

# **Economic Growth Scrutiny Panel**

## **Agenda**

**Thursday, 05 September 2019 AT 10:00**

**In the Flensburg Room, Civic Centre, Carlisle, CA3 8QG**

**\*\*A preparatory meeting for Members will be held at 9.15am in the Flensburg Room\*\***

The Press and Public are welcome to attend for the consideration of any items which are public.

### **Members of the Economic Growth Scrutiny Panel**

Councillor Brown (Chairman), Councillors Mrs Atkinson, Mrs Bowman, Denholm, Meller (Vice Chairman), Mitchelson, Paton, and Rodgeron.

### **Substitutes:**

Councillors Alcroft, Bainbridge, Betton, Birks, Bomford, Mrs Bradley, Collier, Ms Ellis-Williams, Mrs Finlayson, Mrs Glendinning, Glover, Mrs McKerrell, McNulty, Morton, Patrick, Robinson, Robson, Miss Sherriff, Shepherd, Southward, Tarbitt, Dr Tickner and Tinnion.

## **PART A**

### **To be considered when the Public and Press are present**

#### **Apologies for Absence**

To receive apologies for absence and notification of substitutions.

#### **Declarations of Interest (including declarations of “The Party Whip”)**

Members are invited to declare any disclosable pecuniary interests, other registrable interests, and any interests, relating to any time on the agenda at this stage.

#### **Public and Press**

To agree that the items of business within Part A of the agenda should be dealt with in public and that the items of business within Part B of the agenda should be dealt with in private.

#### **MINUTES OF PREVIOUS MEETING**

**7 - 14**

The Chairman will move the minutes of the meeting held on 18 July 2019 as a correct record. The only part of the minutes that may be discussed is their accuracy.

(Copy Minutes herewith)

#### **A.1 CALL-IN OF DECISIONS**

To consider any matter which has been the subject of call-in.

#### **A.2 HOUSING NEED, DELIVERY AND STRATEGY UPDATE**

**15 - 46**

Portfolio: Economy, Enterprise and Housing

Directorate: Economic Development

Officer: Jeremy Hewitson, Housing Development Officer

Report: ED.25/19 herewith

##### **Background:**

The Corporate Director of Economic Development to provide an update on the key findings of the following housing-related evidence bases:

- Updated Strategic Housing Market Assessments (SHMA) for Carlisle;
- 2018/19 Housing Completions and Activity Monitoring;
- Carlisle "Movers' Survey" 2018/19.

##### **Why is this item on the agenda?**

Policy Review / Development.

**What is the Panel being asked to do?**

Note the key findings and scrutinise the effectiveness of existing strategies as well as highlighting any perceived issues for future housing and economic strategy.

**A.3 ST. CUTHBERT'S GARDEN VILLAGE PROGRESS UPDATE****47 - 64**

Portfolio: Economy, Enterprise and Housing

Directorate: Economic Development

Officer: Garry Legg, Investment and Policy Manager

Report: ED.28/19 herewith

**Background:**

The Corporate Director of Economic Development to submit a report providing an update on the progress of the St Cuthbert's Garden Village project and the proposed Engagement Plan relating to forthcoming public consultation on the draft masterplan options.

**Why is this item on the agenda?**

Policy Review / Development.

**What is the Panel being asked to do?**

Scrutinise the proposed Engagement Plan relating to the forthcoming public consultation and note the progress of the project.

**A.4 QUARTER 1 PERFORMANCE REPORT 2019/20****65 - 90**

Portfolio: Finance, Governance and Resources

Directorate: Corporate Support

Officer: Gary Oliver, Policy and Performance Officer

Report: PC.13/19 herewith

**Background:**

The Town Clerk and Chief Executive to submit the performance against current service standards and a summary of the Carlisle Plan 2015-18 actions.

**Why is this item on the agenda?**

Quarterly performance monitoring report

**What is the Panel being asked to?**

Consider the performance of the City Council presented in the report with a

view to seeking continuous improvement in how the Council delivers its priorities.

## **A.5 OVERVIEW REPORT AND WORK PROGRAMME**

**91 - 94**

Portfolio: Cross Cutting

Directorate: Cross Cutting

Officer: Rowan Jones, Overview and Scrutiny Officer

Report: OS.22/19 herewith

### **Background:**

To consider a report providing an overview of matters related to the work of the Economic Growth Scrutiny Panel.

### **Why is this item on the agenda?**

The Economic Growth Scrutiny Panel operates within a Work Programme which has been set for the 2019/20 municipal year. The Plan is reviewed at every meeting so that it can be adjusted to reflect the wishes of the Panel and take into account items relevant to this Panel in the latest Notice of Executive Key Decisions.

### **What is the Panel being asked to do?**

- Note the items (within Panel remit) on the most recent Notice of Executive Key Decisions
- Discuss the Work programme and prioritise as necessary

## **PART B**

### **To be considered in Private**

- NIL -

Enquiries, requests for reports, background papers etc to:

Jacqui Issatt, Committee Clerk (01228) 817557 or  
[jacqui.issatt@carlisle.gov.uk](mailto:jacqui.issatt@carlisle.gov.uk)

A copy of the agenda and reports is available on the Council's website at [www.carlisle.gov.uk](http://www.carlisle.gov.uk) or at the Civic Centre, Carlisle.



**ECONOMIC GROWTH SCRUTINY PANEL**

**18 JULY 2019 AT 10.00AM**

**PRESENT:** Councillor Brown (Chairman), Denholm, Ms Ellis-Williams (as substitute for Councillor Mrs Atkinson), Finlayson (as substitute for Councillor Mrs Bowman), Mitchelson, Rodgerson and Shepherd (as substitute for Councillor Meller).

**ALSO**

**PRESENT:** Councillor J Mallinson - Leader  
Councillor Ellis – Deputy Leader and Finance, Governance and Resources Portfolio Holder  
Councillor Nedved – Economy, Enterprise and Housing Portfolio Holder

**OFFICERS:** Corporate Director of Economic Development  
Regeneration Manager  
Policy and Communications Manager  
Overview and Scrutiny Officer

**EGSP.44/19 APOLOGIES FOR ABSENCE**

Apologies for absence were submitted on behalf of Councillors Mrs Atkinson, Mrs Bowman and Meller.

**EGSP.45/19 DECLARATIONS OF INTEREST**

There were no declarations of interest affecting the business to be transacted at the meeting.

**EGSP.46/19 PUBLIC AND PRESS**

It was agreed that the items of business in Part A be dealt with in public and Part B be dealt with in private.

**EGSP.47/19 MINUTES OF PREVIOUS MEETINGS**

RESOLVED – 1) Noted that Council, at its meeting on 16 July 2019, received and adopted the minutes of the Economic Growth Scrutiny Panel meetings held on 13 June 2019. The Chairman signed the minutes.

2) That the minutes of the special meeting held on 1 July 2019 were agreed.

**EGSP.48/19 CALL IN OF DECISIONS**

There were no items which had been the subject of call-in.

**EGSP.49/19 BORDERLANDS INCLUSIVE GROWTH DEAL / CITY CENTRE PROJECTS UPDATE**

The Regeneration Manager submitted an update on the Borderland Inclusive Growth Deal and an update on a number of City Centre Projects. (ED.24/19)

*Borderlands Inclusive Growth Deal Update*

The Corporate Director of Economic Development was pleased to report that the Heads of Terms for the Borderlands Growth Deal had been signed on 1 July 2019 and both Governments had committed to the Deal. She explained that work on the details of the projects would begin and outline Business Cases would be prepared. She added that Carlisle was considered the capital of the Borderlands Region and was the gateway to the area.

The Regeneration Manager gave an overview of the background to the Borderland Inclusive Growth Deal and reminded the Panel that the Borderlands Region comprised of Carlisle City, Cumbria County, Dumfries and Galloway, Northumberland County and Scottish Borders. The Heads of Terms had been signed and the Deal included a package of investment of up to £350million from the UK and Scottish Governments over 10-15 years, of which, £200million was for Cumbria and Northumberland.

The Regeneration Manager drew the Panel's attention to section 1.5 of the report which set out the four investment themes which had been designed and developed by the five Borderlands partner authorities to address the three main challenges for the Borderlands economy. He reported that the feasibility, viability and value for money case for each project and programme must be made before funding was made available. As such, all funding commitments were subject to the approval of business cases in accordance with relevant departmental and government policies.

The five Borderlands partner authorities would continue to work with both the Scottish and UK governments to develop a final deal document. This would need to include the governance and programme management arrangements for the management of the Deal. A key element of the governance would be the inclusion of the Economic Forum, a private sector-led group to advise and inform the Borderlands Partnership Board. A Programme Management Office would also be established to administer and manage the Deal, ensure that both UK and Scottish governments' requirements were met and report on the impact and delivery of projects and the overall programme.

A Borderlands Conference was planned for October 2019 and would provide the opportunity for interested parties and stakeholders to engage in the next stages of development of the Deal.

In considering the Borderlands section of the report Members raised the following comments and questions:

- How would the structure of the Borderlands Partnership be established?

The Corporate Director of Economic Growth explained that the Borderlands Partnership Board would be made up of the five authorities, the Leaders of which had made it clear that the Board would be politically led. The Board needed input from businesses which would come from the Economic Forum and the Cumbria and Northumbria LEPs. Any decisions that were required would be taken by the five partner authorities including final decisions on business cases. The Growth Deal gave an indication of where the funding would be directed but business cases had to be prepared and agreed to enable specific focussed investment.

The five partner authorities would agree where the Programme Management Office would be, how it was structured and how it was funded. The Office would be a small team supporting the Partnership Board and responding to requests for information from Central Government. A Member felt strongly that any projects in Carlisle should be managed by Carlisle to ensure the project was right for the City and District.



- How would the Economic Forum be established?

The Corporate Director of Economic Development explained that the Council would encourage and support local businesses to take part in the Forum. There would be a vetting and interview process to ensure there was a variety of businesses from different sectors to advise and support the Borderlands Project Board.

- Was there a breakdown of how the £200m would be divided between Cumbria and Northumberland?

The Corporate Director of Economic Development explained that the breakdown of the funding would not be determined until the outline business cases had been completed. The Scottish Government had set out how the funding should be spent in Scotland but the UK Government required a robust demonstration of value for money before committing to fixed figures.

- Would small towns such as Longtown and Brampton benefit from the Place Programme?

The Corporate Director of Economic Development reported that Scotland had a Place Project which had been used as the model for the Borderlands Place Programme. Each District would consider the towns that they felt would benefit from the programme and they would be considered against a criteria. She reminded the Panel of the large geography of the Borderlands Region which contained a lot of small towns which required investment.

The Economy, Enterprise and Housing Portfolio Holder commented that it was hoped that other projects and initiatives, such as the Borderlands Railway Extension, would help to revitalise some of the smaller towns by providing better connectivity.

The Leader reminded the Panel that the five partner authorities shared common issues, problems and wishes. He was confident that there was a common feeling of co-operation and a genuine will to work together for the benefit of the people in the region.

- Would the Borders Railway Extension Feasibility Study include any suggestions of a branch line to Kielder Water to ease the logging traffic on roads?

The Corporate Director of Economic Development had been aware of the issues on the roads with logging vehicles but the main aim of the study was the development of proposals for a new rail line connecting Carlisle to Edinburgh linking with the existing Tweedbank line so it was unlikely that there would be an opportunity to include a branch line at this point, however, the Corporate Director agreed to raise the matter at the appropriate time.

- Was the Lake District included in the Borderlands Region?

The Corporate Director of Economic Development confirmed that the Lake District was included in the Borderlands Region as Cumbria County Council were one of the five partner authorities.

The Panel was concerned that the Lake District was included in the Region and may affect the amount of funding that Cumbria and Northumberland receive. The Panel did not want any funding applications to affect the business case for the flagship railway development project.

The Corporate Director clarified that the initial proposed projects for the Growth Deal had been streamlined down to the projects detailed within the report and each of those projects matched the requirements of the Ministry of Housing, Communities and Local Government (MHCLG).

The Lake District area would receive some funding but not a significant amount. She assured the Panel that the City Council would push hard to maximise the funding in Carlisle.

The Panel stressed the importance of ensuring that the improvements to the Carlisle Railway Station reflected the importance of Carlisle as the heart of the Borderlands Region.

- Was there an opportunity for an energy supplier to be involved in the Energy Investment Company (EIC) to pass savings on to residents?

The Corporate Director of Economic Development responded that the region produced a large amount of energy and the goal was to maximise the energy produced and become self-sufficient.

- The Destination Borderlands project did not have any specific sub-projects for Carlisle, would organisations have to bid for funding to deliver projects? There was some concern that investment would not be made in Carlisle.

The Corporate Director of Economic Development confirmed that the funding would be accessed through the preparation of business cases. Hadrian's Wall was an investment theme within Destination Borderlands and the Partnership Board were keen to pursue investment opportunities across the Wall, and not just in the traditional visitor places.

The Leader reminded the Panel that Carlisle was not just the City, the District was spread over a vast rural area. He agreed the Railway Station was the flagship project in Carlisle and the Council would try to ensure that it received the appropriate share of money and there was a lot of cross border support for the project.

- Were there plans to transfer skills from the Borderlands Deal to less affluent areas?

The Corporate Director of Economic Development confirmed that the Borderlands Growth Deal was inclusive and focused on positively impacting communities across the whole region.

- Would Brexit affect the Deal?

The Corporate Director of Economic Development reminded the Panel that the Heads of Terms had been signed and agreed by both Governments. The Borderlands Growth Deal would help address any issues that may be raised by Brexit.

- The Borderlands Region had a significant number of low paid seasonal jobs, how would the Growth Deal help create secure, year round, better paid jobs?

The Corporate Director of Economic Development explained that one of the objectives of the Destination Borderlands project was to increase the dwell time in the area by improving the attractions and encouraging visitors to stay longer in the Region. The Corporate Director reminded the Panel that the Borderlands Growth Deal was one element of the Economic Strategy which also included the Enterprise Zone and the Garden Village. The Borderlands Deal put Carlisle on the map and enabled better promotion of the City to attract businesses and encourage growth.

