to any new measures.

4. DECLARATIONS OF INTEREST

There were no declarations of interest given for this meeting.

5. PETITIONS

There were no petitions presented for this meeting.

6. DEPUTATIONS

There were no deputations given at this meeting.

7. MINUTES/REFERENCES FROM OTHER COMMITTEES

- (1) Reference from the Housing Tenancy Board meeting held on 12 November 2012

The Executive noted the updated work programme for 2012/13 attached to the minutes at Appendix A ([ht-121112-m](#) refers)

- (2) Reference from the Public Protection Policy Development and Review Panel meeting held on 13 November 2012.

The Executive received comments from the Public Protection Policy Development Review Panel regarding the review on Enforcement Policy and took account of these comments in determining the matter at minute 9(1) below.

- (3) Reference from the Strategic Planning and Environment Policy Development and Review Panel meeting held on 6 November 2012.

The Executive received comments from the Strategic Planning and Environment Policy Development Review Panel regarding the report on Fareham Town Centre Parking Strategy and took account of these comments in determining the matter at minute 10(1) below.

8. EXECUTIVE MATTERS FOR DECISION IN PUBLIC

The Executive considered the following matters for decision and resolved as indicated, in the Notices of Executive Decisions referred to and as set out below:-

Health and Housing

- (1) Homelessness Strategy (Key Decision) - Decision No. [2012/13-100](#)

RESOLVED that the progress made in delivering the Council's Homelessness and Housing Options Strategy be noted and that:-

- (a) the amendments to the 2010-2013 Action Plan, as set out in paragraph 6 of the report, be approved ([xho-121203-r03-afi](#) refers); and
- (b) the proposals for the use of the Homelessness Prevention Grant for 2013/14, as set out in paragraph 7 to 12 of the report, be approved
- (c) the Executive Member for Health and Housing be given delegated authority to make decisions on the use of the balance of the Homelessness Prevention Grant fund in consultation with the Director of Community.

9. Public Protection

- (1) Environmental Health Enforcement Policy (Key Decision) - Decision No. [2012/13-101](#)

RESOLVED that the revised enforcement policy, attached as Appendix A to the report be approved ([xpp-121203-r08-iri](#) refers).

10. Strategic Planning and Environment

- (1) Fareham Town Centre Parking Strategy (Key Decision) - Decision No. [2012/13-102](#)

RESOLVED that the Executive:

- (a) approves the Fareham Town Centre Parking Strategy as set out in Appendix A of the report ([xpt-121203-r07-rfl Appendix A](#) refers);
- (b) approves the new parking tariffs as set out in Appendix 5 of the Strategy for introduction on 1 April 2013;
- (c) requests that new waiting restrictions for the Broadcut car park in Fareham be investigated and progressed; and
- (d) approves the suspension of parking charges for all Fareham town centre car parks on Christmas Day and Easter Sunday.

11. Policy, Strategy and Finance

- (1) Corporate Collection and Recovery Policy - Response to Consultation (Key Decision) - Decision No. [2012/13-103](#)

RESOLVED that the Executive approves the policy, as set out in Appendix C of the report ([xps-121203-r05-cqu Appendix C](#))

- (2) 2013/14 Draft Spending Plans - Decision No. [2012/13-104](#)

RESOLVED that:

- (a) the updated capital programme as set out in Appendix A to the report, be approved ([xps-121203-r01-nwo](#) refers);
- (b) the revised revenue budget for 2012/13 and the proposed revenue budget for 2013/14, as set out in Appendix B to the report, be approved; and
- (c) the proposed fees and charges for 2013/14, as set out in Appendix D to the report, be approved.

12. EXCLUSION OF PUBLIC AND PRESS

RESOLVED that in accordance with the Local Government Act 1972 the Public and Press be excluded from the remainder of the meeting, as the Executive considers that it is not in the public interest to consider the matters in public on the grounds that they will involve the disclosure of exempt information, as defined in Paragraph 1 of Part 1 of Schedule 12A of the Local Government Act.

Private Session

EXECUTIVE MATTER FOR DECISION IN PRIVATE

The Executive considered the following matters for decision in private and resolved as indicated in the Notices of Executive Decisions referred to and as set out below:-

13. Policy, Strategy and Finance

- (1) Tenders - Six Monthly Report - Decision No. [2012/13-105](#)

RESOLVED that details of all tenders received and contracts awarded during the six month period ending 6 October 2012, as set out in Appendix A to the confidential report, be noted.

(NOTE: All decisions are non-key decisions unless otherwise indicated)

(The meeting started at 6:00pm
and ended at 6:23pm).

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FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Leisure and Community
Subject:	Localism Act 2011 - Assets of Community Value
Report of:	Director of Community
Strategy/Policy:	Community Portfolio
Corporate Objective:	Strong and Inclusive Communities

Purpose:

This report outlines the provisions relating to the Localism Act 2011 and the implications for the Council resulting from the requirement to hold a List of Assets of Community Value. The report also proposes a procedure and decision making process for the listing of community assets.

Executive summary:

Under the Localism Act 2011, voluntary and community organisations and parish councils can nominate an asset to be included in a 'list of assets of community value'. The local authority is required to maintain this list. If the owner of a listed asset then wants to sell the asset a moratorium period will be triggered during which the asset cannot be sold. This is intended to allow community groups time to develop a proposal and raise the required capital to bid for the property when it comes onto the open market at the end of that period.

This report outlines the provisions relating to the 'Assets of Community Value' and the implications for the Council resulting from the requirement to hold the List of Assets of Community Value. The report also proposes a procedure and decision making process for the listing of community assets.

Recommendation:

That the draft procedure in appendix A is approved and published on the Council's web site.

Reason:

To comply with the Assets of Community Value (ACV) regulations as contained in the Localism Act 2011, Part 5, Chapter 3.

Cost of proposals:

The cost of administering the scheme can be met within existing budgets but there may be costs associated with the compensation arrangements as set out in the financial implications section of the report.

Appendix A: Fareham Borough Council Assets of Community Value Draft Procedure**Background papers:**

DCLG Non Statutory Advice Note for Local Authorities – Part 5 Chapter 3 of the Localism Act

Assets of Community Value Regulations 2012 (October 2012)

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: Localism Act 2011 - Assets of Community Value

Briefing by: Director of Community

Portfolio: Leisure and Community

INTRODUCTION

1. The Localism Act 2011 introduced a range of new rights for local communities that the Council has responsibility for administering. These rights include the ability to nominate assets of community value for inclusion on a list to be maintained by the local authority.
2. This report outlines the provisions relating to the 'Assets of Community Value' and the implications for the Council resulting from the requirement to hold the List of Assets of Community Value. The report also proposes a procedure and decision making process for the listing of community assets.

BACKGROUND

3. The Assets of Community Value (ACV) provisions are contained in the Localism Act 2011, Part 5, Chapter 3.
4. The ACV process will enable specific community groups to express an interest in owning assets like village shops, community centres, children's centres, libraries, or a local pub should the owner wish to sell.
5. The Council is responsible for creating and publishing a list of assets nominated by the community which meet the specified criteria and a separate list of those nominated that do not meet the criteria.
6. If, at any point in the future, the owner of a registered asset wishes to sell, the community is given a window of opportunity to express an interest in purchasing the asset at that point in time. If they do wish to put forward a proposal, then a six month moratorium is put in place to enable the community to draw up a purchase plan and make an offer to the owner of the asset.

7. The owner of the asset does not have to accept the community bid but must give it due consideration. The Assets of Community Value process does not guarantee the asset will be sold to the community or remain in community use. But it does give the community the opportunity to prepare a bid for the asset.
8. Owners of a listed asset, other than public authorities, will be entitled to claim compensation for loss or expense incurred as a result of their property being on the List of Assets of Community Value and complying with any of the procedures required by the scheme.
9. Claims will be made to the Council who will administer and make any payment resulting from the claim. Department for Communities and Local Government (DCLG) have will reimburse local authorities for any compensation claims over £20,000 paid out in any year.

RISK ASSESSMENT

10. There are no risks associated with the contents of the report but there are potential financial risks as detailed in the Financial Implications section of the report.

FINANCIAL IMPLICATIONS

11. The Department for Communities and Local Government (DCLG) have confirmed a payment of £4,873 from 15 October to all relevant local authorities to cover costs associated with the new duties under the Localism Act 2011 which includes Assets of Community Value. This payment is not ring-fenced and DCLG indicate that, subject to Parliamentary approval further payments will be paid in 2013 and 2014.
12. DCLG also indicate that the Government will reimburse local authorities for any compensation claims over £20,000 paid out in any year, i.e. regardless of whether it arises from one big claim or a number of smaller ones which aggregate to this amount.
13. These reimbursement arrangements give rise to a potential financial liability of up to £15,000 that the Council may have to find if it was subject to multiple compensation claims.
14. Appendix A contains the proposed draft procedure and decision making process for the listing of community assets. The procedure includes a nomination form and a format for listing both successful and non-successful nominations, as required by the regulations.
15. The intention is two publish the procedure and the successful and non-successful nominations on the Councils web site.

CONCLUSION

16. Localism Act 2011, Part 5, Chapter 3 places a requirement on the Council to administer the provisions relating to the 'Assets of Community Value'. The implications for the Council have been outlined in the report and appendix A contains a draft procedure to help Fareham Borough Council administer this new community right.

Reference Papers: None

Fareham Borough Council Assets of Community Value Draft Procedure

Introduction

The Localism Act 2011 introduced Assets of Community Value (ACV) enabling certain community groups to express an interest in and potentially buy an asset that enhances the social wellbeing and interests of the local community. This procedure has been developed to help Fareham Borough Council administer this new community right.

Nomination

Who can nominate an AVC?

Bodies eligible to nominate an ACV are as follows:

- Parish Council
- Neighbourhood forum (Section 61F Town and Country Planning Act 1990)
- Unincorporated Body (a local voluntary or community group that is not incorporated but has at least 21 members who are locally registered to vote)
- Community Interest Group - local voluntary or community group that is incorporated – this means it has a separate legal status from its members and is non profit distributing (e.g. Charity, Community Interest Company, Company Limited by Guarantee, Industrial Provident Society).

What needs to be contained in the nomination?

A community nomination must include a description of the nominated land or building including its boundaries, the name of current occupant / owner, reasons why the land or building is felt to be of community value, and evidence that the nominator is eligible to make a nomination.

When can nominations be submitted?

Nominations must be written, submitted by one of the bodies above and contain the information specified. The Council has provided a nomination form, Appendix 1, and this can be submitted at any time to the Council's Director of Community.

Nomination Assessment

What criteria are used in assessing a nomination?

An initial assessment will check that all required information has been submitted in order to establish that the land or building is eligible for nomination (e.g. not a residential property or operational land), that the body submitting the nomination is eligible to do so and that the land or building does, or could, enhance the social wellbeing and interests of the local community.

What role does the owner of the land or building have?

Part of the assessment process will be to consult with the current owner of the land or building nominated. The owner can object to the land or building being included on the registered list and the Council must consider the grounds for objection but the owner of the land or building does not decide whether the asset is included on the list or not.

Who makes the decision and how long does it take?

A decision to include an asset on the register of Assets of Community Value rests with the Council and this decision will be delegated to the Director of Community following consultation with the Executive Member for Community and the ward councillors from the area in which the asset is located. The Council will make a decision in response to a nomination within 8 weeks of receiving the nomination on the appropriate form.

What happens next?

A decision is then made as to whether the land or building is considered to be an AVC or not. If the decision is that it does, or could, benefit the social wellbeing or interests of the community then it is listed on a register of Assets of Community Value and published on the Council's website. See Appendix 2. Unsuccessful nominations are also published on the Council's website with an explanation of why they were unsuccessful. See Appendix 3. Both the nominating group and current owner of the land or buildings will be notified of the decision.

Right of Appeal

Can the owner of the asset appeal against the nomination?

If an asset is included on the list, an owner has the right to request the Council to review its decision. This request must be submitted 8 weeks from the date written notice of the listing was given. The asset will remain listed while the review is carried out. The internal review will be conducted by a Council Officer of appropriate seniority not previously involved in the decision to list the asset. This officer will be nominated by the Chief Executive. The Council will aim to complete the review within 8 weeks, if a longer period is necessary this will be agreed in writing.

Can the owner of the asset request an independent appeal?

If the owner is not satisfied with the outcome of the Council's internal review they have the right to appeal to the First-Tier Tribunal against the Council's decision. This appeal must be made within 28 days of the notice of the decision of the Council's internal review.

Does the list ever get reviewed?

The published list of Assets of Community Value will be reviewed every two years to ensure it remains current. The Council is also required to remove an asset from the list as soon as practicable in the following circumstances:

- a) After a relevant disposal (other than an exempt disposal)
- b) When an appeal against a listing has been successful
- c) When in the Council's opinion that the Asset is no longer of community value
- d) No later than 5 years from the date of entry on the list.

Intention to Sell

What happens when the owner of a registered asset wishes to sell?

The owner of a registered asset must notify the Council if he wishes to sell. The Council will then inform the group who originally nominated the asset of the owner's intention to sell.

What happens next?

The nominating group has a six week window of opportunity to decide whether or not it is in a position to put forward a proposal to buy the land or building if the owner of the nominated asset wishes to sell. It does not have to put forward the proposal within this six week window, just express an interest. This expression of interest triggers a six month moratorium period during which the owner cannot sell the asset and the community group has time to put together a bid for the asset.

Does the owner of the registered asset have to sell to the community group?

The owner of the asset is not obliged to sell to the community group. They may still choose to sell the asset on the open market following due consideration of the community bid and the end of the six month moratorium. This process gives the community the opportunity to bid for an asset; it is not a requirement for the owner to sell to the community.

What happens if the community group does not express an interest in bidding for the land or building at that particular point in time?

Under these circumstances, the owner of the land or building is free to sell it on the open market.

Compensation

Is the owner of the asset entitled to compensation?

Where necessary the Council will consider claims for compensation from owners of registered assets that find themselves barred from selling whilst the community prepare a bid for ownership. The compensation scheme does not apply to public authorities. The process for considering payment of compensation will be consistent with that set out in the Assets of Community Value (England) Regulations 2012. Claims must be submitted in writing to the Director of Community stating the amount of compensation sought and supporting evidence within 8 weeks of receiving written confirmation of the Council's decision. The Council must consider the claim and provide written reasons for its decision but there is no time limit for responding to the claim.

Review of Compensation Decision

Can the owner of the asset appeal against the compensation award?

If the owner is not satisfied with the Council's response to the compensation claim they may request a review by the Council of its own compensation decision. The internal review will be conducted by a Council Officer of appropriate seniority not previously involved in the decision to list the asset. This officer will be nominated by the Chief Executive. The Council will aim to complete the review within 8 weeks, if a longer period is necessary this will be agreed in writing.

Can the owner of the asset request an independent appeal?

If the owner is not satisfied with the outcome of the Council's internal review on compensation, they have the right to appeal to the First-Tier Tribunal against the Council's decision. This appeal must be made within 28 days of the notice of the decision of the Council's internal review.

Enforcement

How will the Council ensure compliance with the regulations?

To limit any unintentional non-compliance, the asset will be a local land charge. Therefore a non-compliant disposal of property would be ineffective from the outset. The effect of this will be that the ownership of the land has not changed hands.

General information on the provisions relating to the Assets of Community Value provision can be found on the Department for Communities and Local Government website which also provides a link to the Localism Act 2011:

<http://www.communities.gov.uk/communities/communityrights/righttobid/>

The statutory regulations which accompany and clarify the legislation can be found on the following website:

<http://www.legislation.gov.uk/ukdsi/2012/9780111526293/contents>

**Fareham Borough Council
Assets of Community Value
Nominations Form**

This questionnaire is designed to provide the Council with the information required to assess whether the nomination of an asset meets the criteria of an asset of community value.

The questionnaire is divided into three parts:

1. Voluntary or Community Body Details;
2. Asset Detail
3. Social Wellbeing and Social Interests criteria,

As a result of your application, in order to evaluate the nomination, the Council may:

- request additional information or evidence;
- seek clarification;
- conduct interviews; or,
- require presentations.

1.	Voluntary or Community Body Details
1.1	Name and address of the organisation in whose name this nomination is being submitted, include contact name, phone number, email etc:
1.2	Registered or trading name and address if different from question 1.1
1.3	Correspondence address if different from question 1.1
1.4	Does your organisation have a website, if so please provide the address?

1.5	Is your organisation a(n):	
	• Neighbourhood Forum	<input type="checkbox"/>
	• Unincorporated Body	<input type="checkbox"/>
	• Charity	<input type="checkbox"/>
	• Social Enterprise	<input type="checkbox"/>
	• Industrial or Provident Society	<input type="checkbox"/>
	• Community Interest Company	<input type="checkbox"/>
1.6	Company registration number, registered charities number, or Financial Services Authority registration number (list all that apply).	
1.7	Please provide detailed evidence that you are indeed eligible to make a community nomination in accordance with sections 4 and 5 of the Regulations.	

2.	Community Nomination - Asset Detail
2.1	Asset Address
2.2	Asset Owners – include the names of the current occupants of the land, and The names and current or last-know addresses of all those holding a freehold or leasehold state in the land

2.3	Asset / Land Use – Please can you provide details of the use of land over the past 5 years
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3.	Evidence: Asset of Community Value
<p>The Localism Act 2011 defines an asset or land of community value if:</p> <ol style="list-style-type: none"> 1. Its actual or current use (or there is a time in the recent past when its use) furthers the social wellbeing or social interests of the local community, and 2. It is realistic to think that there can continue to be (or it is realistic to think that there is a time in the next 5 years when) non-ancillary use of the building or land that would further the social wellbeing or social interests of the local community. 	
3.1	<p>Why do you feel that the aforementioned asset is indeed an asset of community value? Can you provide evidence of this?</p>

Name of person authorised to sign on behalf of the organisation:

Position/status in the organisation:

Date:

.....

On completion the form should be submitted by email to the Director of Community C/O mbowler@fareham.gov.uk

LIST OF ASSETS OF COMMUNITY VALUE

Entry Number	Date of Entry onto List	Asset Address	Asset Owner	Date of Notice of Relevant Disposal	Date of Request to Bid	Community Interest Group Wishing to Bid	Date Moratorium Period Expires	Date Protected Period Expires
1								
2								
3								
4								
5								
6								
7								
8								

LIST OF LAND NOMINATED BY UNSUCCESSFUL COMMUNITY NOMINATIONS

Entry Number	Date of Entry onto List	Asset Address	Reason Nomination Unsuccessful	Date Nomination Cannot be Considered Again Before
1				
2				
3				
4				
5				
6				
7				
8				

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Report to the Executive for Decision 7 January 2013

Portfolio: Leisure and Community
Subject: **Fareham Park Project - A Corporate Priority**
Report of: Director of Community
Strategy/Policy:

Corporate Objectives: Maintain and extend prosperity;
 Strong and inclusive communities;
 Leisure opportunities for health and fun.

Purpose:

To note the current progress against this corporate priority and agree the leadership and strategic direction for future work in this area.

Executive summary:

In 2008, Fareham Park was identified by the Local Strategic Partnership (LSP) as one of the most deprived areas of the Borough and nationally as evidenced by national deprivation indices. The LSP identified the area as a high priority for all partners. Following the demise of the LSP in 2010, the Council adopted the project as a corporate priority with the aim of reducing deprivation and poverty in Fareham Park. Although some initiatives have been targeted towards this area, the corporate priority currently lacks clear leadership and direction.

This report reviews the needs of the Fareham Park area, the current initiatives aimed at helping to address the deprivation in the area and proposes that a Member and Officer Steering Group is established to oversee the delivery of this important corporate project. It also proposes that the Executive agrees to fund a 3 year Project Officer post to support the Steering Group, to collate information, engage with local service providers, local community groups and prepare bids to attract external funding to the area.

Recommendation:

- (a) The Executive agrees to establish a Member and Officer Steering Group (as detailed in Appendix C) to oversee the delivery of the Fareham Park Project.
- (b) The Executive approves the Terms of Reference for the Member and Officer Steering Group (as set out in Appendix D).
- (c) The Executive Member for Leisure and Community be delegated authority to approve expenditure totalling up to £20,000 on projects which help to improve skills and/or reduce deprivation in the Fareham Park Area.
- (d) The Executive agrees to fund a 3 year Project Officer post to support the Member and Officer Steering Group in the delivery of this project.

Reason:

To provide elected members and the wider community with clarity on how this important corporate priority will be taken forward by the Council.

Cost of proposals:

A Project Officer (on a three fixed term contract) will cost approximately £30k per annum. It is proposed that this post be funded from a reduction in the Community Fund which has consistently under spent over the last three years.

A budget of £20,000 has already been approved by the Council to fund initiatives in the Fareham Park Area which will help to improve the skills of local people and help to reduce deprivation in the Fareham Park Area.

- Appendices A:** Map of Fareham Park
B: Summary of facts and needs for the Fareham Park area
C: Suggested Composition of Fareham Park Steering Group
D: Terms of Reference for Working Group

Background papers:

Executive Briefing Paper

Date: 7 January 2013

Subject: Fareham Park Project - A Corporate Priority

Briefing by: Director of Community

Portfolio: Leisure and Community

INTRODUCTION

1. In 2008, Fareham Park was identified by the Local Strategic Partnership (LSP) as one of the most deprived areas of the Borough and nationally as evidenced by national deprivation indices. The LSP identified the area as a high priority for all partners. Following the demise of the LSP in 2010, the Council adopted the project as a corporate priority with the aim of reducing deprivation and poverty in Fareham Park. Although some initiatives have been targeted towards this area, the corporate priority currently lacks clear leadership and direction.
2. This briefing paper reviews the needs of the Fareham Park area, the current initiatives aimed at helping to address the deprivation in the area and proposes that the Executive establish a member and officer steering group to oversee the delivery of this corporate project.
3. A map showing the boundary of the Fareham Park Area is attached at Appendix A.
4. A summary of some key facts and needs of the area is attached at Appendix B.

RECENT PROGRESS:

5. The following paragraphs provide a summary on recent progress:
 - (a) **Community Chatters**, a local community group that came together as a result of the Learning Links research and training organised and funded by the LSP. With support from the FBC Community Development Manager and the Manager of Highlands Hub they were successful in raising in excess of £2,500 in funds for a Diamond Jubilee event (including securing funding from Awards 4 All). This enabled the event to be free to all those local residents who attended. Although they were hampered by some awful weather they carried on with the event. This included live entertainment and free food and they fed in excess of 400 people on the day.

Unfortunately members of Community Chatters have suffered from limited support and have recently been through a period of uncertainty caused by differences within the group. The remaining members have decided that they wish to focus solely on fund-raising activity in order to help the local community meet local need with a small resource. They are currently considering how they can best achieve this, whilst adhering to good practise in managing any funds they make.

- (b) **A Credit Union**, Fareham Community Savers (FCS) has been established for the Fareham Borough, two years funding has been secured for the project, with a further three years funding, providing a need can be identified and established for its service. 'Fareham Community Savers' (FCS), seeks to act as a local conduit to the services of Hampshire Credit Union through United Savings and Loans (USAL). The project also seeks to offer advice and support to local residents in connection with money management, budgeting and signposting to other sources of advice and support. A weekly session is held at the Highlands Hub every Thursday morning.

- (c) **Encouraging Play**: The Community Development Manager has secured an award of £6000 from the Local Children's Partnership to provide some additional Play Ranger support and activity in the Fareham Park and Broadlaw areas. Plans will need to be established on how best to use this to continue to provide some type of play activity, as we have now reached the formal end of the Play Ranger Programme and the staff are no longer employed by the Council. It is clear that there continues to be a strong demand in the neighbourhood for play opportunities in the area and the National Play Day event held Fareham Park in August attracted in excess of 185 local children and families. Nonetheless, children still have limited access to appropriate facilities for play and are often left to their own devices which can be associated with issues (sometimes anti-social) for the wider community.

- (d) **Outreach Services**: The Hub continues to be well-used by the general community, mornings are especially popular. However the six-month pilot to trial the operation of a number of Council services from the Hub in order to increase access to our services by local residents, has had a disappointing response. As a result and with the agreement of the Hub, the trial was ended on 30 Sept 2012. Further consideration will be given to training volunteers to sign post residents to key services and/or book appointments for vulnerable clients (either at home or at the Hub). Conversely, CAB continues to see a steady stream of clients, through its outreach service at the Hub, likewise, CAB reports that mornings are busier than afternoons. 'Hub' enquiries are across the board in terms of issues, although trends seem to be concentrated on managing benefit changes (implications of welfare reform), housing and tenant rights, debt support and advice, support on fleeing domestic violence, family advice concerning custody and access rights to separated children.

OTHER ISSUES TO BE ADDRESSED

6. Although some issues have been pursued, there are still many areas of work yet to be tackled, this can be mainly attributed to limited capacity and limited involvement by other partners/organisations and reductions in services accordingly.

Support for Community Chatters

7. Since the beginning of the 2012, Community Chatters has been operating on an unsupported basis, following the end of the contract of the temporary Community Development worker (hosted by Community Action Fareham (CAF)). The FBC Community Development Manager has continued to meet with the Chairman of the Group to try and give a sense of continuity and offer limited assistance where relevant.
8. Several members of this group have progressed from the initial pool of residents who volunteered to undertake research training and skill development to build their abilities and confidence. This has helped them to establish themselves as a residents group and canvass the opinions of their fellow residents. They are well respected by members of the community and recognised because of their ability to take on local matters.
9. There is no doubt that this group has made a real difference locally and continues to try new ideas despite their limited membership. However, if the group is to continue, it is clear that formal support is needed and that this will need to be quite focussed until they are back on their feet again. It would appear that CAF has limited capacity to be part of this process or offer any support to this community group.
10. It is recognised that it would be disappointing for this group to disband now.

Links with the Highlands Hub

11. The Hub's usage appears to be growing steadily but it is recognised that as the initiative is operated on a not-for-profit-basis, it is highly unlikely to ever breakeven; this is further compounded as the building is constrained by the capacity of the current accommodation available.
12. On an individual basis, the Hub is recognised locally as a good source of information, help and advice. However, it is felt that as they have now passed their first anniversary, the management committee should be 'encouraged' to consider developing a range of support groups or training sessions tailored to the needs of the immediate local community they are seeking to serve.
13. Until recently the Council has had limited opportunity to input to the Hub Management Committee, therefore it is inappropriate and difficult to effect any change, further than an 'ideas/suggestion' stage. This has recently been resolved with the Hub Management Committee inviting the Council to nominate a representative to join the Management Committee. Councillor Mrs Hockley (Executive Member for Community) is the Council's appointed representative.

14. The Hub is carving out an identity in the Highlands Road area and is creating a positive effect on the area by attracting a number of target groups and being actively involved in leading events for general community benefit.

Safer Neighbourhood Contract

15. The Anti-Social Behaviour Officer consulted residents of the Stow Estate about their concerns and gained their support to launch a Safer Neighbourhood Contract (a compact between residents, the Council, the Police and Landlords) aimed at addressing crime and anti-social behaviour across the area. It is alleged that there is a high level of drug abuse, intolerance between generations and anti-social behaviour in the area and many residents have expressed concern about the cleanliness and quality of the local environment. The Safer Neighbourhood Contract is based on a successful model used in other parts of the country. Once fully developed, the Contract has the potential to be expanded across the whole of the Fareham Park Area subject to the full support of local councillors and all local public sector agencies.

Supporting Troubled Families

16. The Government recently launched a three year programme to provide help and support to troubled families. 40% of the Fareham's Supported Families are resident within Fareham Park. The Fareham Supported Families Programme is managed by The Local Children and Young Persons Partnership with support from the FBC Community Safety Manager.

96 Highland Road

17. This is a large site (formerly the site of the Hampshire Rose Public House) owned by Hampshire County Council (HCC) in a prominent location at the centre of Fareham Park. Despite a number of meetings facilitated by FBC, HCC has failed to bring forward any development proposals. A recent meeting with local traders attended by the Executive Leader of the Council gave rise to a request to HCC to release the site to be used as a temporary car park whilst the future of the site is being considered.

Fareham North-West Community Centre

18. This is a small community centre owned by Fareham Borough Council and managed by the North West Fareham Community Association. The Centre has struggled in recent years, partly as a result of its location, but also due to internal conflict. There is a clear need for a community centre to support Fareham Park with the potential to improve access by local people, make better use of this facility or plan for its relocation to a more central location.

OTHER MATTERS FOR CONSIDERATION:

Aspirations

19. Evidence of the low aspirations among young people in the area is very clear; leaving school with no qualifications many are destined to be dependent on benefits for income and social housing.

20. In the Fareham North West area, limited skills among the adult population continue to have an impact on individuals' ability to alter their future. With the cuts in grant to Community Schools across the county, this has already started to have an impact on the availability of training and skill development opportunities for adults wishing to improve their lot.
21. Whereas previously a partnership with Henry Cort Community School would have helped move this issue forward, as HCC is no longer engaged in Community Education, another provider would need to be attracted to the area.

Children and Young People

22. It is recognised that many local services continue to work in the area; issues resulting from teenage pregnancies, a lack of good parenting, family support, disengagement from troublesome children and young people (i.e.: they are now the community's responsibility, not the parents' anymore) and managing the consequences of anti-social behaviour, continue to form the core activities of several support services.
23. However it is recognised that the neighbourhood could benefit from the introduction of an initiative which seeks to raise aspiration, offer support and help people access training, skills and development, whilst also offering some alternative solutions with positive wider community benefits. As mentioned several agencies appear to be working in the patch, but it would appear that communication between them is not as good as it could be. Currently there is no 'Inter-Agency' style meeting for practitioners working in the locality.

Health

24. No agency has expressed interest in operating a health information and advice service for young people across Fareham, as such, no dedicated advice exists and with limited affordable youth activities available, we could see increases in young people's health conditions (sexually transmitted infections, unplanned pregnancy, drug and alcohol misuse, obesity etc.)
25. The issue of accessible health services for young people has been raised before and still needs addressing, accessibility in terms of friendliness and attitude are reported as being of concern for younger residents.

Welfare Reform

26. It is recognised that Welfare Reform will undoubtedly affect a significant number of households and young people in the area.

Youth Services

27. Following the HCC re-organisation of local youth services and the recent shift towards commissioning arrangements for youth activities, no agency submitted a bid to operate youth activity in the Fareham Park Area. The funding, although limited, could have made a difference. Consequently, the only (no/low cost) activity for children and young people in the neighbourhood is offered on a Friday evening from the Baptist Church in Gudge Heath Lane as the Council's Play Ranger Sessions (previously offered fortnightly at the Hub) have now finished.

SUGGESTED KEY PRIORITIES:-

28. In order to help progress priorities and create positive opportunities for change, the following priorities are suggested to prompt discussion and shape the draft terms of reference for a Fareham Park Steering Group.

Empower the local community - Building Capacity and Self Help:

29. If the Community Chatters Group (or similar voluntary body) is to be effective in helping to tackle the issues in the area, support is clearly needed to help them develop and move forward productively.

Other actions that the Member and Officer Steering Group may wish to consider, include:-

Raise Aspirations and Improve Skills:

- The development of initiatives aimed at raising aspirations in parents and young people, including skill development, numeracy and literacy, and practical skills (i.e. budgeting and money management).
- Writing job applications and 'Job Club' style support, enabling residents to access to further learning courses.
- Encourage positive role models and local apprenticeships, one option maybe the establishment of a Young Fire-fighters Initiative as has been successfully operated in other parts of the County. Improving employability, discipline and responsibility.

Improve provision for Children:

- Exploring options to improve the take up of nursery provision.
- Provide more Play Development opportunities within the area (some of the £6k from Local Children's Partnership could be used to match this).
- Review the opportunities to learn, develop and improve parenting skills.

Improve provision for Young People:

- Development of informal open access youth work activities - (Fareham North-West Community Centre would make an ideal youth club location. This would need to be linked to the delivery of a programme of local street-based youth work).
- Work with partners to secure the available funds for youth activity in the Highlands area, via the Local Children's Partnership commissioning arrangements.

- Research into local health facilities for young people and making them more user friendly and accessible (including drugs and alcohol misuse).

Improve the quality of the local environment:

- Develop and implement a safer community contract (in partnership with all statutory agencies and local residents)
- Review the standard and quality of Streetscene services across the area.
- Review the results of Estate inspections (by Tenancy Services and Local Tenant Representatives).
- Offer initiatives to help local people take pride in and ownership of their own street, collectively with their neighbours.
- Review and seek to maximise use of local community facilities.

Improve the provision of services for Older People:

- Review the services and opportunities for older people across the area.
- Identify initiatives and opportunities to reduce isolation (including the promotion of the community alarm service (Careline) and the Mobile Library Service).
- Maximise the use of community facilities and the new Collingwood House as a focal point for older people.
- Review the take up and provision of meals on wheels, develop the need for luncheon club provision in the area.
- Review the health needs of Older people in the area and explore how services could be made more accessible, possibly an Older Peoples One-Stop facility at Collingwood House community lounge.

Regeneration:

- Redevelopment of Collingwood House, and maximise potential to use the scheme as a local hub for older people living in Fareham Park.
- Facilitate and enable redevelopment proposals for 96 Highlands Road.
- Explore potential for improving the quality and availability of social housing in Fareham Park (including the demolition and rebuilding of existing social housing and or garage sites).

30. **Interagency involvement in the area:** A number of organisations and agencies are involved in the area; however it is recognised that if this could be co-ordinated and more effective working links established. This could help with the development of projects aimed at tackling a number of key issues for the community.

FAREHAM NORTH WEST COMMUNITY PARTNERSHIP

31. It is understood that Councillor Peter Davies (one of the ward Councillors for Fareham North West) recently invited local community groups to a meeting with the aim of seeking their support to establish a Fareham North West Community Partnership working together to serve Fareham North West. It is understood invitees included representatives of Hill Park Baptist Church, Hill Park Working Men's Club, Oak Meadow Children's Centre, Fareham North-West Community Association, Highlands Hub and Henry Cort Community School.

According to Councillor Davies the proposal to establish the Fareham Park Partnership was well supported and the group agreed the following actions:-

- Presenting a united offering of community activities to local residents.
- Providing a joint website with links to the various organisations (with the possibility of FBC hosting the website)
- Producing a joint community newsletter
- Use of other outlets - Fareham Today, Community Action Fareham, Council notice boards, Library.

32. It is understood that Councillor Davies informed the meeting that FBC has provided £20,000 to spend in Fareham North West. A request was made to Councillor Davies for £3,500 to support the Saturday morning club at Henry Cort Community College for referred youngsters. Councillor Davies also suggested that funds could be directed to the area to clear litter and grounds maintenance so it is an area in which people can be proud to live.
33. Whilst the initiative to establish the Fareham North West Partnership should be welcomed as an important route for encouraging interagency dialogue and involvement, it is perhaps premature to make decisions on the award of the £20,000 grant funding in the area without understanding the wider needs of the area and agreeing priorities for action. Hence it is proposed that the award of the £20,000 grant funding should be delegated to the Executive Member for Community and Leisure, and that such awards should only be considered on the advice of the Member and Officer Steering Group. In addition, it is proposed that no grant awards should be considered until the Steering Group has completed a full appraisal of the needs of the area and determined how best to spend the limited funds to help tackle deprivation and/or attract external funding to the area.

FINANCIAL and PERSONNEL IMPLICATIONS

34. A revenue budget of £20,000 has been set aside to help fund community based projects within the Fareham Park Area.
35. There is currently no staff resource dedicated to the delivery of this project, without which the Council is struggling to make an impact on this corporate high priority objective. Therefore, it is proposed that funds are identified to employ a Project Officer on a 3 year fixed term contract to help take this project forward. The Project Officer would be responsible for multi-agency networking, gathering information, preparing reports, identifying and applying for external funds and supporting the work of the member and officer working group. This is estimated to cost £30k per annum.
36. It is proposed that the post be funded by a reduction in the Community Fund which consistently underspent over the last 2 years as shown in the table below.