- Would the discovery of the Roman remains at the Cricket Ground be incorporated into projects?

The Regeneration Manager agreed that the remains had been a great find for the City and could underpin Hadrian's Wall tourism in Carlisle. The next stage would be a project with the Heritage Lottery Fund to fund further excavation work. Following further excavation works there would be a complex process to determine how the remains would be protected and possibly displayed to promote tourism.

- Had Chapel Cross been decommissioned?

The Corporate Director of Economic Development confirmed that the Chapel Cross site had been decommissioned, however, the remediation work would take many years and the project would be phased to manage the long timescale.

The Economy, Enterprise and Housing Portfolio Holder commented that the Borderlands Growth Deal Bid was an immense enterprise with significant benefits to Carlisle and the Region. Carlisle was strategically placed to develop economically and was serious about becoming the gateway to the Region. He felt that the Growth Deal should be embraced fully, and he thanked the previous administration for the groundwork in getting the deal agreed.

- A Member supported the enthusiasm for the Growth Deal but cautioned that it would not be sensible to focus on retail in the City Centre given the changes to retail and how city centres were being used.

The Corporate Director of Economic Development agreed that city centres were changing and they were moving away from being retail orientated to becoming meeting places for recreation, work and retail and the City Council recognised this and their role in the future of the city centre.

The Economy, Enterprise and Housing Portfolio Holder acknowledged that city centres were changing, and this had caused some serious issues for other Cities. The City Council needed to be one step ahead and prepare for a flexible city centre which could include more leisure activities and housing rather than just retail. The improvements to the railway and Citadel area would provide new retail opportunities and further mixed development use to add to a vibrant city centre.

He reported that the Council had submitted an expression of interest bid for funding from the High Street Fund which was as part of a government initiative to improve the high street. Although the bid had not been successful the MHCLG had liked the bid and encouraged the Council to apply again next year.

#### *Update on Key Projects*

The Regeneration Manager updated on the Panel on key projects within the City.

He reported that expressions of interest had been received for the Central Plaza building and the Council was in dialogue with an experienced developer. The developer had carried out appraisals and was not deterred by the condition of the building but was encouraged by the Borderlands Growth Deal. There was no information at the current time on the developer's proposals for the building or a business case but it was positive news moving forward.

With regard to the Dias building on Botchergate, the Regeneration Manager explained that the condition of the building had been a concern for the Council for a number of years and two previous bids for funding to refurbish the area had been commended but had been unsuccessful.

The Council had, in partnership with key stakeholders, submitted a new competitive Expression of Interest to Historic England's High Street Heritage Action Zone Fund for the renovation of the Dias building and the Christ Church Gardens opposite. The Council was negotiating with the owners of the building regarding their involvement and they were willing to make a substantial contribution to the project and were keen to work with the Council. The owners had understood the Council's concerns and had struggled to find a solution which fit in with their business model. An update on the Expression of Interest would be submitted to a future meeting of the Panel.

The Economy, Enterprise and Housing Portfolio Holder understood the concerns regarding the future of the building. The building had been an issue for the City and the co-operation of the owners was needed for the development if the bid was successful.

The Deputy Leader and Finance, Governance and Resources Portfolio Holder shared the concerns regarding the building but felt that the refurbishment of the building would materially improve the City.

RESOLVED – 1) That the Borderlands Inclusive Growth Deal and City Centre projects Update be noted (ED.24/19)

2) That an update on the Expression of Interest which had been submitted to the Historic England's High Street Heritage Action Zone Fund be added to the Work Programme for a future meeting of the Panel.

## **EGSP.50/19 OVERVIEW REPORT AND WORK PROGRAMME**

The Overview and Scrutiny Officer presented report OS.18/19 which provided an overview of matters relating to the work of the Economic Growth Scrutiny Panel.

The most recent Notice of Executive Key Decisions, copies of which had been circulated to all Members, had been published on 21 June 2019. There were no items included within the remit of the Panel.

The Panel's 2019/20 Work Programme had been attached to the report for consideration. The Panel discussed the Work Programme and agreed the following:

- Environment Strategy to be scheduled for 27 October 2019
- Joint Inquiry Day with Health and Wellbeing Scrutiny Panel to be programmed to meet the 27 October 2019 meeting

The Chairman asked that arrangements be made for the Panel to visit the Enterprise Zone.

RESOLVED – 1) That the Overview Report incorporating the Work Programme and Key Decision items relevant to the Economic Growth Scrutiny Panel (OS.18/19) be noted.

2) That the following items be scheduled in the 2019/20 work programme for the Panel;

- Environment Strategy to be scheduled for 27 October 2019
- Joint Inquiry Day with Health and Wellbeing Scrutiny Panel to be programmed to feed into the October meeting

3) That the Overview and Scrutiny Officer make arrangements for the Panel to visit the Enterprise Zone.

(The meeting ended at 11.35am)





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## Economic Growth Scrutiny Panel

Agenda Item:

**A.2**

Meeting Date: 5 September 2019  
Portfolio: Economic Development  
Key Decision: No  
Within Policy and Budget Framework: Yes  
Public / Private: Public

Title: Housing Need, Delivery & Strategy Update  
Report of: Corporate Director of Economic Development  
Report Number: ED.25/19

### Purpose / Summary:

This report provides an update on the key findings of the following housing-related evidence bases:-

- Updated Strategic Housing Market Assessment (SHMA) for Carlisle;
- 2018/19 Housing Completions and Activity Monitoring;
- Carlisle "Movers' Survey" 2018/19.

The report also identifies whether the key findings support that existing strategies remain on track to achieve their intended objectives, in addition to setting out the emerging direction of travel for future Housing and Economic Strategy.

### Recommendations:

The Panel are requested to note the key findings and therefore updated evidence on housing need and delivery, and consequently scrutinise the effectiveness of existing strategies including the Carlisle District Local Plan as well as highlighting any perceived issues for future housing and economic strategy.

### Tracking

Executive:	
Scrutiny:	
Council:	

## **1. BACKGROUND**

- 1.1** The revised Strategic Housing Market Assessment (SHMA) updates a previous (2014) assessment with both compiled by the same consultant, JG Consulting. The SHMA provides an analysis of housing need relating to: the market sector; affordable housing; specialist housing (including for the elderly); private rented sector and St Cuthbert's Garden Village (SCGV). The key findings from the revised SHMA are summarised in Section 2 of this report. A more detailed Executive Summary has been included as *Appendix 1*, as the full SHMA report is 143 pages.
- 1.2** The opportunity is also being taken to report on key findings from completions and activity monitoring across 2018/19, with key headlines detailed in Section 3 of the report.
- 1.3** Finally, the findings of a Movers' Survey across 2018/19, which enables the Council to gain a better understanding of the people and their reasons for moving to new homes in Carlisle, are detailed in Section 4 of this report.
- 1.4** The above sources all provide valuable evidence to help inform future decisions on both housing and economic strategy.

## **2. ANALYSIS OF THE SHMA KEY FINDINGS**

- 2.1** The SHMA primarily covers the period 2018-30; although some of the analysis relating to SCGV goes up to 2050, as this is a long-term development. It is acknowledged, however, that the affordable housing element of the SHMA will need to be refreshed after five years, to ensure the evidence base remains up to date.

### **2.2 Carlisle District Profile**

The SHMA provides a useful headline summary of the District's housing profile, identifying:-

- a relatively old population age structure across the District, albeit a younger profile when compared with Cumbria as a whole.
- a comparatively larger proportion of outright home owners (which will to some extent be linked to the age structure) and a smaller private rented sector than regional and national comparatives.



- balanced stock in terms of the proportion of larger and smaller homes, although the stock in the urban area is notably smaller than seen in rural areas.
- relatively typical economic profile in terms of the proportion of people in work; although levels of unemployment are lower than seen regionally or nationally.
- different characteristics between urban and rural areas – with a younger age structure, greater proportions of households in rented housing, smaller dwelling sizes, greater levels of overcrowding and higher unemployment in the urban area, with more “prosperous” characteristics observed in rural areas.

## **2.3 Demographic Trends and Housing Need Projections**

The assessment considers a number of sources of information and trends to arrive at housing-based projections covering the SHMA study period and the extended period for SCGV. It concludes that:-

- in keeping with previous and separate studies it is necessary to plan for higher levels of growth to address a reduction in the local labour supply and hence to support job growth and the economy, with the Local Plan housing target which averages 565 new home per annum remaining appropriate.
- a need to sustain current levels of planned housing growth beyond the end of the current Local Plan period (2030) in response to economic growth forecasts, acting to emphasise the importance of St Cuthbert’s Garden Village in providing certainty and continuity with regards to longer term housing delivery.
- SCGV, given the nature and scale of the opportunity, should provide greater opportunities for working-age households to move to the area, enabling them to take up the forecast local jobs.
- In the absence of SCGV, and ultimately a proactive plan for longer term managed growth, it is projected that there would be a sustained ageing of the population, with only modest increases in the population of children and those of ‘working-age’.

## **2.4 Affordable Housing Need**

### **2.4.1 Affordable Need by Housing Market Area**

The SHMA shows a net annualised need for 158 affordable homes across the District. Carlisle has three established Housing Market Areas – Carlisle City; Rural East (most of Carlisle’s rural area); and Rural West (Dalston & Burgh ward). Figure 1 sets out the annualised affordable housing requirements for each Housing Market Area.

The analysis identifies a need for additional affordable housing across all three Housing Market Areas, with the highest figure being seen in Carlisle City (which would be expected as approximately 68% of residents within the District live in the City).

**Figure 1: Estimated Need for Affordable Housing by Sub-Area (per annum)**

Housing Market Area	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Re-let Supply	Net Need
Rural West	3	28	5	37	13	24
Rural East	13	85	33	130	72	58
Carlisle City	42	293	197	532	455	77
All households	58	406	234	699	540	158

(Source: Census (2011)/CoRe/Projection Modelling and affordability analysis)

#### **2.4.2 Comparison of Affordable Housing Need with Previous SHMA**

The previous SHMA, covering the period 2014-19, identified a need for 295 affordable dwellings per annum, compared to 158 in the updated assessment. The revised SHMA identifies that whilst the number of households falling into affordable housing need has remained relatively consistent over the last five years, the net housing need has reduced, due to an increase in supply. Increased supply reflects an increase in Housing Association led schemes following the reintroduction of grant for affordable and social rented housing, and the increase in delivery of affordable homes through Section 106 planning gain schemes, linked to increased levels of development over recent years, in conjunction with higher turnover rates of existing social housing stock.

Importantly the SHMA concludes at paragraph 4.45 that:

*“Regardless of the difference in the overall numbers, both studies clearly demonstrate a need to provide additional affordable housing in Carlisle where opportunities arise.”*

### 2.4.3 Affordable Need by Tenure

The SHMA has assessed the affordable need by tenure as follows:-

- 60% affordable or social rent (usually through a Housing Association);
- 40% 'intermediate' low cost home ownership (such as discounted sale or shared ownership).

The formal definition of Affordable Housing is set out in Annex 2 of the National Planning Policy Framework.

### 2.4.4 Affordable Need by Property Size

Figure 2 identifies housing need by property size for social/ affordable rental and intermediate housing.

<b>Figure 2: Suggested Mix of Affordable Housing by Property Size</b>		
<b>Tenure</b>	<b>1-/2 bedrooms</b>	<b>3+ bedrooms</b>
Affordable home ownership	60-70%	30-40%
Affordable housing (rented)	65-75%	25-35%

The percentages in the above table are based on minimum household bedroom requirements, and do not factor in demand. Indeed, the SHMA recognises the limited flexibility which 1-bed properties offer to changing household circumstances, which can often lead to higher turnover and management issues. There appears to be limited demand from local housing associations to deliver 1-bedroom accommodation in any real numbers (despite the 'Bedroom Tax' still being in place), as there remains a significant supply of 1-bed social housing in many areas of Carlisle, as the majority of properties sold through the Right to Buy scheme were family houses. Also acknowledged is the role which delivery of larger family homes in the affordable sector can play in releasing a supply of smaller properties for other households; including older persons households looking to downsize.

## 2.5 **Family Household and Housing Mix**

There are a range of factors which will influence demand for different sizes of homes, including demographic changes; future growth in real earnings and households' ability to save; economic performance and housing affordability. From a demographic perspective there is projecting forward expected to be an increase in the number of households with dependent children – increasing by 17% over the

2018-30 period having regard to the levels of housing delivery enabled by the Carlisle District Local Plan. The analysis linked to long-term (12-year) demographic change therefore concludes that the following represents an appropriate mix of market homes - this takes account of both household changes and the ageing population:-

- 1 – 2 bedrooms: 30-40%
- 3/ 3+ bedrooms: 60-70%.

Based on the evidence, it is expected that the focus of new market housing provision will be on two and three-bedroom properties. Continued demand for family housing can be expected from newly forming households. There may also be some demand for medium-sized properties from older households downsizing and looking to release equity in existing homes, but still retaining flexibility for friends and family to come and stay by retaining a spare bedroom.

The analysis suggested slightly larger homes being required in rural areas although it is considered that the mix on any specific site could be influenced by site characteristics.

Finally, the analysis considered the potential mix of housing in St Cuthbert's Garden Village. Overall, a slightly larger mix of housing might be appropriate (providing more of a family offer). However, overall differences from District-wide needs were not substantial.

## **2.5 Older People and People with Disabilities**

The data shows that in general, Carlisle has similar levels of disability compared with other areas, however an ageing population means that the number of people with disabilities is likely to increase substantially in the future. This inevitably has implications for both the type of housing we need going forward and providing care to people in their existing homes. Key findings include:-

- up to 30% increase in the population aged 65+ over 2018-2030 (potentially accounting for at least half of total population growth);
- a future need for all types of specialist housing for older people including additional care beds;
- a current need for sheltered and Extra Care housing in both the rented and leasehold sectors – 32 per annum in the period to 2030 over half of which is estimated to be required in the rented (affordable) sector; and
- a need for up to 390 dwellings to be for wheelchair users (meeting Building Regulations technical standard M4(3)) over the period 2018-30.