Table:- Community Fund Spend

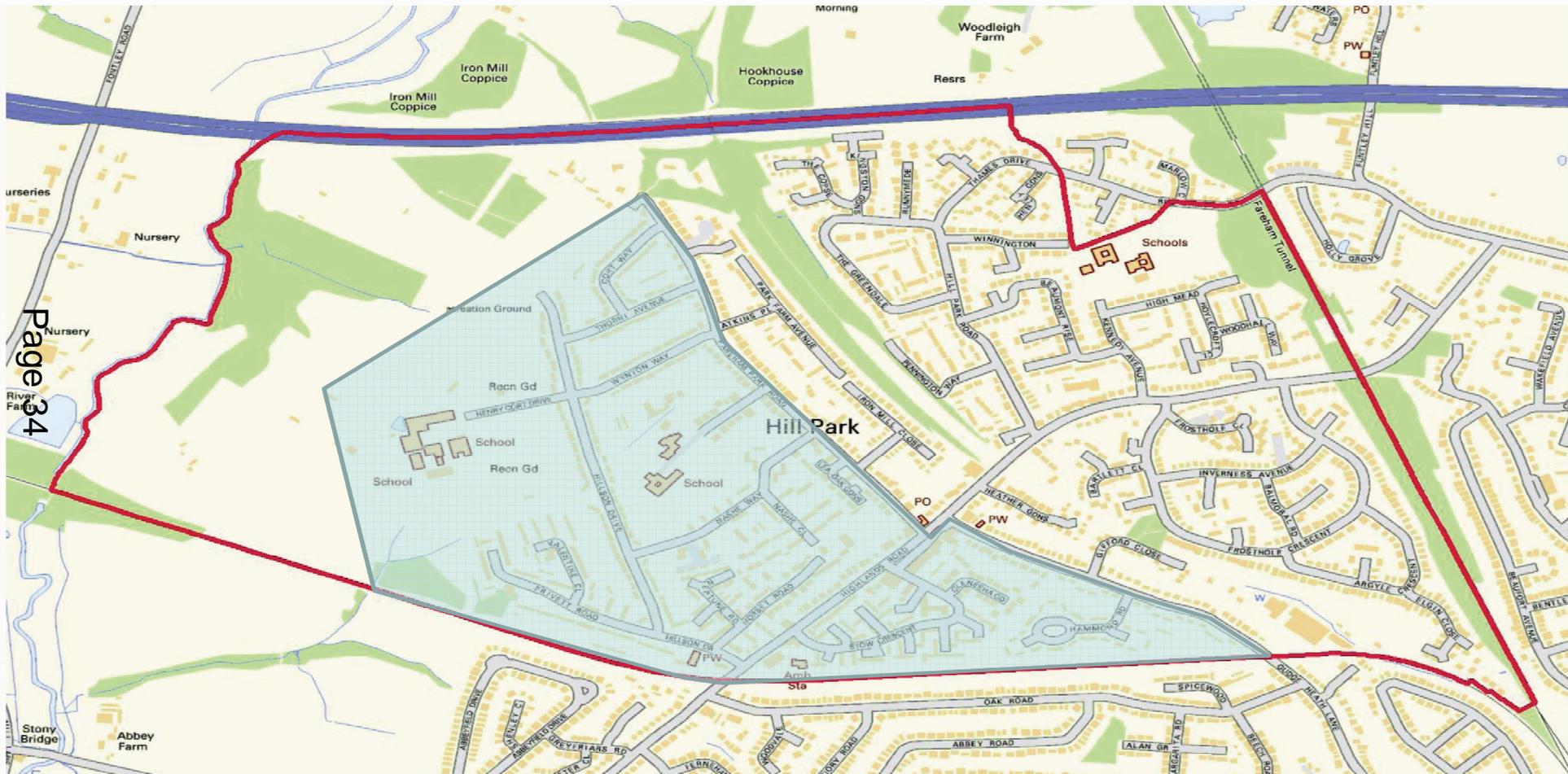
Year	Actual £	Revenue	
		Budget £	Underspend £
2012/13	33,628	101,300	67,672
2011/12	77,277	101,300	24,023
2010/11	67,558	101,300	33,742

CONCLUSION

37. As a key corporate priority, the Council and its partners (statutory and community) need to be clear about their role and direction in the Fareham Park area so that the maximum benefit can be achieved for local residents.
38. In order to secure the support and co-operation of other agencies, and so that resources can be pooled for maximum benefit, a clear strategic direction needs to be established. This will ensure that the community can be effectively resourced and supported, enabling them to identify appropriate solutions to the raft of issues currently affecting them.
39. So that a coherent approach can be facilitated to addressing these matters, it is proposed that future activity, development and regeneration in the neighbourhood be guided by a member and officer working group, to be known as the Fareham Park Partnership.
40. It is acknowledged that in order for this initiative to succeed, appropriate resources will need to be allocated to this initiative. This will enable local activity to be guided by a Project Officer, as well as enabling projects to be initiated, as well as the option to use resources to secure external funding opportunities.

Reference Papers: None

Appendix A - Map of Fareham Park Area



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Appendix B - Summary of the headline facts and needs for the Fareham Park area

- The Fareham Park area was ranked in the top 3% of the most deprived areas in the country, in terms of skills
- Approximately 7340 people live in the Fareham Park area (Census 2001)
- There are 3067 dwellings in the Fareham Park area (Census 2001).
- In summer 2008, **21.6%** of pupils from the Fareham Park project area were eligible for free school meals compared to 5.13% across Fareham overall
- In August 2008, **18.83%** of the Fareham Park area working-age-population was claiming key out of work benefits compared to 5.24% across Fareham as a whole
- In 2001, **46.1%** of the working age population in Fareham Park had no qualifications compared to 29.25% across Fareham NW Ward
- In November 2008, it was identified that **85.05 per 1000 of the 16+ population** in Fareham Park were claiming incapacity benefit, in direct comparison to 33.43 (per 1000 16+ population) across Fareham Borough

Fareham Park Project Evaluation Report, as commissioned from Learning Links, by Local Strategic Partnership (1st November 2009 to 31st March 2011)

Appendix C - Suggested composition of Fareham Park Steering Group

Core Members of the Fareham Park Steering Group

Councillors:-

Executive Member for Leisure and Community - Chairman
Chairman of Leisure and Community Policy Development and Review Panel
Vice Chairman of Leisure and Community Policy Development and Review Panel
Fareham Borough Council - Ward Councillors x 2
HCC County Councillor x 1

Officers:-

Director of Community - Martyn George
Head of Community and Leisure - Mark Bowler
Community Development Manager - Janie Millerchip
Community Safety Manager (and Fareham's Lead officer for Supporting Families programme) - Narinder Bains
Director of Streetscene - Paul Doran
FBC Fareham Park Project Officer - (to be appointed)

Officer Invitees (to attend by invitation as and when appropriate):-

Kevin Wright - Head of Community Safety and Enforcement
Sally Chapman - Anti-Social Behaviour Officer
Jo Complin - Data Analyst
Jane Cresdee - Senior Housing Management Officer
Mick Gore - Operations Manager (Streetscene)
Shaun Barnett - Planned Maintenance Manager

Other Agencies to be Invited (to attend by invitation as and when appropriate):-

Hampshire County Council
Local Children's Partnership
Hub Manager
Baptist Church
St Columba Church
Henry Cort Community School
Oak Meadow Children's Centre
Primary Schools - Orchard Lea Infant and Junior and St Columba Primary Academy
Fareham North-West Community Association
Hill Park Working Men's Club
Police
Drugs and Alcohol Advice Team

FAREHAM PARK PROJECT - Member and Officer Steering Group.

Draft Terms of Reference:

The Steering Group will be responsible for:-

1. Conducting a review of the economic, social and health needs of Fareham Park.
2. Identifying and agreeing the priorities for action.
3. Agreeing a set of performance measures to be used to monitor the success of the project.
4. Engaging with local community organisations and statutory bodies to review, challenge and re-direct local services.
5. Providing advice to the Executive Member for Community and Leisure on award of FBC grant funding (of up to a total of £20,000) to be used to reduce deprivation in the area.
6. Exploring and securing external sources of funding to invest in Fareham Park.
7. Reviewing the quality of FBC services delivered in Fareham Park which impact on deprivation.
8. Providing a six monthly progress report to the Leisure and Community Policy Development and Review Panel and an annual report to the Executive.

The Group will be chaired by the Executive Member for Leisure and Community.

Officers from Fareham Borough Council and/or Hampshire County Council will be invited to attend the Panel meetings to provide professional and technical advice as requested by the Executive Member in consultation with the Director of Community.

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FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Strategic Planning and Environment
Subject:	Draft Development Sites and Policies Plan: Further Consultation on Policy for Solent Breezes
Report of:	Director of Planning and Environment
Strategy/Policy:	Fareham Borough Local Plan
Corporate Objective:	Protecting and Enhancing our Environment A safe and healthy place to live and work Leisure for health and for fun Strong and inclusive communities

Purpose:

To seek initial endorsement of the proposed policy for Solent Breezes and to agree to a specific 4-week public consultation on the draft policy.

Executive summary:

Solent Breezes has been developed as a holiday home park in piece-meal fashion through various planning applications and has a long and complex planning history. Some of the planning applications for extension and/or removal of planning conditions relating to the allowed period of use have been determined by planning appeals. The appeal decisions to date have been inconsistent in approach but in the most recent case the Inspector concluded that the site cannot be regarded as being in a sustainable location suitable for permanent residential dwellings. The preparation of the Development Sites and Policies Plan is the appropriate opportunity to bring development activities within Solent Breezes under the development plan process to provide clarity and ensure consistency with other development plan policies.

Recommendation:

That the draft policy for Solent Breezes, as set out at Appendix A to this report, be published for a 4-week period of targeted public consultation.

Reason:

To undertake consultation on the proposed policy in order to give a clearer direction for development activities in the Solent Breezes holiday home park and to ensure further protection to life and property within the area.

Cost of proposals:

The cost of undertaking publication and consultation is covered within existing budgets.

Appendices A: Draft Fareham Borough Local Plan Part 2: Development Sites & Policies - New Supporting Text & Policy re Development within Solent Breezes

B: Amendment to Proposals Map: Boundary for Policy C2

Background papers: Fareham Borough Council Appeal Statement Ref: P/11/0855/VC

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: Draft Development Sites and Policies Plan: Further Consultation on Policy for Solent Breezes

Briefing by: Director of Planning and Environment

Portfolio: Strategic Planning and Environment

INTRODUCTION

1. The Council is required to prepare a Local Plan to guide the location of developments and decision making on planning applications within the Borough. The draft Development Sites and Policies document is one of three documents (Core Strategy; Development Sites and Policies and New Community North of Fareham) documents which will form the new Local Plan for the Borough. The preparation of the Development Sites and Policies Plan is an opportunity to ensure that all forms of development within the borough during the plan period until 2026 is guided by policies within the Fareham Borough Local Plan.
2. Solent Breezes is a holiday home park comprising holiday chalets and mobile homes with associated facilities. The site is located to the south of Hook, overlooking the Solent and covers an area of about 11.5 hectares. The mobile homes are predominantly owned and managed by a holiday company while the chalets are in private freehold ownership. The site is accessed via an unadopted, narrow and roughly surfaced lane from the small hamlet of Hook, approximately 1 mile to the north.

BACKGROUND

3. Solent Breezes has been in existence since the late 1950s and has a long and complex planning history. The holiday home park has been developed in piecemeal fashion through individual planning applications. Some of the planning applications for extension and/or removal of planning conditions relating to the allowed period of use have been determined by planning appeals. The appeal decisions to date have been inconsistent in approach but in the most recent case the Inspector concluded that the site cannot be regarded as being in a sustainable location suitable for permanent residential dwellings.

4. The preparation of the Development Sites and Policies Plan is the appropriate opportunity to bring development activities within Solent Breezes under the development plan process to provide clarity and ensure consistency with other development plan policies and to reduce the possibility of planning decisions being made inconsistently through the planning appeal process.
5. The Solent Breezes site is located in the countryside where residential development is not normally permitted. The site as a whole was not intended to represent an estate of housing in the countryside but rather, given its coastal and somewhat isolated situation, a recreation and holiday development not intended for year round occupation.
6. The area of coastline from Hook Park to Meon Shore, including Solent Breezes and Chilling Cliffs is identified in the North Solent Shoreline Management Plan as a Coastal Erosion Risk Zone where there is a policy of "no active intervention". This area is the site of greatest potential for coastal change within the borough due to the rollback of the cliffs. Predictions suggest that the locality around Solent Breezes has a potential erosion rate of 8 metres in 20 years, 20 metres in 50 years and 40 metres in 100 years.

PLANNING POLICY CONTEXT

7. Solent Breezes is located in the open countryside far away from required facilities for normal day-to-day living. The National Planning Policy Framework (NPPF) states in paragraph 6 that "*The purpose of the planning system is to contribute to the achievement of sustainable development*"¹. The Framework goes on to say in paragraph 14 that "*At the heart of the National Planning Policy Framework is a presumption in favour of sustainable development which should be seen as a golden thread running through both plan-making and decision-taking*"². The location of Solent Breezes does not meet with "*the golden thread*" stated in the NPPF.
8. Furthermore, the NPPF (paragraph 106) states that "*Local planning authorities should reduce risk from coastal change by avoiding inappropriate development in vulnerable areas or adding to the impacts of physical changes to the coast. They should identify as a Coastal Change Management Area any area likely to be affected by physical changes to the coast, and:*
 - *be clear as to what development will be appropriate in such areas and in what circumstances; and*
 - *make provision for development and infrastructure that needs to be relocated away from Coastal Change Management Areas.*"
9. The Core Strategy Policy CS6 seeks to focus development within defined settlements whilst Policy CS14 looks to strictly control development outside defined settlements. Sustainable development is promoted by Policy CS15 which directs development to locations with sustainable transport options.

¹ The National Planning Policy Framework published March 2012

² The National Planning Policy Framework published March 2012

10. The area of coastline from Hook Park to Meon Shore, including Solent Breezes and Chilling Cliffs, is identified in the draft Development Sites & Policies Plan as a Coastal Change Management Area and as such is subject to draft policy CM1 which seeks to restrict and control new development and new or replacement coastal defence schemes in this location. No comments were received on this draft policy during the recent consultation on the draft Development Sites & Policies Plan.

PROPOSED POLICY

11. Proposals to change holiday chalets to all year round occupation within Solent Breezes have been forthcoming for a number of years and have progressively become an issue with recent decisions being made on appeal. With the increasing issue of coastal erosion in the area, and the issue of sustainable development which runs through government policy, it is proper that development in the area should be managed through an appropriate planning policy. In responding to the requirements of the NPPF, and for the protection of life and property, this policy is now being proposed to bring development activities within the Fareham Borough Local Plan and to guide existing development and new development activities within Solent Breezes.
12. The policy and supporting text at Appendix A is proposed as an addition to existing policies³ on Countryside in the draft Development Sites and Policies Plan. The area to which the policy applies is shown at Appendix B.

CONSULTATION

13. This Executive report and the proposed draft policy for Solent Breezes has been provided to elected Members on the informal Member Working Group for the Development Sites and Policies Plan, and the relevant ward Members, for any comments or views, and these will be reported to the Executive at the meeting to assist in their consideration of the matter.
14. It is proposed that the draft policy for Solent Breezes is published for consultation with a targeted population. The consultation, for a period of 4 weeks (following the close of the call-in period) should be targeted to seek the views of residents, chalet and caravan park owners within Solent Breezes and neighbours along Chilling Lane and at Hook. The consultation would need to be via direct mailing to all owners, given the current winter season. The consultation responses received will be reported to Members (including the informal Member Working Group referred to above) when progressing to the next stage of the Development Sites and Policies Plan, the timetable for which includes Executive and Council consideration of the Pre-Submission Draft of the Plan in April 2013.

RISK ASSESSMENT

15. There are various risks that can be identified with the present process of proposing a policy for Solent Breezes and bringing its development activities with the Development Plan process.

³ Other policies in the Countryside section to be re-numbered accordingly

- The outcome of the consultation may not necessarily support this Council's intention to bring Solent Breezes under a specific development plan policy;
- If there was no planning policy covering development activities within Solent Breezes, there might continue to be planning applications determined by inconsistent planning appeals;
- Without a clear planning policy to guide development within Solent Breezes, development within the site will be difficult to control and enforcement activities might incur unnecessary cost to the Council;
- Solent Breezes is not sustainable because of the lack of facilities required for day-to-day living. Inhabitants of Solent Breezes run the risk of inaccessibility to quick emergency services due to the narrow and roughly surfaced access to the location;
- The Council has a duty of care for residents within its boundaries to good sustainable living; and
- Without an adequate planning policy, development activities within Solent Breezes could place life and property in further risk within an area of coastal erosion and potential inundation by the sea.

FINANCIAL IMPLICATIONS

16. The costs of undertaking this consultation are included within the existing budget for the preparation of the Development Sites and Policies Plan.

CONCLUSION

17. This consultation exercise will help the Council to know the views of both the residents and owners of Solent Breezes and those of its neighbours. The draft Development Sites and Policies Plan is the appropriate opportunity to bring development activities within Solent Breezes under a Development Plan regime. This policy and other policies in the draft Development Sites and Policies document will help guide development within Solent Breezes. This policy has been drafted and is now being recommended for the approval of the Executive for a 4-week period of targeted public consultation.

Reference Papers: Appeal Decision Ref: APP/A1720/A/12/2172444

Draft Fareham Borough Local Plan Part 2: Development Sites & Policies

New Supporting Text & Policy

Development within Solent Breezes

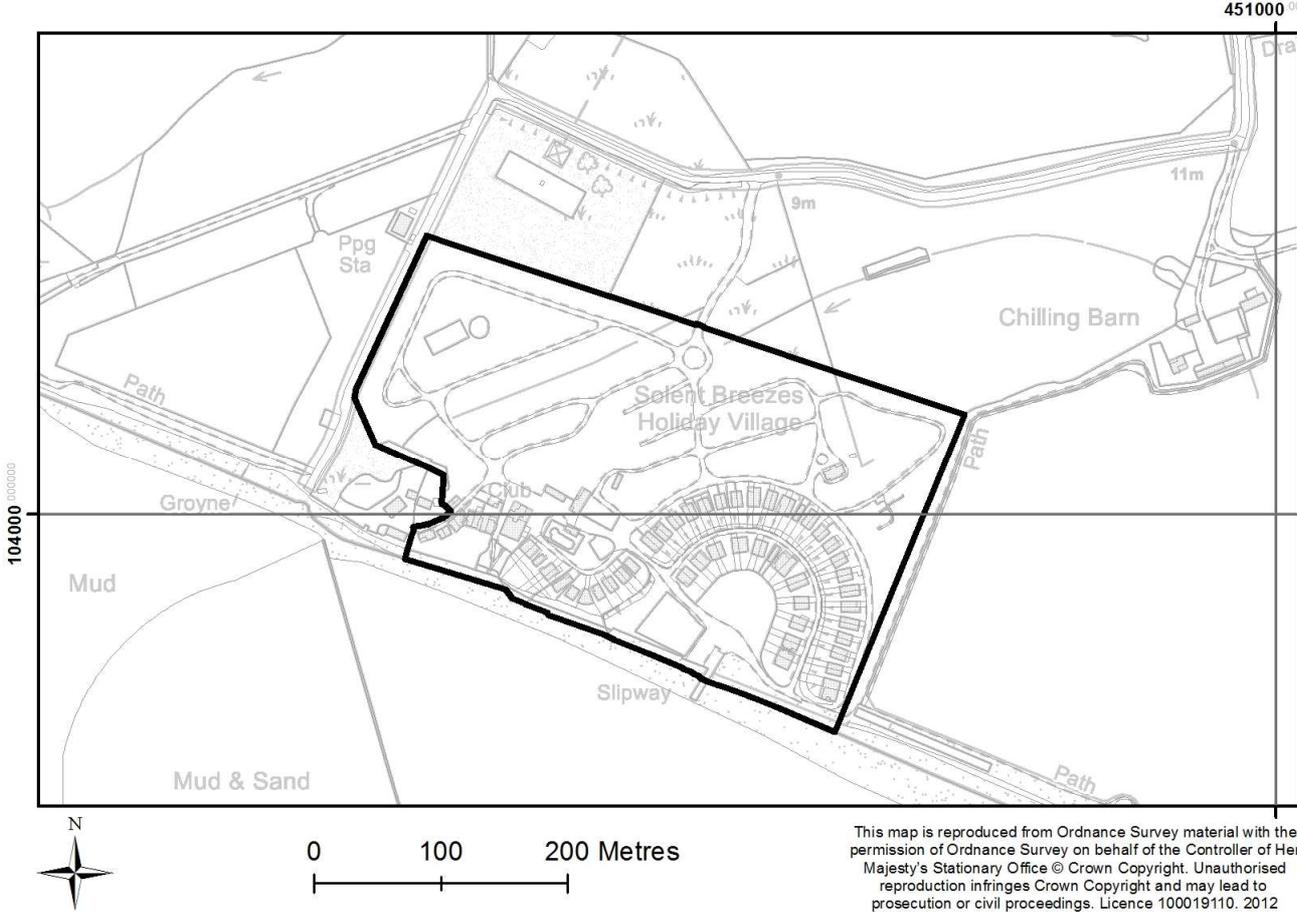
The chalets and mobile homes are provided at the site principally for holiday purposes however over the years a number of the chalets have been used as permanent residential accommodation. The mobile home and chalets are not suitable for permanent occupation as the site is not sustainable owing to its location away from local services. Furthermore the continuing erosion of the holiday accommodation will lead to a change in its character from one of a holiday park to a new residential housing estate. The Council therefore recognises and wants to maintain a distinction between development within Solent Breezes and residential dwellings which should be located within defined urban settlement boundaries.

Proposals for developing caravans for holiday accommodation purposes, or conversion of existing property, or development or intensification of any existing development within Solent Breezes, will be expected to have a condition of limitation of the occupancy period for such development to a maximum of ten months of the year. Limited occupancy conditions will also be attached to new holiday accommodation or other forms of development within Solent Breezes to ensure consistency with other policy aims of controlling development outside the defined urban settlements. Where a limited occupancy condition is attached to the permission, it is expected that the vacant months will be during the winter months (between November and February). Potential impacts on the landscape and other nature conservation designations and the flood risk areas around the coastal zone will be particularly important in determining proposals relating to this policy.

Policy C2 Development Proposals in within Solent Breezes

Within the Solent Breezes site (as defined on the Proposals Map) planning permission will not be granted to vary planning conditions to allow the occupation of any existing chalets and mobile homes on a permanent or year round basis. Planning permission for any new chalets of mobile homes will only be granted subject to appropriate conditions limiting their use to holiday accommodation on a seasonal basis for not more than 10 months a year.

Amendment to Proposals Map: Boundary for Policy C2



FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Strategic Planning and Environment
Subject:	Titchfield Conservation Area Character Appraisal and Management Strategy
Report of:	Director of Planning and Environment
Strategy/Policy:	Fareham Borough Local Plan
Corporate Objective:	Protect and Enhance the Environment

Purpose:

This report summarises the outcome of public consultation on the draft Conservation Area Character Appraisal & Management Strategy for Titchfield Conservation Area.

The report proposes the adoption of the Conservation Area Character Appraisal & Management Strategy as evidence in support of the saved policies of the Fareham Borough Local Plan Review (June 2000), the policies contained within the Fareham Local Plan Part 1: Core Strategy and the emerging policies of the Fareham Local Plan Part 2: Development Sites & Policies.

Executive summary:

This report relates to the Council's programme for the review of the adopted conservation area character assessments. It recommends adoption of the revised Titchfield Conservation Area Character Appraisal and Management Strategy including the making of an article 4 direction, which has taken into account the outcome of the draft document consultation and guidance produced by English Heritage

Recommendation:

It is recommended that:-

- (a) The Titchfield Conservation Area Character Appraisal and Management Strategy, as set out in Appendix A to this report, be adopted as evidence in support of the Fareham Borough Local Plan Review (June 2000), the policies contained within the Fareham Local Plan Part 1: Core Strategy and the emerging policies of the Fareham Local Plan Part 2: Development Sites & Policies.

- (b) The preparation of an article 4 direction, as recommended in the character appraisal document, is supported.
Delegated authority was granted by the Executive to the Executive Member for Strategic Planning and Environment in July 2010 to make article 4 directions in accordance with the provisions of The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2010 and this proposal will be the subject of a further detailed report.
- (c) Delegated authority is granted to the Director of Planning and Environment in consultation with the Executive Member for Strategic Planning and Environment to make minor factual and formatting alterations prior to publication of the adopted document.

Reason:

The documents continue the Council's programme for re-appraisal of the adopted Conservation Area Character Assessments which currently play a key role in helping to identify the heritage significance of conservation areas and in preserving and enhancing their character and appearance through the development management process and in liaison with statutory undertakers.

Cost of proposals:

The operation of the management strategy will be undertaken through existing officer resource and departmental budgets. Any environmental improvement works will be subject to the availability of additional funding.

Appendices A: [Titchfield Conservation Area Character Appraisal and Management Strategy](#)

B: [Draft document consultation comments, responses and action table](#)

Background papers: Individual responses to the public consultation.

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: Titchfield Conservation Area Character Appraisal and Management Strategy

Briefing by: Director of Planning and Environment

Portfolio: Strategic Planning and Environment

INTRODUCTION

1. This report seeks adoption of the revised Conservation Area Character Appraisal and Management Strategy document for Titchfield following public consultation. This continues the programme of re-appraisal of the Council's adopted character appraisal documents. The first Titchfield Conservation Area Character Assessment was adopted in 2002.
2. English Heritage guidance concerning conservation area management now advises Local Authorities to produce conservation area character appraisals and management strategies and to keep them up to date.

THE ROLE OF CHARACTER APPRAISALS

3. A Conservation Area Character Appraisal identifies the qualities of a conservation area that give it heritage significance. Character can derive from the age and style of individual buildings, the way groups of buildings are arranged, the spaces between them, their historical significance in the development of an area and their use. Other factors such as; open spaces, landscaping, trees and important views all interact to form the overall character of an area. In order to make informed decisions about development that affects the character of a conservation area it is essential to have a clear understanding of its heritage significance through an up to date character appraisal document.
4. The appraisal documents also have a general role to play in informing local residents and others about the history of the borough's older settlements and those aspects of their character and appearance that it is important to protect.

THE MANAGEMENT STRATEGY

5. In line with current English Heritage guidance the updated character appraisal has been amended to include a management strategy that sets out the Council's approach to the conservation of the conservation area. It outlines the procedures currently in place to manage change and proposes additional measures and opportunities for enhancement as identified by the appraisal; such as the use of article 4 directions to control potentially harmful alterations, and further additions to the local list.
6. The draft management strategy (as published for public consultation) proposed measures and enhancements to preserve the character and appearance of the conservation area including the following;
 - Use of an article 4 direction to control harmful alterations.
 - Monitoring by photographic and street audit every four years.
 - Liaison with other bodies, including statutory undertakers and other council departments who are responsible for, or undertake, works or re-instatements that are likely to affect the character and appearance of the conservation area.
 - Addition of The Parish Rooms, The former theatre and assembly room at Coach Hill, 37, 39, 41 The Square.
 - Opportunities for enhancement including,
 - Continuation of the environmental improvement works undertaken in 2007 to include the northern end of the High Street and the green space adjacent to 3 south street;
 - Improvements where appropriate to street furniture including seating, bollards and lighting columns;
 - Redevelopment of 8-10 Southampton Hill;
 - Securing replacement of inappropriate architectural detail on historic buildings;
 - Improving the visual impact of the Tanneries buildings.
7. Following adoption the appraisal document will be used as evidence in support of the saved policies of the Fareham Borough Local Plan Review (June 2000), the policies contained within the Fareham Local Plan Part 1: Core Strategy and the emerging policies of the Fareham Local Plan Part 2: Development Sites & Policies. As such, the content of the documents is a material consideration in the determination of planning applications.

ARTICLE 4 DIRECTION

8. Some alterations, mostly to dwellings, can be made in a conservation area without the need for a planning application; a process known as permitted development. The exercise of permitted development rights can lead to changes that are harmful to the character and appearance of a conservation area and an article 4 direction can be used to restrict them and make a planning application necessary. An article 4 direction does not necessarily prevent alteration but by requiring a planning application allows its impact on the character and appearance of the conservation area to be properly considered.

9. It is proposed therefore that the use of an article 4 direction would be appropriate in the Titchfield Conservation Area.

THE PUBLIC CONSULTATION PROCESS

10. Public consultation on the draft Character Appraisal and Management Strategy was undertaken between 29 October and 23 November 2012. It comprised:
- Placement of a display in the Titchfield Community Centre where copies of the document and a comment sheet were made available. The display was periodically manned by an officer of the Council for a number of morning, afternoon and evening sessions to help with enquiries.
 - A letter posted to all residents and premises within the conservation area boundary notifying them of the draft document, the display in the community centre and the period of consultation. Consultation letters were also sent to the Fareham Society, Fareham Local History Group, Titchfield Residents Association, Titchfield Local History Society, English Heritage, Hampshire County Council and other relevant statutory undertakers.
 - Placement of an advertisement by site notice at locations within the conservation area boundary notifying the community of the draft document, the display in the community centre and the period of consultation.
 - Detailing the consultation on the Council's website, including the draft document for download, a copy of the display material from the community centre and access to an online comment sheet was made available. A link to the consultation page on the Council's web site was included on all the consultation material.
11. The consultation asked for comments on the following:
- **Question 1.** The key features identified in the character appraisal to be preserved or enhanced;
 - **Question 2.** The proposed opportunities identified in the character appraisal for enhancing character and appearance;
 - **Question 3.** Comments on the proposal to control harmful alterations to buildings by using an article 4 direction to require a planning application;
 - **Question 4.** Any important views or vistas of the village from the surrounding area or from within the village itself;
 - **Question 5.** Any general comments.

THE OUTCOME OF PUBLIC CONSULTATION

12. In total 39 completed responses were returned which raised a wide range of issues. Some responses related to the specific questions asked and some raised other issues. A summary of the views received is set out below and a more detailed table of comments is attached at Appendix B. The table includes an officer response and a suggested amendment to the document or another action if appropriate.

Responses to Question 1

13. There were 14 responses that expressed support for all of the key features to be preserved or enhanced identified on page 25 of the draft document. The majority of the specific responses received related to the contribution to the character of the village made by historic surfacing materials and the need for the document to recognise their importance. The final document has been amended as a result. Specific references were made to the cobbles on vehicle crossings in the High Street, which have recently been lifted by the Highway Authority and temporarily replaced with tarmac, whereby the views expressed wished to see these re-used or replaced with a similar material. Officers have now agreed with the Highway Authority that the original material is stored and considered for re-use. Other comments related to the importance of the landscaped setting of the village and concern at the narrow width of some of the pavements in the village.

Responses to Question 2

14. There was notable support for improvements to the green at the bottom of West Street, particularly with regard to creating a positive space where people can sit; one comment was received objecting. Comments were also received relating to signage, street lamps, siting of bollards and existing surfacing materials. Positive comments were received relating to the replacement of lost architectural detail on historic buildings, visual improvements to the Tannery buildings and the possible redevelopment of 8-10 Southampton Hill.

Responses to Question 3

15. There was significant support for the use of an article 4 direction to control harmful alterations to buildings by requiring a planning application. There were 15 comments in support of further control and 1 against.

Responses to Question 4

16. There was a good response to this section with 15 comments suggesting views or vistas that people considered to be important. These have been assessed and are now referred to in the revised document under 'Setting and Views' on page 10 and on the Setting Plan on page 14.

Responses to Question 5

17. There were numerous general comments on the document. A total of 11 responses supported the document in general for its content, layout and quality. There were two other principal matters raised by respondents. The first matter concerned highway traffic, congestion, parking and speed within the village. These are detailed on page 5 of Appendix B. The second matter relates to wider planning issues concerned with new development in and surrounding the village, which are detailed on page 6 of Appendix B. Other matters which are outside the scope of the Appraisal and Management Strategy will be forwarded to the appropriate service for consideration and action, as noted.

18. With regard to the highway matters, the identified issues will be raised with the Highway Authority. The future management of streets will need to be subject to more detailed and focussed consultation through Hampshire County Council as the Highway Authority, in conjunction with the Borough Council. Some of the issues raised are likely to be considered as part of the potential future extension of the High Street/Square environmental improvements. This liaison process is identified within the Management Strategy of the document.
19. With regard to wider planning and development issues, these will be considered through the normal planning process having regard to the saved policies contained within the Fareham Borough Local Plan Review (June 2000), the policies contained within the Fareham Local Plan Part 1: Core Strategy, the emerging policies of the Fareham Local Plan Part 2: Development Sites & Policies and the evidence set out in the Titchfield Conservation Area Character Appraisal and Management Strategy. This approach is identified within the Management Strategy of the document. As the Development Sites & Policies Plan is still in draft form, comments that may inform its revision can be considered alongside the consultation comments made on the draft Plan.

CONCLUSION

20. The Titchfield Conservation Area Character Appraisal and Management Strategy continues the Council's programme for re-appraisal of the adopted Conservation Area Character Assessments which currently play a key role in helping to identify the heritage significance of conservation areas and in preserving and enhancing their character and appearance through the development management process.
21. The document has been prepared following best practice guidance set out by English Heritage and has taken account of the comments raised by the community of Titchfield and other interested organisations.

Reference Papers: None

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Conservation Area Appraisal And Management Strategy



Titchfield
(Adopted January 2013)

FAREHAM
BOROUGH COUNCIL

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1 INTRODUCTION

1.1 Fareham Borough Council has designated 13 conservation areas that are considered to be of special architectural or historic interest. They have been selected because each one has a character or appearance which it is desirable to preserve or enhance.

1.2 The character appraisal;

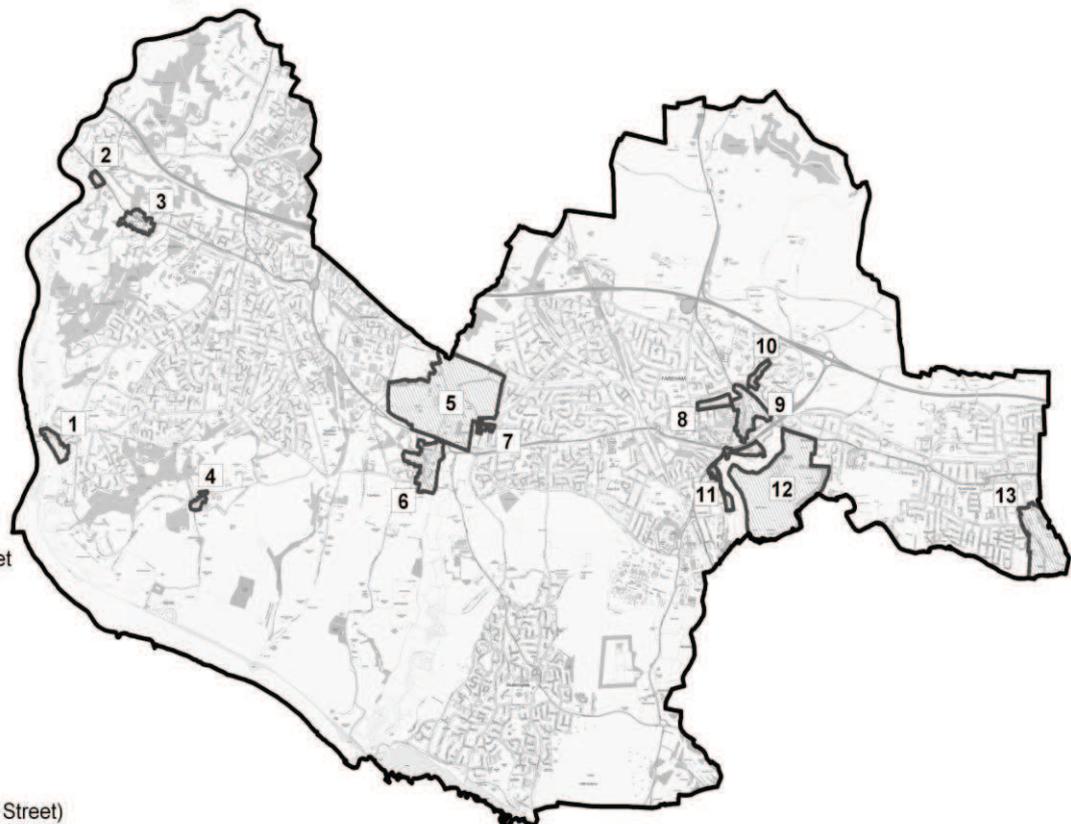
- identifies the special character that justifies conservation area status
- provides evidence to inform decision making affecting the character or appearance of a conservation area

1.3 The management strategy

- sets out how the council aims to preserve or enhance the character and appearance of the conservation area
- identifies the procedures currently in place to manage change and proposes additional measures where considered appropriate
- identifies potential for enhancement

Conservation Areas in the Borough of Fareham

- 1 Warsash
- 2 Swanwick Shore
- 3 Sarisbury Green
- 4 Hook
- 5 Titchfield Abbey
- 6 Titchfield
- 7 Catisfield
- 8 Osborn Road
- 9 Fareham High Street
- 10 Wallington
- 11 Town Quay
- 12 Cams Hall
- 13 Portchester (Castle Street)



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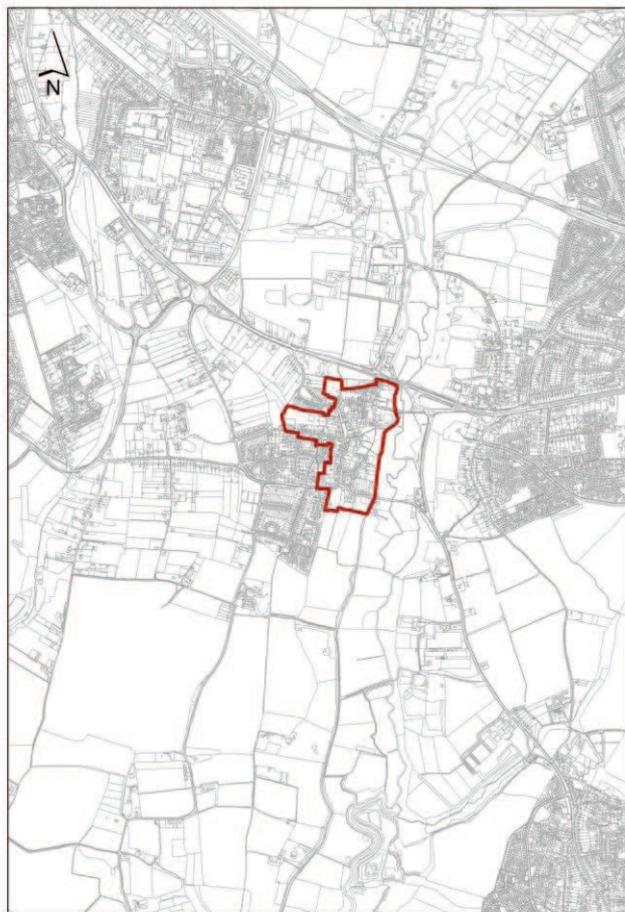
CHARACTER APPRAISAL

2 LOCATION AND SETTING

- 2.1 The village of Titchfield lies on the western bank of the river Meon, approximately 2 miles from the coast. It is located 2½ miles west of Fareham town centre to the south of the A27. The village was designated a conservation area in 1969 and the boundary was subsequently amended to include a larger area in 1994. The conservation area boundary is marked on the map on page 15.