The analysis has also considered the potential need for specialist housing at St Cuthbert's Garden Village. Given that this is a new site, and previous analysis has suggested that it may attract a higher proportion of families it is suggested that needs might be lower than within other housing developments. However, it is also the case that a supply of specialist housing (of which there is currently relatively little across the Council area) could stimulate demand. Taking account of a range of factors, it is concluded that SCGV should be providing around 10% of housing as specialist accommodation, in both the market and affordable sectors.

The Council adopted an Affordable and Specialist Housing Supplementary Planning Document (SPD) in 2018. The 'Specialist' element is partly in recognition of the projected changing demographics around the ageing population and includes measures such as encouraging the development of more bungalows and other property types suitable for older and disabled people.

All six Cumbrian District Councils and Cumbria County Council signed up to an Extra Care Housing Joint Working Protocol earlier this year to facilitate more effective collaboration.

## **2.7 Private Rented Sector**

The SHMA has not attempted to assess the need for additional private rented housing but provides a summary of the sector in Carlisle. Key headlines include:

- The private rented sector (PRS) increased by 89% in Carlisle between the 2001 and 2011 Censuses, accounting for around 14% of all households across the District by 2011 – a higher proportion to that seen across Cumbria, but below equivalent figures for the North West and England (17%).
- Since 2011, the English Housing Survey data shows that the PRS has risen by a further 26% and if Carlisle has seen a similar level of increase then this would equate to approximately 1,800 additional households in the sector – bringing the total up to around 8,700 households – about 18% of all households in the Council area.
- The PRS has some distinct characteristics, including:-
  - a much younger demographic profile and a high proportion of households with dependent children (notably lone parents);
  - relatively higher levels of overcrowding;
  - generally smaller, flatted/terraced accommodation when compared with the owner-occupied sector but an estimated 38% of the stock in Carlisle

has three or more bedrooms, demonstrating the sector's wide role in providing housing for a range of groups, and others who might be described as 'would be owners' – in some cases these people can be prevented from accessing owner-occupation due to deposit requirements.

- rent levels have increased very slightly over time with these lower than seen regionally and nationally suggest no particular lack of supply of private rented homes.

### **3. HOUSING COMPLETIONS AND ACTIVITY MONITORING**

**3.1** It is an obligation of the Carlisle District Local Plan to monitor housing completions on an annual basis. This section presents the findings from the latest 2018/19 monitoring period.

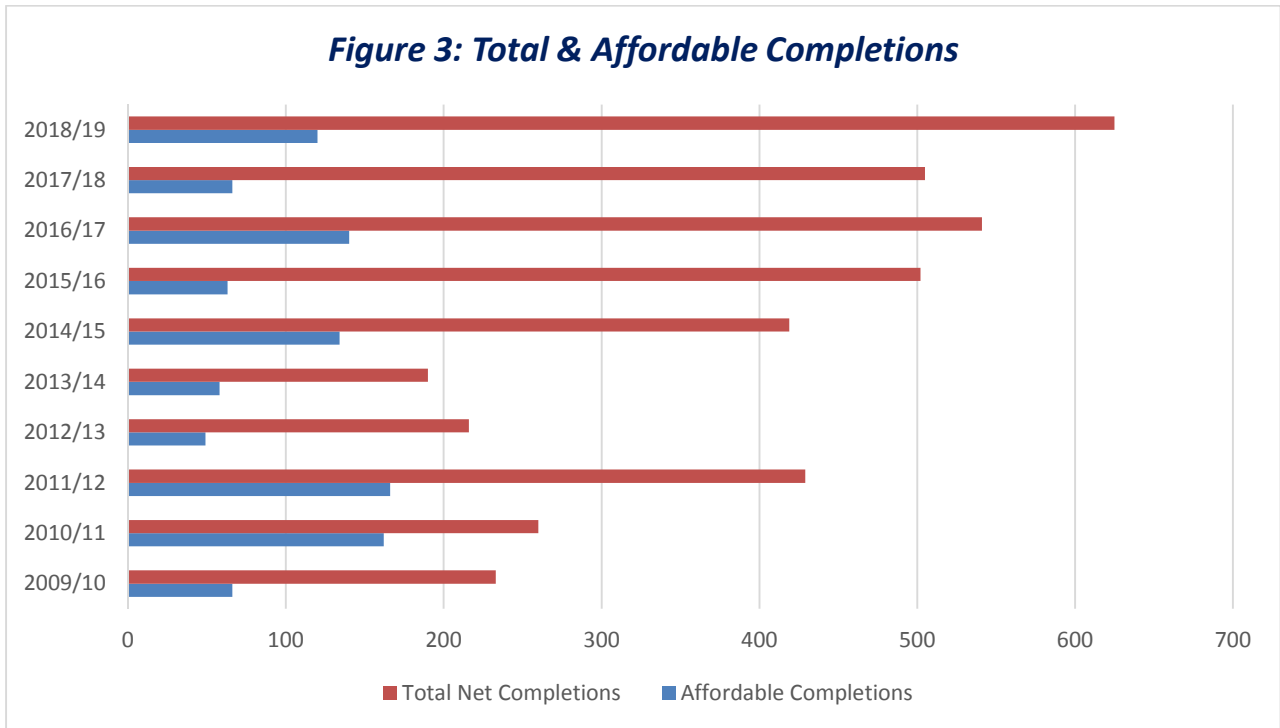
#### **3.2 Total and Affordable Completions**

625 net completions were recorded across 2018/19 of which 473 (76%) were in the Urban Area and 152 (24%) in the Rural Area. This represents a record year for housing completions with delivery, including the urban/rural split, broadly aligned with the objectives of the Carlisle District Local Plan. The vast majority (581) of these completions were new build, with the remaining 44 properties relating to conversions of existing buildings.

Affordable home completions across this same period totalled 120 (19.2% of overall completions) of which 66 were for social/ affordable rent and 54 intermediate low-cost home ownership. In all, 85 of these affordable homes were delivered through the planning system, along with 35 additional properties provided through the 'Heylo' shared ownership scheme, supported by Homes England.

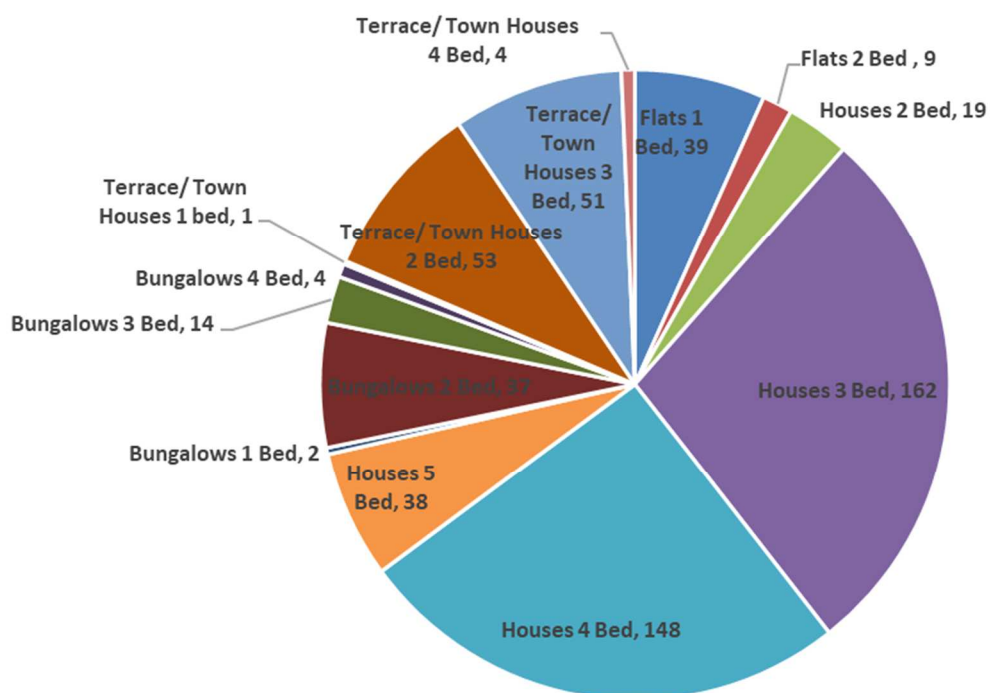
*Figure 3, overleaf, provides a breakdown of total and affordable completions over the last ten years. It clearly demonstrates the significant increase in overall completions since the low of the recession, with higher delivery rates also reflecting the success of the Carlisle District Local Plan. Affordable completions show more of a fluctuation, linked to variations in the annualised level of grant funded completions.*

**Figure 3: Total & Affordable Completions**



### 3.3 Housing Completions by Property Type

Figure 4 provides a breakdown of the total completions for 2018-19 by dwelling type. It demonstrates that a varied range of dwelling types were built during the year; although the most popular were three and four-bedroom detached and semi-detached houses, accounting for approximately half of all completions during 2018-19



### **3.4 Sites under Construction**

549 dwellings were observed as under construction at the time of completions monitoring which bodes well for future completion rates. In total there are 4,661 homes with an outstanding planning permission: 3,475 in the Urban Area and 1,186 in the Rural Area. Most of these are on active sites and hence there is no overwhelming evidence of land banking in Carlisle.

## **4. CARLISLE DISTRICT MOVERS' SURVEY 2018-19**

**4.1** The Movers' Survey was initiated from the beginning of the financial year 2018-19 and has been continued into 2019-20. The survey is an attempt to gain a better understanding of people's reasons for moving to new homes in Carlisle District to help inform wider strategies. Forms are sent to occupiers of new build homes by the Council Tax section – these are not sent where the developer is still liable at the date the new property record is created, which means the sample is smaller than originally anticipated but 55 forms were returned, and the intelligence gathered has still proved useful.

**4.2** A summary of the key findings from the 2018-19 Movers' Survey is provided below:-

i) Where have you moved from?

The 54 responses to this question are summarised below:-

- 41 – Carlisle District – existing residents
- 4 – Cumbria (other Districts)
- 8 – Elsewhere in UK
- 1 – Outside UK

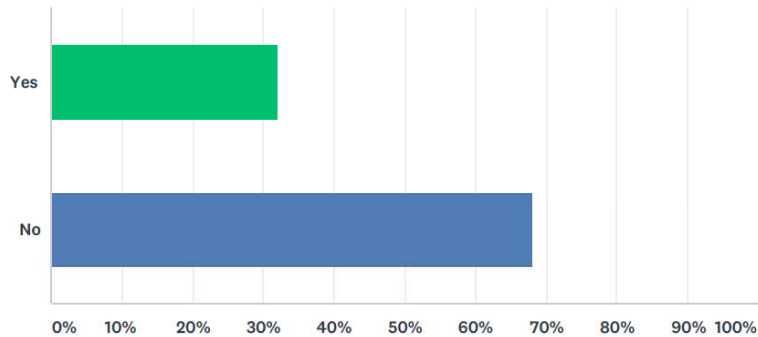
This equates to 76% of movers already resident in Carlisle and 24% moving into the District.



ii) Is this your first independent home?

Q2 Is this your first independent home?

Answered: 53 Skipped: 2

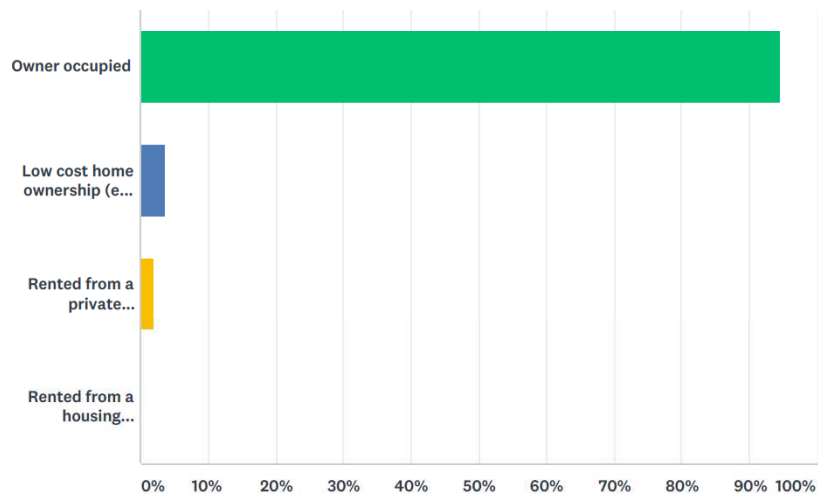


ANSWER CHOICES	RESPONSES	
Yes	32.08%	17
No	67.92%	36
TOTAL		53

iii) Tenure of new home?

Q3 Is your new home?