3 ORIGINS OF THE SETTLEMENT

- 3.1 Documentary and map evidence shows the expansion of the settlement of Titchfield from a medieval core comprising High Street, Church Street, South Street and the lower end of West Street to its present day size and form.
- 3.2 Prior to the Domesday survey there is no evidence of the existence of a village at Titchfield but there are early references to the surrounding Meon valley. Before the seventh century the land around the Meon was occupied by a group of Jute settlers known as the 'Meonware'. These pagan settlers were converted to Christianity sometime towards the end of the seventh century by the mission of the Northumbrian prelate St Wilfred.
- 3.3 It is thought that the village church of St Peter may have been established either sometime in this period or shortly after it, at the beginning of the eighth century. The architectural features of the church that date from the Saxon period such as the west porch, which was later raised to form the tower, are consistent with an early Saxon date. The building is also architecturally similar to a number of surviving Northumbrian churches of the same period, suggesting an association with St Wilfred's mission. The land at Titchfield was part of a royal estate and St Peter's, like many churches, is thought to have been established on royal land as a Minster Church to serve a large area of surrounding countryside. The earliest reference to the name of Titchfield is found in a charter of the Saxon King Aethelred dating from 982. The document mentions a religious property at 'Ticcefelda', and is evidence of the existence of some form of religious establishment in the



Titchfield area in the late Saxon period. It also refers to the 'King's Mill'.

- 3.4 At the head of the tidal estuary, with a reasonably substantial river giving fresh water and power for the industry of the time, Titchfield would have been a natural place for a community to have settled. The first fordable crossing of the river, a plentiful supply of both fresh and salt water fish and abundant building materials enhances the likelihood of early settlement. The first mention of any village settlement is in the Domesday book in 1086 which records Titchfield as being a royal estate held by the King. There are 33 individuals mentioned suggesting a population of perhaps 150. The Titchfield entry also mentions the holding of a market, one of three in Hampshire, the existence of a mill and enough land for 15 ploughs.



- 3.5 In 1232 the Manor of Titchfield was granted to the Bishop of Winchester, Peter des Roches, for the foundation of a Premonstratensian Abbey. Records of the Abbey survive in the form of court rolls and books that contain information about the village in the medieval period. They show that at this time Titchfield was a thriving port and a sizeable market town closely linked to the Abbey.
- 3.6 The abbey records show that Titchfield was a relatively substantial settlement at this time. They refer to numerous businesses in the square such as butchers, bakers, brewers and salters, and occupying the backyards between the square and the church, the workshops of carpenters, coopers, thatchers, rope makers and tailors. Occupants of the village included the administrative staff of the estate, abbey servants, the town reeve, the clerks and the town bailiff. Tradesmen such as ploughmen, the miller, ironworkers, huntsmen, threshers and smiths occupied the approach to the Abbey from the village. Local industries were related to the leather and the wool trade. These included tanners, skimmers, saddlers, and shoemakers, harness makers, spinners and dyers. It is also likely that due to the close proximity of the village to the sea the village diet would have included seafood and village traders would probably have included sailors, fishermen and ship repairers. The importance of Titchfield as a port for destinations such as the west of England and France is indicated by the number of monarchs that have passed through the village. Upon the dissolution of the monasteries, King Henry VIII granted Titchfield Estate in 1537 to the Earl of Southampton, Sir Thomas Wriothesley, who became Baron of Titchfield and subsequently the Earl of Southampton upon the accession of Henry's son, Edward VI. The Earl converted the Abbey and the estate into his country residence, Place House, and in 1546 ordered a survey of his newly acquired property which provides valuable information about activity in the village at that time. The Earl died in 1550 and the estate passed to his son Henry. The second Earl died at the age of 37 after several years in prison for Catholic plots against the Queen, leaving money for the construction of a monument that still stands in St Peter's church.
- 3.7 It seems that the dissolution, resulting in the demise of the Abbey, probably had a negative impact on the prosperity of the village, a situation that the Third Earl of Southampton attempted to rectify. He embarked upon an investment programme which included revival of the local woollen industry, provision of a market hall in the square and the establishment of a local iron works. He also constructed a sea wall across the mouth of the Meon at Titchfield Haven to reclaim tidal land in the valley. To retain access to the village for shipping he constructed one

of the earliest canals¹ in the country, believed to be second only to Exeter. The mouth of the river was blocked and two new sluices were built under a newly created embankment to control the flow of water. Access from the sea to the canal was by staunch lock which allowed the floating of vessels into the lock at high tides. The canal survives and the remains of the sea lock can be seen close to Titchfield Haven where the road crosses the canal. The population growth of the village in this period suggests that the Third Earl's attempts were successful up until the period of the civil war (1642-1644).

- 3.8 A period of relative decline followed and with the death of the fourth Earl, Thomas Wriothesley, the estate passed through a number of ownerships before eventually being bought in 1741 by Peter Delme, the Member of Parliament for Southampton. In the 1740's trade and population revived once more and the village became a busy market town, partly supplying the Naval Port of Portsmouth. This period of prosperity is reflected in the architecture of the village. Peter Delme died in 1770 and the estate passed to his son Peter. The family finally abandoned Place House in 1781, a year after the death of the third Peter Delme and moved to Cams Hall in Fareham, which it is said was extended using materials from Place House.
- 3.9 The railway from London arrived in Fareham in 1841 giving the neighbouring market town a significant advantage and Titchfield again declined in importance. In the nineteenth century strawberry growing became popular on the surrounding land with many smallholdings specialising in their production. The arrival of the line to Southampton and the opening of Swanwick station in 1888 enabled this local industry to thrive and compete with the fruit growing areas of Kent for the London market. Despite an early proposal for a railway that passed through Titchfield the line eventually bypassed the village due to resistance from the Delme family. The agreed route followed the northern edge of Titchfield Park.



Titchfield High Street in 1909

¹ Note that some historians now question if the waterway was ever intended to be a canal, and believe it may have been a drainage channel, and the 'lock' a shared gate and fish trap. This view will need to be verified through further research.

4 ARCHAEOLOGICAL SIGNIFICANCE

- 4.1 The archaeological significance of the village is established in Hampshire County Council and English Heritage's Extensive Urban Survey of Hampshire and the Isle of Wight's Historic Towns (1999). Together with its accompanying strategy document this has been published as part of a countywide survey of Hampshire's historic towns. It identifies areas that are of archaeological importance, and those that are of 'high archaeological importance'.
- 4.2 The property plots along both sides of the High Street and South Street are of high archaeological importance. These areas might provide further information concerning Saxon settlement, the nature of the medieval economy and evidence for the later reorganisation of properties. The church and churchyard is also of high importance as it might contain evidence of burials dating back 1300 years. The former tannery site, which is the possible location of the medieval quay, is also of high importance.
- 4.3 Other areas of the village are of archaeological importance including the property plots along Mill Street and East Street and the land behind plots on High Street and the south side of East Street. A small area at the southern end of South Street, partly extending along Frog Lane, is also classed as important as are the plots both sides of West Street and the river valley to the east of the town. Further information concerning the archaeology of the village and other areas of limited archaeological importance are set out in the archaeological assessment document obtainable from Hampshire County Council.

5 INDUSTRIAL ARCHAEOLOGY

- 5.1 Titchfield had various local industries located on the periphery of its historic core of which there is evidence both in the map record and in the surviving historic buildings. The village had its own breweries located in Bridge Street, East Street and Church Path and The Bugle also brewed its own beer. Fielder's brewery south of Bridge Street, which had large buildings close to the street, was founded in 1744. Tanning was also an important local industry and references to tanneries can be found in village records and maps from the fourteenth century. Most were located on the river to the east of the village. The tannery on Titchfield Hill was in operation until 1955. There was also a gasworks in Titchfield located north of Bridge Street.
- 5.2 The weighbridge at its entrance can still be seen, now in the driveway of a private house. The timber framed barns at Great Posbrook, Carron Row, Brownwich and Fernhill are a record of former agricultural methods and activity that occupied land surrounding the village. Mills were located in the surrounding area at Funtley, Segensworth, Titchfield and Crofton and Titchfield Mill is probably on the site of the 'Kings Mill' mentioned in the Domesday Book; the present building dates from 1830.



6 DEVELOPMENT OF THE SETTLEMENT

6.1 The core of the village is centred on the crossroads formed by the High Street, South Street, West Street and Church Street. The southern part of the High Street known as The Square is greater in width and is probably the site of the market; it was certainly the site of the old market hall which was constructed in about 1612 by the third Earl of Southampton and moved to Barry's Meadow in 1810. The hall was eventually dismantled and reconstructed at the Weald and Downland Museum in Singleton in 1972. It is possible that the reduction in width of the street at the northern end is due to later encroachment of buildings.



Saxton's Map of Hampshire , 1575

6.2 The first evidence of a village street pattern is found in a survey undertaken by the first Earl of Southampton in 1546. Both High Street and South Street are mentioned in the assessment of the Earl's new properties, as is Frog Lane (which was until recently known as Castle Street). East Street and Mill Street are not mentioned as having tenements at this date.

6.3 Titchfield appears on a number of early maps, notably Speed's map of Hampshire dating from 1611. The first map with any detail is the Wriothsley Estate map surveyed between about 1605 and 1610. It shows 60 houses and cottages in the village as well as the church and mill. This map, which was made before the canal was constructed, shows a recognisable village street plan when compared to the present village but there are some notable differences in its basic pattern. Notably, East Street stops at its junction with Mill Lane rather than continuing over the river and up Titchfield Hill. In order to cross the river at this time it would have been necessary to use Stoney (or Anjou) Bridge further north, opposite the Abbey, or the bridge at Bridge Street, which is clearly shown crossing the river to the south east of the village. The line of Southampton Hill is shown continuing west out of the village rather than turning sharply to the north. The junction of Coach Hill, South Street and Bridge Street is clearly shown and Castle Street appears to circle the churchyard and link with Church Path. This map and later maps show High Street continuing north beyond East Street as a path leading across the southern part of the estate towards the Abbey. This may have been an early entry into the town that was later diverted to the east to circle the



Speed's Map of Hampshire , 1610

estate.

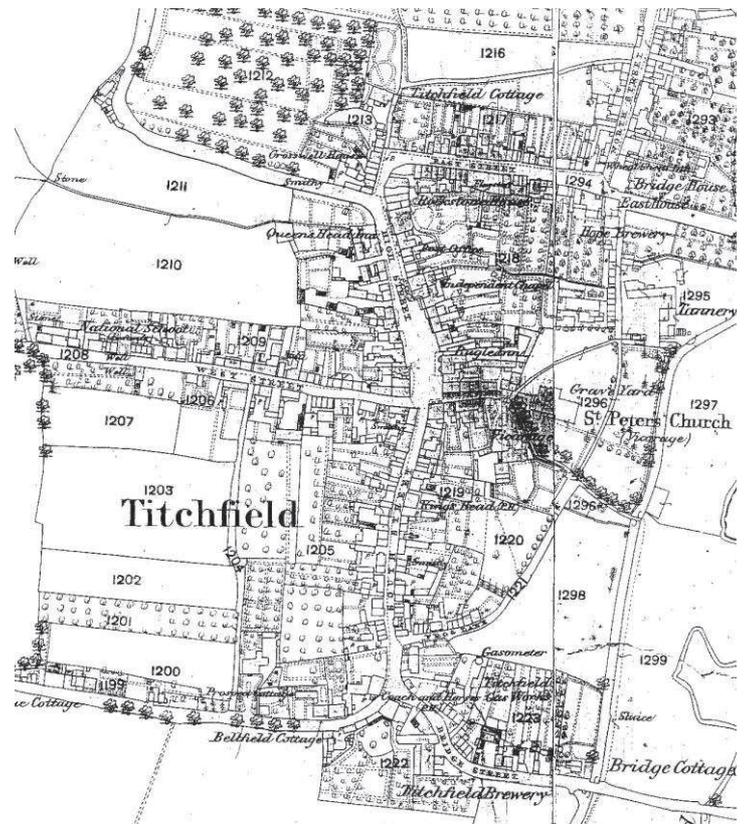
- 6.4 There are 15 timber-framed buildings in the village that have been identified as having features dating from the medieval period. These surviving medieval buildings are located in areas, which are also those mentioned in the early court rolls and manorial records relating to the medieval village.
- 6.5 In the early seventeenth century there was still no development at the upper end of West Street or Castle Street, or on Southampton Hill, Bridge Street and the majority of East Street. A map of the village in 1783 does show some further changes. The current alignment of Southampton Hill has developed and the canal is shown to the west of the river together with buildings on the tannery site. Development has also started to appear further up West Street and to the south of Bridge Street and Coach Hill. The market hall is shown situated in the square.



Titchfield Estate
Map 1610



Ordnance Survey
1810



Ordnance Survey
1880

- 6.6 The 1837 Tithe Map shows in detail the continued expansion of the settlement. Regular residential plots have developed along the north side of East Street and Bridge Street. Houses have also been built up the southern side of Coach Hill. The map confirms the arrival of the turnpike road, which was opened in 1811 as a continuation of East Street across the river and up Titchfield Hill. This placed the village in the economically advantageous position of being on the road between Portsmouth and Southampton. Guessen's Path is also clearly marked linking West Street to Coach Hill and there is an expansion in the size of the tannery.
- 6.7 An early Ordnance Survey map, surveyed c.1870, shows the development of the village relatively unchanged from the Tithe Map. This is also the case with the OS edition of 1909 although by this time the tannery had expanded considerably and development had begun on Southampton Hill. Mains water and sewerage were installed in the 1920's and by the time of the OS edition of 1931 the village had begun to expand further with the development of the Bellfield Estate south of Coach Hill.



Tithe Map 1837

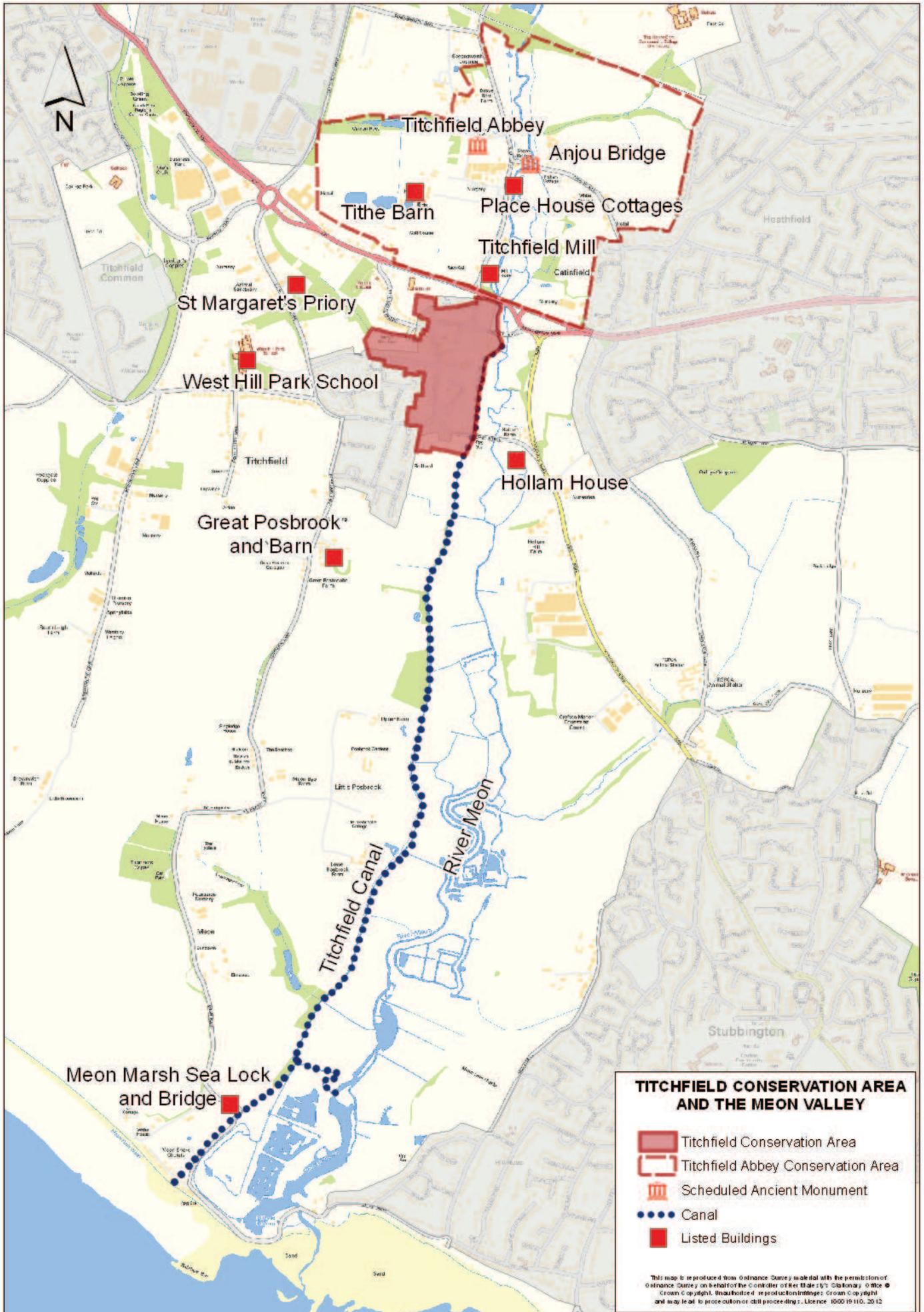
7 SETTING AND VIEWS

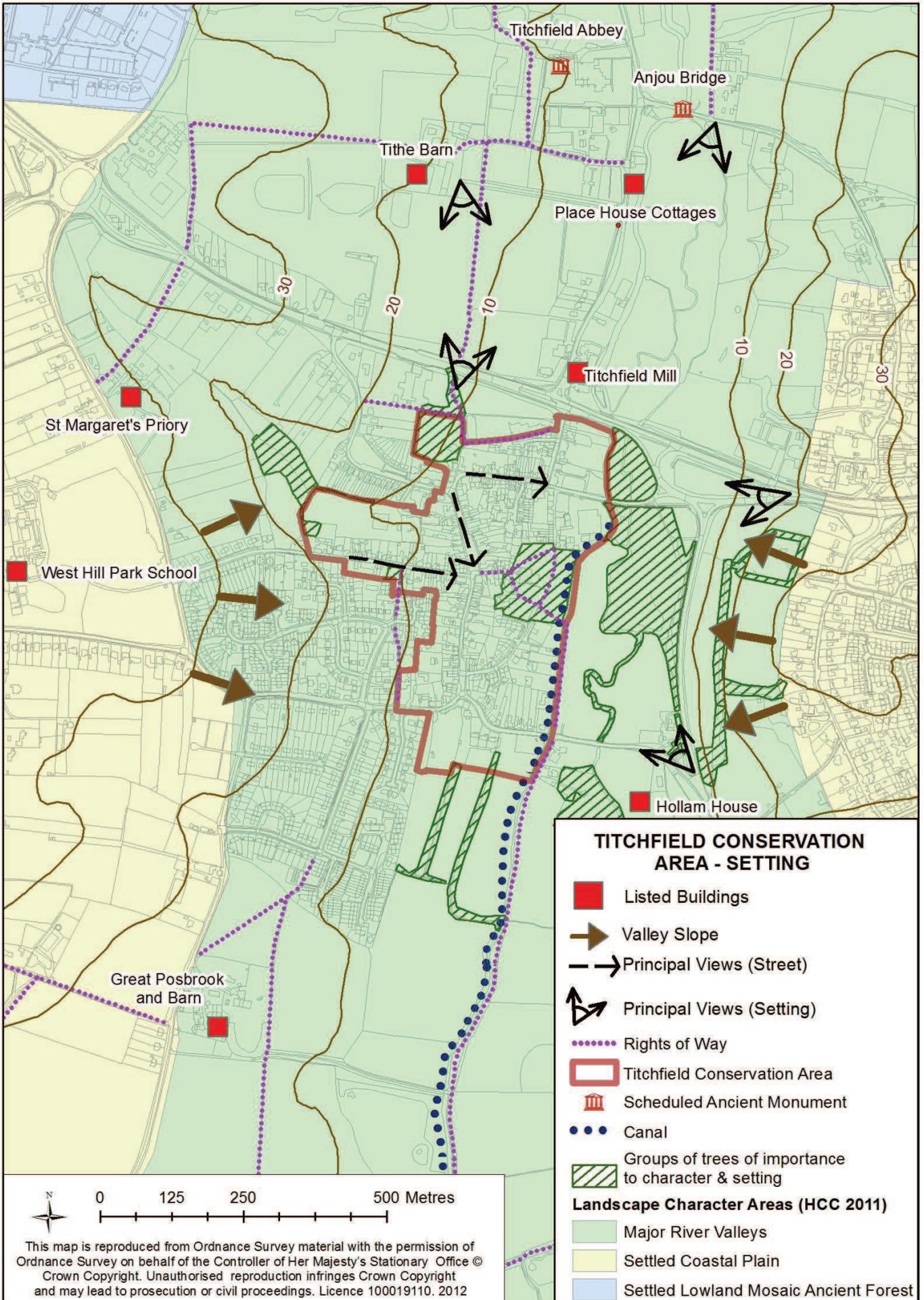
- 7.1 The open land and its topography surrounding the village helps to define it, setting it apart from the surrounding urban areas. The village lies in the valley, west of the River Meon and the former estuary. To the east an important belt of pastureland forms the valley floor, this open land, with the river and the canal, continues southwards through distinctive water meadows, widening towards the coast. The rural setting of the Meon Valley provides important views of Titchfield in the landscape. This river valley character setting of the village and principal views is shown on the Setting Map on page 12. Further information on the Meon Valley Character Area can be obtained from Hampshire County Council².
- 7.2 To the north, beyond the A27, the valley provides a setting for the village, the mill, the abbey and other important monuments and listed buildings. This historic area is now designated as the Titchfield Abbey Conservation Area. The open land and its topography together with the trees on the valley sides and on the valley floor are of great importance to the setting of the village. Along the eastern side of the valley, north and south of the A27, trees provide a rural backdrop to the village and screen from view the modern development at the western edge of Fareham. Significant groups of trees that lie outside the Conservation Area that contribute to the setting and views of the village should be protected.
- 7.3 Coach Hill, West Street and Southampton Hill descend the western valley side and afford fine views of the village. There are also important views of the village from Titchfield Hill and Titchfield Road. A particularly important view is that of the village and St Peter's Church from the top of West Street. The church tower is a significant historic landmark that identifies the village in many distant views. There are also numerous views within the village of the principle streets and particular buildings that close vistas.
- 7.4 The Meon Valley contains a number of buildings outside the Conservation Area that have a historic association with the village and contribute to the wider setting of the Conservation Area. (See the Meon Valley Map on page 12) These include the group of listed buildings set in the open valley north of the A27 that form the Titchfield Abbey Conservation Area. This group includes Titchfield Mill, The Abbey (a scheduled ancient monument) and associated buildings such as the Tithe Barn, Place House Cottages and Anjou (also known as Stoney) Bridge (a scheduled ancient monument). Closer to the village is St Margaret's Priory, which is thought to have been a hunting lodge connected with the Earl of Southampton's estate. Westhill Park is another important building constructed in 1770 by Peter Delme (the third) and now occupied as a School. Hollam House overlooks the village from a prominent site on the eastern side of the valley. To the south of the village Great Posbrook, and the adjacent timber framed barn, recently restored, which are both listed grade II*, are buildings of great age and significance.

8 HISTORIC LANDSCAPE ASSESSMENT

- 8.1 The Historic Landscape Assessment (HLA) is a countywide study undertaken to identify and understand the historic development of today's landscape. Over 80 Historic Landscape Types have been identified and digitally mapped as part of Hampshire County Council's GIS system.
- 8.2 The landscape types that have been identified for the Titchfield area include pre-1810 parkland, valley floor with fields and pastures, scattered settlement with paddocks and village or hamlet (1810 extent). Further detailed information relating to the historic landscape assessment, including charts and maps, can be accessed on the Hampshire County Council website at <http://www3.hants.gov.uk/landscape-and-heritage/historic-environment/historic-landscape.htm>

² See http://www3.hants.gov.uk/3e_meon_valley.pdf or contact Hampshire's Strategic Environmental Delivery Group on 0845 603 5634





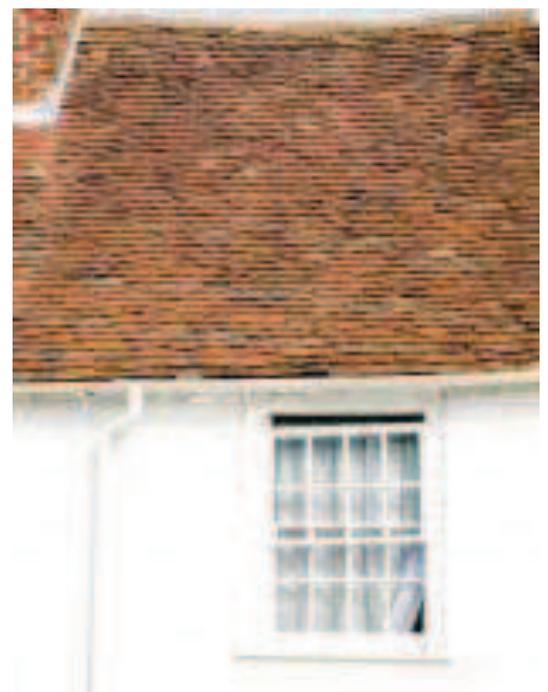
11 STREET PLAN, PATTERN OF DEVELOPMENT AND BUILDING FORM

11.1 The medieval street pattern of Titchfield has survived relatively unaltered and is important to the character and significance of the conservation area. The street alignments, with their subtle twists, turns and inclines, became established at an early date. The main north-south axis comprises South Street, The Square, and High Street, this route continues north as a footpath east of Old Lodge. Church Street and West Street intersect east-west to form a crossroads at the village centre. South Street narrows as it heads south broadening out again at its southern end before its junction with Bridge Street and Coach Hill. Following the construction of the turnpike as a continuation of East Street, the historic route north along Mill Street reduced in importance and is now further severed from Mill Lane by the A27. Church Path continues south from East Street passing through the churchyard as a footpath to Frog Lane, which rejoins South Street at its southern end. On the eastern side of High Street there is some remaining evidence of the medieval 'drokes' or passageways that led away from the High Street accessing properties behind the frontage. There are also a number of footpaths forming a network and linking streets in the village. Archaeological assessment suggests the possibility that parts of the village were planned medieval development.

11.2 The character of Titchfield is that of a small village with a compact urban form. The buildings are small in scale and predominantly two storeys in height with occasional accommodation in the roofspace. Generally, the houses in the older parts of the village front directly onto the street to form a more or less continuous frontage with associated spacious undeveloped gardens to the rear, exceptions to this general pattern are found in areas of later development, such as Bridge Street and Frog Lane. Breaks in the older street frontages to allow access to the land behind are limited and usually narrow, some are in the form of archways and some lead to footpaths. Where there are breaks in the built frontage continuity of enclosure is often maintained with brick walls. Small outbuildings in rear gardens and small scale rear extensions perpendicular to the frontage buildings are a recurring characteristic of the village. The older buildings are not roofed as a whole but are usually broken into smaller separately roofed elements and rear wings; this gives a small scale to the steeply pitched roofs. Many buildings have been altered and rebuilt over the centuries so that in any given stretch of frontage there is likely to be a variety of detail within a general consistency of form. The form and alignment of the village streets results in a number of important views. Particularly important buildings that mark the ends and junctions of streets and close views are identified later in the assessment. The overall historic pattern is strong and is important to the character and appearance of the conservation area; it is a key feature to preserve and enhance.

12 BUILDING MATERIALS

12.1 The use of traditional building materials is essential to character throughout the Conservation Area. With the obvious exception of St Peter's Church, the older buildings of the village were invariably constructed using timber and brick. The earliest buildings in the village are timber framed mostly dating from the 15th, 16th and 17th centuries. The local clay produced a red brick that is characteristic of the village and also the plain clay peg tile that is the predominant roof material. Brick began to be used from the middle of the 16th century, initially for chimneys and as an infill material for timber framing. Later it was used for



buildings such as Old Lodge (1630-40). Bricks were laid using traditional bonds, such as Flemish, and these are characteristic of the village and important to character. Red brick was often used in combination with vitrified grey headers to enhance brickwork, particularly on street elevations. Details vary, from their use in banding or chequered Flemish bond to their use for whole facades where they are laid in header bond using red brick for dressings. Numerous examples of patterned brickwork using these details can be seen in Titchfield. The variety and abundance of chimneys in the village is essential to character and many have traditional Fareham pots.

- 12.2 The popularity of stucco as a building material in the Georgian and Regency periods is also reflected in the village, particularly in The Square, with many buildings or facades having been rendered. Later in the 19th century slate became more easily available though very few buildings in the village are roofed with this material instead of the traditional clay tile.
- 12.3 There is a variety of traditional stone and clay paving and surfacing materials throughout the village including the use of pavers, setts and stone kerbs. The retention, maintenance and restoration of historic paving and the use of traditional surfacing materials and detailing is important to the character and appearance of the conservation area.

13 ARCHITECTURE

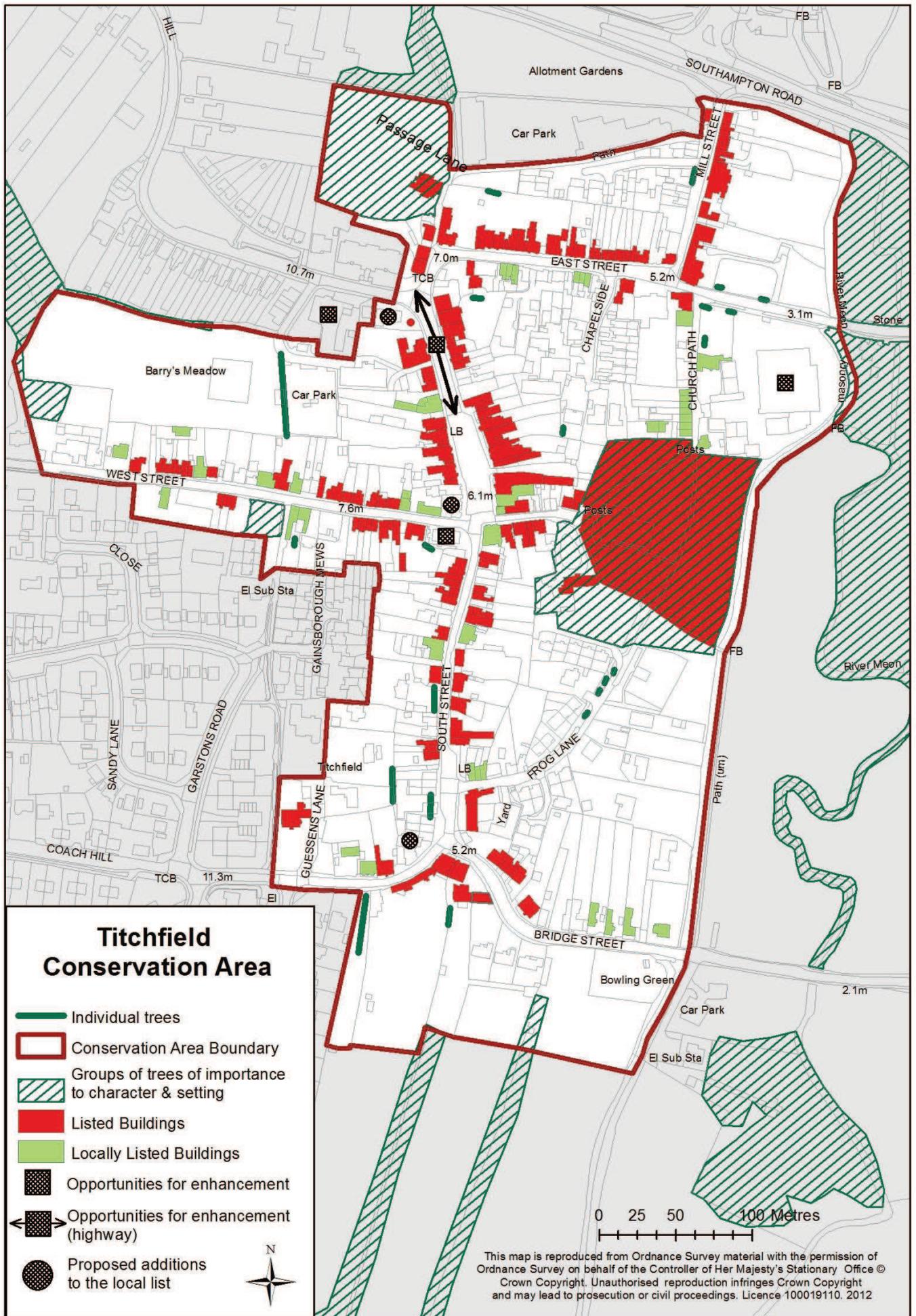
- 13.1 The architecture of the village embodies a mix of buildings and styles from many periods. Although many buildings appear Georgian with the use of classical detailing closer inspection reveals a large number of earlier and timber framed buildings, a number of these date from the 15th century. Changing fashion often resulted in the addition of classical details such as sash windows or re-fronting of older timber framed buildings; many examples can be seen in the village. The use of classical door surrounds and parapets are common details and some of the larger Georgian buildings have porches with columns. These formal details are more abundant and exuberant in the High Street and The Square where some of the porches and other architectural features are quite ornate. Elsewhere, for example in Church Path and West Street a simpler vernacular cottage scale predominates. Vertical sliding sash windows are predominant on the larger buildings with the use of flush cottage casements common elsewhere. Later bay windows are common and examples of both semi-circular and canted bays can be found. The use of traditional materials and fenestration is important to the character and appearance of the conservation area.



- 13.2 There has been inappropriate alteration and loss of traditional architectural detail on a number of unlisted buildings within the conservation area this has had a detrimental impact on its character and appearance.

14 TREES AND PLANTING

- 14.1 The village contains a number of important trees, which contribute to the character and appearance of individual streets. There are also groups of trees, some in rear gardens and some outside the Conservation Area boundary, which form a backdrop in longer views which is important to the character and setting of the village. The abundance of smaller domestic



planting visible in rear gardens and over walls in the streets all contributes to the character of the village. Trees considered to be of particular townscape importance are marked on the street maps but this should not be taken to mean that other trees and areas of planting are not important to the character of the village.

15 INDIVIDUAL STREET ASSESSMENTS

15.1 These identify aspects of character that are considered to be important to individual streets and areas. They should be read in conjunction with the appraisal of the significance of the character of the village as a whole. A detailed assessment of the architectural merit of individual buildings is not attempted but particular buildings are mentioned where they make a significant contribution to the character of individual streets. Many of the buildings that contribute to the character of the Conservation Area are listed³ and alteration of them in any manner that would affect their special architectural or historic interest requires listed building consent.

Mill Street

15.2 Mill Street was formerly the northern route into Titchfield from Fareham via Catisfield and Stoney Bridge. This role was reduced upon construction of the turnpike in 1811 and later by the severance of the link with the mill and Mill Lane with the construction of the A27 in 1928. The street is now residential but in the past housed both a malthouse and the village poorhouse. The buildings still exhibit a plain industrial character.

15.3 The entry from the A27 is well defined by buildings on both sides of the road and the church is visible from the street. The west side has a scatter of houses with gaps between and two large and important trees midway are important to the street. The absence of a pavement on this side gives the street an informal feel. The frontage on the east side is a continuous plane of red brick, the scale of the properties increasing towards East Street. These frontage houses, typical of the village's historic street pattern, have large undeveloped rear gardens that reach to the river; these are important to character and setting. They are enclosed by brick boundary walls and contain important trees. The predominant use of red facing brick in a traditional bond for buildings and walls, together with clay tiled roofs and numerous brick chimney stacks gives the street a strong and distinctive character. The simple brick details, flat door hoods and mix of traditional sash windows and casements contribute to character.