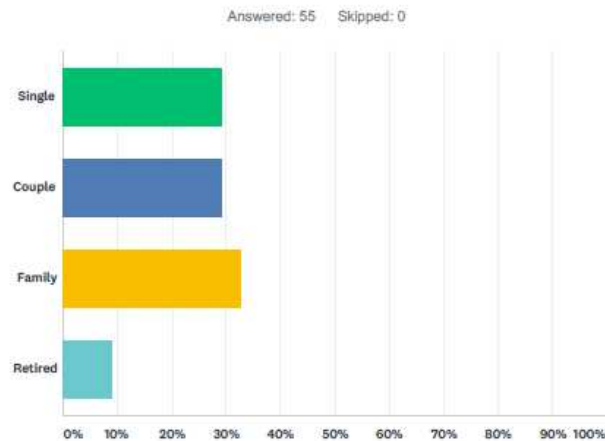
Answered: 55 Skipped: 0



ANSWER CHOICES	RESPONSES	
Owner occupied	94.55%	52
Low cost home ownership (e.g. shared ownership or discounted sale)	3.64%	2
Rented from a private landlord	1.82%	1
Rented from a housing association	0.00%	0
TOTAL		55

iv) Household Composition

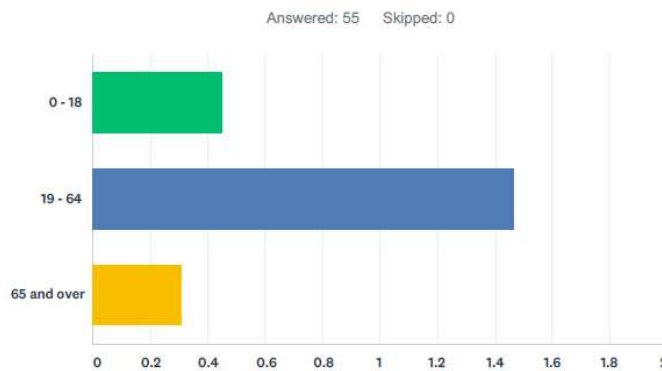
Q4 Which of the following best describes your household?



ANSWER CHOICES	RESPONSES	
Single	29.09%	16
Couple	29.09%	16
Family	32.73%	18
Retired	9.09%	5
TOTAL		55

v) Household Demographics

Q5 How many people are there in your household from each of the following age bands?

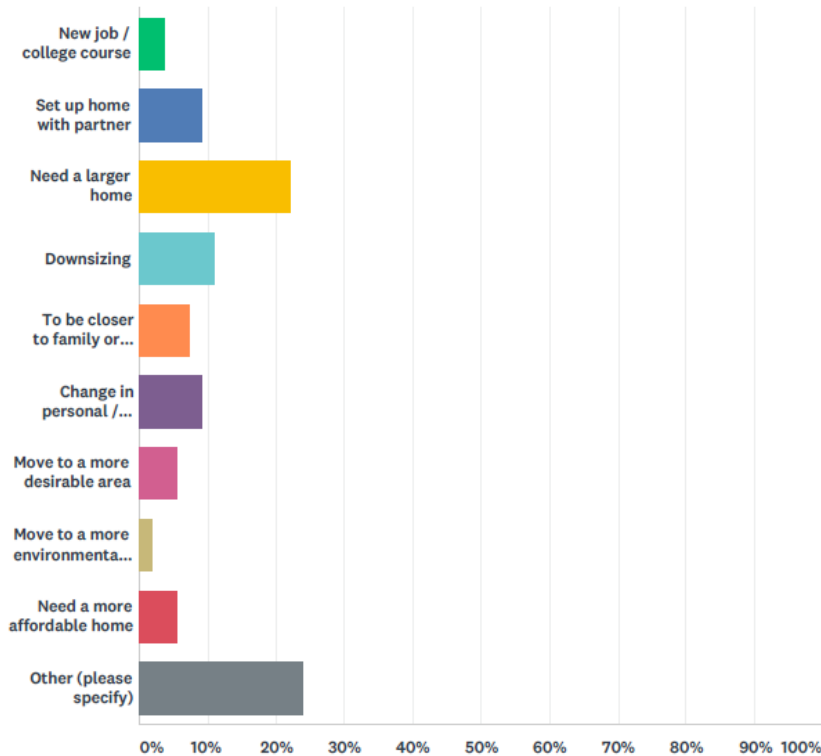


ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
0 - 18	0.4	24	53
19 - 64	1.4	79	54
65 and over	0.3	16	52
Total Respondents: 55			

vi) Reason for moving to new address?

Q6 What is your main reason for moving?

Answered: 54 Skipped: 1



ANSWER CHOICES	RESPONSES	
New job / college course	3.70%	2
Set up home with partner	9.26%	5
Need a larger home	22.22%	12
Downsizing	11.11%	6
To be closer to family or friends	7.41%	4
Change in personal / household circumstances	9.26%	5
Move to a more desirable area	5.56%	3
Move to a more environmentally friendly home	1.85%	1
Need a more affordable home	5.56%	3
Other (please specify)	24.07%	13
TOTAL		54

The most popular individual reason for people moving was people needing a larger home. A summary of the reasons for moving identified by the 13 respondents who selected “Other” is set out below – this includes a number of people who indicated they were first-time buyers or moving to their first home:-

- 1 Retirement
- 2 Relocation from overseas New job /
- 3 Moving out of parents' house into first home
- 4 First time buyer
- 5 first time buyer
- 6 First home
- 7 To escape the overcrowded & congested South
- 8 To be near work
- 9 Moving out of parents' house
- 10 Move to a more desirable area / move to a more environmentally friendly home / out of flood zone
- 11 Buying own home
- 12 Purchased our own home left private rented
- 13 Moved from a flat to a house.

**4.3** The Movers' Survey, although based on a limited sample, has still established some clear trends:-

- i) The majority of respondents previously lived within the District, but approximately a quarter (24%) had moved to Carlisle, which is relevant to the need to attract more people to take up jobs, recognising the projected increase in the level of older/ retired people.
- ii) Almost a third of people indicated this was their first independent home.
- iii) Nearly all respondents were owner-occupiers; although this reflects the types of household the forms would typically be sent to (total and affordable completions are already monitored).
- iv) The largest household group was 'family' at almost 33%; although this was only slightly ahead of 'single' and 'couple' both on just over 29%, with retired some way behind at just over 9%.
- v) There were significantly more people in the 19-64 age band at almost 1.5 per household, than in the 0-19 or 65 and over bands. This is an important factor in respect of the economic benefits of maintaining Carlisle's working age population.
- vi) People indicated a wide range of reasons for moving home; however, the two most popular reasons were setting up home for the first time and needing a larger home.

## **5. IMPLICATIONS OF THE FINDINGS ON HOUSING AND ECONOMIC STRATEGY**

**5.1** The updated SHMA; Housing Completions and Activity Monitoring; and Movers' Survey provide valuable evidence to help assess the effectiveness of existing plans and policies as well as informing future strategies.

**5.2** A summary of the headline finding from these work streams is as follows:-

### SHMA

- Supportive of Local Plan development targets;
- There is still a significant need for affordable housing (158 dwellings per annum) – both for rent and low-cost home ownership;
- Significant need for Extra Care housing (32 per annum up to 2030) – both for rent and leasehold, due to projected increase in older persons' population;
- Need for increased levels of accessible and adaptable homes, including wheelchair standard dwellings, to meet the needs of older and disabled people;
- St Cuthbert's Garden Village will play a key role up to 2050 in delivering a range of new homes for families, older people, and crucially homes for working age people to support the local economy.

### Completions and Activity Monitoring

- Record completions in 2018-19 – 625 dwellings;
- Affordable delivery during the year was 120 – a significant increase on the previous year, but still below the SHMA target of 158;
- Although half of all completions were 3 and 4 bedroomed detached and semi-detached houses there was still a broad overall mix of development;
- Significant pipeline of outstanding planning permissions.

### Movers' Survey

- Approximately three-quarters of movers previously resident in Carlisle and around a quarter moving from outside the District;
- Strong level of working age people in respondents' households – important for the economy
- Main reasons for moving were setting up first home or needing a larger property.

- 5.3** In general terms the latest findings act to affirm that the Carlisle District Local Plan is on course with respect to its intended objectives. Key objectives include boosting significantly the supply of new homes within Carlisle, as well as securing an appropriate mix of home types and tenures, to sustain and support the growth of the economy. These objectives are also central to wider economic strategies including Cumbria Local Enterprise Partnership's Local Industrial Strategy and are equally one of a number of key drivers at the heart of the Borderlands Inclusive Growth Deal.
- 5.4** Looking to the future the key findings will also support the development of the Council's Housing Strategy and Economic Strategy. Whilst previously, it had been envisaged that a 'stand-alone' Housing Strategy would be prepared (including private sector housing as well as hostels and homelessness) emerging thinking is that the strategic direction for Housing might be better represented as a key element of a wider Economic Strategy for Carlisle. This approach would reflect the fact that other important housing-related areas are already covered by their own strategies, such as the Interagency Homelessness Strategy for Carlisle, and also importantly that housing and the demographic change it needs to support are absolutely central to a thriving and prosperous economy. It equally reflects that there are likely to be many synergies between the actions needed to support inward investment and sustained housing growth, through for example the effective promotion of Carlisle as a great place to live, work and to do business.

## **6. RISKS**

- 6.1** The SHMA; Completions and Activity Monitoring; and Movers' Survey provide important and valuable evidence, which will help to inform the Council's decision-making in respect of strategic housing and economic matters. Updating this research provides the Council with a fit for purpose evidence base, which will mitigate against the risk of working with outdated information and data, ensuring that future strategies are relevant and clear in their intended objectives.

## **7. CONSULTATION**

- 7.1** The findings of the SHMA and interrogation of key issues arising will be subject to consultation and scrutiny, as a key element of progressing the Council's Economic / Housing Strategy, as well as the Local planning process.

## **8. CONCLUSION AND REASONS FOR RECOMMENDATIONS**

- 8.1** This report provides Members of the Panel with updated evidence on housing need and delivery to enable them to scrutinise the effectiveness of existing strategies and

initiatives, and to enable them to help inform the development of future housing and economic strategy.

## **9. CONTRIBUTION TO THE CARLISLE PLAN PRIORITIES**

### **9.1 “Address current and future housing needs to protect and improve residents’ quality of life.”**

**Contact Officer:**            **Jeremy Hewitson**

**Ext:**    **7519**

**Appendices**            ***Appendix 1: Executive Summary to the Strategic Housing***  
**attached to report:**    ***Market Assessment for Carlisle update July 2019***

**Note: in compliance with section 100d of the Local Government Act 1972 the report has been prepared in part from the following papers:**

- **None**

### **CORPORATE IMPLICATIONS:**

**LEGAL** - This report follows on from the Housing Strategy Update report to the Economic Growth Scrutiny Panel of 30 August 2018 (ED/27/18) and serves as an update to the draft housing strategy for information. In due course, as it forms part of the Council's Policy Framework, the Strategy will need to follow the formal route of Executive, Scrutiny, Executive and Council.

**FINANCE** – The Council provides base budget provision in the Housing function to undertake the reviews and analysis included in this report.

**EQUALITY** – An equality impact assessment will be prepared and published alongside the draft Strategy.

**INFORMATION GOVERNANCE** – No implications.

## **Appendix 1 – Strategic Housing Market Assessment for Carlisle – Introduction/ Executive Summary**

### **Summary**

1. This report provides an updated Strategic Housing Market assessment (SHMA) for Carlisle Council. The methodology used in this report responds to the revised National Planning Policy Framework (NPPF) of 2018 and 2019. This continues to set out the Government's objective to significantly boost housing supply. The analysis is also mindful of revised Planning Practice Guidance (PPG) on housing need assessment (February 2019).
2. A key part of the revised NPPF/PPG is the introduction of a Standard Method for the assessment of housing need. Housing need in the context of current and emerging guidance (and as used in this report) therefore refers *"the number of homes identified as being needed through the application of the standard method set out in national planning guidance, or a justified alternative approach."*
3. The analysis is also mindful of Key Policies in the Carlisle Local Plan (adopted in November 2016). Important policies can be summarised as SP2 (Strategic Growth and Distribution) which sets out an overall housing target; HO4 (Affordable Housing) which includes affordable housing policies and the areas to which they should be applied and HO10 (Housing to Meet Specific Needs) which amongst other things includes noting a need for accommodation for older persons.
4. The future impact of St Cuthbert's Garden Village (SCGV) will also be a key consideration for the Council. The Garden Village being expected to deliver around 10,000 new homes up to 2050. Beyond 2030 (the end of the current Local Plan period) the vast majority of housing delivered in Carlisle is expected to be on the SCGV site. Thus, an understanding of the appropriate mix of housing is an important part of this report.
5. The SHMA update focusses mainly on needs in the 2018-30 period (i.e. the remainder of the Local Plan). However, key analysis is also provided looking forward to 2050, and in particular in relation to SCGV. To provide an evidence base, this report sets out a number of either linked or distinct sections to cover a range of core subject areas; the sections are summarised below:



- Section 2 – Carlisle – Area Profile;
  - Section 3 – Demographic Trends and Housing Need Projections;
  - Section 4 – Affordable Housing Need;
  - Section 5 – Family Households and Housing Mix;
  - Section 6 – Older People and People with Disabilities; and
  - Section 7 – Private Rented Sector (PRS)
6. Whilst much of the report focusses on the 2018-30 period, it is the case that some analysis (particularly in relation to affordable housing) should be reviewed and updated periodically (probably at least every five years). This would capture any changes in the housing market as well as enabling changes to planning policy and guidance to be reflected in the analysis.

### **Carlisle District Profile**

7. A range of variables have been considered to look at the profile of the population and housing in the District (and for the three sub-areas). Key variables have looked at population, household characteristics, housing profile and the economic profile of residents.
8. The analysis identifies a relatively old population age structure across the District, albeit a younger profile when compared with Cumbria as a whole. The age structure in the urban part of the District is somewhat younger than seen in rural areas. Analysis shows a modest population increase over the 2007-17 period. There has however been a fall in the number of people aged under 65 and a notable growth in the population aged 65 and over – increasing by 22% in the decade to 2017. Due to the population profile, household types are to some extent concentrated in older age groups; as of 2011, 22% of all households in the District were entirely composed of people aged 65 and over. The urban area has a notably higher proportion of lone parent households than more rural parts of the District.
9. The tenure profile of the District sees a relatively large proportion of outright owners (which will to some extent be linked to the age structure) and a small private rented sector when compared with the regional and national position. Again, there are notable differences between urban and rural areas, with Carlisle Urban seeing a low level of owner-occupation and higher numbers in both the social and private rented sector. Between 2001 and 2011, the number of owners with a mortgage declined by 7%, whilst the private rented sector increased by 89%; this may reflect the difficulties faced by younger households in accessing market housing to buy.