³ List descriptions for each individual listed building can be viewed from <http://www.heritagegateway.org.uk>. Details can also be provided by the Borough Council



East Street & Southampton Hill

15.4 East Street is predominantly residential and built up on both sides of the road with houses that abut the back edge of the pavement. The undeveloped gardens behind the frontage are important to character and typical of the overall historic development pattern of the village. The approach from Titchfield Hill crosses an early 19th century brick bridge, with twin arches and stone copings. It is flanked either side by walls that surround the garden of number 1 Mill Street and the Tanneries which contribute to its character. East Street is glimpsed through a narrow gap between buildings that marks the change from a quiet tree lined approach to the start of the busier village street. Broader at its junction with Mill Street it narrows, climbing a slight incline, towards the High Street. The only commercial buildings, The Wheat sheaf public house and Titchfield Motor Works, are at its eastern end. The straight street affords views along its length which is closed in both directions by prominent buildings, 1 Mill Street to the east and 5 High Street to the west. Both have a backdrop of important trees.



- 15.5 The rise in ground level, looking west, is reflected in the stepped roofline of the buildings. The variety of roof designs, ridge and eaves heights that are characteristic of the whole village contribute to the interest and character of the street. Properties increase in size on approach to the centre of the village. A mixture of stucco and brickwork, some painted, characterises the frontages and red brick is present in boundary walls. Roofs are predominantly clay tile, with some slate on the south side and there are a large number of important chimneys of different types and sizes. Simple door hoods and mixture of traditional sash windows, some set in C19 canted bays, and casements are all important to character.
- 15.6 Southampton Hill descends steeply into the conservation area from the west. It affords important views of the Historic buildings of the High Street and the parish room, which is enclosed by a flint wall. The site of 8-10 Southampton Hill, which lies just outside the conservation area boundary, has a negative influence on the setting of the conservation area particularly in views from Barry's Meadow and the adjacent car park. There is an opportunity for appropriate development of this site to enhance the character and appearance of the conservation area and its setting.



16 CHURCH STREET, CHURCH PATH AND THE CHURCHYARD

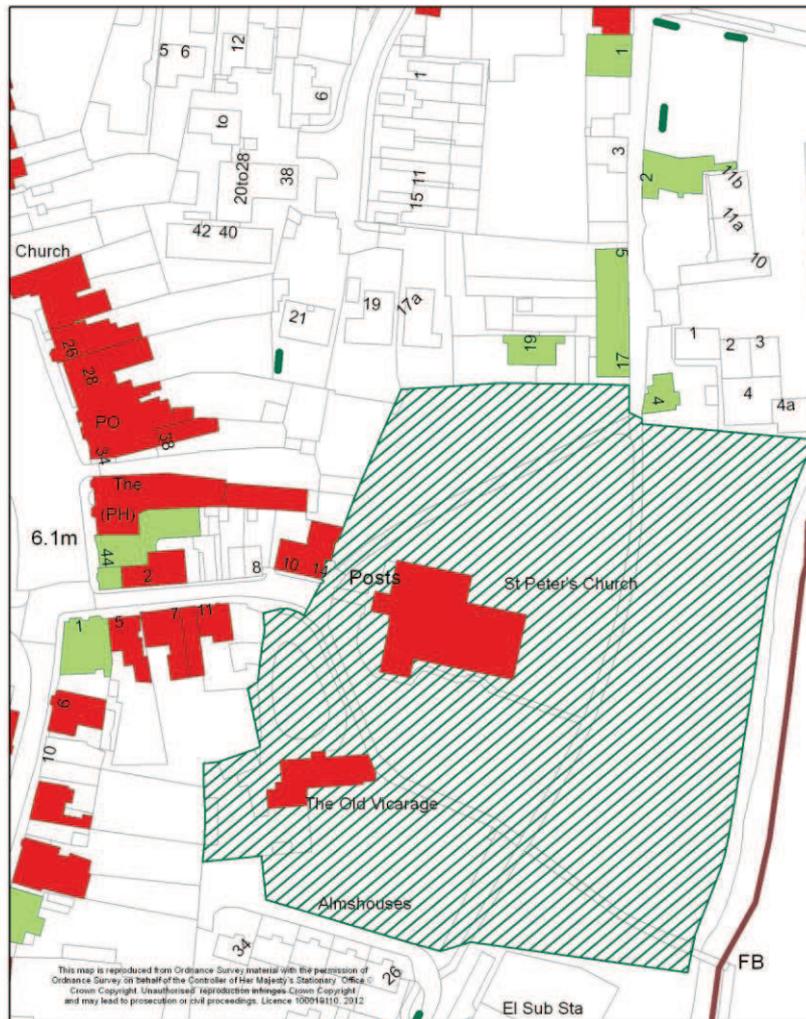
- 16.1 Church Street is in the core of the medieval settlement and contains some of the oldest buildings in the village. Its narrow feel, narrow pavements and continuous frontages are important to character. The street turns slightly southwards leading the eye to the church, an important view that closes the street at its eastern end. The street has a quiet character that contrasts with the busy High Street. The frontage buildings are small in scale incorporate a mix of materials and a variety of form and traditional detailing that is characteristic of the village. Brick boundary walls and garages fill the breaks between the houses and there are important railings close to the church. The road leads to footpaths either side of the church linking south to Frog Lane and north to Church Path.



16.2 Church Path is a quiet, narrow approach to the churchyard that leads down hill from its junction with East Street. The buildings about the footpath and garden walls retain a sense of enclosure in the breaks between buildings. These reduce to a small cottage scale at its southern end whilst at its northern end, approaching East Street, buildings are larger with a formal stucco finish and sash windows. A terrace of simple red brick cottages contributes to the character and appearance of the footpath, their gardens flank the churchyard with railings. Views are closed by significant trees in the churchyard.



16.3 The churchyard is significant both in historic terms and also for the contribution it makes to the character and appearance of the village. It provides a spacious and tranquil setting for the historic church of St Peter and its associated listed memorials, low boundary walls and table tombs. It also has important and historic pedestrian links to Church Path, Frog Lane and Church Street. The churchyard contains numerous important trees that contribute strongly to its character. Number 14 Church Street is a key building that leads the eye to the start of Church Street and the village centre. The tall red brick garden walls of the former vicarage flank the south-western edge of the churchyard giving it and the adjacent footpath a strong sense of enclosure. The eastern edge of the churchyard, bordered by the canal, marks the edge of the village and is open to the countryside. There are important views east across the valley floor.



High Street & The Square

16.4 High Street leads south from East Street before widening in the centre of the village to form the Square. Historically The Square was the site of the medieval market and later the market hall and there were many workshops and businesses its backyards and drokes. Its character is derived from the activities and uses that are present as well as the character of the street and the architecture and scale of the buildings. The Square still contains a mix of houses, offices and shops that are essential to the vitality and character of Titchfield. Most buildings about the back edge of the pavement edge forming a continuous frontage but a few have small enclosed frontages. Behind the frontage are open undeveloped spacious gardens, typical of the historic development plan of the village and these are a key feature to preserve and enhance.

16.5 Many properties in the High Street were rebuilt or re-fronted in the late 18th century, a time of moderate prosperity in the village. There is architecture in the High Street that is noticeably grander in scale and richer in detail than elsewhere in the village, a hierarchy that is important to the character of the settlement. The domestic scale and vernacular character is evident behind later frontages in the form of red brick walls, clay tiled roofs and sections of visible timber framing. Some of the buildings have narrow frontages enclosed with railings. A number of historic shopfronts survive which contribute to the character of the square, those at 37, 39 & 41 are of local interest. Number 1 Church Street is a prominent building that closes the view south. The listed buildings 9-11 High Street, a K6 telephone box, also listed, and a traditional fingerpost sign on the corner of Coach Hill, close the view north. There is an important backdrop of trees in the grounds of Old Lodge that also close the view north.

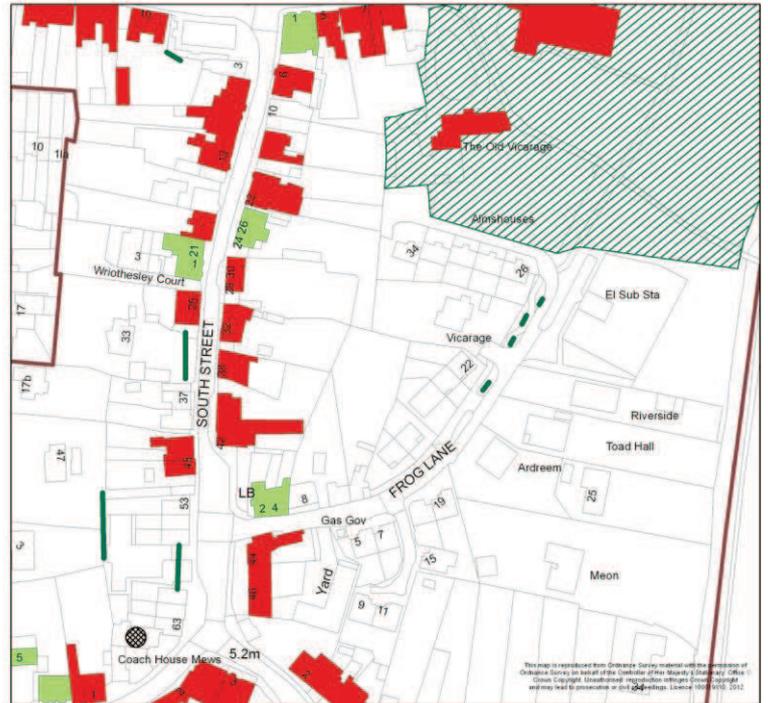


16.6 The wide variety of building scales, ridge and eaves heights characteristic of the village continues through the High Street. There is a mix of traditional materials, which includes a predominance of stucco and painted brick on the façades and clay tile roofs. Rear wings extending the frontage properties and small scale brick outbuildings in the gardens are a key feature of the Conservation Area. The Victorian Parish Rooms, flint boundary wall and the listed war memorial on the corner of Southampton Hill are of historic interest.

South Street and Frog Lane

16.7 The northern part of South Street is narrow with an enclosed feel that contrasts with the expanse of The Square. A slight curve hides its southern end from view giving the street interest. In contrast to the High Street the buildings in South Street return to a smaller two storey scale and simpler form. Although predominantly residential there is a mix of uses at the northern end of the street.

16.8 Buildings near The Square are closely spaced on the frontage but continue the variety of building scales, ridge heights and eaves heights. The large undeveloped rear gardens of the frontage buildings are characteristic of the historic development pattern of the village and are important to character. Some of these buildings date from the medieval period, notably number 11 which was a storehouse connected with the Abbey. The jettied frontages of the medieval 15th century timber framed houses at numbers 28 to 30 South Street and the later 17th century house at no 32 are important landmarks. Numbers 28 to 30 have been dated using dendrochronology, and were built with timbers felled in 1412; these are two of the oldest buildings in the Conservation Area. The former tin chapel on the eastern side of the street is also of interest.



- 16.10 South Street broadens before its junction with Frog Lane and the arrangement of buildings becomes more spacious. There are several buildings of importance to the street including 45 South Street with its jettied first floor and prominent timber clad gable. The late 18th century assembly room and theatre has been restored in connection with new development. This new frontage development respects the historic pattern of development and the form and scale typical of the village. On the east side of the road numbers 44 and 46 are elegant examples of grey Georgian brickwork set behind small frontage gardens. The large buildings at 2 Coach Hill and Brewery House, adjoining the site of the former Fielder's Brewery, terminate the street.
- 16.11 Red brick walls and outbuildings opposite a row of cottages abutting the street mark the narrow entrance into Frog Lane (formerly Castle Street). The street curves to the north becoming a footpath that leads through the churchyard to Church Path. The majority of the street contrasts with the older development of the village consisting of modern development set back from the road behind front gardens.

West Street

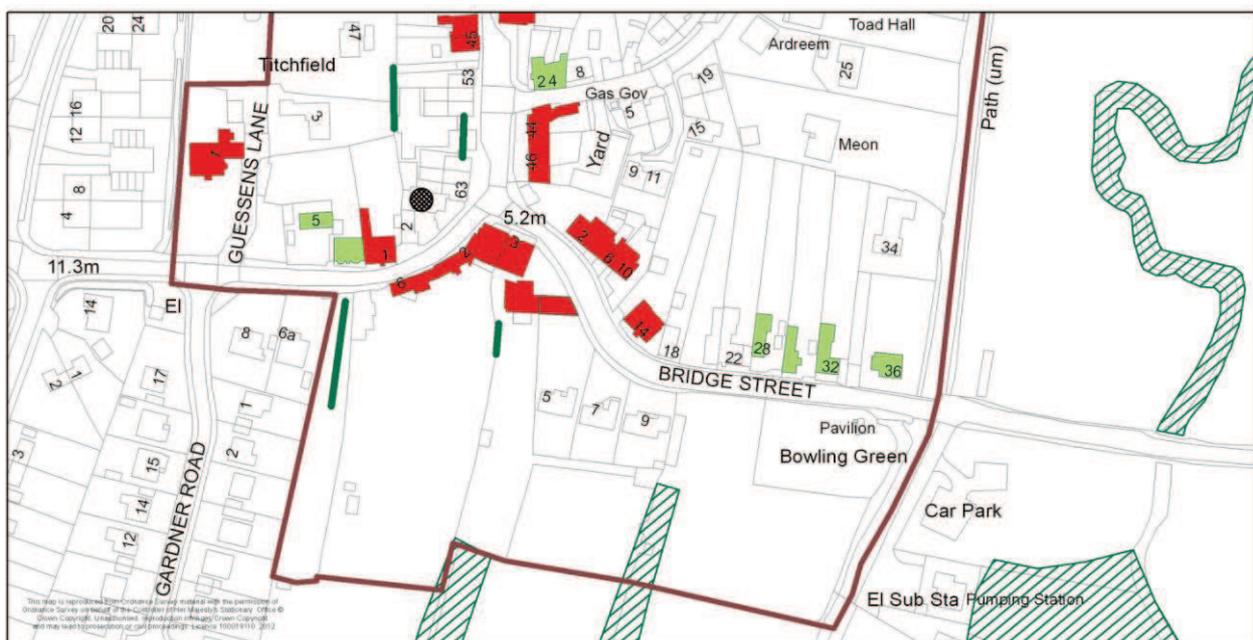
- 16.12 The strong character of West Street derives from its steep slope down into the village centre from the top of the valley. This affords important views of the church and the buildings of the village set against a rural backdrop of trees on the opposite side of the valley. On entering the Conservation Area West Street is informal narrow lane with planting either side or no pavements.
- 16.13 The character of the street differs on either side with a more or less continuous frontage stepping down the hill on the north side and a more broken frontage with brick walls, spaces and planting to the south. Guessens Path, part of the historic street pattern, emerges onto West Street from Coach Hill part way down the hill, beside an area of open space. Overall the buildings have a cottage scale and a variety of form and detailing characteristic of the village. As elsewhere in the village the roofs are predominantly clay tile and there are numerous chimneys. Two features of local interest in West Street are an historic wall that incorporates the knucklebones of sheep as courses between the brickwork and three large sarsen stones in the open space, which were relocated from the Kites Croft development north west of the village. These are naturally occurring blocks of sandstone that are sometimes unearthed in the sand and gravel areas of Hampshire. The typical pattern of frontage buildings and associated undeveloped rear gardens is evident and important to character.



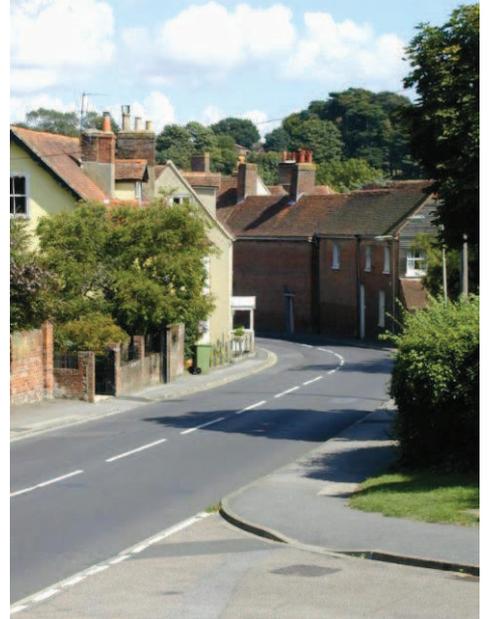


Coach Hill and Bridge Street

- 16.14 Coach Hill and Bridge Street are both important southern approaches to the village that converge and lead into South Street. They differ significantly in character.
- 16.15 Coach Hill drops down the western side of the valley from the more modern development on the valley side into the Conservation Area and curves sharply to the left at the bottom of the hill before joining South Street. From the hill the view across the village contains an important rural backdrop comprising the open land of the valley and the substantial belt of trees on its eastern side. The trees obscure the western built up edge of Fareham and are important to the setting of the village. Buildings close in to the back of the pavement edge either side of the street at the bottom of the hill signifying the start of the older settlement and the tall red brick walls of the buildings on the outside of the bend give strong character to the street.



16.16 Bridge Street leads into the village from the east affording views of the open land of the valley floor. The street crosses two bridges over the river and the canal. The canal marks the start of the village. In contrast to older parts of the village, buildings are not tight to the back edge of the pavement edge but are set behind small front gardens and enclosed by brick walls. The street contains significant trees and planting. Particularly prominent is a group occupying land behind the site of the former Fielders Brewery. The street turns at its western end with a small terrace and outbuildings on its north side, Brewery House, partly 17th century, and 2 Coach Hill are prominent buildings which close the street and mark the start of South Street.



17 KEY FEATURES TO PRESERVE AND ENHANCE

17.1 There is a great variety of historic features, architectural details and elements of street character that should be conserved if the special character of Titchfield is to be preserved. The following key features that contribute to the character of the Conservation Area have been identified.

- The landscaped setting of the village including the belts of trees on the valley sides that are essential to the setting of the Conservation Area and are prominent in views across the valley
- The character and appearance of the River Meon and the Titchfield Canal.
- Important views including those into and out of the Conservation Area
- The historic development pattern of the village originating from the medieval period
- The form, scale and hierarchy of the buildings
- The continuity, established form, scale and detailing of the street frontages, brick boundary walls and outbuildings that contribute to character and appearance
- The mixture of architectural detail including particularly Tudor, Jacobean, Georgian and Victorian
- The use of traditional natural building materials and techniques, including brick bonds, that contribute to character and appearance and the predominance of handmade red clay tile as a roofing material
- The number and variety of surviving chimneys
- The historic paving, traditional surfacing materials, narrow pavements and stone kerbs, including the absence of formal pavements and kerbing, that contributes to street character
- Views of St Peter's Church, the churchyard and The Square
- The archaeological interest of the village
- Important trees and planting in the Conservation Area and outside the boundary that contributes to its character, appearance and setting
- The contribution of non designated heritage assets, including locally listed buildings, to character and appearance
- The surviving historic shopfronts
- The mixed use character of the Conservation Area

MANAGEMENT STRATEGY

18 CONSERVATION AREA MANAGEMENT

18.1 The management strategy sets out the council's approach for preservation or enhancement of the character and appearance of the conservation area that has been identified by the appraisal. It sets out the procedures currently in place to manage change and proposes additional measures and opportunities for enhancement. The strategy also identifies other measures such as additions to the local list, boundary review and monitoring.

19 THE MANAGEMENT OF DEVELOPMENT

National Legislation and Guidance

19.1 In exercising its powers under the Planning (Listed Buildings and Conservation Areas) Act 1990 the local planning authority will pay special attention to the desirability of preserving or enhancing the character or appearance of a conservation area and the management of development is a key function in delivering this statutory duty. The provisions of the Planning (Listed Buildings and Conservation Areas) Act 1990 that relate to the control of listed buildings, through the listed building consent procedure, and the management of trees are also important in preserving the character or appearance of the conservation area. Current government guidance concerning conservation areas, which are designated heritage assets, can be found in The National Planning Policy Framework.

Current Local Planning Policy

19.2 The council will apply policies contained in the local plan to preserve or enhance the character and appearance of conservation areas in considering development proposals

19.3 The Fareham Borough Local Plan will consist of three parts;

- Local Plan 1: Core Strategy (adopted August 2011)
- Local Plan 2: Development Sites and Policies (in preparation)
- Local Plan 3: New Community North of Fareham Area Action Plan (in preparation)

19.4 It will eventually replace the Fareham Borough Local Plan Review (June 2000). The boundaries of the conservation areas are included on the proposals map.

19.5 A number of the policies in the Fareham Borough Local Plan Review (June 2000) that relate to the historic environment have been 'saved'^[1] and in time will be replaced by the new policies of the Fareham Borough Local Plan. The Fareham Borough Local Plan 1: Core Strategy was adopted by the Council in August 2011, Policy CS17 'High Quality Design' includes development affecting heritage assets. Appendix 1 of the document sets out the policies of the Local Plan Review (June 2000) that have been superseded. New development will be considered in the light of the core strategy and saved policies.

19.6 This appraisal and management strategy has been prepared in accordance with national guidance as evidence in support of the saved policies of the Fareham Borough Local Plan Review (June 2000), policies contained within the Fareham Borough Local Plan 1: Core Strategy and the emerging policies of the other parts Fareham Borough Local Plan. As such the appraisal and management strategy will be treated as a material consideration in the

^[1] The Fareham Borough Local Plan Review expired in September 2007, but many of its policies have been saved (Direction under paragraph 1(3) of schedule 8 to the Planning and Compulsory Purchase Act 2004).

determination of planning applications.

Managing Development

- 19.7 In a conservation area planning permission is required for a greater range of extensions, alterations and other development than elsewhere. Conservation Area Consent may also be required for the demolition of unlisted buildings and other structures. Listed building consent is also required for alterations to listed buildings that affect their character as buildings of special architectural or historic interest. It is advisable to contact the Department of Planning and Environment for advice about the need for an application. It is an offence to cut down, top, lop, uproot or wilfully damage or destroy trees in a conservation area without the consent of the local planning authority and the local planning authority must be given six weeks prior notice of any such works to trees.
- 19.8 To ensure that the character and appearance of the conservation area is given proper consideration in the exercise of planning functions the council will follow the approach set out below;
- take into account the evidence in this appraisal for development management purposes as a material consideration in support of the policies of the Fareham Borough Local Plan
 - take specialist advice relating to the historic environment in the exercise of development management functions likely to affect the significance of the conservation area and heritage assets
 - require applicants to provide a Heritage Statement explaining how their proposals will conserve or enhance the Conservation Area, in accordance with the NPPF
 - take specialist advice relating to the management of trees in the exercise of development management functions likely to affect the character, appearance and setting of the conservation area
 - work with other bodies, including statutory undertakers and other council departments who are responsible for, or undertake, works or re-instatements that are likely to affect the character and appearance of the conservation area and the architectural or historic interest or setting of historic buildings including matters relating to street furniture, footpath, carriageway and footway surfacing, highway management and safety
 - encourage prospective applicants to seek pre-application advice for development that is likely to affect the character and appearance of the conservation area and the architectural or historic interest or setting of historic buildings
 - prepare guidance documents to inform proposals for development and alteration
 - prepare development briefs or design principles statements to guide any significant re-development proposals
 - consider the need for further controls on advertising within the Conservation Area

20 ARTICLE 4 DIRECTION

- 20.1 Permitted development allows a variety of minor alterations and extensions to be made without the need for a planning application. Potentially these changes can be harmful to character and appearance. Some permitted development rights can be removed with the use of an article 4 direction. The use of a direction does not necessarily prevent development but by requiring a planning application to be made allows proper assessment of its impact on the character and appearance of the conservation area. There is no fee for such an application. The formal procedure for serving an article 4 direction requires a separate period of public consultation on

the detailed proposals.

20.2 Loss of traditional architectural details and inappropriate alteration has been identified on a number of unlisted buildings in the character appraisal and this has, in part, been due to the exercise of permitted development rights. The appraisal has highlighted the potential for further erosion of character and appearance through the continued exercise of permitted development rights. Therefore an Article 4 direction will be used to restrict certain types of permitted development from selected buildings.

21 MONITORING

- Recording - monitoring of change in the conservation area is considered necessary to enable the council to review the effectiveness of planning control over time and to address any need for action. A dated photographic survey, which is recommended for this purpose, will be updated every 4 years
- Street Audit - the council will periodically undertake an audit of the conservation area to identify inappropriate changes or unauthorised alterations, the council will consider the use of its enforcement procedures in such circumstances

22 BUILDINGS AT RISK

22.1 The council will continue to monitor the condition of listed buildings and will identify those considered to be at risk of neglect and decay. If necessary the council will seek to secure appropriate repairs through liaison with owners. In cases of serious neglect and decay the council will consider the use of its statutory powers.

23 BOUNDARY REVIEW

23.1 The local Planning Authority has a duty imposed by the Planning (Listed Buildings and Conservation Areas) Act 1990 to determine which parts of the borough are 'areas of special architectural or historic interest the character or appearance of which it is desirable to preserve or enhance'. This includes assessment of the current boundaries of existing conservation areas. There are no boundary changes recommended for the Titchfield Conservation Area.

24 ADDITIONS TO THE LOCAL LIST

24.1 The council maintains a local list of buildings of architectural or historic interest. The local list identifies buildings which although not of national significance have a local interest that merits recognition in the planning process. Consideration of the architectural and historic interest and setting of locally listed buildings is a material consideration in planning decisions and policy HE9 of the Fareham Borough Local Plan Review and policy HN1 of the Draft Local Part 2: Development Sites and Policies apply. Subject to further research it is recommended that 4 buildings in the Titchfield Conservation area may be suitable considered for possible addition to the local list.

- The Parish Rooms
- The former theatre and assembly room, Coach Hill
- 37,39,41 The Square

25 OPPORTUNITIES FOR ENHANCEMENT

25.1 There are few features that detract from the historic character of the village to any great extent. However a number of opportunities have been identified that would lead to enhancement if implemented.* see map on page 15

Opportunity for Enhancement	Method
Continuation of the environmental improvement works undertaken in 2007 ⁴ to include the northern end of the high street and the green space adjacent to 3 south street *	Through working with the Highway Authority and other statutory bodies to guide improvements where opportunity and resources allow
Improvements where appropriate to street furniture including seating, bollards and lighting columns	
Improvements to surfacing where appropriate, including footpaths, private drives, footways, carriageways and crossovers	
Redevelopment of 8-10 Southampton Hill *	Guided by an agreed design principles statement/ development brief
Securing replacement of inappropriate architectural detail on historic buildings	Guiding landowners when maintenance/ refurbishment is planned or when other opportunities arise
Improving the visual impact of the Tanneries buildings *	

26 RESOURCES

26.1 Current resources for development management, including enforcement, and specialist advice relating to the historic environment, arboriculture and ecology, including resources for the environmental improvement programme are provided by the Department of Planning and Environment. Opportunities for enhancement of the conservation area that are identified in this document are subject to the availability of appropriate resources in relation to publicly owned land or in other cases discussion with individual landowners where an opportunity arises.

⁴ A partnership scheme with the Hampshire County Council was completed in 2007. The improvements included re-surfacing the footpaths in The Square with high quality York stone, the installation of traditional granite kerbs and upgrading to more appropriate street lighting.

27 CONTACTS:

Advice concerning conservation areas and listed buildings can be obtained from:

Planning Policy
Department of Planning and Environment
Fareham Borough Council
Civic Offices
Civic Way
Fareham
PO16 7AZ
Tel: 01329 236100

Email: conservation@fareham.gov.uk

APPENDIX B

Draft document consultation comments, responses and action table

Comment	No.	Response	Action
1. KEY FEATURES IDENTIFIED IN THE CHARACTER APPRAISAL AND MANAGEMENT STRATEGY TO BE PRESERVED AND ENHANCED			
<ul style="list-style-type: none"> General support for <u>all</u> 'Key features' identified in the document 	14	Support welcomed	No action required.
Surfacing & Footways			
<ul style="list-style-type: none"> Appraisal fails to mention the older pavement styles and materials throughout the conservation area, particularly cobbles. 	6	Noted	References to these details have now been included.
<ul style="list-style-type: none"> Replacement of cobbles should be with a similar material. 	1	Noted	It has been agreed with Hampshire County Council (HCC), as Highway Authority, that original historic materials within adopted carriageways and footways or footpaths will be retained in situ where possible. If these need to be removed, they will be considered for reinstatement where safe and fit for purpose. As a last resort replacement materials will be used that match the original materials as closely as possible.
<ul style="list-style-type: none"> Historic cobbles in High Street should remain 	6	Noted	
<ul style="list-style-type: none"> Historic cobbles should be re-used 	3	Noted	
<ul style="list-style-type: none"> Historic stone kerbs in the High Street should be preserved 	2	Noted	
<ul style="list-style-type: none"> Pavement in Southampton Hill is dangerous and should be renewed 	1	Noted	This issue will be raised with the Highway Authority who is responsible for the safety of footways. A large part of Southampton Hill is not within the Conservation Area and therefore further assessment is required.
<ul style="list-style-type: none"> Some pavements in the village are too narrow 	1	Noted	This issue will be raised with the Highway Authority who is responsible for the safety of footways. However care will be taken to ensure that the character of the Conservation Area will not be affected by inappropriate changes.
Setting and Landscape			
<ul style="list-style-type: none"> The landscaped setting of the village should be preserved 	1	Noted	No action for Conservation Area Character Appraisal (CACA). Relevant to draft Development Sites & Policies Plan.

Comment	No.	Response	Action
2. OPPORTUNITIES IDENTIFIED IN THE CHARACTER APPRAISAL AND MANAGEMENT STRATEGY FOR ENHANCING CHARACTER AND APPEARANCE			
<ul style="list-style-type: none"> General support for all opportunities for enhancement set out in the document 	2	Support welcomed	No action required.
Continuation of the environmental improvement works undertaken in 2007 to include the northern end of the high street and the green space adjacent to 3 south street;			
<ul style="list-style-type: none"> Support for improvements to the green at the bottom of West Street inc: tree planting, removal of Bollards, seats etc 	5	Support welcomed	Retain reference in document. Any changes to the street and green space will be subject to more detailed public consultation to ensure an appropriate design. Any changes will be subject to securing funding.
<ul style="list-style-type: none"> The green is kept "rural" by the villagers. A town garden which would be out of character and is not wanted. 	1	Noted	
Improvements To Street Furniture, Inc; Seating Bollards, Lighting Columns			
<ul style="list-style-type: none"> Lighting throughout the village needs to be uniform 	3	Noted	No Action. Upgrading of lighting is currently underway throughout the borough as part of Hampshire County Council Street Lighting Public Finance Initiative. The Borough Council has already identified the importance of appropriate design within Conservation Areas as part of this programme of works.
<ul style="list-style-type: none"> Redundant signs should be removed 		Noted	A review of signage will be undertaken as part of the future management strategy. This will carried out in conjunction with

Comment	No.	Response	Action
			HCC to determine which signs can be removed, when and how this will be funded.
<ul style="list-style-type: none"> Street Lamps causing an obstruction should be wall hung 		Noted	This issue will be raised with the Highway Authority who is responsible for ensuring footways remain safe and free of obstruction.
<ul style="list-style-type: none"> Bollards should be set further from the pavement edge in South street to avoid vehicle damage 		Noted	This issue will be raised with the Highway Authority who is responsible for ensuring the safety of users of the highway. There are standards for set back and it is important to ensure that the footway is not compromised for space by moving the bollards and that their purpose in reducing speed through narrowing is also not compromised.
<ul style="list-style-type: none"> 20mph should be extended further up west street which would also remove unsightly signs and improve views 		Noted	This issue will be raised with the Highway Authority who is responsible for ensuring the safety of users of the highway.
<p>Improvements to Surfacing Including Footpaths, Private Drives, Footways, Carriageways and Crossovers</p>			
<ul style="list-style-type: none"> Improvements to footways should have regard to the historic nature of materials used & should always preserve & make safe what is already there 	1	Noted	It has been agreed with Hampshire County Council, the Highway Authority that original historic materials within adopted carriageways and footways or footpaths will be retained in situ where possible. If they need to be removed, they will be considered for reinstatement where safe and fit for purpose. As a last resort replacement materials will be used that match original materials as closely as possible.

Comment	No.	Response	Action
Redevelopment of 8-10 Southampton Hill			
<ul style="list-style-type: none"> Support 	3	Support welcomed	The Borough Council will work with the owners of the site to ensure that the design of any future redevelopment is of high quality and appropriate to the sites context on the edge of the conservation area.
Securing Replacement of Inappropriate Architectural Detail on historic Buildings			
<ul style="list-style-type: none"> Support 	3	Support welcomed	The Borough Council will work with the owners of property to ensure that the design of any future alterations is of high quality and appropriate to the character of the Conservation Area or listed building status.
Improving the visual Impact of the Tanneries buildings			
<ul style="list-style-type: none"> Support 	2	Support welcomed	The Borough Council will work with the owners of the Tannery buildings to ensure that the design of any future alterations is of high quality and appropriate to the character of the conservation area.
Proposed additions to Local List			
<ul style="list-style-type: none"> Support 	3	Support welcomed	The Borough Council will proceed to locally list those buildings identified.

Comment	No.	Response	Action
3. PROPOSAL TO CONTROL HARMFUL ALTERATIONS TO BUILDINGS BY USING AN ARTICLE 4 DIRECTION TO REQUIRE A PLANNING APPLICATION			
<ul style="list-style-type: none"> Support for use of article 4 direction 	15	Support welcomed	The Borough Council will proceed to prepare an article 4 direction.
<ul style="list-style-type: none"> Against use of article 4 direction 	1	Noted	There appears to be broad support for the imposition of an article 4 direction. The direction does not mean that changes to properties cannot be made, rather that they are subject to control such that the Council can ensure that alterations are appropriately designed having regard to the character of the conservation area.
4. VIEWS OF THE VILLAGE FROM THE SURROUNDING AREA OR WITHIN THE VILLAGE ITSELF YOU CONSIDER TO BE IMPORTANT			
Agree with views as identified in the document			
<ul style="list-style-type: none"> Agree 	1	Noted	No action required.
Wider Views			
<ul style="list-style-type: none"> Setting and views of the village from surrounding hills 	2	Noted Noted	Views identified have been considered and where appropriate added to the document text and map.
<ul style="list-style-type: none"> The view from the top of the hill at Highlands Road looking west is spoiled by the large industrial building dominating the skyline (Kites 	1		

Comment	No.	Response	Action
Croft)			
<ul style="list-style-type: none"> View from A27 looking westward from junction of A27 	1		
<ul style="list-style-type: none"> View across the A27 to the abbey 	2		
<ul style="list-style-type: none"> View looking over the water meadows towards the back of the church from the road to Stubbington 	2		
<ul style="list-style-type: none"> Views of the landscape setting of the village including 	1		
<ul style="list-style-type: none"> View of the village from A27 from Fareham 	1		
<ul style="list-style-type: none"> Views from the land around Tithe Barn 	2		
<ul style="list-style-type: none"> Views from the canal walk 	1		
<ul style="list-style-type: none"> the belts of trees on the valley sides 	1		
<ul style="list-style-type: none"> View from Ranvilles Lane of West Street 	1		
Views in the Village			
<ul style="list-style-type: none"> Views within the square 	2	Noted	Views identified have been considered and where appropriate added to the document text and map.
<ul style="list-style-type: none"> Views at village entrances 	1		
<ul style="list-style-type: none"> Views looking down West Street including the Church 	3		
<ul style="list-style-type: none"> View of the trees including a large oak tree with the "Sarcen Stones" on West Street 	1		
<ul style="list-style-type: none"> Views around the church and the square 	2		
<ul style="list-style-type: none"> Established sight lines are important 	1		

Comment	No.	Response	Action
• Views of the canal	1		
• Views of Bettons Carpet Shop from the Square	1		

5. GENERAL COMMENTS RAISED			
The document itself			
• General support for the quality, content and layout of the document as a whole	11	Support welcome	No action required.
• Paragraph 5.1 and 5.2 repeat	2	Noted	Document corrected.
• No mention of Parish Room, tin church, telephone box, war memorial or finger post signs	1	Noted	References added.
• Support for managing development section of character appraisal	1	Support welcome	No action required.
• Additional guidance concerning appropriate development would be helpful	3	Noted	No action. The document identifies within the management strategy how the planning process will consider alterations to buildings. Additional guidance will be considered separately either through the forthcoming Design Supplementary Planning Document or specific conservation area and listed building guidance material
• Not enough emphasis on the character of The Square	1	Noted	The importance of the High Street and The Square is mentioned in a separate section (p20/21) and referred to in other sections. No change.
• The sheeps knuckle wall at the top of West St should be mentioned	1	Noted	Reference is made in paragraph 14.18.

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Comment	No.	Response	Action
<ul style="list-style-type: none"> The document is over complicated and uses jargon which deters reading and comment 	1	Noted	There is a balance between being overly technical and complicated and too basic such that meaning can be lost. Given the weight of responses supporting the quality content and layout of the document it is considered that the balance is reasonable.
<ul style="list-style-type: none"> No evidence that the north end of the High Street was as wide as The Square 	1	Agreed	No action. The document does not assert that this was ever the case.
<ul style="list-style-type: none"> Bellfield estate should be included 	1	Noted	No action. The Bellfield estate does not possess the special architectural or historic interest necessary to be designated as part of the conservation area.
<ul style="list-style-type: none"> A key to the map symbols is required 	1	Agreed	This error has been addressed.
<ul style="list-style-type: none"> Tin tabanacle on South Street should be mentioned, surprise it is not listed within the group listing of South St. 	1	Noted	Reference added. Further investigation needed with regard to the possibility of listing.
<ul style="list-style-type: none"> Some historians now believe that what was called the New River was never intended to be a canal, but was merely a drainage channel, and that the 'lock' was a shared gate and fish trap. 	1	Noted	Footnote added to ensure this alternative theory is referenced in the document.
Traffic and parking and highway issues			
<ul style="list-style-type: none"> Too many cars parked in the Square 	1	Noted	The provision of accessible parking is important to the economic well being of the village. It is acknowledged that it can affect the visual quality of the square, particularly the extent of white lining and other traffic related street furniture. The future management of the square and other streets will need to be subject to more detailed and focussed consultation through Hampshire County Council as the Highway Authority in conjunction with the Borough Council.
<ul style="list-style-type: none"> The character and appearance of the square is harmed by many long stay parked cars 	2		
<ul style="list-style-type: none"> The amount of parking in the square is harmful to its character and appearance 	1		

Comment	No.	Response	Action
<ul style="list-style-type: none"> The Traffic island at the bottom of Southampton Hill unsightly 	1	Noted	This will be considered as part of the future expansion of environmental improvements from the High Street/ The Square.
<ul style="list-style-type: none"> Traffic congestion is a problem, additional provision should be made to the rear of houses in Mill Street 	1	Noted	<p>The future management of streets will need to be subject to more detailed and focussed consultation through Hampshire County Council as the Highway Authority, in conjunction with the Borough Council.</p> <p>The historic development form did not take account of the future emergence of cars and the level of car ownership, which has resulted in significant on-street parking. There is no realistic alternative. Developing the land to the rear of Mill Street for parking would be contrary to planning policy and would harm the character, appearance and setting of the conservation area; it would not solve the parking congestion in other streets.</p> <p>These issues will be raised with the Highway Authority. The future management of streets will need to be subject to more detailed and focussed consultation through Hampshire County Council as the Highway Authority, in conjunction with the Borough Council.</p> <p>Many of the issues raised will be taken into account when considering the extension of the environmental improvement scheme from The Square.</p>
<ul style="list-style-type: none"> Parking of cars on West Street & narrow pavement on East Street is a problem 			
<ul style="list-style-type: none"> Traffic congestion is a problem 	1		
<ul style="list-style-type: none"> Wooden bollards should be kept in South Street 	1		
<ul style="list-style-type: none"> Bollards should be extended at southern end of South Street 	1		
<ul style="list-style-type: none"> No observation of Yellow Lines 	1		
<ul style="list-style-type: none"> Disregard of speed limits 	5		
<ul style="list-style-type: none"> Further traffic restrictions required in the Square East Street, South Street and West Street to reduce unnecessary traffic 	1		
<ul style="list-style-type: none"> Extension of 20mp limit into Southampton Hill and other areas 	2		
<ul style="list-style-type: none"> The square should be a precinct 	1		
<ul style="list-style-type: none"> Speed limit should be reduced on Mill Lane and traffic calming measures introduced to enhance the area / increase road pedestrian safety. The heavy goods vehicles & proximity of the road and the speed of the traffic causing damage to the listed Place House Cottages. 			
<ul style="list-style-type: none"> The pavement from the pub, in front of Parish Rooms, are badly rutted and uneven. 	1		
<ul style="list-style-type: none"> car parking outside of the shops is not very good, there have been so many near missed accidents 			

<ul style="list-style-type: none"> The bus turning into Southampton Hill from East Street is dangerous for pedestrians 	1		
Comment	No.	Response	Action
<ul style="list-style-type: none"> West street should be 20mph limit 	1		
<ul style="list-style-type: none"> Traffic lights should be re-sequenced to make passage through the village slower 	1		
<ul style="list-style-type: none"> There should be residents parking scheme introduced in East Street 	1		
<ul style="list-style-type: none"> Village used as a rat run from Stubbington to Warsash 	2		
<ul style="list-style-type: none"> Clear car park sign posting required 	1		
Planning and development related matters			
<ul style="list-style-type: none"> The strategic gap must be maintained. 	1	Noted	No action. The strategic gap is located within the countryside whereby Core Strategy Policy strictly controls development, subject to certain types necessary for agriculture, forestry and horticulture. Any such development must also be of a high standard of design, appropriate to the character, appearance and setting of the conservation area and must ensure that the principles of the Strategic Gap are not eroded.
<ul style="list-style-type: none"> Additional provision for car parking should be made at Barry's Meadow 	1	Noted	Expansion of Barry's Meadow would involve the partial loss of valuable amenity and open space.
<ul style="list-style-type: none"> Conservation area must not be preserved in aspic 	2	Noted	No Action. The intention of the management strategy is to conserve not retain 'in aspic'.
<ul style="list-style-type: none"> Support for conservation of trees 	1	Support welcome	No action.
<ul style="list-style-type: none"> The parish rooms should be a listed building 	2	Noted	The Parish Rooms are considered to be of sufficient interest to justify addition to the council's local list. If further investigation reveals national interest, then an application to English Heritage will be made.

Comment	No.	Response	Action
<ul style="list-style-type: none"> Advertising should be controlled 	2	Noted	Advertising is controlled through The Town and Country Planning (Control of Advertisements) (England) Regulations. The special interest of listed buildings is protected by legislation. Consideration will be given to the need and applicability of an Area of Special Control Order, which allows for further control over advertising.
<ul style="list-style-type: none"> The use of estate agent boards should be enforced against in inappropriate locations 	1	Noted	
<ul style="list-style-type: none"> New development should respond to the form and materials of the older buildings of the village 	2	Noted	No action. Planning policies require the Local Planning Authority to pay special attention to the desirability of preserving a listed building or its setting or any features of special architectural or historic interest which it possesses; of preserving or enhancing the character, appearance, and setting of Conservation Areas; In this way new development is likely to be acceptable if it responds to the form and materials of the older buildings. However, it is not possible to rule out entirely a different approach if it meets the policy criteria.
<ul style="list-style-type: none"> There should be no more development in and around the village 	1	Noted	No action. Planning Policies allow for development within urban areas, which includes the Conservation Area subject to specific guidance and criteria as set out above. Around the village, the land is located within the strategic gap and countryside whereby Core Strategy Policy strictly controls development, subject to certain types necessary for agriculture, forestry and horticulture. Any such development must also be of a high standard of design and be appropriate to the character and setting of the Conservation Area and ensure that the principles of the Strategic Gap are not eroded.
<ul style="list-style-type: none"> Areas of the village that fall outside the conservation area should be considered for further housing within certain guidelines to retain character 	1		

Comment	No.	Response	Action
<ul style="list-style-type: none"> The Abbey Garden centre should be encouraged to improve the dilapidated and overgrown greenhouses to the south 	1	Noted	To be considered as part of the revised Titchfield Abbey Conservation Area Character Appraisal and Management Strategy.
<ul style="list-style-type: none"> Care should be taken when considering applications that may impact on the outlook from the Abbey and the area around it. 	1	Noted	Core Strategy Policies cover development in such locations. However important views and spaces will be considered as part of the future revision to the Titchfield Abbey Conservation Area Character Appraisal and Management Strategy.
<ul style="list-style-type: none"> The use of slim double glazed units and other new energy saving technologies should be considered in historic buildings 	1	Noted	No action. Submission of details and techniques will be considered having regard to conservation and listed building policies.
<ul style="list-style-type: none"> There is a lack of variety in retail establishments 	1	Noted	The particular type of retail establishment is a reflection of market trends and cannot be specifically delivered by the planning process. The square is recognised as a local centre within the Core Strategy, which allows for retail and other uses.
<ul style="list-style-type: none"> There should be no development on Barry's Meadow 	1	Noted	Existing Planning Policy does not support new development on public open space. The management of the open space will however allow for new play equipment or facilities appropriate to the open space.
Areas for improvement			
<ul style="list-style-type: none"> Sub station should be screened 	1	Noted	This will be investigated to determine whether the land owners will allow for some planting or other measures to help screen its impact.
<ul style="list-style-type: none"> More seats in the square. 	1	Noted	The future management of streets will need to be subject to more detailed and focused consultation through Hampshire County Council as the Highway Authority, in conjunction with the Borough Council. It recognised that there is divided opinion on the benefits and dis-benefits of providing seating.

Comment	No.	Response	Action
<ul style="list-style-type: none"> Provision of a seat beside the Canal 	1	Noted	This issue will need to be investigated further with regard to land ownership. The canal runs through privately owned land and it is not clear whether space exists within public rights of way that would enable seating.
<ul style="list-style-type: none"> Tree planting should be undertaken inside and outside conservation area 	1	Noted	Where land is owned by the Borough Council or Hampshire County Council, the potential to plant trees will be explored. Where land is privately owned, the planting of trees will be subject to personal preference, but it is recognised that they add value to the character of the conservation area.
<ul style="list-style-type: none"> Improvements to the green space on Southampton Hill, including seating 	1	Noted	This issue will be explored with the Borough Council's Parks and Open Spaces manager. Any proposals will be expected to be subject to further public consultation.
<ul style="list-style-type: none"> Village should be promoted more as a historic attraction 	4	Noted	This issue will need to be explored further with the village community and the Borough Council or County Council if more advertising is proposed or signage is to be erected on Council land.
<ul style="list-style-type: none"> A map of places of interest should be included in the village 	1	Noted	
<ul style="list-style-type: none"> New stone in the square weathering badly, original slabs of higher quality 	1	Noted	This will be investigated by the Hampshire County Council as the Highway Authority.
<ul style="list-style-type: none"> Bus shelter in square underused and unsightly, place for young to congregate 	1	Noted	Any alterations or changes to the bus shelter will be considered as part of the extension of the environmental improvements in the future and will be subject to more detailed and focussed consultation through Hampshire County Council as the Highway Authority in conjunction with the Borough Council.

Comment	No.	Response	Action
<ul style="list-style-type: none"> The cobbles across the pavements especially each side The Queens Head Public House are very slippery when wet. 	1	Noted	<p>Where cobbles are deemed to be dangerous, It has been agreed with Hampshire County Council, the Highway Authority that original historic materials within adopted carriageways and footways or footpaths will be retained in situ where possible. If they need to be removed, they will be considered for reinstatement where safe and fit for purpose. As a last resort replacement materials will be used that match original materials as closely as possible.</p>
<ul style="list-style-type: none"> Cobble crossovers dangerous to pedestrians 	1		
<ul style="list-style-type: none"> Canal needs maintenance of vegetation 	1	Noted	<p>This issue will be passed on to the responsible owners. It is understood that maintenance falls to the Environment Agency.</p>
<ul style="list-style-type: none"> New fingerposts needed (on wooden posts) to show canal footpath on Bridge Street. 	1	Noted	<p>New signage, if on a recognised right of way will be under the control of the Highway Authority. This request will be passed to the relevant section for action.</p>
<ul style="list-style-type: none"> MUGA (Multi Use Games Area) which has been put in Recreation Ground across from the A27 should be placed in Barrys Meadow 	1	Noted	<p>This issue will be explored with the Borough Council's Parks and Open Spaces manager.</p>
<ul style="list-style-type: none"> Community Centre was built out of keeping with the Conservation area buildings and there may be scope to upgrade its external appearance. 	1	Noted	<p>Any upgrade will be subject to need and funding. Where alterations are sought, Planning policies will require an appropriate design and use of materials.</p>
<ul style="list-style-type: none"> Pollution from cars is damaging old buildings 	1	Noted	<p>The level of pollution is subject to the level of traffic and car engine technology, which is outside of the control of the Borough Council. Any measure to restrict traffic will be subject to more detailed and focussed consultation through Hampshire County Council as the Highway Authority, in conjunction with the Borough Council.</p>
<p>Other comments</p>			
<ul style="list-style-type: none"> Grateful for the wild grass and seeds project on the A27. 	1	Support welcomed	No action.
<ul style="list-style-type: none"> Tradition of Christmas trees on the houses should be maintained 	1	Noted	No action.

<ul style="list-style-type: none"> Dislike of smokers on the pavement, not support seating outside the pub in the summer. 	1	Noted	Any additional seats within the public highway will be subject to more detailed and focussed consultation through Hampshire County Council as the Highway Authority, in conjunction with the Borough Council.
<ul style="list-style-type: none"> The benches in the square, South Street and the churchyard are a danger. Youths congregating can be intimidating 	1	Noted	It recognised that there is divided opinion on the benefits and dis-benefits of providing seating. The future management of streets and spaces will need to be subject to more detailed and focussed consultation through landowners, Hampshire County Council as the Highway Authority and with the Borough Council.
<ul style="list-style-type: none"> There is local nuisance in West Street from local authority housing, care needs to be taken selecting occupiers 	1	Noted	This issue is outside the scope of this consultation.

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COMMENTS FROM ORGANISATIONS			
Fareham Society	-		
<ul style="list-style-type: none"> West Street - p:22 para 14:18 for accuracy it is felt that following the mention of the large sarsen stones, should be inserted the words 'Relocated from the Kites Croft site which is the North West of the village' 	-	Agreed	Information added.
<ul style="list-style-type: none"> Page 25 bullet point 10 - include additional bullet point to underline the open and undeveloped rear gardens behind many of the frontage buildings which are typical of the historic development plan of the village 	-	Noted	This issue is covered by the 3 rd bullet which identifies the historic development pattern of the village originating from the medieval period.
<ul style="list-style-type: none"> page 27 para 17.8 bullet point 4 Add to last sentence, after street furniture 'Road surfaces' Opportunities for Enhancement 	-	Agreed	Add after highway management.

Comment	No.	Response	Action
<ul style="list-style-type: none"> page 29 Add to third box of table - Improvements 'where appropriate' to surfacing etc 	-	Agreed	Wording added.
<ul style="list-style-type: none"> page 26 para 17.6 The society hopes to see a shop front design guide policy as part of general design guidance within the emerging local plan - to apply to shop fronts in historic areas 	-	Noted	This has been identified as being included in the future Design Supplementary Planning Document.
English Heritage	-		
<ul style="list-style-type: none"> informative and a potential catalyst for action by the Council and local community, 	-	Noted	No action.
<ul style="list-style-type: none"> the Appraisal and Management Plan form an important part of the evidence base for the Council's Borough Local Plan and a material consideration in planning decisions 	-	Noted	No action.
<ul style="list-style-type: none"> I expected to find more mention of the listed buildings within the village, but with such a preponderance of designated buildings I appreciate that this would significantly increase the size of the document and could divert focus away from the Conservation Area as an asset in its own right. 	-	Noted	No action.
<ul style="list-style-type: none"> Suggest a link to the National Heritage List for England as a footnote to paragraph 14.1 (http://www.heritagegateway.org.uk). 	-	Agreed	Footnote added.

Comment	No.	Response	Action
<ul style="list-style-type: none"> The inclusion of the Management Strategy very usefully demonstrates a logical progress from the overall character to the key features to preserve and enhance to how that will be achieved. This progression could helpfully be explained at the outset of the Strategy to clarify the relationship of the Strategy to the Appraisal. 	-	Agreed	Addition made.
<ul style="list-style-type: none"> Paragraph 17.8 is particularly important. The first bullet point very usefully makes the essential, in my view, link between the policies of the Borough Local Plan that provide the drive and direction for the conservation of the character of the Conservation Area and the Appraisal that identifies that character. 	-	Noted	No action.
<ul style="list-style-type: none"> include within this list a requirement for an applicant to provide a heritage statement explaining how their proposals will conserve or enhance the Conservation Area, in accordance with paragraph 128 of the NPPF 	-	Agreed	Requirement added.
<ul style="list-style-type: none"> supports for use of Article 4 Directions 	-	Support welcomed	No action.
<ul style="list-style-type: none"> “recommended” in paragraph 18.2 should be “proposed 	-	Noted	Sentence tense changed to state that an Article 4 will be served.
<ul style="list-style-type: none"> “may consider” in paragraph 20.1 should be “will consider” 	-	Agreed	Words replaced.
<ul style="list-style-type: none"> The identification of opportunities for enhancement is welcome. 	-	Noted	No action.

	No.	Response	Action
Environment Agency	-		
<ul style="list-style-type: none"> • Pleased that the character of the River Meon is acknowledged an important contribution to the area. 	-	Noted	No action.
Titchfield Village Trust	-		
<ul style="list-style-type: none"> • The strategic gap (Titchfield Abbey Conservation area) should be maintained. The proposal to turn the largest part of it into a country park while allowing a care home development would seem an ideal solution retaining the open space in perpetuity for the people of the borough and as the strategy says 'setting it apart from the surrounding urban area.' We are in danger of becoming Solent City if spaces like this are not preserved. 	-	Noted	No action.
Titchfield History Society	-		
<ul style="list-style-type: none"> • Some historians now believe that what was called the New River was never intended to be a canal, but was merely a drainage channel, and that the 'lock' was a shared gate and fish trap. A useful introduction to the discussion is John Mitchell articles in the Hampshire Field Out Newsletter 52, Autumn 2009. Four more articles can be found in Titchfield: An Ancient Parish, the history society 2012. 	-	Noted	A footnote has been added to reflect the potential factual change.
Fareham Local History Group	-		
	-		

Comment	No.	Response	Action
<ul style="list-style-type: none"> Research on the canal published by Hampshire field Club disputing it was a canal which should be reviewed 	-	Noted	A footnote has been added to reflect the potential factual change.
	-		
Southern Water	-		
<ul style="list-style-type: none"> No Comment 	-	Noted	No action.
	-		

FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio: Strategic Planning and Environment
Subject: **New Community North of Fareham: Design Code**
Report of: Director of Planning and Environment
Strategy/Policy: Fareham Borough Local Plan

Corporate Objective: To protect and enhance the environment
 Maintain and extend prosperity
 Leisure for health and fun
 A balanced housing market
 Strong and inclusive communities
 Dynamic, prudent and progressive Council

Purpose:

To advise the Executive on the process currently underway to prepare a concept masterplan and high level design policies for the New Community North of Fareham (NCNF), outline the process required to prepare a design code to ensure that development achieves the required standard of design, and to set out proposed terms of reference for the Design Member Working Group.

Executive summary:

LDA Design and Parsons Brinkerhoff have been commissioned to prepare a preferred concept masterplan to inform and become part of the Area Action Plan (AAP) for the NCNF. The concept masterplan will include a series of parameter plans which show the extent and broad nature of the green infrastructure, the links through the site and with the wider area, and a series of character areas. These will be the basis in developing the design policies for the NCNF in the AAP.

Once these higher level design policies have been established, work will start on preparing a design code which will set out in more detail the design standards expected to be achieved in the new community.

The NCNF Design Code will be specific to the new community and will sit alongside, but be separate from the Design Guide Supplementary Planning Document (SPD) to be prepared which will provide design guidance for the rest of the Borough

Recommendation:

- (a) That the Executive agree the preparation of a Design Code for the New Community North of Fareham;
- (b) That the Design Member Working Group be tasked with overseeing the process of preparing the NCNF Design Code which will include agreeing the programme and consultation process;
- (c) That the terms of reference for the Design Member Working Group (as set out paragraph 13 of this report) be approved.

Reason:

To secure a high standard of design in the New Community North of Fareham.

Cost of proposals:

To be met initially within existing resources and predominantly funded from the Housing and Planning Delivery Grant reserve. External sources of funding will also be sought to offset this cost, however if further use of New Homes Bonus is necessary to meet the later phases of the NCNF work programme, this will be reported as part of the revised budget process. Procurement of the NCNF Design Code will follow in the first part of 2013.

Appendices: None

Background papers: None

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: New Community North of Fareham: Design Code

Briefing by: Director of Planning and Environment

Portfolio: Strategic Planning and Environment

INTRODUCTION

1. Policy CS13 in the adopted Core Strategy requires the new community to be an exemplar of sustainable design. The policy also requires the preparation of a comprehensive masterplan to bring forward the new community. This is seen as being a two stage process, with the Council preparing a concept masterplan which will define the boundary of the NCF, and show the broad disposition of the land-uses, and which will form part of the AAP. The landowners will subsequently prepare more detailed masterplans showing the indicative layouts and the internal road hierarchy to accompany their planning application(s).
2. Following a tender process earlier this year, LDA Design and Parsons Brinkerhoff prepared a series of concept masterplanning options. These formed the basis of the community engagement process on the emerging options undertaken by the Council in July 2012.
3. The next stage of preparing the concept masterplan is to evaluate the responses to the options consultation and align them to emerging evidence studies in order to prepare a single preferred version of the concept masterplan.

PREPARATION OF THE CONCEPT MASTERPLAN

4. Following a further tender process, LDA Design and Parsons Brinkerhoff were awarded the commission to prepare a preferred concept masterplan to inform and become part of the Area Action Plan for the NCF.

5. The concept masterplan will be accompanied by a series of parameter plans which show the extent and broad nature of the green infrastructure; the links through the site and with the wider area; and which will identify a series of character areas. The site will be broken down into distinctive character areas identified through an analysis of the existing site features/ constraints, the landscape characteristics of different parts of the site and the topography. Each character area will have its own set of high level design principles, including average densities and maximum building heights.
6. These design principles will form the basis of the high level design policies to be included in the AAP and which once adopted will become part of the Development Plan.
7. The process of outlining the design parameters in the new community commenced with a workshop on 3 December 2012 on creating quality places to which all members were invited. The NCNF Standing Conference has also held two workshops on green infrastructure and creating quality places to help the Council develop its policy on achieving a high standard of design.
8. The preferred version of the concept masterplan is due to be presented to the Executive on 15 April 2013.
9. Before the concept masterplan is finalised, good practice suggests that it should be the subject of an independent design review. This would normally be undertaken by either the Design Council or the Regional Design Panel. It is expected that the process for a design review will be decided early next year.

DESIGN CODE

10. Once the design principles have been established through the draft AAP, work will commence on the more detailed Design Code. The Design Code is required to ensure consistency in the design approach regardless of who develops a particular part of the development area or when. Given the length of time before the development is completed (around 20 years) there will need to be a degree of flexibility in the Design Code to ensure that it is responsive to changing circumstances and opportunities, including the inevitable advances in technology.
11. The work of preparing the design code is not expected to commence before April 2013, after the policies in the AAP have been drafted and agreed by Council. But the contents of the Design Code and what topics it should cover can be determined beforehand.

RELATIONSHIP TO THE DESIGN SUPPLEMENTARY PLANNING DOCUMENT (SPD)

12. Running in parallel to this process, following the Executive decision on 5 November 2012, an SPD is being prepared by the Council to cover design guidance for development proposals throughout the rest of the Borough. The SPD will not provide design guidance for the new community, but some of the principles included in the Design SPD are expected to also be incorporated into the NCNF Design Code.

ROLE OF THE DESIGN MEMBER WORKING GROUP

13. Given the Executive decision in November 2012 to prepare a Design SPD and establish a Design Member Working Group, together with the need to prepare a Design Code for the NCNF, the terms of reference for the Design Member Working Group will include the following:
 - i. to consider and comment on the high level design policies to be included in the Area Action Plan for the new community north of Fareham;
 - ii. to consider the NCNF Design Code(s), the proposed programme and consultation arrangements as this is prepared;
 - iii. to consider the Supplementary Planning Document which will offer design guidance throughout the rest of the borough.
14. The expectation is that in order to ensure consistency of approach, the Design Member Working Group will, as appropriate, need to meet jointly with the existing NCNF AAP Member Working Group, in order to effectively guide the work on the review of design policies for the AAP.
15. An early task for the Design Member Working Group will be to agree the nature and scope of the NCNF Design Code, and how the required level of flexibility can be embedded in the document.

RISK ASSESSMENT

16. There is an expectation that the NCNF will have a unique and distinctive character and achieve high standards of sustainable design. If no Design Code is prepared for the NCNF there would be a risk that the required standards would not be achieved.

FINANCIAL IMPLICATIONS

17. The costs of preparing a Design Code for the new community will be predominantly be initially funded from the Housing and Planning Delivery Grant reserve which currently stands at £814,000 and has been set aside to be used for studies relating to the New Community North of Fareham and other Action Plan Projects. Since 2004/05 the Council has received over £2.637 million of funding through Planning Delivery Grant and Housing and Planning Delivery Grant. External sources of funding will also be sought to offset design code costs, however if further use of New Homes Bonus is necessary to meet the later phases of the NCNF work programme, this will be reported as part of the revised budget process.

CONCLUSION

18. It is recommended that the Executive approves in principle the need to prepare a robust Design Code to ensure that the NCNF achieves a high standard of design. The details of how the Design Code will be prepared, its programme and consultation process will be within the remit of the new Design Member Working Group and is reflected in the newly established terms of reference set out in paragraph 13 of this report.

FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Strategic Planning and Environment
Subject:	Collective Energy Switching
Report of:	Director of Planning and Environment
Strategy/Policy:	
Corporate Objective:	Protecting and Enhancing our Environment A balanced housing market

Purpose:

To seek endorsement and approval for Fareham Borough Council to join a County wide Collective Energy Switching scheme led by Hampshire County Council.

Executive summary:

Collective energy switching aims to enable residents to reduce their energy bills by giving them easy access to better energy prices through collective purchasing power and a simple process for switching. Schemes are mostly targeted at those who are likely to be on a higher tariff than they should be, such as those who have never switched supplier, vulnerable residents and those in fuel poverty.

Hampshire County Council has written to individual Local Authorities in the Borough to invite them to be part of a County wide Collective Energy Switching project with the aim of reaching the largest possible target market.

The process would involve Hampshire County Council tendering for a partner provider who would organise the majority of the logistics of any switch. This partnership would create a "brand", similar to Insulate Hampshire, which would utilise public confidence in the County Council and Local Authorities.

Hampshire County Council and their chosen partner would undertake the majority of the marketing, although Fareham Borough Council would be expected to help with the marketing of the brand at a local level. The overall aim would be to sign up as many residents as possible, focussing especially on those residents most in need, such as those in fuel poverty. Once residents have signed up to the project a reverse auction is run, with energy companies trying to offer the lowest tariff. Those who have signed up are then offered the new tariff and those that agree are then switched to the new provider.

Recommendation:

That the Executive supports Fareham Borough Council's involvement in a County wide Collective Energy Switching project.

Reason:

To help residents reduce their energy bills through collective purchasing power.

Cost of proposals:

There are no capital costs to join the County wide scheme. Hampshire County Council are likely to fund the high level marketing but will recoup this expenditure through a "finders fee" paid to the partnership by the energy company that gained the new customers.

The costs to Fareham Borough Council will only be in Officers time, with the Communications team required to help with local marketing, the Strategic Housing team required to identify and contact those who will benefit the most from the scheme and the Sustainability Co-ordinator organising overall Fareham Borough Council involvement.

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: Collective Energy Switching

Briefing by: Director of Planning and Environment

Portfolio: Strategic Planning and Environment

INTRODUCTION

1. Collective energy switching aims to enable residents to reduce their energy bills by giving them easy access to better energy prices through collective purchasing power and a simple process for switching. Schemes are mostly targeted at those who are likely to be on a higher tariff than they should be, such as those who have never switched supplier, vulnerable residents and those in fuel poverty.

PROPOSAL

2. Hampshire County Council has invited Fareham Borough Council to be part of a County wide Collective Energy Switching project. The proposal would be run in a similar way to the successful Insulate Hampshire project with Hampshire County Council running a tender for a partner provider who will undertake the majority of the logistical work, with Hampshire County Council and Local Authorities responsible for local marketing. The project will run initially for 1 year, although there is potential to undertake multiple "switches" in this one year contract, but it could then be extended to up to four years if deemed successful.
3. Hampshire County Council are considering either creating a new partnership arrangement between local authorities, Hampshire County Council and the chosen partner or simply carrying on with the partnership already in place dealing with the Insulate Hampshire scheme. Hampshire County Council are currently assessing the legality of changing the terms of reference in the Insulate Hampshire scheme to allow for a new partner provider, and potentially adding Portsmouth and Southampton City Council's as members (these authorities did not take part in Insulate Hampshire).
4. Hampshire County are looking to undertake a tender exercise starting in late January or February 2013 and would like to have some Local Authority commitment before this process starts.

DETAILS

5. An individual "switch" would typically entail:
 - Marketing
 - Residents registering to be part of the project
 - A "reverse auction" run with a range of energy providers (lowest bid wins)
 - The best tariff is then identified and offered to the potential participants and they have the option to switch
 - The collective switch is then arranged
6. Hampshire County Council would undertake a central marketing campaign in conjunction with a designated "brand" with the chosen partner provider. Fareham Borough Council would be required to undertake a more local marketing campaign to ensure the information reaches as many people as possible. The more households that sign up to the scheme, the better deal they are likely to receive.
7. The project will be open to ALL residential properties, both market and social housing, in the first instance, with the potential to include small, medium-sized enterprises further down the line. It will be in the interest of Fareham Borough Council to ensure residents in fuel poverty are made aware of the scheme, which may involve targeted marketing.
8. A reverse auction is run with various energy providers competing to win the switch by offering their lowest possible tariff. In any of the individual "switches" the partner provider will be asked to provide multiple tariffs, the idea being to give people options and to give people the best deal. This will cover electric and gas, as well as dual fuel tariffs. There may be options to consider "off-grid" tariffs in future switches.
9. Residents that sign up to the scheme will be asked to submit details from a recent energy bill. This information will be important so that when an energy provider then wins the reverse auction, they can use it to provide a bespoke offer showing a comparison between what an individual household is currently paying compared to the new offered tariff, and they can also calculate the saving made. At this point those who have registered will have the choice whether to take the offered tariff or not, those that agree will then be switched onto the new tariff.
10. This process can then be repeated as many times as required within the contract timeline.

RESOURCE IMPLICATIONS

11. In terms of financial implications Hampshire County Council originally discussed the option of each authority adding money to a central pot for marketing, but there appeared to be limited appetite for this. Hampshire County Council has since offered to put up around £30,000 for a central marketing pot, and then would encourage each individual authority to do their additional marketing within existing resources (website, Facebook, Fareham Today etc).

Hampshire County Council would most likely recoup this expenditure through a "finders fee" which energy providers would pay to the partnership following any "collective switch".

Any extra money that comes through this "finders fee" would be put into a Hampshire Wide Energy Fund which would then be used for projects to reduce fuel poverty across the County. The exact details of the size of the "finders fee" and the amount left over is difficult to determine without knowing how many residents will sign up.

12. There are time implications on Fareham Borough Council staff to ensure that marketing is effective at a local level, and to ensure we engage with those who would benefit most from a collective switch, such as those in fuel poverty. The Communications team and the Sustainability Co-ordinator will be required to help with local marketing and "getting the message out" via sources such as the Council's website, Council connect, Fareham Today, press release, Facebook, Twitter etc. The Strategic Housing team will be required to identify and potentially contact those who will benefit the most from the scheme. There will also be a requirement for Fareham Borough Council to be a member of the working partnership to ensure that any concerns or issues the Council may have during the project are duly taken into account.
13. It is important to stress that communication and marketing will be key in ensuring the success of this project. The process has to be as simple as possible and as wide reaching in possible to ensure community engagement and resident buy in.

CONCLUSION

14. Collective Energy Switching schemes offer residents the potential to reduce their energy bills at no cost through collective purchasing power. Many people are currently not on the best energy deals because they find the prospect of switching energy suppliers daunting. This process removes this barrier as the work is done for them. Even after signing up for the project residents are under no obligation to take up the offered tariff. This scheme could help not only those residents currently in fuel poverty, but potentially all residents in the Borough.
15. This project has minimal resource implications to the Council and involves no financial outlay.

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FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Strategic Planning and Environment
Subject:	Consultation on Planning Performance and the Planning Guarantee
Report of:	Director of Planning and Environment
Strategy/Policy:	
Corporate Objective:	Dynamic, prudent and progressive council; Maintain and extend prosperity; Strong and inclusive communities;

Purpose:

This report reviews the consultation on 'Planning Performance and the Planning Guarantee' and makes recommendations on the response to the Government.

Executive summary:

On the 22nd November the Government began a consultation on 'Planning Performance and the Planning Guarantee'. The consultation sets out the criteria that might be used to assess planning authority performance, what thresholds might be used, how any designations would be made and the consequences of such a designation. Where a Planning Authority has been designated as poorly performing applicants for planning permission will be able to apply directly to the Planning Inspectorate. It also proposes a refund of the planning application fee in cases where the planning guarantee is not met.

Recommendation:

That the Executive agrees the Council's response to the government consultation on 'Planning Performance and the Planning Guarantee' as set out in Appendix B to this report.

Reason:

To ensure that the Government is made aware of this Council's views before any changes are made to existing planning legislation

Cost of proposals:

The administration and additional work associated with planning performance agreements is unlikely to have any major impact upon resources.

Failure to make decisions on any planning applications within 26 weeks (unless agreed with the applicant) could result in the planning application fee being repaid in full.

Appendices A: [Planning Performance and the Planning Guarantee - consultation by Department of Communities & local Government - November 2012](#)

B: Proposed Council response to consultation

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: Consultation on Planning Performance and the Planning Guarantee

Briefing by: Director of Planning and Environment

Portfolio: Strategic Planning and Environment

INTRODUCTION

1. This report concerns a consultation from the Department for Communities and Local Government concerning "Planning performance and the planning guarantee". The underlying aim is to stimulate economic growth by seeking to ensure that quality planning decisions are made as quickly and efficiently as possible.
2. The aims would be facilitated by "The Growth and Infrastructure Bill", which was introduced to Parliament on 18 October 2012. If the quality or speed of decisions on planning applications by Local Planning Authorities is judged to be unacceptable (as set out in greater detail within the following Executive Briefing Paper) applicants will be given the option of making planning applications directly to the Secretary of State from the outset.
3. The consultation sets out how the Government proposes to measure quality and speed and requests views on specific questions. It should be noted that the questions are focussed upon the method of implementation and review rather than seeking views upon the overall principle.

SYNOPSIS OF THE CONSULTATION DOCUMENT

4. The focus of the consultation is upon poorly performing Local Planning Authorities and emphasises that it will apply where there is clear evidence of very poor performance.
5. Performance would be assessed by the speed and quality of decisions made and any Authority failing would be designated as poorly performing. It is proposed that these be assessed as follows:-

SPEED

6. The Government expects that local planning authorities make decisions within the statutory periods wherever possible. These periods are: 16 weeks in the case of applications subject to an Environmental Impact Assessment; 13 weeks for major planning applications; and 8 weeks for virtually all other cases.
7. Major applications are seen as the most important for driving economic growth. Major applications are defined as those: comprising housing schemes of 10 or more houses (or sites greater than 0.5 hectares or more where the number of dwellings is not yet known); development involving 1,000 square metres or more of new floorspace or a site area of 1 hectare or more; and development involving minerals and waste.
8. Local planning authority performance is proposed to be assessed on the extent to which applications for major development are determined within 13 weeks, averaged over a two year period. This assessment would be made once a year.
9. The National Planning Policy Framework encourages the use of Planning Performance Agreements (PPAs). These are timetable agreements between the Authority and the applicant where it is clear – at the pre-application or post application submission stage – that more time will be required to reach a decision. These applications would not be included in the assessment of the time within which an Authority makes its planning decisions.

QUALITY

10. As a quantitative means of assessment, the consultation proposes the use of the planning appeal success rate for major development as a measure of quality.
11. The Government believes that successful appeals provide an indication of whether planning authorities are making decisions that reflect policies in up-to-date plans and the National Planning Policy Framework. The consultation recognises that Local Authorities deal with differing numbers of major application appeals so it suggests that the number of major development appeals allowed each year needs to be related to the total volume of applications dealt with. The measure of quality should be the proportion of all major decisions made that are overturned at appeal, over a two year period.

PROVIDING THE RIGHT INFORMATION

12. The proposed measure of time taken to make planning decisions (i.e. decisions taken within the statutory period and the number of major applications decided) relies upon accurate data being supplied to the Department of Communities and Local Government (DCLG) on a regular basis. This information is already supplied by Fareham Borough Council as part of the quarterly returns to the DCLG.

13. The Government raises concern that some local authorities could withhold data for quarters in which their performance has slipped so that to discourage this:

- Data for a single missing quarter in one reporting (financial) year would be estimated from the returns for other quarters;
- Where data for two or three quarters in a reporting year are missing, figures for the absent quarters would be imputed in a similar way, but with a penalty of a reduction of five percentage points per missing quarter for the speed of decisions, and one percentage point per missing quarter for decisions overturned at appeal;
- Any authority with a whole year of data missing would automatically designated as very poor performing;
- Planning authorities would be given an opportunity to fill gaps in the existing data prior to any performance designations being made.