10. The dwelling stock in the District is fairly balanced in terms of the proportion of larger and smaller homes although the stock in the urban area is notably smaller than seen in rural areas. Overcrowding in the District (and across sub-areas) is low, and there is a notable level of under-occupation (37% of all households have at least two spare bedrooms). Under-occupancy is notably lower in the urban part of the District.
11. The economic profile of the District looks to be fairly average in terms of the proportion of people in work, although levels of unemployment are lower than seen regionally or nationally. The data also suggests that the population is slightly less well qualified (in academic terms) and are less likely than other areas to be working in more senior positions.
12. The analysis identifies that there are greater differences within the Council area than when comparing the area with other locations. In particular the urban area of Carlisle has very different characteristics to the rural areas – this includes a younger age structure, greater proportions of households in rented housing, smaller dwelling sizes, lower levels of under-occupation and higher unemployment. The urban area also saw a small decline in population from 2007 to 2017, compared with a modest increase across the rural areas.
13. Overall, the analysis identifies Carlisle as having more ‘prosperous’ characteristics in rural areas in terms of the variables studied (when compared with other local, regional and national areas) and less ‘prosperous’ in the urban area. The analysis may therefore imply that there may be reasons to suggest different policy responses in different locations, or at least to recognise that the District as a whole is not homogeneous. Differences across the area should be noted when considering key outputs from the analysis to follow in this report.

## **Demographic Trends and Housing Need Projections**

14. Over the past five or more years, assessing the level of housing need has been for individual local authorities (or groups of local authorities) to prepare by following advice in Planning Practice Guidance (PPG). However, the new National Planning Policy Framework (NPPF) of February 2019 has introduced a Standard Method, based on looking at projected household growth and adjustments based on the level of affordability in an area. Local authorities are encouraged to plan for more housing than the Standard Method suggests, for example where there are growth strategies in place.

15. The Standard Method calculation for Carlisle suggests household growth of about 185 per annum, plus an uplift of around 8% for market signals (affordability). Therefore, the objectively assessed housing need (OAN) for the District as a whole is for 200 dwellings per annum. This is some way below the housing requirement in the current Local Plan (a residual need for around 620 homes per annum in the 2018-30 period).
16. Further analysis looking at economic growth suggested that planning for the Standard Method (200 dwellings per annum) would see a reduction in the local labour supply (the economically active population) and would not support any job growth in the Council area. Therefore, whilst the Standard Method does show population and household growth that is consistent with recent demographic trends, it would not support economic growth and would potentially leave the local authority with a labour supply shortage and therefore an inability for local businesses to be competitive and viable.
17. Analysis was carried out to consider the likely level of housing delivery required to meet economic growth forecasts (in this case taken from a Lambert Smith Hampton report of October 2018). From this it was clear that the Council would need to plan for more homes than prescribed by the Standard Method and that a higher level of delivery would be needed post 2030 (i.e. after the end of the current Local Plan period).
18. Whilst a report such as this should not be entirely prescriptive about housing numbers due to some uncertainties in the assumptions used (particularly if projecting forward to 2050) it does seem clear that the development of St Cuthbert's Garden Village would provide opportunities for households to move to the area (and take up the forecast local jobs).
19. A final analysis carried out has been to project how the population of Carlisle might develop if housing is provided in-line with the current housing trajectory. This shows that without SCGV there would be projected to be an ageing of the population, along with modest increases in the population of children and those of 'working-age'. With the inclusion of SCGV it is projected that there would be a greater increase in people of 'working-age', and thus able to support the forecast economic growth.

## Affordable Housing Need

20. Analysis has been undertaken to estimate the need for affordable housing in the 2018-30 period. The analysis is split between a 'traditional' need (which is mainly for social/affordable rented accommodation and is based on households unable to buy or rent in the market) and the 'additional' category of need introduced by the revised NPPF/PPG (which includes housing for those who can afford to rent privately but cannot afford to buy a home).
21. The analysis has taken account of local housing costs (to both buy and rent) along with estimates of household income. Additionally, when looking at traditional needs, consideration is given estimates of the supply of social/affordable rented housing. For the additional definition, consideration is given to the potential supply (from Land Registry data) of cheaper accommodation to buy.
22. Using the traditional method, the analysis suggests a need for 158 affordable homes per annum and therefore the Council is justified in seeking to secure additional affordable housing. There is also a need shown in all parts of the District.

<b>Figure 1: Estimated Need for Affordable Housing by sub-area (per annum)</b>						
	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Re-let Supply	Net Need
Rural West	3	28	5	37	13	24
Rural East	13	85	33	130	72	58
Carlisle Urban	42	293	197	532	455	77
All households	58	406	234	699	540	158

Source: Census (2011)/CoRe/Projection Modelling and affordability analysis

23. It is also suggested that the cost of housing to rent within this group is fixed by reference to local incomes (and the Living Rent methodology) although rents above Local Housing Allowance limits should be avoided (to ensure housing affordable to those needing to claim Housing Benefit).
24. When looking at the need for affordable home ownership products (i.e. the expanded definition of affordable housing in the NPPF) it is clear that there are a number of households likely to be able to afford to rent privately but who cannot

afford to buy a suitable home. However, there is also a potential supply of homes within the existing stock that can make a contribution to this need. It is therefore difficult to robustly identify an overall need for affordable home ownership products.

25. However, it does seem that there are many households in Carlisle who are being excluded from the owner-occupied sector. The analysis would therefore suggest that a key issue in the District is about access to capital (e.g. for deposits, stamp duty, legal costs) as well as potentially mortgage restrictions (e.g. where employment is temporary) rather than simply the cost of housing to buy.
26. If the Council does seek to provide 10% of housing as affordable home ownership, then a range of tenure types are likely to be appropriate. This would include shared ownership, which would typically see lower deposit requirements and lower overall costs (given that the rent would also be subsidised) as well as low-cost home ownership properties. The Council currently operates a low-cost home ownership scheme where discounted sale properties are sold at 70% of OMV in perpetuity. This has been a successful product in helping households to buy their first home and there are now over 400 properties within the portfolio.
27. The evidence does not show any basis in need terms to increase the provision of affordable home ownership above the 10% figure currently suggested in the NPPF, although a higher proportion might be appropriate in some circumstances (e.g. to help support viability or to assist in diversifying the housing stock).
28. The Council's current affordable housing policy for higher value areas (Zones A & C) includes a target of 30% affordable housing, of which half (15% of all housing) would typically be sought as intermediate housing. Whilst the 15% is higher than the general conclusions of this report, it is not considered to be an unreasonable policy target, particularly as it would be expected that there would be some cases where a lower level of delivery might be provided (e.g. where there are viability issues).
29. Overall, the analysis identifies a notable need for affordable housing, and it is clear that provision of new affordable housing is an important and pressing issue in the District. It does however need to be stressed that this report does not provide an affordable housing target; the amount of affordable housing delivered will be limited to the amount that can viably be provided. The evidence does however suggest that affordable housing delivery should be maximised where opportunities arise.

## Family Households and Housing Mix

30. The proportion of households with dependent children is slightly lower than the regional and national average. There has been some growth in the number of 'family' households and also modest growth in the number of households with non-dependent children (likely in many cases to be grown-up children living with parents) – growth in these household groups has been below the overall increase in households. Projecting forward, there is expected to be an increase in the number of households with dependent children – increasing by 17% over the 2018-30 period when linking to housing delivery of 620 dwellings per annum (i.e. the residual amount of housing to be provided by 2030 under the adopted Local Plan).
31. There are a range of factors which will influence demand for different sizes of homes, including demographic changes; future growth in real earnings and households' ability to save; economic performance and housing affordability. The analysis linked to long-term (12-year) demographic change concludes that the following represents an appropriate mix of affordable and market homes, this takes account of both household changes and the ageing of the population:

<b>Figure 2: Suggested Mix of Housing by Size and Tenure</b>		
	1-/2-bedrooms	3+-bedrooms
Market	30-40%	60-70%
Affordable home ownership	60-70%	30-40%
Affordable housing (rented)	65-75%	25-35%

32. The strategic conclusions in the affordable sector recognise the role which delivery of larger family homes can play in releasing a supply of smaller properties for other households. Also recognised is the limited flexibility which 1-bed properties offer to changing household circumstances, which feed through into higher turnover and management issues. The conclusions also take account of the current mix of housing in the District (by tenure).
33. The mix identified above could inform strategic policies although a flexible approach should be adopted. In applying the mix to individual development sites, regard should be had to the nature of the site and character of the area, and to up-to-date

evidence of need as well as the existing mix and turnover of properties at the local level. The Council should also monitor the mix of housing delivered.

34. Based on the evidence, it is expected that the focus of new market housing provision will be on 2- and 3-bed properties. Continued demand for family housing can be expected from newly forming households. There may also be some demand for medium-sized properties (2- and 3-beds) from older households downsizing and looking to release equity in existing homes, but still retaining flexibility for friends and family to come and stay.
35. Analysis also considered demographic trends and the current mix of housing at a smaller-area level (including for a broad Urban/Rural split). Generally, the analysis suggested slightly larger homes being required in rural areas although it is considered that the mix on any specific site could be influenced by site characteristics, and also any localised evidence of need, such as that drawn from the Housing Register.
36. Finally, the analysis considered the potential mix of housing on the SCGV site. Overall, a slightly larger mix of housing might be appropriate (providing more of a family offer). However, overall differences from District-wide needs were not substantial. That said, the scale of potential development in SCGV does provide the opportunity to deliver a wide range of different housing products for different groups of the population.

### **Older People and People with Disabilities**

37. Planning Practice Guidance (PPG) section 56 (Housing: optional technical standards) sets out how local authorities can gather evidence to set requirements on a range of issues (including accessibility and wheelchair housing standards). The PPG (on housing needs assessment) suggests looking at the specific needs of older people and those with disabilities. A range of data sources are considered, as suggested by CLG and also some more traditionally used in assessments such as this (e.g. from Housing LIN and HOPSR). This is to consider the need for specialist accommodation for older people and also Building Regulations M4(2) (accessible and adaptable dwellings), and M4(3) (wheelchair user dwellings).
38. Planning Practice Guidance (PPG) section 56 (Housing: optional technical standards) sets out how local authorities can gather evidence to set requirements on a range of issues (including accessibility and wheelchair housing standards). The PPG (on housing needs assessment) suggests looking at the specific needs of

older people and those with disabilities. A range of data sources are considered, as suggested by CLG and also some more traditionally used in assessments such as this (e.g. from Housing LIN and HOPSR). This is to consider the need for specialist accommodation for older people and also Building Regulations M4(2) (accessible and adaptable dwellings), and M4(3) (wheelchair user dwellings).

39. The data shows that in general, Carlisle has similar levels of disability compared with other areas, however an ageing population means that the number of people with disabilities is likely to increase substantially in the future. Key findings include:
- Up to 30% increase in the population aged 65+ over 2018-2030 (potentially accounting for at least half of total population growth);
  - A current need for sheltered and extra-care housing in both the rented and leasehold sectors;
  - A future need for all types of specialist housing for older people;
  - A need for additional care bedspaces; and
  - a need for up to 390 dwellings to be for wheelchair users (meeting technical standard M4(3))
40. This would suggest that there is a clear need to increase the supply of accessible and adaptable dwellings and wheelchair user dwellings as well as providing specific provision of older persons housing. Given the evidence, the Council could consider (as a start point) requiring all dwellings to meet the M4(2) standards (which are similar to the Lifetime Homes Standards) and at least 5% meeting M4(3). It should however be noted that there will be cases where this may not be possible (e.g. due to viability or site-specific circumstances) and so any policy should be applied flexibly.
41. The Council should also consider if a different approach is prudent for market housing and affordable homes, recognising that Registered Providers may already build to higher standards, and that households in the affordable sector are more likely to have some form of disability.
42. In seeking M4(2) compliant homes, the Council should also be mindful that such homes could be considered as 'homes for life' and would be suitable for any occupant, regardless of whether or not they have a disability at the time of initial occupation.
43. The analysis is not definitive about the quantities of different types of specialist housing (or its tenure) due to a range of views about prevalence rates; the need for



housing with care (Extra-care/Enhanced sheltered) is estimated to be for around 380 dwellings in the period to 2030 (32 per annum); over half of these are estimated to be required in the rented (affordable) sector – it is considered that these will be in a C3 use class.

**Figure 3: Older Persons' Dwelling Requirements 2018 to 2030 – Carlisle (linked to dwelling provision of 620 per annum)**

		Housing demand per 1,000 75+	Current supply	2018 demand	Current shortfall/ (surplus)	Addition al demand to 2030	Shortfall / (surplus) by 2030
Housing with support	Rented	84	241	900	659	377	1,036
	Leasehold	46	150	495	345	207	552
Housing with care	Rented	21	104	222	118	93	211
	Leasehold	11	0	119	119	50	168
Total		162	495	1,736	1,241	727	1,967
Care home bedspaces		99	961	1,062	101	445	546

Source: Derived from demographic projections and Housing LIN/HOPSR/EAC

44. The analysis has also considered the potential need for specialist housing on the St Cuthbert's Garden Village site. Given that this is a new site, and previous analysis has suggested that it may attract a higher proportion of families. It is suggested that needs might be lower than within other housing developments. However, it is also the case that a supply of specialist housing (of which there is currently relatively little across the Council area) could stimulate demand. Taking account of a range of factors, it is concluded that SCGV should be providing around 10% of housing as specialist accommodation, in both the market and affordable sectors.

### Private Rented Sector

45. The private rented sector (PRS) accounts for around 14% of all households in Carlisle (as of 2011) – a higher proportion to that seen across Cumbria, but below equivalent figures for the North West and England (17%). The number of households in this sector has grown substantially (increasing by 89% in the 2001-11 period) with further increases likely to have occurred since 2011 (at a national level the English Housing Survey reports a further 26% increase in the size of the sector).

<b>Figure 4: Change in tenure (2001-11) – Carlisle</b>				
	2001 households	2011 households	Change	% change
Owens outright	13,369	16,754	3,385	25.3%
Owens with mortgage/loan	17,777	16,577	-1,200	-6.8%
Social rented	8,055	7,394	-661	-8.2%
Private rented	3,666	6,914	3,248	88.6%
Other	1,096	703	-393	-35.9%
TOTAL	43,963	48,342	4,379	10.0%

Source: 2001 and 2011 Census

46. The PRS has some distinct characteristics, including a much younger demographic profile and a high proportion of households with dependent children (notably lone parents) – levels of overcrowding are relatively high. In terms of the built-form and size of dwellings in the sector, it can be noted that the PRS generally provides smaller, flatted/terraced accommodation when compared with the owner-occupied sector. That said, around 38% of the private rented stock has three or more bedrooms and demonstrates the sector's wide role in providing housing for a range of groups, including those claiming Housing Benefit and others who might be described as 'would be owners' and who may be prevented from accessing the sector due to issues such as deposit requirements.
47. Additional analysis suggests that rent levels have increased very slightly over time (when looking at the 2011-18 period) but that increases in rents fall slightly behind the increase in house prices over the same period – the increase in rents is lower than seen regionally and nationally and does not suggest any particular lack of supply of private rented homes.
48. There is no evidence of a need for Build to Rent housing (i.e. developments specifically for private rent). Given the current Government's push for such schemes, the Council should consider any proposals on their merit, including taking account of any affordable housing offer (such as rent levels and the security of tenure).
49. This study has not attempted to estimate the need for additional private rented housing. It is likely that the decision of households as to whether to buy or rent a home in the open market is dependent on a number of factors which mean that demand can fluctuate over time; this would include mortgage lending practices and

the availability of Housing Benefit. A general (national and local) shortage of housing is likely to have driven some of the growth in the private rented sector, including increases in the number of younger people in the sector, and increases in shared accommodation. If the supply of housing increases, then this potentially means that more households would be able to buy, but who would otherwise be renting.

### **St Cuthbert's Garden Village (SCGV)**

50. St Cuthbert's Garden Village (SCGV) will comprise of up to 10,000 new homes, new employment space, associated community and social infrastructure and a new strategic link road. Throughout the main SHMA update report (and within this summary) a range of analysis has been carried out to consider the overall need for housing and to provide some advice about housing mix. Below are some of the main summary points from the analysis.
51. Analysis was carried out to consider the likely level of housing delivery required to meet economic growth forecasts (in this case taken from a Lambert Smith Hampton report of October 2018). Whilst a report such as this cannot be entirely prescriptive about housing numbers due to some uncertainties in the assumptions used (particularly if projecting forward to 2050) it does seem clear that the development of St Cuthbert's Garden Village would provide opportunities for households to move to the area (and take up the forecast local jobs). Overall, the analysis suggests broad balance between homes and jobs when including the proposed SCGV development.
52. In terms of the demographic impact of SCGV analysis showed that without SCGV there would be projected to be a significant ageing of the population, along with modest increases in the population of children and those of 'working-age'. With the inclusion of SCGV it is projected that there would be a greater increase in people of 'working-age', and thus able to support the forecast economic growth.
53. The report has not specifically looked at the need for affordable housing in relation to SCGV, in part because of the difficulties of projecting this forward to 2050. However, given levels of affordable need in the Council area generally, it is concluded that opportunities to provide affordable housing should be maximised (subject to viability). It is also considered that the opportunity be taken to provide a range of affordable housing to rent and buy, as well as an element of housing specifically for older people (see below).

54. In looking at the overall mix of housing to be provided on SCGV, analysis suggested that this might be generally slightly biased towards a family offer (across all sectors). This is in part due to the modelling suggesting that the development might see a slightly higher proportion of people of working-age relative to the rest of the Borough. That said, the mix suggestions were not substantially different from those suggested across the Council area – provision should be made for a wide range of household groups.
55. Given the scale of development, the Council might also consider if the site should include an element of ‘executive’ homes (likely to be larger 5+ bedroom detached homes). This could help to provide a wider socio-economic mix, particularly where associated with local employment growth. Additionally, the Council could consider including a reasonable proportion of bungalows (maybe up to 10% of homes across all tenures) – the viability assessment suggests that such development is viable on larger schemes.
56. The analysis of needs for Older Persons’ suggests that the Council might seek something in the region of 10% of homes as being suitable for older people (homes being provided in both the market and affordable sectors). Analysis in the report has identified that currently there is a very low level of specialist provision in the Council area, and the scale of development at SCGV would allow for relatively large (and hence viable) schemes to be developed. The Council will also need to consider provision of wheelchair accessible homes, and homes that meet the higher of the Housing Technical Standards (M4(2)).
57. Finally, whilst the report does not highlight any particular need to plan for additional private rented accommodation, or build-to-rent homes, it is again the case given the scale of development that this type of provision might be attractive to particular developers/providers and could be considered as part of the wider mix of types and tenures of housing. This might also include providing opportunities for self- and custom-build housing.
58. Overall, the development of SCGV provides the Council with a significant opportunity to develop the range of homes needed by the future population of the Council area. As a general point it is clear that the development should meet the needs of a wide range of household groups both in the market and affordable sectors and include provision of specialist housing for older people/those with disabilities. Other considerations will include development of bungalows, executive homes, build-to-rent housing and plots for self- and custom-build

## Overall Summary

59. Overall, the SHMA identifies that the Government's Standard Method would lead to a housing need for 200 dwellings per annum. Planning at this level would however be likely to see a reduction in the resident labour supply and therefore act as a barrier to economic development in the Council area. To ensure economic growth, the Council should continue to develop in line with the adopted Local Plan (to 2030) and seek to provide strong delivery thereafter – this will include the development of St Cuthbert's Garden Village (SCGV).
60. The affordable needs assessment continues to show a need for affordable housing in the District, and in all sub-areas. The evidence of a need for affordable home ownership products was far from clear-cut, however given the clear steer in the NPPF it is recommended that the Council do consider seeking 10% of housing on larger sites as affordable home ownership; where possible such housing would ideally a mix of tenures such as shared ownership and low-cost home ownership.
61. The analysis also identifies a need for all sizes of housing within all tenure groups. For market housing there is a focus on smaller (2- and 3-bedroom) family units, but also some larger (4+-bedroom) homes. For affordable home ownership the focus should be on 2-bedroom homes (along with 1- and 3-bedroom accommodation) whilst for social/affordable rented housing the need is particularly for 1- and 2-bedroom homes. It is suggested that SCGV could support a slightly larger mix of housing, although differences from the general mix required are not substantial.
62. Finally, the analysis identifies a large and growing older person population. This is likely to drive the need for additional specialist accommodation in both the rented (affordable) and leasehold (market) sectors, as well as a need for additional care home bed spaces. If the Council follows the housing trajectory then potentially around 16% of additional homes should be some sort of specialist housing for older people. On the SCGV site it is suggested at provision of around 10% is investigated.



# Economic Growth Scrutiny Panel

Agenda  
Item:

**A.3**

Meeting Date: 5<sup>th</sup> September 2019  
Portfolio: Economy, Enterprise and Housing  
Key Decision: No  
Within Policy and Budget Framework: No  
Public / Private: Public

Title: St Cuthbert's Garden Village Progress Update  
Report of: Corporate Director of Economic Development  
Report Number: ED.28/19

## Purpose / Summary:

To update the Panel on progress of the planning and delivery of St Cuthbert's Garden Village, including the key next steps in advancing the project across 2019.

## Recommendations:

To note progress on the project and scrutinise the proposed Engagement Plan relating to forthcoming public consultation on the draft masterplan options.

## Tracking


## **1. BACKGROUND**

- 1.1** St Cuthbert's Garden Village (SCGV) has its origins in the adopted Carlisle District Local Plan 2015 – 2030, which identifies land to the south of the City (referred to as Carlisle South via Policy SP 3) for growth for a major mixed-use development focussed on housing. The project was accepted into the Government's Garden Villages, Towns and Cities Programme in January 2017. With the potential to develop up to 10,325 new homes, alongside new employment opportunities and a wide range of supporting community infrastructure, SCGV is the most northerly and the largest of the current garden villages nationally.
- 1.2** Project governance was established at the inception of the work at which point four key project strands were identified comprised of Masterplanning; Plan Making; Carlisle Southern Link Road; and Delivery. The Governance arrangements include a now well-established cross-party Members' Advisory Group.
- 1.3** Following the conclusion of Stage 1 masterplanning in February 2019 governance arrangements were updated. A multi-disciplinary Vision and Quality Project Group has been set up tasked with ensuring that the masterplan and the Local Plan are positively challenged to seek the highest possible quality of place. A Plan Making Group has also been set up to coordinate Local Plan development with the masterplanning outputs. A Strategic Partnering Board at a senior level between the City and County Councils demonstrates a significant strength in joint working and the alignment of the Garden Village and Carlisle Southern Link Road.
- 1.4** Good progress continues to be made to date in advancing the project, including moving into Stage 2 of the masterplanning, underpinned by robust and ongoing public and stakeholder engagement. Progress has been aided by a series of successful capacity funding bids via the Government's Garden Villages programme, with a 2018/19 award of £300 000 in March. The Council has submitted a bid for £620 000 for the 2019/2020 period.
- 1.5** The project is increasingly complex as interdependences between the individual project strands come to the fore. Report ED 06/19, taken to the Executive in February 2019, sets out the key stages of work for masterplanning, local planning and delivery across the year ahead.

## **2. PROGRESS ACROSS 2019**

- 2.1** Significant progress has been made in 2019 with highlights including:



- Stage 1 Masterplanning concluded;
- Stage 2 Masterplanning commissioned and underway;
- Successful £102 million bid from the Housing Infrastructure Fund (HIF) towards the construction of the Carlisle Southern Link Road (CSLR);
- £300 000 Garden Village and Town Capacity Funding awarded;
- 2019/20 Garden Village and Town Capacity Funding bid submitted;
- Selected as one of six new sites to participate in the Healthy New Towns Learning and Implementation Events project;
- Momentum in engagement with a wide range of stakeholders.

**2.2** Arup with Hive Land and Planning were appointed in February 2019 to lead on Stage Two masterplanning, followed by the appointment of AECOM to undertake the statutory Sustainability Appraisal and the Habitats Regulations Assessment. A further study to help us understand Viability and Deliverability is being undertaken by Aspinall Verdi. Further work engaging with landowners is being aided by Hive Land and Planning. A well-attended briefing session for landowners, agents and developers was held in July.

**2.3** The award of HIF funding in February has been significant in providing certainty about the release of land for development of the Garden Village. The bid was submitted by Cumbria County Council with significant input from St Cuthbert's Garden Village team.

**2.4** Public and stakeholder engagement has continued with both workshops and dialogue covering a range of areas. Young people have continued to be involved on the theme of 'what makes a place great to live in', with the Schools' Council (pupils from local primary schools), and students from Carlisle College giving a different demographic perspective of how the new communities could look and feel. Local Parish Councils continue to be actively involved.

### **3. KEY NEXT STEPS**

#### **3.1 Masterplanning**

**3.2** Stage 1 masterplanning focussed on concept proposals and a vision for SCGV with receipt of Gillespie's final report in February. This report is published on our web-site.

- 3.3** Procurement of Stage 2 Masterplanning saw consultants appointed by 22<sup>nd</sup> February 2019. Arup with Hive Land and Planning are working to develop a Masterplan Framework for St Cuthbert's, taking forward the Vision and Concept work already completed and providing the technical detail that will inform and support the preparation of a development plan document for SCGV. This will include the identification and selection of site allocations and land use designations as well as detailed strategic drainage, movement and green infrastructure frameworks.
- 3.4** Specifically, Stage Two Masterplanning aims to test and evolve the outcome of earlier work and will develop a more detailed Masterplan that will cover:
- Land use – expressing the location, extent, type and mix of development including housing, commercial, retail, community and other uses.
  - Movement and access – highlighting new and enhanced routes to create a well-connected place for walking, cycling, public transport and other vehicles.
  - Green and blue infrastructure – identifying the location and function of new and enhanced green and blue spaces across the area.
  - Urban design – defining important gateways, focal points, views and frontages.
- 3.5** Stage 2 Masterplanning will follow a broadly five-stage process, starting at the initial inception and ranging through to the finalisation of the completed Masterplan Framework. As of the date of this report the Council has received both the Baseline report (Stage 1) and the Option Development and Testing plans and report (Stage 2a) which will be presented at the panel meeting. Both these reports will shortly be subject to public consultation as set out below.
- 3.6** The outcomes from the consultation exercise, which will be from a wide range of sources including the surrounding communities and statutory stakeholders, will inform the next stage of masterplanning which will be the development of a preferred option. Once the preferred option has been agreed internally, it will need to be tested against a number of factors including fit with the vision, drivers and principles, and viability and feasibility from a land assembly perspective. The preferred options will also be subject to transport modelling, a drainage assessment, health impact assessment and utilities assessment.
- 3.7 Plan Making**
- 3.8** The Council remains committed to preparing a separate Development Plan Document for SCGV to be known as the St Cuthbert's Garden Village Local Plan.

This reflects recognition of the need for a robust planning framework given the scale of development and the ambitions for quality not least given garden village status.