Designation as poorly performing would be automatic by setting fixed thresholds:

- where 30% or fewer major applications have been determined within the statutory period or more than 20% of major decisions have been overturned at appeal.

14. To achieve increasing incentive it is proposed to 'raise the bar' for the speed of decisions after the first year.

DESIGNATION

15. Designations would be made once a year and last for at least a year. Designation would automatically follow the publication of the relevant statistics on processing speeds and appeal outcomes for the year. Initial designations would be made in October 2013 which would mean that assessment would be made on the basis of performance from 2011 - 2012 and 2012 - 2013. A designated authority would need to demonstrate a sufficient degree of improvement before the designation is lifted.

16. If a Local Planning Authority is 'designated', the following would apply:

- Applicants for major development will have the option of applying directly to the Secretary of State;
- Related applications may also be made to the Secretary of State at the same time (listed building etc).

17. The Planning Inspectorate would carry out this role on behalf of the Secretary of State.

18. Those applying directly to the Planning Inspectorate would be able to seek pre-application advice from the Planning Inspectorate, the local planning authority or both.
19. The Planning Inspectorate would also receive the application fee but the Council would still have to undertake the following:
 - Site notices and neighbour notification;
 - Providing the planning history for the site;
 - Notification of any cumulative impact considerations, such as where environmental impact assessment or assessment under the Habitats Regulations is involved, or there may be cumulative impacts upon the highways network;
 - Section 106 agreements that may be appropriate;
 - Discharge of any planning conditions.
20. Most applications for major development determined by Local Planning Authorities are decided at a planning committee meeting. It is proposed that applications to the Planning Inspectorate would be examined principally by written representations with the option of a short hearing to allow the key parties to briefly put their points in person.
21. The performance standard for the Inspectorate in dealing with applications would, initially, be to determine 80% of cases within 13 weeks (or 16 weeks in the case of applications for major development which are subject to environmental impact assessment) and the Planning Inspectorate will provide quarterly data on its performance. The performance standard will be reviewed annually.
22. The scheme does not provide for any right of appeal once an application has been decided by the Inspectorate as the application will already have been considered on behalf of the Secretary of State, mirroring non-determination appeals.
23. The Government anticipates that the legislation will stimulate an increased focus on performance across planning authorities generally, and will help to ensure that the Planning Guarantee is met.

PLANNING GUARANTEE

24. The Planning Guarantee was announced in the Plan for Growth (March 2011). The principle is that no planning application should take more than a year to decide, including any appeal. Therefore any planning application should be with the Local Planning Authority for no more than 26 weeks; and similarly no more than 26 weeks with the Planning Inspectorate.

25. Exceptions are to this approach are:

- Applications subject to Planning Performance Agreements;
- Planning appeals for particularly complex developments;
- Planning appeals that relate to enforcement cases.

26. The Government considers that the prospect of authorities being designated on the basis of very poor performance will help to deliver the Planning Guarantee, as this should encourage an increased focus on the timeliness of decisions.

27. The Planning Guarantee applies to individual decisions rather than individual planning authorities. It is also proposed that a refund of the planning application fee should be made for any planning application remaining undetermined after 26 weeks.

COMMENTS

28. The clear aim of the consultation is a drive to ensure Local Planning Authorities make quicker and better quality decisions. This is already an aim of this authority when taking decisions and therefore in principle the objective is strongly supported

29. The principal of monitoring how many applications are being decided within the statutorily designated time periods is not a new approach. Performance tables were used in the recent past to establish performance levels in connection with the assessment of Planning Delivery Grants. The fundamental difference from the Planning Delivery Grant assessment is that there will be penalties for poor performance as opposed to rewards for good.

30. The relative merits of the method proposed are not for debate, but the means of assessing performance is. Designation (as a poor performer) would be automatic if the Authority failed to meet the thresholds set for speed or quality (either could result in designation as a poorly performing Authority).

31. As Members will be aware, there are a number of reasons why a planning application might not be determined within statutory timetables at the present time. These include:

- Complicated planning proposals raising multiple issues;
- A desire to achieve high quality schemes through negotiating proposals with applicants;
- Negotiations upon complicated legal agreements which can include other agencies (e.g. Hampshire County Council);
- Seeking further changes and additional information to address issues arising during consideration of the planning application.

32. Whilst these have resulted in decisions being taken outside 13 weeks, they have resulted in the majority of cases in negotiated planning permissions which are acceptable to the applicant.

33. In future this Authority would need to encourage applicants to enter into Planning Performance Agreements (PPAs) where the determination period was likely to extend beyond 13 weeks. This has not been done to date at Fareham, but in principle, officers do not see an objection to such an approach. The Government is seeking views on simplifying the approach to PPAs further still if possible and officers would support keeping the 'bureaucracy' to the absolute minimum wherever possible.
34. In the event that Fareham Borough Council was designated as poorly performing, it would lose the automatic right to determine major planning applications and applicants could chose determination by the Planning Inspectorate. The Consultation clarifies that the majority of applications would be handled in a form of written representation procedure. The effect would be that although local people would still be able to comment on applications, the determination by a democratically elected committee could be lost for those very applications where this is seen to be the most equitable process.

CONCLUSION

35. The principle of what the Government is seeking to achieve is supported. Concern is raised with some of detailed proposals and the implications of them. These are detailed in the suggested formal response attached at Appendix B to the Executive report.

APPENDIX B

Proposed Council response to consultation

Question 1: Do you agree that local planning authority performance should be assessed on the basis of the speed and quality of decisions on planning applications?

The Authority accepts that the monitoring of decision making performance is an established part of the ongoing planning regime and that it has an important place. It does not question the need to establish areas of poor performance and to seek to improve these. Assessing the percentage of appeals allowed as part of the total number of decisions made on planning applications is acceptable in principle; there is however a risk that planning proposals which are 'marginal' might be permitted to avoid the risk of an allowed appeal.

Question 2: Do you agree that speed should be assessed on the extent to which applications for major development are determined within the statutory time limits, over a two year period?

This authority is supportive of the approach in principle. Concern is raised however that the Government is to apply the assessment retrospectively. There are a number of major planning applications which this authority did not determine within 13 weeks and which were not subject to planning performance agreements. They were negotiated with applicants who were aware of timescales and did not object to the fact that decisions were made beyond the 13 week period.

Question 3: Do you agree that extensions to timescales, made with the written consent of the applicant following submission, should be treated as a form of planning performance agreement (and therefore excluded from the data on which performance will be assessed)?

This represents a good approach fully in line with this authority's own aims to reduce unnecessary bureaucracy.

Question 4: Do you agree that there is scope for a more proportionate approach to the form and content of planning performance agreements?

A more proportionate use of such agreements would be welcomed. Again this represents an approach in line with this authority's own aims to reduce unnecessary bureaucracy.

Question 5: Do you agree that quality should be assessed on the proportion of major decisions that are overturned at appeal, over a two year period?

The Authority believes that the two tests should be taken in combination since it believes that there is a case to suggest that longer determination periods can in some cases lead to better 'quality' decisions and reduce the need to appeal which is in the long term interests of good planning and growth encouragement. There is also a risk that planning proposals which are 'marginal' might be permitted to avoid the risk of an allowed appeal.

Question 6: Do you agree with the proposed approach to ensuring that sufficient information is available to implement the policy?

This authority currently submits performance data on a quarterly basis and does not object in principle to this approach.

Question 7: Do you agree that the threshold for designations should be set initially at 30% or fewer of major decisions made on time or more than 20% of major decisions overturned at appeal?

See 5 above. It is the Authority's view that the two performance measured should be combined.

Question 8: Do you agree that the threshold for designation on the basis of processing speeds should be raised over time? And, if so, by how much should they increase after the first year?

This authority believes it would be best to review the thresholds once the system has been operating for a time, thereby enabling a full understanding of the impact of the changes upon the decision making process.

Question 9: Do you agree that designations should be made once a year, solely on the basis of the published statistics, as a way to ensure fairness and transparency?

Yes, subject to the response provided at question 5.

Question 10: Do you agree that the option to apply directly to the Secretary of State should be limited to applications for major development?

Yes

Question 11: Do you agree with the proposed approaches to pre-application engagement and the determination of applications submitted directly to the Secretary of State?

It is recommended that pre-application advice should be required in all cases which are to be submitted directly to the Planning Inspectorate. Determination of major applications without local engagement or debate, especially large scale schemes, would substantially reduce the scope for involvement by local residents and communities from that which currently exists.

Question 12: Do you agree with the proposed approach to supporting and assessing improvement in designated authorities? Are there specific criteria or thresholds that you would propose?

Supporting poorly performing Authorities and monitoring improvement appears to be fundamental baseline if a penalty based system is to be introduced.

Question 13: Do you agree with the proposed scope of the planning guarantee?

At face value one year to determine any application should be sufficient in most cases. There remain extensive applications involving complex issues that can result in longer periods where applicants themselves struggle to achieve the next timescales.

Question 14: Do you agree that the planning application fee should be refunded if no decision has been made within 26 weeks?

Measures need to be in place to ensure applicants cannot deliberately delay determination to obtain a refund.



Department for
Communities and
Local Government

Planning performance and the planning guarantee

Consultation

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The consultation process and how to respond

Scope of the consultation

Topic of this consultation:	The Growth and Infrastructure Bill will allow applicants for planning permission to apply directly to the Planning Inspectorate, where a planning authority has been designated as poorly performing. This consultation seeks views on our proposals for how this measure would be implemented, and for related proposals for the planning guarantee.
Scope of this consultation:	The consultation sets out the criteria that might be used to assess planning authority performance, what thresholds might be used, how any designations would be made and the consequences of such a designation (including the procedures that would apply where an application is submitted to the Planning Inspectorate, and the basis on which a designation would end). It also proposes a refund of the planning application fee in cases where the planning guarantee is not met.
Geographical scope:	These proposals relate to England only.
Impact assessment:	The Impact Assessment for the Growth and Infrastructure Bill can be viewed at: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/14682/growth_and_infrastructure_bill_-_impact_assessment.pdf

Basic information

To:	This is a public consultation and it is open to anyone with an interest in these proposals to respond.
Body responsible for the consultation:	The Department for Communities and Local Government is responsible for the policy and the consultation exercise.
Duration:	This consultation will run for 8 weeks. It will begin on Thursday 22 November 2012 and end on Thursday 17 January 2013.
Enquiries:	E-mail: robert.shane@communities.gsi.gov.uk

How to respond:	<p>Please respond to this consultation by email to: PlanningPerformance@communities.gsi.gov.uk</p> <p>Alternatively, please send postal responses to:</p> <p>Robert Shane Planning Performance Consultation Department for Communities and Local Government 1/J1 Eland House Bressenden Place London SW1E 5DU</p>
Additional ways to become involved:	N/A
After the consultation:	A summary of responses to the consultation will be published.

Background

Getting to this stage:	<p>The Growth and Infrastructure Bill can be viewed at: http://www.publications.parliament.uk/pa/bills/cbill/2012-2013/0075/cbill_2012-20130075_en_1.htm</p> <p>The Planning Guarantee was announced in the Plan for Growth in March 2011: http://cdn.hm-treasury.gov.uk/2011budget_growth.pdf</p>
Previous engagement:	Further details of how the planning guarantee could be implemented were announced in July 2011.

Introduction

About this consultation

1. An effective planning system plays a vital part in supporting growth – promoting and enabling the homes, jobs and facilities that communities need, and minimising uncertainty and delay for those proposing or affected by development.
2. The Government has already taken important steps to ensure that the planning system fulfils this potential – in particular by publishing the National Planning Policy Framework in March 2012. This not only represents a radical simplification of national policy, but also emphasises the need for a positive approach to both plan making and decision taking, while retaining important protections. A number of reforms to simplify and speed-up planning procedures have also been announced, including the planning guarantee – that applications should take no more than a year to decide, including any planning appeal.
3. Our reforms have given significant additional power to councils and communities in deciding the scale, location and form of development in their areas. But with this power comes a responsibility to exercise planning functions properly. The Growth and Infrastructure Bill, introduced to Parliament on 18 October, contains a number of additional proposals that build upon our existing reforms. They include a measure to enable quicker and better decisions where there are clear failures in local planning authority performance, by giving applicants the option of applying directly to the Planning Inspectorate.
4. This measure is aimed only at those few situations where councils are clearly failing to deliver an effective service. Applicants for planning permission can reasonably expect timely and good quality decisions – justice delayed is justice denied. Where there is clear evidence of very poor performance we want to give applicants the choice of a better service, but will also want to ensure that those authorities have access to the support they need in order to improve as quickly as possible.
5. This consultation asks for views on our proposals for implementing this measure once the Bill is enacted. This will help to inform debate on the clause as it progresses through Parliament. The measure would be implemented through policy and secondary legislation, the final form of which will need to reflect Parliament's decisions on the Bill. The consultation also sets out our further proposals for implementing the planning guarantee, which is closely related to the provisions in the Bill.
6. We would welcome comments from any individuals or organisations with an interest in these proposals, which apply to England only. The closing date for responses is Thursday 17 January 2013.

What are we proposing?

7. The legislation will allow applications to be submitted to the Secretary of State where a local planning authority is designated for this purpose. We intend that this power would be used only where there is a track record of very poor performance in either the speed or quality of the decisions made by an authority; and that clear benchmarks are used to define what this means in practice.
8. Where an authority is designated, we propose that applications would be submitted to the Planning Inspectorate (on behalf of the Secretary of State), where the applicant chooses this route. This ability would be limited to those seeking permission for major development¹. A designated authority would need to demonstrate a sufficient degree of improvement before the designation is lifted.
9. Apart from its direct effects, we anticipate that the legislation will stimulate an increased focus on performance across planning authorities generally, and will help to ensure that the planning guarantee is met. As a further means of ensuring that decisions are made within the guarantee period, we are also proposing a refund of the planning application fee, should an application remain undetermined after 26 weeks. This would apply to all planning applications, and be implemented through a change to secondary legislation.
10. These proposals are set out in detail in the remainder of this consultation, along with a number of questions (which are summarised at the end of the document).

¹ 'Major development' is defined in The Town and Country Planning (Development Management Procedure) (England) Order 2010, as amended. It includes housing schemes of 10 or more houses (or 0.5 hectares or more where the number of dwellings is not yet known); development involving 1,000 square metres or more of new floorspace or a site area of 1 hectare or more; and development involving minerals and waste.

Context

Why positive and timely planning decisions matter

11. Obtaining planning permission is a key step for those wishing to carry out development – whether house builders proposing new homes, businesses with plans to expand or individuals hoping to make significant changes to their property. Delays in the process can mean frustration, unnecessary expense and the loss of investment and jobs. It can also create uncertainty for communities with an interest in the proposals.
12. In 2011-12 local planning authorities made 435,000 decisions on planning applications². Some 87% of these were approved, and the majority – 78% overall – were determined within the statutory time limits.
13. However the picture is far from uniform. In particular there has been a decline in the speed with which applications for major development are decided, despite a decrease in workload: over the past four years the proportion of major applications determined within the statutory 13 week time limit has fallen from 71% (2008-2009) to 57% (2011-12) – despite an 18% drop in major decisions during the same period.
14. In the past year over a fifth of applications for major development took more than half a year to determine, and 9% took more than a year; any subsequent appeal against a refusal of permission would add further time. Some 43% of planning appeals involving major development were successful in the past year.
15. There are also big variations in the performance of individual planning authorities. For example over 25 authorities decided more than 80% of applications for major development on time in 2011-12; whereas 14 authorities dealt with fewer than 25% on time. Appeal success rates against local authority decisions ranged from 14% to 80% (excluding authorities that had five or fewer appeals).
16. We recognise that there can be good reasons for some delays, in particular where authorities and applicants have both recognised that more time than the statutory period is required to negotiate the right outcome on large or complex proposals. This is not the issue that we wish to tackle; rather it is the instances of unnecessary delay and of poor quality decisions on applications that add to costs, and which delay or deter investment and growth.
17. The quarterly survey of home builders conducted by the Home Builder's Federation consistently cites 'planning delays' as one of the most

² Excluding 'county matter' applications, such as decisions on minerals and waste schemes.

significant constraints on homebuilding; in June 2012, 77% of respondents considered such delays to be a major constraint.

18. The costs of delay can be substantial. It has been estimated that the financing costs to developers of holding onto land and other assets while their projects are being evaluated amounts to £1 billion per year, with further substantial costs associated with land holdings that are required due to the uncertainty of the planning process and as a consequence of sites that fail to gain consent. This could push financing costs from £1 billion to over £2 billion³.
19. It is because of the consequences of unnecessary delays – whether those delays arise from slow decisions or poorly judged decisions that are overturned at appeal – that we believe it is right to take action where there is clear evidence that particular planning authorities are performing very poorly. We expect to have to use this power very sparingly. The Government remains committed to decentralising power and responsibility wherever possible, and this measure will not affect the great majority of authorities that already provide an effective planning service, other than to act as a reminder of the importance of timely and well considered decisions.

³ Professor Michael Ball (November 2011) Memorandum to Communities and Local Government Committee's Inquiry into the Draft National Planning Policy Framework

Assessing performance

Our approach

20. We intend to set out the criteria for assessing performance, and the thresholds for designating any authorities under this measure, in a policy statement that will be published in response to this consultation once the Growth and Infrastructure Bill gains Royal Assent.
21. The performance of planning authorities can be looked at in a number of ways, from a focus on particular indicators to wider measures of the 'quality of service'. The overall service that planning authorities provide to applicants and local communities needs to be efficient, proportionate and effective. It is right that this continues to be the focus of improvement efforts by authorities, supported by organisations such as the Planning Officers' Society and the Planning Advisory Service.
22. At the same time we consider that the basis for identifying any cases of very poor performance needs to be kept relatively simple, so that the approach is transparent, and to avoid placing additional reporting burdens on authorities. For this reason we propose to monitor and assess performance on the basis of two key measures: the speed and quality of decisions on planning applications. These have a direct bearing on the planning system's efficiency and effectiveness for both applicants and communities; and on its contribution to growth.

Question 1: Do you agree that local planning authority performance should be assessed on the basis of the speed and quality of decisions on planning applications?

Speed of decisions

23. We propose to use the existing statutory time limits for determining planning applications, as in principle all decisions should be made within these periods – unless an extended period has been agreed in writing between the parties. This means a maximum of 13 weeks for applications for major development and eight weeks for all others⁴.
24. We also propose, for identifying and addressing very poor performance, to focus only on applications for major development – as these are the

⁴ The statutory time limits are set out in The Town and Country Planning (Development Management Procedure) (England) Order 2010, as amended. An extended period of 16 weeks applies for applications subject to The Town and Country Planning (Environmental Impact Assessment) Regulations 2011.

proposals which are most important for driving growth, and which have the greatest bearing upon communities.

25. Some authorities deal with relatively few applications for major development, and performance in dealing with such proposals in any one authority can fluctuate from quarter to quarter, depending on the number and scale of proposals under consideration. We therefore propose that performance should be assessed on the extent to which applications for major development are determined within 13 weeks⁵, averaged over a two year period. This assessment would be made once a year (see paragraph 46).
26. We have considered whether an alternative approach – of using the average processing time for determining applications for major development – could be used instead. This would not reflect the obligation to make decisions within the statutory time limits; nor would it address as effectively the minority of decisions that take considerably longer to decide. It would also require a new reporting regime, additional to the existing arrangements for reporting planning performance, to capture the time taken to decide each individual application.

Question 2: Do you agree that speed should be assessed on the extent to which applications for major development are determined within the statutory time limits, over a two year period?

The role of planning performance agreements

27. We want to ensure that we focus on genuinely poor performance, and that authorities are not penalised unfairly for delays that are beyond their control. Some applications for major development do need more than the statutory time period to decide, especially where the issues are particularly complex and involve statutory consultees. Sometimes, delays may be at the instigation of the applicant, such as where a delay is sought to avoid triggering a purchase clause linked to the granting of planning permission.
28. The National Planning Policy Framework encourages the use of planning performance agreements. These involve a bespoke timetable agreed between the authority and the applicant where it is clear – at the pre-application stage – that more time than the statutory period will be required to reach a decision. Such agreements are reported separately by authorities, and are excluded from the statistics on the extent to which decisions are made within the statutory period.
29. Agreements to extend the time for a decision beyond the statutory period sometimes need to be made after an application is submitted (as the Development Management Procedure Order explicitly allows). We

⁵ Or 16 weeks in the case of applications subject to Environmental Impact Assessment.

consider that it would be fair to treat these in the same way as planning performance agreements for reporting purposes – so that they are not included in the assessment of the time within which an authority makes its planning decisions.

30. We therefore propose that post-application agreements to extend the timescale for determination should in future be recorded as a form of planning performance agreement, provided there is explicit agreement to the extension of time from the applicant (in writing), and the agreement specifies a clear timescale for reaching a decision.
31. In proposing this, we also consider that the approach sometimes taken towards planning performance agreements needs to change. Existing guidance⁶ encourages a very thorough approach that will not always be appropriate. We would like to see a more proportionate approach which is tailored to the size and complexity of schemes and the stage that they have reached in the application process. However agreements should, as a minimum, set out a clear and agreed timescale for determining the application.

Question 3: Do you agree that extensions to timescales, made with the written consent of the applicant following submission, should be treated as a form of planning performance agreement (and therefore excluded from the data on which performance will be assessed)?

Question 4: Do you agree that there is scope for a more proportionate approach to the form and content of planning performance agreements?

Quality of decisions

32. We propose to use the appeal success rate for major development to indicate the 'quality' of decisions made by each planning authority.
33. Successful appeals against planning authority decisions represent cases where the Secretary of State, or an Inspector acting on his behalf, concludes that a different decision should have been reached and the application allowed⁷. As such they provide an indication of whether planning authorities are making positive decisions that reflect policies in up-to-date plans (where relevant) and the National Planning Policy Framework.

⁶ Advisory Team for Large Applications (2008) Guidance Note: Implementing Planning Performance Agreements

⁷ Where the authority has failed to make a decision within the statutory period, and the applicant then exercises their right to appeal against non-determination, the planning authority is deemed to have refused permission. A small minority of appeals are made against conditions attached to a grant of permission.

34. Some individual appeal outcomes can turn on small differences of view about the application or interpretation of particular policies; or about the weight to be given to different material considerations. Where, however, an authority has a sustained track record of losing significantly more appeals than the average, it is likely to reflect the quality of its initial decisions. For this reason we propose that appeal success rates should be assessed over a two year period.
35. The appeal success rate also needs to be read in context. An authority that acts positively and approves the great majority of its applications for major development, but loses a very small number of appeals brought against it, should not be penalised for 'poor performance'⁸. It follows that the number of appeals lost each year needs to be related to the total volume of applications dealt with. We therefore propose that the measure of quality should be the proportion of all major decisions made that are overturned at appeal, over a two year period.

Question 5: Do you agree that quality should be assessed on the proportion of major decisions that are overturned at appeal, over a two year period?

Having the right information

36. The proposed measures of speed and quality both rely upon accurate data being supplied to the Department on a regular basis (i.e. decisions made within the statutory period, and the total volume of major decisions made so that the proportion overturned at appeal can be calculated).
37. This information is already supplied by local authorities as part of the quarterly returns required by the single data list⁹. At present there are very few gaps in the data provided by authorities, but there is a risk that in future authorities could withhold data for quarters in which their performance has slipped.
38. To discourage this we propose the following:
- Data for a single missing quarter in one reporting (financial) year would be estimated by the Department from the returns for other quarters – based on average performance for the quarters for which information is available.
 - Where data for two or three quarters in a reporting year are missing, figures for the absent quarters would be imputed in a similar way, but with a penalty then applied in proportion to the amount of data

⁸ An authority could, of course, have also refused applications for sound reasons, such as a clear conflict with up-to-date local or national policies; but these refusals should not result in a high appeal success rate against the authority's decisions.

⁹ Department for Communities and Local Government (March 2012) Single list of central government data requirements from local government

missing. We propose that this penalty would be a reduction of five percentage points per missing quarter for the speed of decisions, and one percentage point per missing quarter for decisions overturned at appeal¹⁰.

- Any authority with a whole year of data missing would automatically be designated as very poor performing.
39. For the initial introduction of the measure we also propose that planning authorities would be given an opportunity to fill gaps in the existing data prior to any designations being made¹¹. Gaps in the existing data which are not filled by authorities in this way will be imputed (and, if necessary, penalised) as described above.
40. The current statistical returns supplied to the Department do not indicate the determination times for district applications which are subject to environmental impact assessment. These could, as a result, be counted against the 13 week time limit for applications for major development, rather than the 16 weeks which the law allows. We propose to amend the returns so that this can be remedied for future data collection. As a transitional measure, any authorities identified for potential designation on the basis of existing data will be given an opportunity to notify us of any environmental impact assessment cases relating to applications for major development during the assessment period, which will be discounted from the calculation of performance.
41. To ensure that the information on which any designations would be based is readily available, the Department will publish quarterly statistics on the extent to which decisions on applications for major development have been overturned at appeal, alongside the existing data on the extent to which decisions are made within the statutory time periods.

Question 6: Do you agree with the proposed approach to ensuring that sufficient information is available to implement the policy?

Setting the bar

42. We wish to set out very clearly what constitutes sufficiently poor performance for a planning authority to be designated once the Growth and Infrastructure Bill becomes law. A minimum standard will provide certainty to authorities about the action they must take where their performance is poor; and make clear to applicants the circumstances in which they can expect the Government to act when there is demonstrable evidence that planning is not being delivered effectively.

¹⁰ For example: an authority that processed 40% of its major decisions within the statutory period over the reporting year as a whole (calculated in part using imputed data), and which had three quarters of data missing, would have its overall figure reduced to 30% for the year.

¹¹ i.e. information for the two reporting years against which performance will be assessed – likely to be 2011-12 and 2012-13

43. We therefore propose using absolute thresholds below which authorities would be designated, rather than a fixed percentage of authorities that are performing most poorly on the basis of speed or quality.
44. We intend to set these thresholds so that only very poor performance would result in an authority being designated: where 30% or fewer major applications have been determined within the statutory period or more than 20% of major decisions have been overturned at appeal. We consider it important that a designation could be made on the basis of either measure (rather than a combination of the two), so that applicants can access a better service where speed or quality is a significant issue.
45. We also propose raising the bar for the speed of decisions after the first year, to ensure that there is a strong but achievable incentive for further improvement in performance, and to reflect an anticipated increase in the use of planning performance agreements for the more difficult cases as proposed elsewhere in this consultation.

Question 7: Do you agree that the threshold for designations should be set initially at 30% or fewer of major decisions made on time or more than 20% of major decisions overturned at appeal?

Question 8: Do you agree that the threshold for designation on the basis of processing speeds should be raised over time? And, if so, by how much should it increase after the first year?

Making a designation

46. We wish to avoid frequent changes in the authorities to which a designation applies; to provide certainty for both applicants and councils, and to ensure that any designated authorities have sufficient time to improve. We therefore propose that designations would be made once a year, and that those authorities which are designated would remain in that situation for at least a year.
47. Any designations would need to be made fairly and transparently. We therefore propose that the designation process would follow automatically, following the publication of the relevant statistics on processing speeds and appeal outcomes for the year, were an authority to appear below the thresholds that have been set. For the first year, before any initial designations are made, authorities will be given an opportunity to correct any gaps or errors in the existing data (see paragraph 39 above); cases that were subject to environmental impact assessment will also be taken into account (see paragraph 40).
48. It will be clear from each year's data not just which authorities are to be designated (if any), but also which authorities are just above the bar and need to improve to avoid a designation the following year.

Question 9: Do you agree that designations should be made once a year, solely on the basis of the published statistics, as a way to ensure fairness and transparency?

49. Once the Growth and Infrastructure Bill receives Royal Assent we anticipate that the first designations would be made once the necessary secondary legislation is in place (planned for October 2013). The timetable would be:
- April 2013: Response to consultation announced; criteria and initial thresholds for designations confirmed
 - July 2013: Performance data for 2012-13 (as well as 2011-12) available, indicating which authorities are liable for designation
 - August-September 2013: Opportunity to correct any data errors and account for applications subject to environmental impact assessment
 - October 2013: Secondary legislation in place and initial designations made
50. For unitary authorities we propose that 'county matter' applications would be assessed – and any designations made – separately from the assessment of 'district' performance. Because unitary authorities deal with both types of application, taking their average performance across all types of case would not involve the same mix of application types faced by either district authorities or county councils (and so preclude a comparable assessment of performance).
51. The Bill sets out a limited number of planning authorities to which a designation would not apply: the Homes and Communities Agency, Mayor of London, a Mayoral development corporation and an urban development corporation. Where these organisations have responsibility for determining applications, it is specifically for deciding particularly large or complex schemes, so it would not be appropriate to assess their performance in the same way.

Effects of designation

Application process

52. Where a planning authority is designated on the basis of very poor performance, the Growth and Infrastructure Bill would give applicants the option of applying directly to the Secretary of State; applicants could if they wish continue to apply to the designated authority in the usual way.
53. The legislation would allow the Secretary of State to prescribe the types of development to which this choice would apply. As already explained (paragraph 24 above) we propose that it be limited to applications for major development, being those which are most important for driving growth, and which have the greatest bearing upon communities.
54. Where an application is submitted directly in this way, certain related applications may also be made to the Secretary of State at the same time. The Bill makes specific provision for applications for listed building and conservation area consent¹²; we do not intend at present to prescribe any additional categories of related consent.
55. The Bill also allows the Secretary of State to appoint persons to determine applications on his behalf, and we propose that the Planning Inspectorate carries out this role (the Secretary of State would also be able to 'recover' any such cases for his own determination, but we would expect that this power would be used sparingly).
56. Early pre-application discussions can have significant benefits for the overall efficiency and effectiveness of the planning application process, including the prospects for securing timely decisions once a planning application has been submitted. Those applying directly to the Secretary of State would be able (and encouraged) to seek pre-application advice from the Planning Inspectorate, the local planning authority or both. We propose that the Inspectorate would charge for any pre-application advice on a cost recovery basis.
57. The Planning Inspectorate would also receive the application fee (on behalf of the Secretary of State) for any application submitted directly to it, and we propose to amend the regulations so that this would be set at the same level as the fees payable to local planning authorities.
58. We propose that the process for determining applications submitted to the Inspectorate should mirror, as far as possible, that which usually applies when an application is submitted to a local planning authority. The Development Management Procedure Order would be modified

¹² The Enterprise and Regulatory Reform Bill currently before Parliament proposes to remove the requirement for conservation area consent to be obtained

accordingly. A necessary exception to this principle is the planning committee stage, alternative proposals for which are set out below.

59. Where a planning application is submitted directly to the Secretary of State there will be a small number of administrative functions which, for practical reasons, will need to be carried out locally. We propose that these should continue to be undertaken by the designated local planning authority (and the Bill allows the Secretary of State to issue directions to this effect). We propose that these functions would include:
 - Site notices and neighbour notification
 - Providing the planning history for the site
 - Notification of any cumulative impact considerations, such as where environmental impact assessment or assessment under the Habitats Regulations is involved, or there may be cumulative impacts upon the highways network
60. The Planning Inspectorate would specify a timescale for the completion of these tasks. While we think that the planning authority is best placed to do this work, we would welcome views on whether alternative approaches should be considered, such as the use of a local agent.
61. The local planning authority would remain responsible for maintaining the planning register for its area, including details of any applications that are submitted directly to the Planning Inspectorate. The Planning Inspectorate would notify the planning authority of such applications.
62. Most applications for major development determined by local planning authorities are decided at a planning committee meeting, providing an opportunity for the merits of the proposal to be considered in public. The Bill allows the Secretary of State to determine the procedure to be followed where an application is submitted directly to him. We propose that the Planning Inspectorate should choose the most appropriate procedure to employ on a case by case basis (which could be an abbreviated form of hearing or inquiry, or written representations); but that the presumption should be that applications are examined principally by means of written representations with the option of a short hearing to allow the key parties to briefly put their points in person.
63. We do not propose that the Planning Inspectorate would enter into discussions with the applicant about the nature and scope of any section 106 agreement that may be appropriate, as we consider these are best determined locally by the applicant and the planning authority. In determining an application the Inspectorate would take into account, as a material consideration, any planning obligation advanced by the applicant, or any agreement which the applicant has entered into (or is prepared to enter into) with the authority.
64. We want to ensure that the Planning Inspectorate can offer a high standard of service when applications are submitted to it. We propose

that the performance standard for the Inspectorate in dealing with applications would, initially, be to determine 80% of cases within 13 weeks¹³ (or 16 weeks in the case of applications for major development which are subject to environmental impact assessment); unless an extended period has been agreed in writing with the applicant. This compares to the current average performance among planning authorities of deciding 57% of applications for major development within 13 weeks. The Inspectorate will provide quarterly data on its performance, and the performance standard will be reviewed annually.

65. The Bill does not provide for any right of appeal once an application has been decided by the Inspectorate, other than judicial review, as the application will already have been considered on behalf of the Secretary of State. This mirrors the position where applicants for planning permission choose to appeal against non-determination. Applicants will be made fully aware of this if they choose to submit their applications directly to the Inspectorate.
66. The discharge of any planning conditions attached to a planning permission issued by the Inspectorate would remain the responsibility of the local planning authority.

Question 10: Do you agree that the option to apply directly to the Secretary of State should be limited to applications for major development?

Question 11: Do you agree with the proposed approaches to pre-application engagement and the determination of applications submitted directly to the Secretary of State?

Supporting and assessing improvement

67. Any authorities designated on the basis of very poor performance will need time to improve, support while they are doing so and a fair opportunity to show when – and to what extent – their performance has improved.
68. We are proposing that any designation would last for at least a year, but would be subject to review well before that year ends, so that the authority has every opportunity for the designation to be lifted at the end of the one year period. During the period of designation we would expect the authority to take maximum advantage of opportunities for peer support and other forms of sector-led improvement (such as those offered through the Planning Advisory Service); and to explore options for radical change such as shared services.

¹³ This is in line with a number of existing performance standards for the Inspectorate

69. Designated authorities will not necessarily be dealing with a significant number of applications for major development, so we propose that any assessment of improvement should be based on a range of other considerations that we will set out in policy:
- The authority's performance in determining all those applications for which it remains responsible
 - Its performance in carrying out any administrative tasks associated with applications submitted directly to the Secretary of State (see paragraph 59 above)
 - A review of the steps taken by the planning authority to improve, and its capacity and capability to deal efficiently and effectively with major planning applications
70. This assessment would be undertaken by the Department for Communities and Local Government.

Question 12: Do you agree with the proposed approach to supporting and assessing improvement in designated authorities? Are there specific criteria or thresholds that you would propose?

The planning guarantee

Principles and scope

71. The planning guarantee was announced in the Plan for Growth (March 2011). The principle is simple: that no planning application – major or otherwise – should take more than a year to decide, even where a planning appeal has been made. It does not replace the statutory time limits for determining applications, which should continue to be met wherever possible, but instead provides a ‘longstop’ date by which any schemes that take longer (or which involve a planning appeal) should be determined.
72. In practice the guarantee means that cases should spend no more than 26 weeks with either the local planning authority or, in the case of appeals, the Planning Inspectorate. This gives both decision-making bodies an equal maximum time to come to a view, limiting the risk that over-runs with one part of the process might restrict the scope for the guarantee to be met. A similar 26 week limit would in future apply to the Planning Inspectorate where it is determining planning applications submitted to it directly as a result of the proposals in the Bill.
73. The guarantee applies to the time a valid application spends with these decision-making bodies. It does not cover the period before an application is submitted, after permission is granted, or any time between the local planning authority’s decision and any subsequent decision by the applicant to appeal. This is because the behaviour of applicants can have a significant bearing upon the length of these periods; for example, they have up to six months to decide whether to lodge an appeal against a refusal (12 weeks in the case of householder applications).
74. There are a small number of cases which, exceptionally, we propose to exclude from the scope of the planning guarantee. These are:
 - Applications subject to Planning Performance Agreements, due to the bespoke timetables involved
 - Similarly, planning appeals subject to bespoke timetables agreed between the main parties for particularly complex cases (including Secretary of State casework where this applies¹⁴)
 - Planning appeals that relate to enforcement cases (which are often particularly complex with additional evidence coming forward during the course of the appeal); or which involve re-determinations following a successful judicial review

¹⁴ i.e. ‘recovered’ appeals and call-ins

Question 13: Do you agree with the proposed scope of the planning guarantee?

Delivering the guarantee

75. An initial monitoring report on performance against the planning guarantee was published earlier this year, and we will continue to report on it annually¹⁵. The great majority of decisions on both planning applications and appeals are made well within 26 weeks, but it is reasonable to consider what further measures could be taken to encourage all decisions to be made within this time (subject to the exemptions mentioned above).
76. The prospect of authorities being designated on the basis of very poor performance in determining applications for major development within the statutory period will help to deliver the planning guarantee, as this should encourage an increased focus on the timeliness of decisions.
77. As the guarantee applies to individual decisions (rather than individual planning authorities) we consider that an additional measure would also help to ensure that the guarantee is met. We therefore propose to amend secondary legislation to require a refund of the planning application fee, where a planning application remains undecided after 26 weeks¹⁶. This would apply to planning authorities and to the Planning Inspectorate (where it is responsible for determining major planning applications).
78. Applications subject to a planning performance agreement would be excluded from this measure. We would want to avoid any risk of applicants deliberately delaying the determination of an application in order to obtain a refund, or of authorities refusing applications just to avoid the penalty; such behaviour would be taken into account by an Inspector in considering whether to award costs in any subsequent appeal proceedings.