- 3.9** The core of the SCGV Local Plan will be the masterplan and hence there is a clear interdependency between these two project strands. As the outputs of Stage 2 Masterplanning start to emerge the work is being used to inform the scope of policies and strategic objectives that will be used to guide development in the Garden Village area.
- 3.10** The Local Plan will ultimately include site allocations to provide the right amount of homes, sufficient and appropriate land to provide a range of local and more strategic employment allocations and areas designated as district centres where the right conditions will be created to provide retail, leisure, health and other community uses. The Plan will also ensure that the natural environment that will be created within and between the new communities is designed to the highest quality, delivered at the right time, and protected from future harm.
- 3.11** The Local Plan will also have to make provision for the right infrastructure to support the proposed level of development, and safeguard any land required to support the development of this infrastructure. It will guide the phasing of all these measures setting out what should be developed and by when in order to ensure that new homes are adequately served by community, transport and utility infrastructure.
- 3.12** The Council's Local Development Scheme (LDS), a statutory document which must be used to give the public an indication of the timescales across which planning documents are to be prepared, has been updated to reflect modest slippage in the currently published programme. Executive approved the LDS in June 2019. Adoption of the Local Plan is envisaged in September 2021.
- 3.13** The Local Plan will be underpinned by a broad range of evidence studies, the most recent of which were published in Spring this year and which comprise heritage work on Brisco and the Housing Market Demand and Capacity Assessment. A Strategic Housing Market Assessment update which looks at affordable housing need across the District has also been completed in July 2019, with the outputs of this work directly helping to inform affordable housing policies likely to feature within the SCGV Local Plan.
- 3.14 Carlisle Southern Link Road**

- 3.15** To realise the full scale and ambition of SCGV, and to improve strategic connectivity between east and west, a new link road connecting Junction 42 of the M6 and the A595 is proposed. The Carlisle Southern Link Road (CSLR) has been given priority within the Cumbria Infrastructure Plan and has received endorsement as part of Transport for the North's Strategic Local Connectivity Workstream. A business case was submitted to the Government's Housing Infrastructure Fund (HIF) in September 2018 and a successful outcome was announced in February 2019 with an award of £102 million. This together with an additional £10 million from local contributions will ensure the deliverability of the CSLR.
- 3.16** A planning application for the CSLR is expected to be submitted in October 2019 and construction is scheduled to commence in 2021 with completion and opening in 2023. A continuation of seamless joint working between the Garden Village and the CSLR is required as the detailed design for the road is finalised. This reflects a need to ensure that the detailed design is informed from a placemaking perspective particularly at a number of critical points where the route directly interfaces with planned garden village development.
- 3.17 Delivery**
- 3.18** As a Garden Village, there is unanimous recognition and national expectation that St Cuthbert's should be a unique and high-quality development, with three high level aims:
- The delivery of high quality homes and jobs needed in the area over the long term to enable the growth ambitions of Carlisle and the Borderlands;
  - The comprehensive provision of infrastructure for transport and telecommunications, education, health, community and cultural infrastructure required to create sustainable communities; and
  - Ensuring the creation of quality places including the conservation and enhancement of the natural and historic environment, including landscape, together with an effective long-term approach to local stewardship.
- 3.19** It is recognised that to implement these ambitions, in addition to a robust planning framework, there needs to be a dedicated focus on delivery, particularly for strategic infrastructure. There will be a need to review the various delivery options which could range from an entirely private sector led approach to a dedicated public sector led model, across 2019, with a desire to have identified a preferred approach towards the year end.
- 3.20** To support project delivery Aspinall Verdi has been appointed to undertake a district wide baseline study of land values and development costs to underpin a potential

Community Infrastructure Levy. The consultants will also prepare a specific viability assessment for the Garden Village. As part of the governance structure for the Garden Village, the Land and Delivery Project Group will take the operational lead on progressing the delivery strategy and ensuring the coordination of all of the work strands relating to this area.

- 3.21** Further technical expertise is required to support the next stages of landowner engagement with an intention to establish a series of landowner forums. Hive Land and Planning are assisting in this work area.

#### **4. CONSULTATION**

- 4.1** Progress to date has been underpinned by robust, extensive and innovative engagement with this having added clear value to the vision and concept proposals for the Garden Village. This has included community engagement, dialogue with key stakeholders including infrastructure providers, dialogue and facilitated sessions with the local Parish Councils and with Members including via the dedicated Members' Advisory Group. The Schools' Council and Carlisle College students have also been actively engaged.
- 4.2** The next key stages of the project will continue to be subject to robust and extensive engagement building on the work done to date and evolving to reflect on lessons learnt. Scrutiny Panel and the Member Advisory Group are recognised as valued sounding boards for helping to inform communication and engagement strategies, with comments on proposed approaches always welcomed and genuinely always aiding robustness.
- 4.3** The dedicated St Cuthbert's Garden Village web site is being updated and refreshed in advance of the forthcoming consultation. An Engagement Plan for the draft options for the Garden Village has been drawn up and is appended to this report. The Plan aims to set out the aims of the engagement, what methods will be used, key engagement materials, venues, dates and times. We would welcome members' thoughts on this plan.
- 4.4** This period of engagement formally starts on 2<sup>nd</sup> September and runs for 6 weeks. In order to ensure that the final masterplan framework for the Garden Village is robust it is essential to develop and test alternative spatial options, alongside setting the scope of policies that could be included in the St Cuthbert's Local Plan. Each of the options sets out a different approach, for example with regards to the required amount of land, density of development, and feel and character of the place.

- 4.5** Community and stakeholder feedback together with ongoing development of evidence, such as viability work, together with the Sustainability Appraisal and the Habitats Regulations Assessment will all help to shape the preferred option for the garden village, which will form the next step in the masterplanning process.

## **5. RISKS**

- 5.1** A dedicated risk register is kept and regularly reviewed as part of the overall project management approach. The main risk continues to be centred on the continued availability of adequate resourcing (in terms of both staff time and budgetary provision) for undertaking the technical work and further engagement needed to maintain momentum and progress of each of the key project strands. Key to managing this will be the continued availability of Government capacity funding, the latest bid being made in July 2019.
- 5.2** The overriding risk is that a failure to plan for the growth of St Cuthbert's will result in growth occurring to the south of the city in a much more fragmented and incremental nature. Such an approach would prejudice the delivery of the necessary infrastructure needed to support new communities; impact on the sustainability and overall quality of place; undermine strategic ambitions; and risk not delivering the mix of development needed nor at the pace required.

## **6. CONCLUSION AND REASONS FOR RECOMMENDATIONS**

- 6.1** Good progress continues to be made with both the planning and delivery aspects of St Cuthbert's Garden Village. With Stage 2 Masterplanning well underway, together with viability work, landowner engagement and Local Plan development. 2019 is a busy and critical stage in the evolution of the project. Given the nature and profile of the SCGV project, it is important that Members continue to keep abreast and are comfortable with both the progress of the project and the future direction of travel. Scrutiny of the engagement plan at the advent of an important consultation on draft masterplan options should add significant value to efforts to engage as many and as wide a spectrum of people and interests as possible.

## **7. CONTRIBUTION TO THE CARLISLE PLAN PRIORITIES**

- 7.1** St Cuthbert's Garden Village will have a significant influence in terms of shaping how Carlisle will grow and function long into the future. Accordingly, it will have a significant, direct and positive impact on a number of Carlisle Plan priorities including:

- “supporting the growth of more high quality and sustainable business and employment opportunities” – through identifying new sites for development and opportunities to better balance the local economy;
- “addressing Carlisle’s current and future housing needs” – through being the single largest development site and therefore contributor to supply across the latter stages of the current Local Plan period and much of the next one, including affordable and specialist housing;
- “working more effectively with partners to achieve the City Council’s priorities” – through recognition that the scale of the project requires the input, commitment and direct support of a wide array of stakeholders and partner agencies.

**Contact Officer:** Jillian Hale

**Ext:** 7191

**Appendices attached to report:** *Appendix 1 – Stage 2 Masterplanning – Draft Options: Engagement Plan*

**Note:** in compliance with section 100d of the Local Government Act 1972 the report has been prepared in part from the following papers:

- ED 02/19 Report to EGSP on Garden Village progress update.
- ED 06/19 Report to Executive on Garden Village key next steps.

## **CORPORATE IMPLICATIONS:**

**LEGAL** – ultimately any resultant Development Plan Documents will need to be approved in accordance with Article 4 of the Constitution and the Budget and Policy Framework. Consultants and persons/companies delivering work packages will need to be procured in accordance with the Council’s Contract Procedure Rules and contracts properly documented as appropriate.

**FINANCE** – The Council’s Medium Term Financial Plan and budgeting for 2019/20 has identified that the Garden Village project is a key priority for the City with Council funding being allocated to supplement the Capacity Funding bids received and awaited. Further commitments have also been included in the proposed 2019/20 budget for future allocations towards the Carlisle Southern Link Road.

**EQUALITY** – None

**INFORMATION GOVERNANCE** – No information governance implications.



# Carlisle St Cuthbert's Garden Village

## Stage 2 Masterplanning – Draft Options

### Engagement Plan

#### 1. Background:

- 1.1 St Cuthbert's Garden Village (SCGV) refers to the area introduced through the Carlisle District Local Plan 2015-2030 as 'Carlisle South'. The area was shown on the Plan's Key Diagram and described in Policy SP3 as a *"broad location for growth for a major mixed use development, focusing on housing"*. The area is now being progressed as a garden village following the project's successful inclusion in the Government's Locally Led Garden Village programme.
- 1.2 Owing to the intended scale of the opportunity, which comprises of up to 10,000 new homes including new employment development; community facilities; and a new southern link road, Local Plan Policy SP3 sets out that development of the area will be guided by a masterplan that will be approved as a Development Plan Document (an additional and area based 'Local Plan'). It is proposed that this is known as the St. Cuthbert's Local Plan.
- 1.3 Masterplanning is being progressed in two stages. Stage One concluded in late 2018 with the publication of a Concept and Vision Report. The key outputs of this work were a vision, key guiding principles to shape future planning and delivery and the identification of a preferred concept option as to where and how development should be progressed.
- 1.4 Work commenced on Stage Two Masterplanning in February 2019. Stage Two is concerned with the identification of a preferred option for a masterplan framework for the site, the primary purpose of which will be as a planning instrument to guide future more detailed masterplans and design stages. It will also act as a material planning consideration to help de-risk and bring forward development proposals that will deliver against the vision and objectives for the Garden Village.



1.5 Stage One was subject to significant public and stakeholder engagement across 2018 with detailed reports of the engagement outputs published and available on the St Cuthbert's Garden Village website. The opportunity was also taken in 2018 to consult on the proposed scope of the SCGV Local Plan.

1.6 Engagement to date has added significant value to the early visioning and masterplanning stages, justifying the decision to significantly exceed minimum statutory engagement requirements. These efforts have been recognised by Homes England and others in the national Garden Villages programme as best practice. There remains a commitment to continue such an approach.

## **2. Purpose of Stage 2 Masterplanning 'Options' Engagement:**

2.2 Engagement on the second stage of masterplanning and specifically 'options' for a framework masterplan is aiming to commence on Monday 2<sup>nd</sup> September 2019 and run for a period of six weeks until Monday 14<sup>th</sup> October 2019.

2.3 The specific objectives of the engagement are to:

- reaffirm and refine the vision for SCGV and the key guiding principles being used to inform ongoing masterplanning;
- inform the refinement of options to ultimately aid the identification of a preferred option;
- inform an updated scope of the St. Cuthbert's Local Plan, fulfilling the requirements of Regulation 18 of the Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended); and
- raise awareness / profile of the St. Cuthbert's Garden Village project.

## **3. Target Audience:**

3.1 Previous engagement has reaffirmed that the scale of St Cuthbert's is such that it is of interest to a wide spectrum of stakeholders both within Carlisle and the wider region.

3.2 Building on the success of previous engagement efforts, this latest stage of engagement will aim to be as inclusive as possible. Activities will continue to be tailored to help secure feedback with a distinction made between organisational stakeholders and the general public. Engaging young people will continue to be key given the delivery of a new garden village will span several decades and therefore accommodate Carlisle's next generation. So too will be engaging the resident population within the areas which will be subject to significant change over the coming decades.

#### **4. Reaffirmation and Refinement of the Vision**

- 4.1 Stage One Masterplanning provided a vision and nine key guiding principles for SCGV. The guiding principles are intended to guide the future development of homes and neighbourhoods and outline what will make St Cuthbert's a unique, inspirational and desirable place to live, work, grow up and grow old in. The principles took into account current best practice and referenced lessons learnt from across the UK and wider world in the creation of successful living environments.
- 4.2 As ongoing masterplanning develops a better understanding of the site constraints and opportunities, and the world around us continues to change, it is imperative that the vision and guiding principles are revisited to ensure they remain relevant and reflect the desired ambition of Carlisle and key stakeholders.
- 4.3 A key objective of this latest engagement is to secure meaningful feedback which can help reaffirm and where appropriate refine elements of the vision for St. Cuthbert's and the key guiding principles. Feedback at this stage will be important given that the vision and guiding principles will be used to help drive masterplanning forward towards a preferred masterplan framework option across the remainder of 2019.

#### **5. Refinement of Strategic Framework Options**

- 5.1 In order to ensure that the final masterplan Framework for SCGV is robust it is essential to develop and test alternative spatial options. Each of the options are driven by different but equally important placemaking drivers and each gives rise to different spatial implications, including for example the required amount of land, density of development and the feel and character of place.
- 5.2 The selection of a preferred option will be influenced by public and stakeholder feedback alongside ongoing technical assessments such as viability appraisals, sustainability appraisal, landowner engagement and other evidence based technical assessments. It is likely that the preferred option will be a hybrid of elements across all options and therefore a key focus of the engagement will be on capturing what elements people like and dislike for each as well as a greater understanding of what is likely to work well.
- 5.3 Whilst some of the options modestly depart from elements of the Stage One Concept Plan, this is a consequence of the placemaking drivers employed and/or a need to ensure a critical mass of c.10,000 new homes. Importantly the options are at this stage exactly that, with a reasonable degree of distinction between to help stimulate discussion about the drivers behind each.