Question 14: Do you agree that the planning application fee should be refunded if no decision has been made within 26 weeks?

¹⁵ Department for Communities and Local Government (September 2012) Planning Guarantee Monitoring Report

¹⁶ Unless the application falls into one of the exempted categories noted above

Consultation questions

Question 1: Do you agree that local planning authority performance should be assessed on the basis of the speed and quality of decisions on planning applications?

Question 2: Do you agree that speed should be assessed on the extent to which applications for major development are determined within the statutory time limits, over a two year period?

Question 3: Do you agree that extensions to timescales, made with the written consent of the applicant following submission, should be treated as a form of planning performance agreement (and therefore excluded from the data on which performance will be assessed)?

Question 4: Do you agree that there is scope for a more proportionate approach to the form and content of planning performance agreements?

Question 5: Do you agree that quality should be assessed on the proportion of major decisions that are overturned at appeal, over a two year period?

Question 6: Do you agree with the proposed approach to ensuring that sufficient information is available to implement the policy?

Question 7: Do you agree that the threshold for designations should be set initially at 30% or fewer of major decisions made on time or more than 20% of major decisions overturned at appeal?

Question 8: Do you agree that the threshold for designation on the basis of processing speeds should be raised over time? And, if so, by how much should they increase after the first year?

Question 9: Do you agree that designations should be made once a year, solely on the basis of the published statistics, as a way to ensure fairness and transparency?

Question 10: Do you agree that the option to apply directly to the Secretary of State should be limited to applications for major development?

Question 11: Do you agree with the proposed approaches to pre-application engagement and the determination of applications submitted directly to the Secretary of State?

Question 12: Do you agree with the proposed approach to supporting and assessing improvement in designated authorities? Are there specific criteria or thresholds that you would propose?

Question 13: Do you agree with the proposed scope of the planning guarantee?

Question 14: Do you agree that the planning application fee should be refunded if no decision has been made within 26 weeks?

FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Policy, Strategy and Finance
Subject:	Finance Strategy, Capital Programme, Revenue Budget and Council Tax 2013/14
Report of:	Director of Finance and Resources
Strategy/Policy:	Finance Strategy 2013/14
Corporate Objective:	A dynamic, prudent, progressive and best practice Council

Purpose:

This report reviews the Council's finance strategy and makes recommendations regarding the capital programme, the revised revenue budget for 2012/13 and the revenue budget for 2013/14.

Executive summary:

On 3 December 2012, the Executive considered the Council's capital programme, revised service budget for 2012/13 and proposed service budgets for 2013/14.

Capital Programme and Resources 2012/13 to 2016/17

The capital programme amounts to £19,903,000, and there are capital resources totalling £32,100,000 over the programme period. Whilst a surplus of capital resources exists, there are significant spending requirements emerging that require new resources to be accumulated now so that the Council can meet its future commitments.

Revised General Fund Revenue Budget 2012/13

The revised general fund revenue budget for 2012/13 amounts to £13,253,500 for service budgets with other budgets totalling £-2,795,000 giving an overall position of £10,458,500.

General Fund Revenue Budget 2013/14

The proposed general fund budget for 2013/14 totals £12,730,200 for service budgets along with £-3,055,000 for other budgets giving an overall position of £9,675,200 which is a reduction of £783,300 against the original budget for 2012/13.

Recommendation:

- (a) That the capital programme for the period 2011/12 - 2015/16, amounting to £19,903,000 be approved;
- (b) That the revised 2012/13 general fund budget, amounting to £10,458,500 be approved;
- (c) That the base 2012/13 general fund revenue budget amounting to £9,675,200 be approved;
- (d) That the Executive recommends to Council that authority to calculate the Non-domestic rate baseline for 2013/14 and subsequent years be delegated to the Director of Finance and Resources.

Reason:

To allow the Council to approve the capital programme, general fund revised revenue budget for 2012/13 and draft revenue budget for 2013/14.

Cost of proposals:

The costs are set out in the overall revenue budget and capital programme detailed in the attached briefing paper.

Appendix A: Consolidated General Fund Budget 2012/13 (revised) and 2013/14 (Base)

Background papers: None

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: Finance Strategy, Capital Programme, Revenue Budget and Council Tax 2013/14

Briefing by: Director of Finance and Resources

Portfolio: Policy, Strategy and Finance

INTRODUCTION

1. This report brings together the revenue and capital spending plans for the Council's local service agreements, as part of the Council's co-ordinated strategic, service and financial planning process.
2. The finance strategy was considered in October 2012, in advance of the budget process. The Finance Strategy reviewed the Council's overall financial position, taking into account:
 - the actual position in the previous financial year;
 - issues that have arisen in the current year;
 - the future level of government support;
 - current and future financial pressures; and
 - timing of the Council's major capital schemes.
3. It is against this background that the budget setting principles for the forthcoming financial year were agreed.
4. This report provides a further update to the Council's overall financial position in the light of the updated capital programme and the approved service budgets and allows the ability to accommodate new revenue and capital spending plans to be considered.

FINANCE STRATEGY AND BUDGET SETTING PRINCIPLES FOR 2013/14

5. On 1 October 2012 the Executive considered a report on the Council's finance strategy that highlighted the various issues that will impact on the revenue budget and council tax for 2013/14 and later years.
6. A major corporate priority for the Council is to maintain council tax increases at or below the rate of inflation. Currently RPIX inflation is 3.3% (Oct 12) and headline RPI was 3.2%. The Government has indicated that it expects councils to freeze council tax at the 2012/13 levels and will reward councils that achieve it with additional grant to do this. The budget has been prepared in a way that will deliver a nil percent increase in council tax for a fourth year, consistent with the outcome achieved for 2012/13.
7. Gross expenditure on services in 2012/13 is £47.8 million but a minimal increase of only £60,000 (0.13%) is sufficient to increase the council tax by 1%. For 2013/14 the spending and funding pressures equate to an 11% increase in the amount due from council tax payers.

GENERAL FUND CAPITAL PROGRAMME

8. The general fund capital programme was considered by the Executive on 3 December 2012. The programme amounted to £19,827,000 for the period 2012/13 - 2016/17.
9. Since the budget was set there has been a Government announcement that further funding for Disabled Facilities Grant has been made available. Fareham's element of this is an extra £76,000 and has been included in the budget figures. This brings the total capital programme to £19,903,000.
10. Resources needed to fund the capital programme, as set out in the Finance Strategy amount to £32.1 million over the programme period, and therefore by 2016/17 there should be a surplus of £12.2 million.
11. However, while the condition of the Council's assets is generally good, there is a growing need to make a significant investment over the coming years in order to maintain the assets and meet future service needs. Despite the current surplus of capital resources (compared to the approved programme), the asset reviews suggest that there is insufficient resources in the future.
12. Consequently, there is a need to continue accumulating additional resources to meet the future capital demands. The Executive has previously agreed to set aside £500,000 from the revenue budget each year for this purpose and also has a policy to use New Homes Bonus money for capital and project funding once any funding shortfall or requirement to fund expenditure relating to the New Community North of Fareham has been met. Capital resources will also be supplemented with any non-specific windfall income received during the year.

THE REVENUE BUDGET

The Base Revenue Budget 2012/13

13. The net revenue budget for 2012/13 was £10,458,500, a reduction of £363,800 on the previous year, and as a result the council tax was frozen, which was below the annual rate of inflation for the eighth consecutive year.

The Revised Service Budget 2012/13

14. The Executive and the Committees considered the revised service budgets for 2012/13 in November and December 2012. The overall service budget is £304,000 less than the base budget for the year.

Other budgets, such as investment income, contributions to capital, etc. have increased by an equivalent amount, and the revised budget remains as £10,458,000.

15. The following table summarises the overall variation in service budgets with further information of how this is spread across portfolios in Appendix A:-

	Base 2012/13 £000s	Revised 2012/13 £000s	Variations £000s
Service Expenditure	45,869	47,601	+1,732
Service Income	-32,312	-34,348	-2,036
Net Service Expenditure	13,557	13,253	-304
Other Budgets	-3,099	-2,795	+304
Total Budget	10,458	10,458	0

THE SERVICE BUDGET 2013/14

Cost of Services

16. The Executive considered the draft 2013/14 revenue budget for each committee and portfolio on 3 December 2012.

Other Budgets

17. In addition to the expenditure and income required to provide Council services, there are other costs and income which need to be taken into account when establishing the overall budget requirement. These include capital financing costs, interest earned on the Council's investments, accounting adjustments, etc.
18. Capital Financing Costs: The proposed budget provides for a revenue contribution to capital of £2.0m, which includes a contribution of £500,000 towards future capital commitments. This also includes a share of the New Homes Bonus award in the year (£731,800).

19. Interest on Balances: The downturn in the economy and the uncertainty within the financial markets has had a significant adverse impact on the anticipated income earned on investments. The Council has taken numerous steps to protect its investment portfolio even further, by spreading risks, using highly rated commercial institutions or Government bodies and investing for short periods. Consequently, however, the rates of return are limited. The increase in the figures for the base budget for 2013/14 is due to an additional £300,000 received from the Housing Revenue Account for the borrowing as part of the HRA reforms.
20. Portchester Crematorium Contribution: This crematorium is one of the Council's earliest partnerships with three other Councils. Each year the crematorium contributes a share of any surplus to each Council and the Joint Committee have agreed that in 2013/14 the contribution will be £150,000 which is the same as the original budget for the current year.
21. The following table summarises the overall variations in the Council's net budget, with further information of how this is spread across portfolios in Appendix A:

	Base 2012/13 £000s	Base 2013/14 £000s	Variations £000s
Gross Service Expenditure	45,869	42,577	-3,292
Gross Service Income	-32,312	-29,847	2,465
Net Service Expenditure	13,557	12,730	-827
Other budgets	-3,099	-3,055	44
Total Budget	10,458	9,675	-783

22. Taking account of all revenue budget items, the overall budget for 2013/14 will be £9,675,200, which represents an overall decrease of £783,300 or 7.5%. Taking account of the anticipated change in the formula grant and the council tax base for 2013/14, this budget will allow the council tax to be set at the same level as in 2012/13.

SPENDING PRESSURES AND SERVICE EFFICIENCIES

23. The Finance Strategy explained that there are a number of very significant spending pressures facing the Council over the coming years. These pressures represent increasing costs that cannot be avoided (e.g. changes to rateable values on car parks, rising fuel and equipment maintenance costs, etc), reducing income from services and investments, and additional funding that is required in order to progress high corporate priority actions.
24. The proposed budget of £9,675,200 includes over £632,000 of extraordinary cost increases (or income reductions) and efficiencies have been implemented to offset these costs.

SPENDING RESERVE

25. The Spending Reserve provides for unforeseen fluctuations in revenue expenditure and income such that one-off variations can be funded without having an adverse impact on the council tax. In accordance with the Finance Strategy, the minimum balance for the reserve is 5% of the planned gross expenditure. Taking account of the proposed expenditure in 2012-13, this equates to £2,390,000 and the current balance in the reserve is £2,810,000, a surplus over the minimum balance of £420,000.
26. As part of the Medium Term Financial Strategy it was agreed to use some of the spending reserve surplus on one-off projects. These projects would focus on 4 themes; Implementing Efficiency Plans, Improving the Customer Experience, High Street Innovation and Invest to Save. Ideas for each project are still being developed but include the following:
27. Implementing Efficiency Plans: On 2nd April 2012, the Executive approved a series of efficiency proposals, amounting to £636,700. At the time, it was estimated that there were £217,000 of termination costs in relation to staff redundancies. The report explained that “in year” savings would meet this cost however, it also identified the need to possibly access the Spending Reserve if this could not be contained. A sum of £150,000 was therefore set aside to meet any shortfall in funding termination costs and to deliver the approved efficiency plan on time. Any draw down on the £150,000 will be determined at the end of the financial year.
28. Improving the Customer Experience: £100,000 was earmarked to invest in actions with a focus on making services more accessible to residents and re-designing services with the customer at the centre of the process. Examples that are being explored include
- Redesigning the Council website
 - Redesigning the layout of the ground floor
 - Increased use of Council Connect and outreach into the borough
 - 2013 Residents Survey
 - Customer services training
29. High Street Innovation: £100,000 was used to match fund an equivalent Government grant, to promote and extend the prosperity of the town centre. At the Executive on 3 December 2012 the Leader gave an update on the use of this funding. Further work will be undertaken with a view to a report being brought to the Executive early in 2013. Projects identified so far through the work undertaken with local businesses include;
- Town Centre Parking - including removal of some restrictions in Council car parks,
 - Improving signage around the town centre,
 - Streetscene improvements including new seating, cycle rack, market stalls
 - Improved information for visitors including a dedicated website for Fareham Town Centre
 - Encouraging new business through effective means of support
 - Development site and policies plans to facilitate more use of the Henry Cort area.

30. Invest To Save: £100,000 was also earmarked to identify opportunities where innovation, technology and investment can improve the efficiency of services and reduce overall costs. Ideas being investigated include:
- Proactive marketing of Economic Development and borough assets
 - Commercial Property Investment - A report detailing how this will work is also on this agenda
 - Changes to Vehicle Fleet, using GPS & fuel efficiency devices
 - ICT Opportunities - Use of wireless technology & mobile devices to deliver front line services
 - Parking Machines - Improved payment methods for customers using car parks.

GOVERNMENT SUPPORT IN 2013/14

31. Currently, local councils receive their funding from 3 main sources: grants from central government; council tax; and other locally generated income such as fees and charges for services.
32. Under existing arrangements, business rates revenue is collected by local authorities but pooled nationally, to then be redistributed to Councils using a centrally determined formula. So while local authorities have a vital role to play in supporting the local economy there is little financial incentive to do so. There is also little or no financial risk at a local level associated with collecting rates.
33. From April 2013, business rates will be retained locally by the billing authority, and the Council will pay a proportion of the money collected to Hampshire County Council, Hampshire Fire and Rescue Authority and the Government. This will be based on a complex funding model, which has not yet been finalised. A large proportion of the risks and rewards will now be borne by local authorities, and any cash-flow risks will be borne in full by Fareham as the billing authority.
34. Some of the business rate growth can be retained by the Council and other preceptors. This "reward" could arise from improved collection rates, an increase in the number of non-domestic premises in the borough and revaluations. Equally, Councils must also bear the cost of any reduction in the money collected, which could arise from a reduced collection rate, business premises converting to residential or being removed from the rating list, from appeals and revaluations, etc.
35. The model represents a fundamental change in the way local government services are funded, and the risks associated with that funding.
36. It is not yet possible to quantify how much funding will be available for local services as the new regime has not been finalised, but an assumption has been made that approximately £3.9m of business rates and Government grant will be used to part-fund the budget, a reduction of approximately £250,000 compared to the current year. This funding should be clarified in readiness for the February budget report.

37. To arrive at this estimate, an estimate of the business rates baseline needs to be set. This is the first year in which such a calculation needs to be made, and it is proposed that in the same way that the council tax base is delegated to the Section 151 Officer to determine, the business rates baseline is also delegated. The baseline figure for 2013/14 will be reported for information to the February Executive.
38. The Government has also announced that there will be a one-off freeze grant available in 2013/14 for councils that keep their council tax either at or below the 2012/13 level. This grant equivalent to a 1% increase in council tax levels will enable council tax to remain low but it does mean that in order to keep spend at the same level there will be a need to reduce costs further due to 'lost' council tax income in future years.

NEW HOMES BONUS

39. On 1 October 2012 in approving the Finance Strategy, the Executive approved the following policy on the treatment of the New Homes Bonus income:
- *“Firstly, the award should be top-sliced to meet reduced central government funding, and to support service delivery (particularly where demand has grown in line with the growth in housing);*
 - *The balance should be earmarked for investment in capital schemes or other projects, which are driven by corporate priorities;*
 - *In determining the use of funds for capital investment, there should be a bias towards*
 - *investing in land & property that will generate a long term source of income;*
 - *Projects that support economic or employment growth; and*
 - *Projects that support or secure further housing delivery.*
40. *If assumptions for the reduction in Government funding are correct, then a top slice of any NHB award will be necessary to support continued service delivery. Any balance of the award for 2013/14 is likely to be required to fund expenditure relating to the New Community North of Fareham (NCNF).”*
41. In line with the policy, the £658,000 received in 2012/13 will be used for capital investment.
42. The provisional reward for 2013/14 is £1,092,700 and it is proposed that £731,800 of this will be used for capital investment, £281,000 used to offset reduced central government funding and £79,900 to fund expenditure relating to the NCNF. The NCNF element takes account of the Area Action Plan timetable of activities which was considered by the Executive in November, however work has commenced on two other issues of importance.
43. Firstly, work required to demonstrate how infrastructure to be provided can be funded has commenced. This is likely to be completed in the autumn of 2013, culminating in the production of a detailed Infrastructure Funding Strategy.

44. Secondly, as referenced elsewhere on this agenda, a design code for the new community will be produced. The Infrastructure Funding Strategy will be important supporting evidence to the Area Action Plan for the new community and both pieces of work will initially be funded from existing budgets.
45. External sources of funding will be sought to offset this additional cost, however if further use of New Homes Bonus is necessary to meet the later phases of the NCNF work programme, this will be reported as part of the revised budget process for 2013/14.

RISK ASSESSMENT

46. In considering the budget, there are a number of issues that need to be borne in mind, as set out below:-
47. The economic climate remains very uncertain, and has had a significant impact on certain services and budgets.
48. The Government continues to expect the public sector to achieve significant efficiencies, in 2013/14 and in future years due to changes in funding. The table below shows the funding changes for Fareham since 2009-10.

Financial Year	Government Grant (RSG & NNDR)	£ Change	% Change
2009/10	£6,204,530		
2010/11	£6,235,553	£31,023	+0.5%
2011/12	£4,610,248	-£1,625,305	-26.1%
2012/13	£4,000,459	-£609,789	-13.2%

49. Between October 2009 and October 2012 RPIX has increased by 13.8%.
50. To add to the funding reductions the Local Government Resource Review will shift the balance of risk away from Central Government to a local level with Councils bearing a large degree of the risk of fluctuations in business rates collected.
51. The Council Tax Support Scheme (CTSS) adds another significant financial risk onto local authorities as the benefit being paid will no longer be funded centrally. A report detailing the proposed scheme is also on this agenda, which explains that the financial risks facing the council could arise from an increase in the take up of support, and the Council's ability to collect the extra council tax which will be due.
52. The Executive has previously agreed that the balance on the spending reserve should equate to at least 5% of gross revenue expenditure which, for 2012/13, is £2,390,000. A detailed assessment of need has been carried out, following guidance from the Chartered Institute of Public Finance and Accountancy (LAAP77), which indicates that this is an appropriate level to retain but should not be reduced, especially at this time of significant uncertainty.

53. While the Council's capital resources are expected to exceed planned capital expenditure at the end of the programme period (by approximately £12.3m), future spending requirements could give rise to a very significant shortfall. It is therefore imperative that capital reserves are replenished whenever possible in order to meet the future spending needs.

THE COUNCIL TAX FOR 2013/14

54. If the proposed base budget is approved, the overall revenue budget for 2013/14 will be £9,675,200.
55. With government support of £3,904,000 and other funding of £110,126, the total amount to be raised from council taxpayers would be £5,661,074.
56. With the council tax base – the equivalent number of Band D properties – for 2013/14 being 40,373, this would give a council tax per Band D property for 2013/14 of £140.22, which is the same level of council that is charged in 2010/11 and 2011/12. This council tax freeze compares favourably to the current level of inflation of 3.1% (RPIX, October 2012).

ASSURANCE STATEMENT BY THE STATUTORY CHIEF FINANCIAL OFFICER

57. Section 25 of the Local Government Act 2003 states that when the Council sets a budget for the forthcoming financial year, the statutory Chief Financial Officer (CFO) must report to the authority on the robustness of the budgets and the adequacy of the financial reserves.
58. The CFO is able to confirm that the Council's co-ordinated finance strategy allows the availability of resources to finance both capital and revenue expenditure to be considered at the same time. It provides the necessary flexibility to allow resources to be allocated to both capital and revenue and this has enabled the delivery of balanced budgets for both capital and revenue.
59. The CFO can also confirm the robustness of the approved budgets and therefore major variations in expenditure and income are not anticipated. However, a risk assessment has been carried out to highlight the impact of possible variations in the level of expenditure and income and by maintaining the spending reserve at 5% of gross expenditure resources are in place to meet any likely variations that could not be met from within the Council's overall budget.

CONCLUSION

60. The Council's finances remain under significant pressure in the current year, and there is every indication that this situation will persist in the future not only from economic pressures but also from Central Government funding constraints.
61. Consequently, the budget setting process for 2013/14 has presented the same challenges that were experienced during the 2012/13 budget, but with careful forward planning and appropriate mitigating action being taken at the earliest opportunity, the proposed budget has been produced which is believed to be robust and sustainable.

62. Taking new priority spending into account, the proposed revenue budget for 2013/14 will provide sufficient resources to deliver the Council's services and its priorities, and enable the council tax to be frozen for 2013/14, at current levels.

Reference Papers: None

ACTUAL REVENUE BUDGET

	Budget 2012/13 £	Revised 2012/13 £	Variation Base to Rev £	Budget 2013/14 £	Variation Base to base £
Committees					
Planning Committee	713,700	730,400	16,700	669,000	-44,700
Licensing and Regulatory Affairs Committee	503,900	479,600	-24,300	395,800	-108,100
Executive - Portfolio Budgets					
- Leisure & Community	1,688,500	1,791,500	103,000	1,681,800	-6,700
- Housing	2,029,200	1,482,200	-547,000	1,369,400	-659,800
- Strategic Planning and Environment	-752,300	-326,300	426,000	-234,100	518,200
- Policy, Strategy and Finance	2,147,000	2,210,500	63,500	2,131,000	-16,000
- Public Protection	2,757,600	2,485,600	272,000	2,435,700	-321,900
- Streetscene	4,470,000	4,400,000	-70,000	4,281,600	-188,400
SERVICE BUDGETS	13,557,600	13,253,500	-304,100	12,730,200	-827,400
Capital Charges	-1,935,500	-1,763,400	172,100	-1,763,400	172,100
Capital Financing Costs					
- Use of Housing Capital Receipts	-1,115,000	-558,300	556,700	-415,600	699,400
- Direct Revenue Funding	1,290,000	1,385,000	95,000	1,301,000	11,000
- Direct Revenue Funding NHB	658,000	658,000	0	731,800	73,800
Interest on Balances	-591,000	-874,500	-283,500	-874,500	-283,500
Portchester Crematorium	-150,000	-150,000	0	-150,000	0
New Homes Bonus	-658,000	-658,000	0	-1,092,700	-434,700
Contribution to(+)/from(-) Reserves	-597,600	-833,800	-236,200	-791,600	-194,000
OTHER BUDGETS	-3,099,100	-2,795,000	304,100	-3,055,000	44,100
NET BUDGET	10,458,500	10,458,500	0	9,675,200	-783,300

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FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Policy, Strategy and Finance
Subject:	Commercial Property Investment Acquisition Strategy
Report of:	Director of Finance and Resources
Strategy/Policy:	Asset Management Plan
Corporate Objective:	A dynamic, prudent, progressive and best practice Council

Purpose:
To put in place a Commercial Property Investment Acquisition Strategy as a means to optimise returns on Council investments.

Executive summary:
As part of the Council's on-going review of finances and new income generating opportunities, some initial investigatory work has been carried out into the possibility of generating an on-going revenue stream by increasing its investment in commercial property.

If the Council were to consider using some of its treasury related cash investments into commercial property, it is likely that a greater return could be secured, but there are several factors that would need to be considered in order to choose the most suitable investment. This could be achieved by putting in place a Commercial Property Investment Acquisition Strategy. The strategy will include the criteria that would need to be considered in order to choose the most suitable investment and measures to minimise risk.

Attached as Appendix A to the report is a draft Commercial Property Investment Acquisition Strategy for consideration by the Executive.

Recommendation:
The Executive are requested ;

- (a) To agree to the principle of a programme of investment in commercial property and adopt the draft Commercial Property Investment Acquisition Strategy attached as Appendix A to the report;
- (b) To consider an appropriate amount as an initial investment to fund a commercial property investment acquisition programme;

- (c) Agrees to delegate authority to the Director of Finance & Resources, following consultation with the Executive Leader, to submit offers for Commercial Property Investments in accordance with the criteria set out in the Commercial Property Investment Acquisition Strategy with details of successful acquisitions being included in the periodic financial monitoring reports proposed to be reported to the Executive in paragraph e) below;
- (d) Agrees to the engagement of Hellier Langston, Chartered Surveyors under the terms of the framework agreement recently put in place, to work with officers to identify suitable commercial property investments in accordance with the criteria set out in the draft Commercial Property Investment Acquisition Strategy and as required act on the Council's behalf to negotiate acquisitions;
- (e) Request officers to design a performance measurement framework to actively manage the portfolio, to be included in the periodic financial monitoring reports to Executive.

Reason:

Due to the low returns being received by the Council from treasury related investments and which is likely to continue into the medium term, to inform the Executive of the option of investing in commercial property investments with acquisitions subject to the criteria set out in the draft Commercial Investment Property Acquisition Strategy.

Cost of proposals:

The proposals in this report will give rise to capital expenditure, and the level depends upon the budget which the Executive considers appropriate. The revenue implications of any investment in property will depend on the individual circumstances. However it is likely that each £1m investment could increase net revenue income by £40,000-£50,000 per annum

Appendix A: [Draft Commercial Property Investment Acquisition Strategy](#)

Background papers: None

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: Commercial Property Investment Acquisition Strategy

Briefing by: Director of Finance and Resources

Portfolio: Policy, Strategy and Finance

INTRODUCTION

1. Officers have carried out some initial investigatory work into the possibility of generating an on-going revenue stream by increasing its investment in commercial property. Currently, the Council has circa £40m invested in treasury-related activity, but returns are historically low and this is likely to continue into the medium term.
2. If the Council were to consider switching a part of this investment into property, it is likely that a greater return could be secured, but there are several factors that would need to be considered, in order to choose the most suitable investment.
3. The above objective could be achieved by putting in place a Commercial Property Investment Acquisition Strategy. The strategy will include the criteria that would need to be considered in order to choose the most suitable investment and measures to minimise risk.
4. Set out below are the principles of what should be included in a Commercial Property Investment Acquisition Strategy and attached as Appendix A to the report is a draft of a strategy for the Executives consideration.

COMMERCIAL PROPERTY INVESTMENT ACQUISITION STRATEGY

5. A Commercial Property Investment Acquisition Strategy should cover the following;
 - (a) Risk Appetite – how risk averse is the Council, in terms of security of the capital value of the asset and extent to which rental income is guaranteed
 - (b) Growth vs Return – is the purpose of the investment to generate a steady revenue stream or to grow the capital value

- (c) Financial or Qualitative – should the investment purely deliver financial returns or seek to deliver other qualitative benefits, e.g. to improve vitality of the town centre
 - (d) Exit Strategy – What should the Council's exit strategy be, e.g. exit after a fixed time, exit when asset value has grown by x%, exit when financial returns match property returns,
 - (e) Location – To what extent should the council invest in property beyond its boundary
 - (f) Value – What is the overall value available and to what extent should that be disaggregated over individual investments
6. The following principles are included in the draft Commercial Property Investment Acquisition Strategy.
- (a) Investments should mainly be for revenue return purposes only, (i.e. capital growth should be a secondary consideration);
 - (b) Strong covenants with a relatively long term to run should be sought;
 - (c) The first consideration should be for a financial return, (i.e. qualitative benefits should be a secondary consideration);
 - (d) Investment beyond the borough is acceptable, as long as it has no potential to threaten or undermine the economy in the borough;
 - (e) The investments should be disaggregated to limit losses on any single investment
 - (f) The Council should develop a realistic and clearly defined exit strategy for all acquisitions, which define the circumstances and likely timescales when it is appropriate to sell the property, prior to any formal proposal to purchase.
7. Attached as Appendix A to the report is a draft Commercial Property Investment Acquisition Strategy which includes those matters referred to above. The draft strategy has been prepared in liaison with Hellier Langston, Chartered Surveyors, who were recently appointed under a framework agreement to provide property advice when required to Fareham and Gosport Borough Councils following competitive fee procurement exercise. It was considered important to obtain input into the Commercial Property Investment Acquisition Strategy from a firm of surveyors active in the commercial property investment market on behalf of clients.
8. The opportunity to make offers to acquire suitable investments may arise at unexpected times. In these circumstances, it is necessary to be able to move quickly to submit an offer and conclude terms for acquisition. For this reason, it is suggested that the Executive agrees to delegate authority to the Director of Finance & Resources, following consultation with the Executive Leader, to submit offers for commercial property investments.
9. However to maintain transparency of the activity within the property portfolio, a periodic reporting process would be introduced which would measure performance of the portfolio against a set of agreed target, and would also report details of successful acquisitions in the preceding period.

RISK ASSESSMENT

10. The risks associated with acquiring commercial property investments and measures to minimise the exposure to risk are set out in the draft Commercial Property Investment Acquisition Strategy. Most notably are the risks that the initial capital investment will deteriorate, and the on-going revenue stream does not materialise. For this reason, there will need to be a set of clear criteria agreed prior to any acquisition which limits the Councils exposure to these risks. This can be achieved, for example, by acquiring property with long term leases to a tenant with a strong financial standing and good track record. It can also be mitigated by establishing a clear “exit strategy” in the event that the property no longer achieves the wider objectives of the portfolio.

FINANCIAL IMPLICATIONS

11. The extent to which any commercial property acquisition programme is implemented depends on the value of capital which the Executive wishes to commit. An initial investment of £3m would potentially result in revenue investment income to increase by £150,000 (net). Any investment would be classed as capital expenditure, and would need to be included in the Council's capital programme.
12. Property acquisitions most likely involve use of capital receipts that are currently invested in the money markets. The financial benefit would therefore be marginally offset by the loss of investment interest earned.
13. There would, however, be an opportunity to access low cost borrowing to finance acquisitions, which would protect the Council's investment portfolio, and could be useful where a shorter term holding is anticipated, (e.g. purchase, hold and possibly refurbish or restructure lease arrangements, then sell on after a period of time), or for much longer speculative opportunities, (e.g. new development at Daedalus Enterprise Zone).

LEGAL CONSIDERATIONS

14. Other Councils have embarked on a strategy to acquire commercial property investments. In particular Eastleigh Council has been very active in acquiring commercial investments within their borough boundaries. However, it will be imperative to secure legal advice on the most appropriate way of structuring any acquisition programme, before any properties are purchased.

CONCLUSION

15. The report considers the merits of putting in place a Commercial Property Investment Acquisition Strategy due to the low returns being received by the Council from treasury related investments and which is likely to continue into the medium term.

Reference Papers: None

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APPENDIX A**Draft Commercial Property Investment Acquisition Strategy**Introduction and Objectives

1. The Asset Management Plan which is updated biennially includes a Property Strategy, Disposal Strategy and a Repairs and Maintenance Strategy. In order to maximise the returns on resources which the Council has available for investment, the Council is considering how commercial property can play a role. The approach to acquiring commercial property for investment is set out in this "Commercial Property Investment Acquisition Strategy" (CPIAS).
2. The CPIAS aims to be a viable and sustainable strategy for the acquisition of commercial property investments. It seeks to:
 - a) Optimise the returns on all property investment, while offering a reasonable level of protection to the Council's initial investment;
 - b) Exploit new opportunities for income generation from the Council's assets and investments;
 - c) Promote key strategic Council policies;
 - d) Provide value for money and facilitate assets that represent a sound financial investment for the Council;
3. Property investment decisions made within the scope of the CPIAS will need to satisfy one of two objectives;

- i. Investments to promote the key strategic policies of the Council

This relates to buildings that fall within certain development areas or that are likely to enhance the standards within the borough for council tax payers, such as properties in and around Fareham Shopping Centre or others where an interest is held. These investments would be location specific, i.e., within the Borough.

- ii. Investment to maximise 'value for money'

This relates to investments to be purchased on a purely commercial basis because they provide a good income stream and maximise the return on investment. These investments would not be location specific and therefore could be outside of the Fareham Borough.

Commercial Property as an Investment

4. All investment sectors, including commercial property, have seen revenue streams depleted during the economic downturn. However, current market conditions have led to opportunities that may previously not have existed leading to a re-balancing of pricing favouring the investor.
5. Property as an asset can provide a reliable and long term source of revenue income, but which is sufficiently liquid such that it can be traded or disposed of if required. Growth in the capital value of the investment is also possible, although in current markets, the focus should be principally on securing a reliable source of revenue income.

Managing the risks of investing in commercial property

6. Investing in property is not risk-free, so it is important that any acquisitions reflect the Council's risk appetite in terms of maintaining the capital value of the asset and extent to which rental income is guaranteed.
7. The main risk is vacancy and the resultant loss of income. The added costs of holding a vacant property include non-domestic rates, insurance, utilities, security, inspections and management. In addition, there would be the cost of marketing the property, the agent's disposal fees and legal fees for completing the lease documentation for re-letting the premises.
8. Other risks include tenant's defaulting on rental payments, repairs not being undertaken or unauthorised works or sub-lettings being undertaken.
9. Risks will need to be minimised through a series of measures:
 - a. Funds available for the purchase of commercial investments will be disaggregated to limit the overall impact that any single investment would have on the Council's finances;
 - b. Assets with existing tenants of a "high quality" only will be considered, as measured by undertaking appropriate financial checks;
 - c. Assets with a sufficiently long tenancy term will only be considered;
 - d. Appropriate checks will be carried out to ascertain the tenant's reliability including provision of satisfactory trade, landlord and bank references for tenants;
 - e. Other "due diligence" must be undertaken to protect the Council's investment as far as possible. These would include checks such as planning conditions, land contamination issues, planning policy issues, quality and strength of tenant lease agreements, etc.

10. The steps that must be taken before any decision to purchase a property will be clearly documented, and this will be tested via a challenge process involving the Head of Estates, Director of Finance and Resources and the Executive portfolio holder for Policy Strategy and Finance.

Managing the costs related to investing in commercial property

11. The process of identifying, acquiring, managing and maintaining, then ultimately disposing of commercial property can be substantial. It is therefore important that these costs are recognised when contemplating an investment decision.
12. The overriding principle of the strategy is that any investment in commercial property will generate a higher net financial “return” than would otherwise be expected through an investment in the financial markets.
13. Any increase in costs must therefore be kept to a minimum so they do not undermine the rental income stream achieved from the investment. To do this, preference will be given to properties with a full repairing liability upon the tenant, and where the management overhead is minimal.

Identification of potential investments

14. Potential investments will need to be considered against certain criteria as follows.

- a. Covenant strength

Covenant strength will affect the yield profile of an investment as a strong covenant will generally offer more security and therefore less risk. A tenants covenant can be measured against a series of “due diligence” checks, including a measurement of a tenant’s financial standing and long term strength.

- b. Location

Assets purchased to improve the wellbeing of the borough are likely to be within Fareham. These could be funded from cash resources or via prudential borrowing.

Assets purchased purely for investment purposes would not be location specific and therefore could be outside of the borough. The strength of the investment opportunity will dictate the wider locations which may be considered, as opposed to the location being the driving force.

15. Investments to promote the key strategic policies of the Council: For asset purchases falling into this category, covenant strength will remain important, but by other strategic factors are likely to supersede this. For example, the asset may be in a key location which will offer long term development opportunities for the Council, or it may be in an area of high vacancy rates where start up or small businesses may be encouraged in order to improve the overall success of the area. It could also be that the Council is looking to promote a certain service or facility which may not be achieved by a tenant with a strong covenant.
16. Investment to maximise 'value for money': The aim of purchasing assets falling into this category is to maximise income, provide a secure investment with a strong covenanted tenant in place and to minimise outgoings.
17. Return on Investment / Yield: The aim of the majority of investments is to provide a secure return on income. The Council will manage its commercial property as a single portfolio, ensuring that the collective returns achieved on the investments meet the overall financial target that is set. It is therefore also important that any purchasing decisions also contribute positively to the performance of the portfolio, both financially and in minimising the overall risks.
18. Sector Types: The main property sectors are retail, office, industrial and leisure/healthcare. The portfolio will aim to spread its investment across the sectors to limit exposure to any volatility in a particular area.
19. Management of Property: Properties with fully repairing and insuring leases shall be sought as a preference for investment, in order to minimise the cost of management and maintenance. Exceptions could be made for properties that are purchased for specific development or planning reasons. In order to minimise management overheads, use of an external property management firm would be considered to handle the day to day operational issues with the portfolio, particularly for properties which are outside the Borough.
20. Tenure: Assets acquired with tenants in place may be subject to sub leases granted within the security of tenure provisions of the Landlord and Tenant Act 1954. This may be less attractive if assets are purchased for future development possibilities as ending the tenancies will require the Council to satisfy one of the grounds under the Act to take back possession. Conditions of tenure will therefore be a further important consideration in any investment decision.
21. "Exit Strategy": There will be a need in the future to dispose of property investments. This may happen because of the need to return the investment to cash for other purposes, or it could be due to poor financial performance of a particular property, etc. So, while it is likely that the majority of investments will be held for a medium to long term in order to achieve the required return and to justify the cost of the acquisition, it is important to understand the opportunities to dispose of any investment at the outset. Therefore, as part of the investment decision, consideration must be given to the potential ways in which the Council could "exit" from the investment, such as sale to another investor, sale for redevelopment, etc. An investment would only proceed where there is a clear exit strategy, should it be required.

Monitoring and Review

22. The risks associated with property investment are arguably greater than those associated with cash investments. Equally, the returns achieved from investment can be very positive to assist in funding day to day services in the borough. For this reason, a robust and on-going method of monitoring portfolio performance will be necessary.
23. A portfolio performance framework will, on an on-going basis, consider the following aspects:
- i. How an asset is performing against an individual financial target
 - ii. Whether the risk profile of the asset has changed since the point of investment
 - iii. Whether the portfolio remains sufficiently well balanced and diverse to limit the risk to the Council
 - iv. Whether the portfolio is performing satisfactorily against its financial target
24. The responsibility for managing the performance of the portfolio will reside with the Council's Head of Estates. This will be reviewed by the Director of Finance and Resources, and will periodically be scrutinised by the Council's Corporate Asset Management Group.
25. A Portfolio performance report will also be published at least annually for Member scrutiny.

Way Ahead

26. The CPIAS document shall be kept under review, to ensure that it remains relevant to the changing economic outlook, and also to the Council's own financial circumstances. In the meantime, the following actions will be undertaken to deliver the objectives of the strategy.

		Target date
1	Develop a property risk assessment template, identifying the measures for considering new property acquisition opportunities.	31 st January 2013
2	Develop a "Portfolio Performance Management Framework" to monitor the performance of properties against agreed targets and to consider retention, disposal or management of each asset.	28 th February 2013
3	Engage the Council's retained property agent to identify opportunities which are consistent with CPIAS.	31 st January 2013
4	Establish a challenge process for assessing property opportunities, prior to acquisition.	28 th February 2013
5	Establish a member scrutiny process, to ensure there are transparent arrangements for reporting the performance and activity of the portfolio on a periodic basis.	30 th June 2013

FAREHAM

BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Policy, Strategy and Finance
Subject:	Local Council Tax Support Scheme 2013/14
Report of:	Director of Finance and Resources
Strategy/Policy:	
Corporate Objective:	A dynamic, prudent and progressive Council

Purpose:
To provide the Executive with the results of public consultation and seek approval of the Fareham Local Council Tax Support scheme and related changes to council tax discounts and exemptions, effective from 1st April 2013.

Executive summary:
In October 2012, the Executive agreed a draft Local Council Tax Support scheme for the purposes of a public consultation exercise. An extensive consultation exercise was carried out during October and November, and over 600 responses were received.

The consultation process also sought views on a number of possible changes to certain discounts and exemptions for council tax relating to empty properties and second homes.

Having analysed the responses from the consultation, a detailed Equalities Impact Assessment has been concluded, and a final scheme has now been prepared for the Executive to consider. This will enable a scheme to be recommended to Full council later in the month and prior to the deadline of 31st January 2013.

- Recommendation:**
- (a) That the Executive approves:-
 - i. The final Council Tax Support scheme, as set out in the report;
 - ii. The local discounts, exemptions and premiums for second homes and empty properties within the Borough;
 - (b) The Executive considers whether the final scheme should be revised to enable Transition Grant to be claimed
 - (c) The Executive to recommend the final scheme for adoption to Full Council for final adoption.

(d) The Director of Finance and Resources, be given delegated authority to make any necessary minor amendments, and to publish the final scheme prior to 1st April 2013.

Reason:

To enable a Council Tax Support scheme to be agreed in advance of the 31st January 2013 deadline.

Cost of proposals:

The proposals within this report are estimated to cost £3.96m, and it is anticipated that this can be contained within devolved funding from central Government. The proposals to amend council tax discounts and exemptions are expected to generate approximately £28,000 of additional income, of which £3,000 would be attributed to Fareham BC, and the balance to the major precepting authorities.

Appendices A: Results of the Public Consultation Exercise

B: [Summary Equalities Impact Assessment \(Council Tax Support\)](#)

C: [Summary Equalities Impact Assessment \(Council Tax Discounts\)](#)

Background papers: None

FAREHAM

BOROUGH COUNCIL

Executive Briefing Paper

Date: 7 January 2013

Subject: Local Council Tax Support Scheme 2013/14

Briefing by: Director of Finance and Resources

Portfolio: Policy, Strategy and Finance

INTRODUCTION

1. In the 2010 Spending Review, the Government stated that it would reduce spending on Council Tax Benefit by 10%, by abolishing the national arrangements and devolving the responsibility to design a scheme to the local billing authorities from 2013/14. The 10% saving was one of the proposals put forward by the Department of Communities and Local Government (DCLG) as part of its contribution to the national budget deficit reduction. This ambition has since been enshrined in legislation, following royal assent of the Local Government Finance Act.
2. At its meeting on 1st October 2012, the Executive agreed to consult upon a series of options, in the form of a draft Council Tax Support (CTS) scheme, together with options to amend discounts and exemptions currently offered to owners of second homes and empty properties. This report sets out the results of the consultation exercise and proposes a final scheme for council tax support.

RESULTS OF CONSULTATION

3. Recognising that the proposed local CTS scheme and changes to council tax discounts were far reaching and would impact all tax payers in some form, an extensive consultation exercise took place. This started on 2nd October and closed on 30th November 2012. The following methods were used to ensure views were gathered from a wide range of customers, residents and other interested parties:
 - On-line survey, available for all to access
 - Paper copies available for all, upon request
 - Targeted request for feedback to residents, via the e-Panel
 - Attendance at CAT meetings in all CAT areas
 - Full page article within the Fareham Today magazine
 - Proactive, "face to face" engagement with claimants visiting the civic offices

- Information leaflets accompanying all benefit correspondence, encouraging feedback
 - Targeted publication of consultation to those organisations listed on the Community Groups database
 - Regular reminders via press release and social media (Facebook and Twitter).
4. In total, 630 responses to the consultation exercise were received, and the results are summarised in Appendix A.
5. The results of the consultation indicate that most aspects of the draft scheme were supported by the majority of the respondents. The aspects where this was either less clear, or where a contrary view was expressed are shown below;
- 52% of respondents felt that those in receipt of support should pay at least 25% of their bill, with 38% supporting the lower 20% threshold.
 - 48% of respondents felt that claimants in employment should not receive more support to encourage them to increase their working hours; 38% were supportive of this approach.
 - 44% supported the removal of the Second Adult Rebate, whereas 30% disagreed.
 - 69% felt that homes which were empty and unfurnished for less than 6 months should pay council tax
 - 44% felt that the Council should provide funding for Money Advice to support those affected by the scheme, with 44% disagreeing.
6. The results of the consultation exercise have been taken into account when designing the final scheme for CTS and council tax discounts.

PROPOSED CHANGES TO COUNCIL TAX DISCOUNTS

7. The Local Government Finance Act now provides local authorities with the ability to determine the extent of discounts or exemptions in the following circumstances:
- Ability to charge full council tax on second homes (currently a 10% discount is available);
 - Properties undergoing major repair will no longer receive a standard 100%, 12 month “class A exemption”, but billing authorities may give a local discount of up to 100%;
 - Vacant dwellings will no longer receive a standard 100%, 6 month “class C exemption” but billing authorities may give a local discount of up to 100%
 - Billing authorities may levy a premium charge of up to 150% of the council tax on an empty property, where it has been empty and unfurnished for at least 2 years.
8. The consultation exercise supported the removal of all of the above discounts and exemptions. This would affect 295 “second homes” in the borough and 225 “empty properties”.

9. However, it is important to consider the circumstances that give rise to homes being empty or unoccupied for prolonged periods of time. A large proportion of the borough's second homes are holiday homes or chalets (for example located at Meon Shore or Solent Breezes), properties which become unoccupied are often rental properties which are vacant during a transitional re-letting period, or are derived from deceased estates.
10. Taking account of the consultation responses, but also the reasons why properties become vacant, the following approach is proposed:-

Proposal	Rationale
a. That the 10% second homes discount is removed, effective from 1 st April 2013	Recognizing the results of the public consultation To offset the cost of CTS
b. That a local discount of 100% is introduced to replicate the current "class A" exemption for properties requiring or undergoing majors repairs or structural alterations, limited to a maximum of 12 months.	This will recognise the reduced services used by such properties and act as a financial incentive for homeowners to complete major repair work promptly.
c. That a local discount of 100% is introduced to replicate the current "class C" exemption for properties which are vacant and unfurnished, limited to a maximum of 6 months.	This will avoid a significant increase in administrative work and continue to provide a short period of time for properties to be re-let or sold.
d. That a local Empty Property premium be introduced, equivalent to 50% of (and in addition to) the standard council tax liability for a property which has been vacant and unfurnished for at least 2 years.	To support the Council's Empty Homes Strategy

PROPOSED LOCAL COUNCIL TAX SUPPORT SCHEME

11. At the Executive in May 2012, the Executive agreed a set of guiding principles upon which a draft CTS scheme for Fareham was designed. The draft scheme was considered by the Executive in October and this was used as the basis of the consultation that followed. The features of the draft scheme were :-

- **Principle 1:** Every Working Age claimant should pay something towards their Council Tax
- **Principle 2:** The scheme should protect the most vulnerable claimants
- **Principle 3:** The scheme should incentivise work
- **Principle 4:** Everyone in the household who can contribute, should contribute
- **Principle 5:** Benefit should not be paid to those with large capital or savings

12. Following these principles, the draft scheme was prepared which was based upon the existing arrangements for council tax benefit, but with the following important changes.

Key Principle	Draft Scheme
1. Every working age claimant should pay something towards their Council Tax	Working age claimants will receive a maximum of 75% or 80% of the means-tested financial support award, capped at a Band C The current Second Adult Rebate scheme will be removed.
2. The scheme should protect the most vulnerable claimants	The current means-test, comprising disregards, premiums and allowances will be retained in full. Those claimants in receipt of the Enhanced Disability Premium and Severe Disability Premium will be protected from the changes Those claimants in receipt of a war pension or war widow/ers pension will be protected from the changes
3. The scheme should incentivise work	The current scheme of extended payments and child care costs will be retained. All earned-income disregards will be increased by £5 per week
4. Everyone in the household who can contribute, should contribute	All working age non-dependants will be expected to contribute a minimum of £3.30 per week
5. Benefit should not be paid to those with large capital or savings	The capital thresholds will remain in place, with no support paid to claimants where their capital exceeds the upper threshold of £16,000. (The lower threshold, £6,000, also remains unchanged).

13. In addition to these scheme features, the local arrangements proposed the introduction of a Hardship Fund, to provide limited, short term assistance in cases of extreme hardship. This would be supported with further financial commitment to a money advice service, in order to provide a longer term solution to managing and overcoming hardship.
14. Maximum support: The consultation sought views on the appropriate maximum level of financial support for claimants, and the majority opted for a 75% upper limit. However, further assessment of the likely cost of the scheme would indicate that the more generous upper limit (80%), which was supported by 38% of respondents, could be contained within the available resources. For this reason, the final scheme proposes an upper maximum limit of 80%.

15. Incentives to Work: The consultation responses also indicated that the scheme should not increase the incentives to work, with only 38% supporting the proposal. However, given that it is an overriding Government objective to make it advantageous to work rather than rely upon the welfare system, the final scheme proposes that this enhancement remains.
16. Second Adult Rebate: A small majority (44%) agreed the second adult rebate arrangements should be removed from April 2013. Members will recall that the rationale for removing this as part of the draft scheme was to ensure that support was only given to those following a full means testing exercise of the liable person, and that the Second Adult Rebate give rise to an anomaly where (if certain criteria applied) benefit had to be paid regardless of the liable person's ability to pay. Therefore, the final scheme confirms the original proposal and removes the second adult rebate feature.
17. Money Advice: The proposal to improve the money advice that is available to those in need was evenly split in the consultation responses, with 44% supporting and 44% disagreeing with the proposal. The rationale for the original proposal was to put in place a scheme which equipped claimants with the skills necessary to manage a reduced level of benefit themselves within their finances. While the responses were evenly split, the final scheme proposes that the Council makes available a grant for an improved money advice service to be operated through the Citizen's Advice Bureau. Officers are in discussions with the CAB about the nature and scope of such a service, but it is likely to involve two elements; advice for individuals on their personal financial situation and more generic training about managing personal finances.
18. In order to comply with the Local Government Finance Act, it is necessary for the Council to publish the full details of the scheme. Once agreed, this will be made available to the public, and be submitted to the Tribunals Service, who will be responsible for considering any appeals against the decisions taken in administering the CTS scheme. The detailed scheme is currently being prepared and will be submitted to Full Council when the scope of the scheme is finally determined.

CTS SCHEME TRANSITIONAL GRANT

19. Since the draft scheme was published, the Department for Communities and Local Government has made available an additional £100 million for one year only, to support local authorities in developing "well-designed council tax support schemes and maintain positive incentives to work".
20. Councils must set their CTS schemes by 31st Jan 2013, but cannot apply for the grant until March 2013. There are certain criteria, set by Government, which must be complied with in order to qualify for the grant, which seek to ensure that low income households do not face an extensive increase in their council tax liability in 2013-14. To apply for a grant, billing authorities must adopt schemes which ensure that:

- a. Those who would be entitled to 100% support under current council tax benefit arrangements pay between zero and no more than 8.5% of their net council tax liability;
 - b. The taper rate does not increase above 25%;
 - c. There is no sharp reduction in support for those entering work.
21. The proposed CTS scheme for Fareham does meet point (b), above, but does not meet the other two criteria. If the Council chose to amend the scheme and claim the grant, then the following main features would need to be amended:-
- a. Working age claimants receiving maximum support of 80% would be removed. Instead, the scheme would offer a maximum reduction of benefit (compared to the existing arrangements) of 8.5%
 - b. The “band C” cap on support would be removed.
 - c. The requirement for all working age non-dependants to contribute a minimum of £3.30 per week, would be removed.
22. It is estimated that the cost of amending the final scheme, to meet criteria for receiving the transitional grant would be £280,000. The transitional grant that would be paid (across billing and precepting authorities) would be £108,000, giving rise to a funding shortfall of £172,000. This shortfall would need to be met by the funding authorities in the following proportions
- Fareham BC (£17k)
 - Hampshire CC (£129k)
 - Hampshire Fire and Rescue (£8k)
 - Hampshire Police (£18k)

EQUALITIES IMPACT ASSESSMENT

23. A full and detailed equalities impact assessment has been carried on the proposals contained within the report. In summary, it is felt that the scheme complies with the requirements upon the Council, and this does not change if the Council opted to accept the Transition Grant.
24. A summary of the findings from the Impact assessment is attached as [Appendix B](#).
25. A summary of the findings from the Impact assessment carried out in relation to the proposed changes to Council Tax is attached as [Appendix C](#).

FINANCIAL IMPLICATIONS

26. It is anticipated that the proposals for the Fareham CTS scheme will cost in the region of £3.96m. Assuming that the funding for the scheme is confirmed, then this cost would be contained within the funding, without being a spending pressure upon the Council or major precepting authorities.

27. The proposals to introduce a hardship fund (£100,000) and extended Money Advice (£30,000) have been taken into account when setting the draft general budgets for 2013/14, which were agreed by the Executive at their December meeting. This is a cost which falls upon Fareham BC, and unlike other aspects of the scheme, will not be shared with other preceptors.
28. If the Council decides to amend the scheme proposals so that Transition Grant can be applied for, costs will increase by £280,000, which would be partly offset by grant of £108,000. The funding shortfall of £172,000 would need to be found from cost reductions elsewhere, by Fareham BC and the other preceptors. It is anticipated that the FBC element of the shortfall (£17,000) could be met from the budget earmarked for the Hardship Fund, on the basis that the transitional scheme in 2013/14 would be more generous than the core scheme.
29. The additional income that can be expected from the technical changes to council tax discounts and exemptions are limited, but are estimated to be in the order of £28,000.

CONCLUSION

30. The proposed move from nationally council tax benefit to a local CTS scheme present a very significant challenge for all local authorities. The proposed scheme within the report should enable the Council to contain the cost within the available resources, and fully take account of the feedback from an extensive period of consultation. They also make some provision to assist with limiting financial hardship in extreme cases.
31. Proposals within the report will also go some way to mitigating the impact of the CTS scheme through changes to the scheme for council tax discounts and exemptions.
32. Members are asked to consider the final proposals contained within the report, and make a recommendation to the special meeting of Full Council, concerning the proposed scheme, the amendments required to qualify for Transition Grant, and the changes to council tax discounts/exemptions.

Reference Papers: None

Analysis of Consultation Responses

		Response	Responses (%)	Responses (no.)
1	If everyone should pay something towards their Council Tax bill, should the minimum amount they pay be 20% or 25% of their bill?			
		Minimum of 20%	38%	236
		Minimum of 25%	52%	326
		Don't know	10%	60
2	Should people who receive Council Tax Benefit who are in properties with a higher Council Tax charge be asked to pay more?			
		Yes	74%	461
		No	20%	123
		Don't know	6%	38
3	Should people who are working receive more Council Tax Benefit to encourage them to increase the number of hours they work?			
		Yes	38%	235
		No	48%	298
		Don't know	14%	89

		Response	Responses (%)	Responses (no.)
4	Should other adults living in a household where the Council Tax payer claims Council Tax Benefit, be asked to pay more toward the Council Tax bill than they do now?	Yes	77%	476
		No	16%	98
		Don't know	7%	45
5	Should the Second Adult Rebate be removed?	Yes	44%	268
		No	30%	186
		Don't know	26%	161
6	Should all non-dependent adults make a contribution to the household Council Tax bill?	Yes	78%	480
		No	15%	94
		Don't know	7%	45
7	Should people with empty second homes (a furnished property which is no-one's sole or main residence) stop receiving a 10% Council Tax discount?	Yes	80%	499
		No	16%	97
		Don't know	4%	22

		Response	Responses (%)	Responses (no.)
8	Should people with empty homes which need, or have recently had major repairs to make them habitable, pay Council Tax?	Yes	75%	461
		No	18%	114
		Don't know	7%	44
9	Should people with empty homes that have been left unoccupied and unfurnished for less than six months pay Council Tax?	Yes	69%	425
		No	26%	164
		Don't know	5%	31
10	Should people with homes left empty for more than two years pay 150% Council Tax?	Yes	62%	381
		No	32%	196
		Don't know	6%	42
11	Should the most vulnerable local residents that find it very difficult to work, be protected from any cuts to the level of support available to them?	Yes	76%	469
		No	15%	95
		Don't know	9%	53

		Response	Responses (%)	Responses (no.)
12	Should the Council provide funding for more Money Advice for local people?	Yes	44%	273
		No	44%	270
		Don't know	12%	76
13	Should the Council create a Hardship Fund to support people suffering genuine hardship because of the changes to Council Tax Benefit?	Yes	60%	367
		No	27%	163
		Don't know	13%	85
14	Do you think there are any groups of people in the community who would be affected more than others if everyone currently on benefit has to pay something towards their Council Tax?	Yes	35%	210
		No	29%	174
		Don't know	36%	223

15 Please could you tell us whether you think these will have a high impact, a medium impact or a low impact on each of those groups as a result of the changes to Council Tax Benefits?

	High	Medium	Low	Don't know	Total
Families with children	117	267	114	92	590
Percentage	20%	45%	19%	16%	
Lone parents	211	226	62	94	593
Percentage	36%	38%	10%	16%	
Carers	189	204	80	111	584
Percentage	32%	35%	14%	19%	
Part time and full time workers	44	214	235	96	589
Percentage	7%	36%	40%	17%	
People who are disabled	238	174	79	102	593
Percentage	40%	30%	13%	17%	
Single People and couples without children	40	133	315	105	593
Percentage	7%	22%	53%	18%	

		Response	Responses (%)	Responses (no.)
17	Would you say that any of the following describe your household? Tick all that apply	A family with three or more children	4%	28
		A lone parent h/hold	3%	23
		A carer	3%	23
		A h/hold with full and/or part time workers	37%	259
		A household that includes someone who is disabled	7%	47
		A single person h/hold or a couple without children	22%	156
		None of them	23%	165
		Don't know	1%	8
18	Are you a service personnel or ex service personnel?	Yes	20%	125
		No	80%	491
19	Are you a War Widow?	Yes	1%	3
		No	99%	602

		Response	Responses (%)	Responses (no.)
20	Your age	Under 16	0%	0
		16-24	1%	6
		25-34	5%	33
		35-44	13%	79
		45-54	20%	127
		55-64	23%	144
		65+	33%	207
		Prefer not to say	5%	27
21	Your gender	Male	57%	354
		Female	39%	240
		Prefer not to say	4%	28
22	Do you consider yourself to have a disability, or long-term illness, physical or mental health condition?	Yes	14%	84
		No	80%	495
		Prefer not to say	6%	43

		Response	Responses (%)	Responses (no.)
23	Your ethnic origin	Asian Bangladeshi	0% -	
		Asian Indian	0%	2
		Asian Pakistani	0% -	
		Asian - other background	0% -	
		Black African	0%	1
		Black Caribbean	0% -	
		Black - other background	0% -	
		Chinese	0% -	
		Mixed race	0%	2
		White British	90%	544
		White Irish	0%	3
		White - other background	4%	16
		Prefer not to say	6%	34
24	Your religion	No religion	27%	164
		Buddhist	0%	1
		Christian	64%	383
		Hindu	0%	1
		Jewish	0%	1
		Muslim	0%	1
		Sikh	-	
		Prefer not to say	9%	48

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Equality Impact Assessment Executive Summary Report

Name of function, policy or strategy being assessed:	Council Tax Support Scheme
Service:	Revenues and Benefits
Department:	Finance and Resources
Name and job titles of officers completing this assessment:	Caroline Quirk – Head of Revenues and Benefits Jenny Moses – Corporate Policy Officer
Date of Assessment:	7 th December 2012

Summary of decision from screening stage or findings of detailed assessment:

This EIA is in response to the Governments' reform of Council Tax Benefit – Local council tax reduction schemes. It looks at the potential impact for each of the proposals that are subject to a report to the Executive for decision 7th January 2013.

The following consultation methods were used to ensure views are gathered from a wide range of customers, including for example, claimants and non-claimants, representative organisations, voluntary community and faith organisations:

- On-line and e-panel surveys (paper copies also to be made available)
- Attendance at CAT meetings - opportunity for residents to talk about the proposed scheme with officers, complete a paper survey or signpost to on-line consultation
- Targeted publication of consultation to those organisations listed on our Community Groups database
- Targeted publication of consultation to accompany all benefit and Council Tax correspondence issued during the consultation period

Publication of consultation via press release, Facebook, Twitter, borough notice boards and Autumn edition of Fareham Today.

A total of 630 responses were received from individuals, organisations and community groups. The responses were generally positive and the majority were in favour of protecting the most vulnerable and those that genuinely cannot afford to pay.

The following table summarises the proposals and consultation responses.

Key Principle	Draft Scheme	Consultation responses
1. Every working age claimant should pay something towards their Council Tax	<p>Working age claimants will receive a maximum of 75% or 80% of the means-tested financial support award</p> <p>Financial support award capped at a Band C</p> <p>The current Second Adult Rebate scheme will be removed.</p>	<p>52% of respondents said that claimants should receive a maximum of 75%.</p> <p>74% of respondents said those in higher banded properties should pay more.</p> <p>44% of respondents said this rebate should be removed.</p>
2. The scheme should protect the most vulnerable claimants	<p>The current means-test, comprising disregards, premiums and allowances will be retained in full.</p> <p>Those claimants in receipt of the Enhanced Disability Premium and Severe Disability Premium will be protected from the changes</p> <p>Those claimants in receipt of a war pension or war widow/ers pension will be protected from</p>	<p>The majority of respondents agreed that the most vulnerable should be protected, and those that genuinely cannot afford to pay.</p>

	the changes	
3. The scheme should incentivise work	The current scheme of extended payments and child care costs will be retained. All earned-income disregards will be increased by £5 per week	The majority of respondents agreed that claimants with children should be protected. 48% of respondents disagreed with this proposal.
4. Everyone in the household who can contribute, should contribute	All working age non-dependants will be expected to contribute a minimum of £3.30 per week	77% of respondents agreed that those who could pay should pay towards their Council Tax.

Summary of Recommendations:

The Council Tax Reduction scheme proposed by the Council is legal and justified as it meets Governments requirement to reduce the countries welfare bill and DCLG guidance that:

1. Every working age claimant should pay something towards their Council Tax.
2. The scheme should protect the most vulnerable claimants.
3. The scheme should incentivise work.
4. Everyone in the household, who can contribute, should contribute.

It is fair as it spreads the burden of financial cuts across all claimants taking into account those that cannot pay.

Proposal 2 protects the most vulnerable claimants, and proposal 5 will enable those in work to earn £5 per week more than the current scheme thus incentivising work.

The numbers of claimants in houses of band D or above are very low.

However, to mitigate the negative impact there will be a Hardship Fund to provide help in extreme cases of financial hardship. Additionally, the Council proposes to invest into the provision of Money Advice service through a third party.

A successful application for the 'transitional relief grant' will enable the Council to further mitigate against the impact of the reduction in council tax support. By trying to mirror scheme proposals of neighbouring authorities, will help to promote community cohesion and foster good relations if residents in neighbouring towns are subject to similar changes.

Once the Council has decided on the final scheme to be implemented it must give full details of its decisions as feedback to all those who have taken part in the consultation process.

Monitoring of the impact of the scheme and particularly the application of the hardship fund will have to be undertaken to ensure the scheme is administered fairly and does not negatively impact or discriminate against any particular groups of people.

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Equality Impact Assessment Executive Summary Report

Name of function, policy or strategy being assessed:	Technical reforms of Council Tax – Exemptions relating to Empty Unfurnished Properties.
Service:	Revenues and Benefits
Department:	Finance and Resources
Name and job titles of officers completing this assessment:	Caroline Quirk – Head of Revenues and Benefits Adrian Collier –Local Taxation Manager Jenny Moses – Corporate Policy Officer
Date of Assessment:	7 th December 2012

Summary of decision from screening stage or findings of detailed assessment:

This EIA is in response to the Governments' technical reforms of Council Tax – exemptions relating to empty or unfurnished properties. It looks at the potential impact for each of the proposals that are subject to a report to the Executive for decision 7th January 2013.

The following consultation methods were used to ensure views are gathered from a wide range of customers, including for example, claimants and non-claimants, representative organisations, voluntary community and faith organisations:

- On-line and e-panel surveys (paper copies also to be made available)
- Attendance at CAT meetings - opportunity for residents to talk about the proposed scheme with officers, complete a paper survey or signpost to on-line consultation
- Targeted publication of consultation to those organisations listed on our Community Groups database
- Targeted publication of consultation to accompany all benefit and Council Tax correspondence issued during the consultation period

Publication of consultation via press release, Facebook, Twitter, borough notice boards and Autumn edition of Fareham Today.

A total of 630 responses were received from individuals, organisations and community groups. The responses were generally positive and the majority were in favour of all of the proposals.

In summary 80% of respondents said that the 10% discount on second homes should be removed. 75% of respondents said that those who own empty properties or those in need of refurbishment should pay council tax, 69% said that the six month exemption should be removed and 62% said that owners should pay 150% council tax if their properties remain empty after 24 months.

Equality monitoring information is not collected from those claiming exemptions and therefore it is not possible to quantify the actual/potential positive or negative impact on specific groups. The proposals will apply to all landlords, private and social and in some cases can be viewed as increasing a business charge but for some individual owners, particularly in the case of long term empty properties, may increase financial burdens.

Summary of Recommendations:

Although there is no equality data collected and therefore little evidence of the impact the proposals may have it is recognised that the likely impacts of the changes are financial through increased costs. Financial hardship can also affect housing status, health and wellbeing or result in legal proceedings. With this in mind and the feedback from the extensive consultation exercise it is found that the proposals are fair, in that those who can afford to pay should pay. However, legislation gives the Council power to reduce the amount of tax payable. This power can be utilised to offset potential hardship that may be caused in respect of unoccupied and unfurnished properties. This discretionary power should be used to alleviate any problems in exceptional circumstances.

Once full Council has decided on which proposals it will implement the decisions will need to be publicised fully as a response to all those who have taken part in the consultation process.

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BOROUGH COUNCIL

Report to the Executive for Decision 7 January 2013

Portfolio:	Policy, Strategy and Finance
Subject:	Disposal of Land Adjoining 268 Brook Lane, Sarisbury Green
Report of:	Director of Finance and Resources
Strategy/Policy:	Asset Management
Corporate Objective:	A dynamic, prudent, progressive and best practice Council

Purpose:

To request the Executive to consider the options regarding a strip of land adjoining 268 Brook Lane, Sarisbury Green.

Executive summary:

A strip of land originally acquired for a greenway route is no longer required for that purpose. The land has been licensed on a temporary basis to the owners of 268 Brook Lane but options exist for a longer term agreement for the occupation of the land or for the disposal of the land on the open market.

Recommendation:

It is recommended that the land is declared surplus and is disposed of (Option 2), subject to the Council successfully obtaining the release of the planning condition.

Reason:

Option 2 would produce a one-off consideration and relieve the Council of any ongoing management issues

Cost of proposals:

Legal costs for the transfer would be the responsibility of the purchaser(s).

Appendix A: [Plan](#)

Background papers: None

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Executive Briefing Paper

Date: 7 January 2013

Subject: Disposal of Land Adjoining 268 Brook Lane , Sarisbury Green

Briefing by: Director of Finance and Resources

Portfolio: Policy, Strategy and Finance

INTRODUCTION

1. In 2001 planning permission was granted for the construction of a single dwelling to the side of 270 Brook Lane, Sarisbury Green (the new house became 268 Brook Lane). The permission was subject to a Section 106 Agreement part of which contained a condition that the Borough Council acquire a strip of land at the edge of the development plot. The strip is shown outlined in black on the attached plan. The original intention was that, subject to funding becoming available this strip would join up with a section of footpath to the rear of the development at Battle Close and become part of the greenway network from the District Centre to the Cold East Development.
2. The development plot was subsequently sold and in 2003 the strip of land was transferred to the Borough Council. At that stage no funding was available to complete the greenway and rather than leave the strip of land vacant with a risk of dumping etc it was agreed that until such time as it was required for the greenway it would be licensed back to the purchaser of the development plot on a peppercorn basis.
3. The house was subsequently sold in 2006 to the current occupiers and a new licence was set up in their names. The licence was renewed in April 2011 for 3 years and it can be terminated by the Council on the giving of six months notice in writing. In 2009 the owner of 266 Brook Lane approached the Borough Council to register his interest in purchasing part of the land should it become available in the future and has more recently confirmed his continuing interest.
4. Hampshire County Council have confirmed that they have no aspirations or funding to complete the footpath link and when resources allow will look to stop-up and dispose of the Battle Close section of greenway. An alternative footway exists via Highnam Gardens.

PROPOSAL

5. Given that the County Council do not intend to progress the greenway link there is no reason for the Borough Council to continue to licence the land on a short term basis. Under the terms of the Transfer and the Section 106 Agreement there is no guidance as to disposal in the event of the land not being required for the intended purpose, but clearly if the purpose is no longer relevant then the Borough Council should consider disposal.

DETAILED OPTIONS

Option 1

6. The Council could licence (or alternatively lease) the strip of land to an interested party (subject to a review of the fee or rental) on a longer term basis or could consider inviting bids from both interested parties for a licence or lease. Whilst the costs of preparing the documentation would be passed to the licensee/lessee there would still be an ongoing administration role for the Council.

Option 2

7. The land could be declared surplus to requirement and disposed of. If this approach was pursued the owners of 266 & 268 Brook Lane have expressed an interest in buying some/all of the land. It could also be of interest to the residents of 1 & 3 Highnam Gardens. Given the level of potential interest in the land officers suggest that the disposal is advertised locally and competitive bids sought. It is also proposed that the land is packaged in 2 parts - a road frontage section and a rear section (the road frontage section is shown cross hatched black on the inset plan). Any ongoing administration role would cease on the disposal of the land.
8. Whichever option is pursued an application to remove the original planning condition would need to be made and it is recommended that this is applied for once a decision has been reached by the Executive. This will take approx 8 weeks as it follows the same process as a full planning application but once achieved will mean that the land is no longer constrained by the condition.
9. If the Executive were to declare the land surplus then six months Notice will need to be served to bring the licence to an end.

RISK ASSESSMENT

10. If the application for removal of the condition were unsuccessful any proposed disposal could not then be progressed.

FINANCIAL IMPLICATIONS

11. If the land were to be licensed or leased an ongoing fee or rental would be received. If the land were disposed of the Borough Council would receive a one-off consideration from one or more purchasers.

CONCLUSION

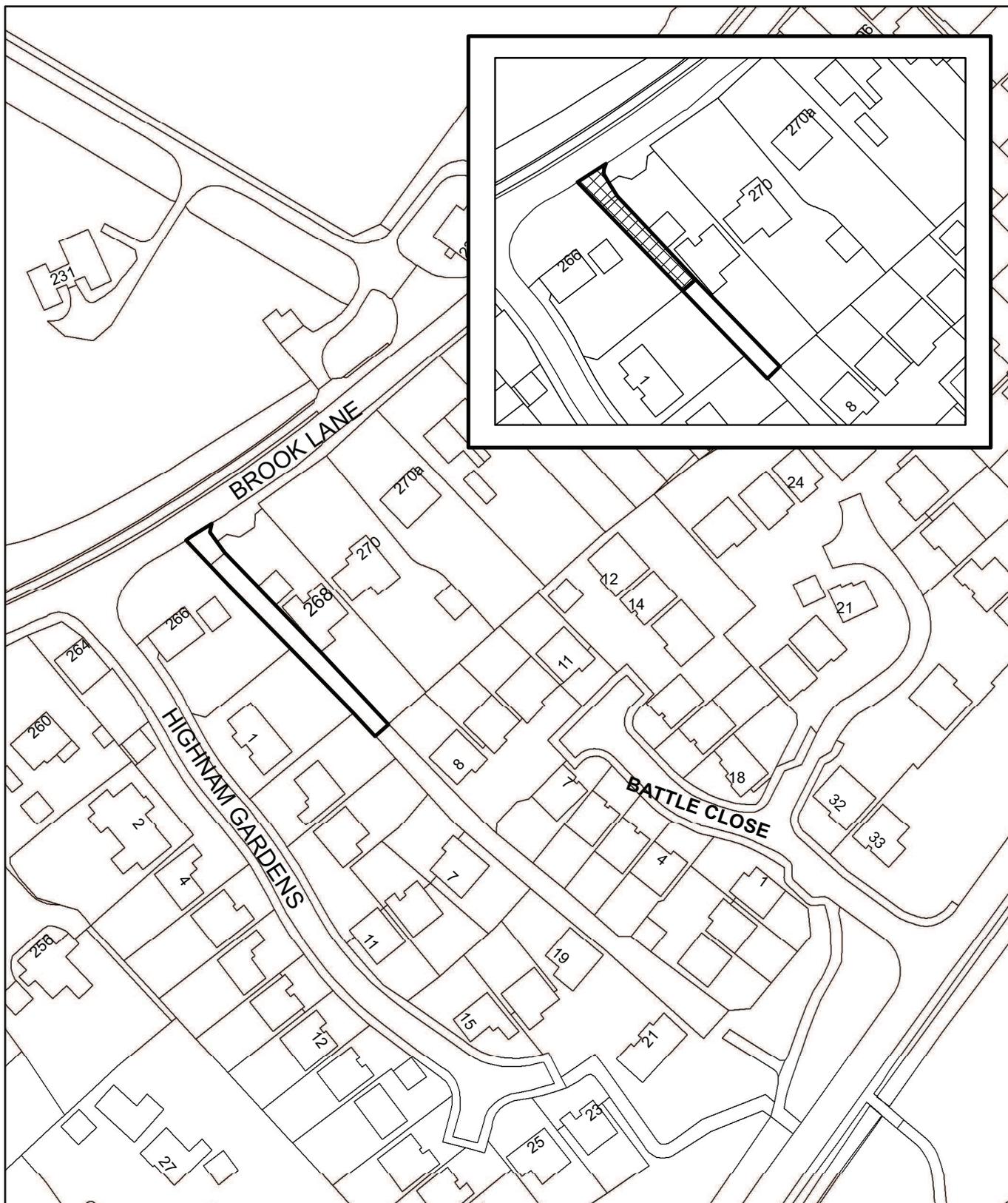
12. The strip of land adjoining 268 Brook Lane is no longer required for greenway purposes and so a longer term arrangement could be considered or the land could be declared surplus to requirement and disposed of.

Reference Papers: None



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