#### **6. Updated Scope for the SCGV Local Plan**

- 6.1 To fulfil Regulation 18 of the relevant Town and Country Planning regulations which govern local plan making, the City Council must

*(a) notify each of the bodies or persons specified in paragraph (2) of the subject of a local plan which the local planning authority propose to prepare, and*

*(b) invite each of them to make representations to the local planning authority about what a local plan with that subject ought to contain.*

- 6.2 The Council fulfilled this requirement in January 2018 by way of setting out the intended scope of the St. Cuthbert's Local Plan within a dedicated consultation document. Comments were then invited on the intended scope.
- 6.3 It was made clear in January 2018 that the intended scope of the Local Plan was that envisaged at that time, but that the scope would be subject to continuing refinement as masterplanning and visioning work progresses and to reflect ongoing engagement.
- 6.4 Following the completion of the Stage One visioning and masterplanning work, and the establishment of key guiding principles to shape future planning, it is considered timely and appropriate to seek the views of the public and stakeholders on an updated scope of the SCGV Local Plan.
- 6.5 The updated scope of the SCGV Local Plan will be set out in a short document which alongside the scope explains the intended role and hence purpose of the local plan including making clear the intended timescales for its preparation. Comments will then be invited on the scope principally by way of asking people whether they agree with the intended scope of the St. Cuthbert's Local Plan and/or whether they consider that its policy coverage should be widened.

## **7. Raising Awareness:**

- 7.1 A key underlying objective of all engagement efforts is to raise awareness and the profile of the St Cuthbert's Garden Village project. This in turn will help to maximise interest in the project and grow the audience which can be engaged in the future.
- 7.2 A proactive approach to utilising already strong media interest in the project will be pursued to generate significant initial awareness. Editorial and advertisement coverage across publications will assist such efforts, with a strong push through social media utilising a dedicated hashtag. Efforts will be made to sustain activity and interest across the 6 week engagement period and thereafter.
- 7.3 The dedicated St. Cuthbert's website remains the primary means of disseminating information and capturing feedback on the project as it progresses, including the current engagement opportunity. Accordingly, there will be a significant pushing of this web address through advertising, social media and its inclusion on promotional materials to be distributed at engagement events. Importantly there is also a feature upon the website where anyone with an interest in the project can register to be notified of key updates.

- 7.4 A distinctive brand was developed for the inaugural launch of the SCGV project and first major engagement opportunity in early 2018. This included a logo, design style and colour palette. The brand, now supported by branding guidelines to ensure the correct and consistent application, will continue to be deployed across engagement materials to aid the longevity of project awareness by way of it being instantly visually recognised.
- 7.5 Stakeholders known to have a potential interest in the area, including those listed in the Council's Statement of Community Involvement, will be directly notified of the engagement opportunity by email / letter. This includes those who have taken advantage of the ability to self-register their interest via the St Cuthbert's Garden Village website. All landowners will also be notified directly via a bespoke letter / email in so far as up to date contact details are available.
- 7.6 Flyers, posters and adverts in the press will, alongside the web and social media, be used to communicate specific opportunities to get involved such as public drop in events.
- 7.7 The digital banner on the Civic Centre will also be used to highlight this latest engagement opportunity and to push people to find out more.

## **8. Summary of Engagement Activities:**

### **8.1 Methods of engagement will include:**

- Staffed public drop in events
- Facilitated stakeholder workshops
- Facilitated Parish Council workshops
- Facilitated and targeted land owner workshops
- Virtual Exhibition
- Online survey
- Bespoke (external) Design Review Panel
- Ad-hoc one to ones as requested
- Duty-to-cooperate meetings with adjoining District Councils

### **8.2 The promotion of such opportunities will follow the approach detailed in the preceding section of this plan.**

### **8.3 Cumbria County Council have confirmed a willingness to provide staff and material at each of the core public drop in events to be able to provide updates on the Carlisle Southern Link Road. This will see the continuation of excellent joint working and is important given that the public and other stakeholders see the two projects essentially as one.**

## **9. Key Engagement Materials**

### **9.1 Core documents at the heart of the Options engagement will be:**



[www.stcuthbertsgv.co.uk](http://www.stcuthbertsgv.co.uk)

- Stage 2 Masterplanning Options Report and associated Options Plans;
- Stage 2 Masterplanning Baseline Report;
- SCGV Local Plan Scope and Context Report; and
- Summary leaflet.

- 9.2 Key documents will be available to download from the SCGV website. Copies will also be made available at the Council's Civic Centre Offices and principal libraries within the District. Copies will also be deposited in each of the Member Group Rooms within the Civic Centre Offices.
- 9.3 The summary leaflet will provide key headline information in a printed format which people can take away from drop in events to help try and increase response rates. It will contain a summary of key headline information to communicate what this stage of engagement is about and importantly signpost people to how they can get involved and have their say.
- 9.4 Materials produced for public drop in events, principally in the form of pull up banners, will aim to draw out and summarise key headline information from the above documents including a summary of the 'story so far' leading to this current stage of the work. Reference copies of the core documents will also be made available at all engagement events.

## **10. Feedback**

- 10.1 Feedback will be encouraged principally via the use of an online survey to be accessed via the St. Cuthbert's dedicated website. There will also be the option to email comments to [stcuthbertsgv@carlisle.gov.uk](mailto:stcuthbertsgv@carlisle.gov.uk).
- 10.2 At public drop in events each large copy of an Option Plan will be accompanied by a large SWOT analysis sheet which will function like a 'graffiti wall', enabling the public to add to it and equally see what others have said. Being structured around the principles of a SWOT analysis should aid the options process by drawing out what people like and dislike about each and capturing what concerns and/or excites them in a more constructive manner. A similar approach will also be employed with respect to facilitated workshops with the Parish Councils.
- 10.3 All additional engagement events will always be approached with a clear strategy in place which seeks to ensure that it captures meaningful outputs which can be fed into the options refinement process.
- 10.4 Post the engagement a report summarising feedback will be prepared and made publicly available.

## **11. Landowner Engagement:**

- 11.1 Good relationships have been established to date with key landowners across the area. Previous efforts have seen all landowners written to providing key updates as well as one-to-one meetings having occurred with those identified as being key landowners relative to the size and more precise location of their landholdings.
- 11.2 Hive Land and Planning consultancy were engaged in May 2019 to support the Council with landowner engagement across 2019. This reflects that landowner engagement will continue to intensify as more detailed masterplanning outputs emerge, enabling landowners to see more definitively how their land features and/or is affected by the emerging options. Good working relationships with the County Council's team leading on the land owner engagement for the Carlisle Southern Link Road have been established, given the need to ensure efforts are coordinated.
- 11.3 There is a critical need to engage landowners specifically on the stage two masterplanning options. Landowners are therefore to be invited to workshops which aim to bring them together grouped around the four key settlements of Cummersdale, Durdar, Brisco and Carleton. This will enable options to be discussed in a more collective manner which is important given the need for landowner collaboration if comprehensive development is to be achieved.
- 11.4 All landowners will be offered and able to draw upon one-to-one meetings to discuss any specific concerns in a more confidential environment.

## **12. Key Messages:**

- 12.1 All engagement activities and conversations should be progressed against the backdrop of the following key messages:
- St Cuthbert's Garden Village (SCGV) is an ambitious mixed proposal that aims to be innovative and ground breaking, that could include the development of just over 10,000 new homes, new employment opportunities, community facilities and a new Carlisle southern link road.
  - Planning positively for the opportunity now should act to ensure that Carlisle can continue to grow across the longer term via a plan led and comprehensive approach which seeks to create strong communities well supported by the timely delivery of necessary supporting infrastructure.
  - A new Carlisle Southern Link Road is an integral part of the St. Cuthbert's project, helping to open land up for development and ensure the strategic connectivity required is in place
  - The February 2019 announcement of £102m Housing Infrastructure Funding for the Carlisle Southern Link Road is dependent on the realisation of housing at St Cuthbert's Garden Village and as such there is a critical dependency between the SCGV and CSLR projects.
    - Further information on the CSLR is available from <https://www.cumbria.gov.uk/cslr/>



- Development of the area will be guided by an additional and specific Local Plan – the St Cuthbert’s Garden Village Local Plan – which will operate alongside the Carlisle District Local Plan (2015-2030).
- Masterplanning for SCGV is being progressed in two stages. Stage One concluded in late 2018 and provides a vision; key guiding principles and a concept framework for how the area should be developed.
- Stage Two masterplanning commenced in February 2019 and will seek to test the outputs from Stage One against more detailed evidence and ultimately provide a more detailed strategic masterplan framework for the site.
  - Stage Two reviews and adds to the baseline evidence base and draws on the vision, key principles and findings from engagement to date to prepare a number of options for a strategic masterplan framework.
  - The options presented for the strategic masterplan framework are exactly that at this stage and there is genuinely scope to shape and influence their evolution towards a preferred option.
  - Stage Two masterplanning is expected to conclude in March 2020.
- St. Cuthbert’s is a long-term project, the planning of which will take several years and the subsequent delivery of which will span several decades.
- There will continue to be plenty of opportunities for the public, stakeholders and landowners to get involved and help shape the future of the area including on a preferred strategic masterplan framework and draft versions of the SCGV Local Plan as it emerges.
- The City Council continue to work with key public sector partners in progressing SCGV including Cumbria County Council, Homes England, Cumbria Local Enterprise Partnership, Environment Agency and United Utilities.





# Report to Economic Growth Scrutiny Panel

Agenda  
Item:  
**A.4**

Meeting Date: 5 September 2019  
Portfolio: Finance, Governance and Resources  
Key Decision: No  
Within Policy and Budget Framework: Yes  
Public / Private: Public

Title: QUARTER 1 PERFORMANCE REPORT 2019/20  
Report of: Policy and Communications Manager  
Report Number: PC 13-19

## Purpose / Summary:

This report contains the Quarter 1 2019/20 performance against the current Service Standards and a summary of the Carlisle Plan 2015-18 actions as defined in the 'plan on a page'. Performance against the Panel's 2019/20 Key Performance Indicators (KPIs) are also included.

## Recommendations:

1. Scrutinise the performance of the City Council with a view to seeking continuous improvement in how the Council delivers its priorities.
2. Consider the proposal to close the Carlisle Plan Key Actions listed in the report.

## Tracking

Executive:	16/9/19
Scrutiny:	Business and Transformation 22/8/19 Health and Wellbeing 29/8/19 Economic Growth 5/9/19
Council:	N/A

## **1. BACKGROUND**

This report contains the Quarter 1 2019/20 performance against the Service Standards and a summary of the Carlisle Plan 2015-18 actions as defined in the 'plan on a page'. The Panel's Key Performance Indicators (KPIs) are also included as an appendix.

Service Standards are the measures judged to be the most important to our customers and therefore the mostly likely to influence the overall satisfaction with how the Council performs. The following pages contains the Council's performance against the Service Standards for this Panel.

The updates against the actions in the Carlisle Plan are presented in Section 3. Only actions within the remit of the Panel are included in this report. The intention is to give the Panel a brief overview of the current position without duplicating the more detailed reporting that takes place within the Scrutiny agendas and Portfolio Holder reports.

### **Summary of KPIs and Service Standards:**

Service Standards – 0 'red', 0 'amber' and 1 'green'

KPIs – 0 'red', 1 'amber', 11 'green'

### **Summary of Exceptions (RED)**

None

## **2. PROPOSALS**

See Carlisle Plan section.

## **3. RISKS**

None.

## **4. CONSULTATION**

The report was reviewed by Directorate Management Teams in July, by the Senior Management Team on 30 July 2019 and will be considered at the other Scrutiny Panels.

## **5. CONCLUSION AND REASONS FOR RECOMMENDATIONS**

The Panel are asked to scrutinise the Quarter 1 Performance Report prior to it being submitted to Executive. The Panel is also asked to scrutinise the proposal to close some of the Carlisle Plan Key Actions as they have either been delivered or are now considered 'business as usual.'

## **6. CONTRIBUTION TO THE CARLISLE PLAN PRIORITIES**

Detail in the report.

**Contact Officer:** Gary Oliver

**Ext:** 7430

**Appendices attached to report:**

Performance Dashboard

**Note:** in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers:

- None

**CORPORATE IMPLICATIONS:**

**LEGAL** - This report raises no explicit legal issues.

**FINANCE** – This report raises no explicit financial issues.

**EQUALITY** – This report raises no explicit issues relating to the Public Sector Equality Duty.

**INFORMATION GOVERNANCE** – This report raises no explicit issues relating to Information Governance.

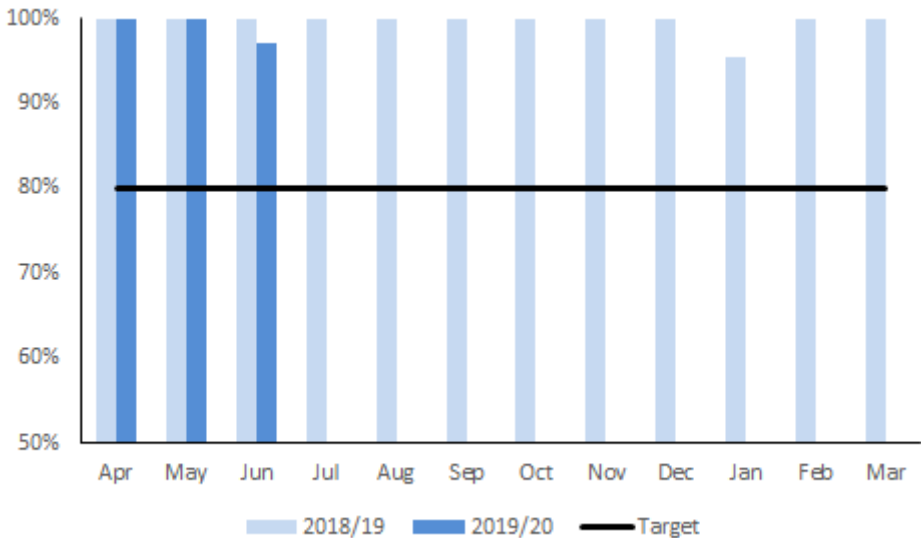
## **Section 1: Service Standards 2018/19**

Service Standards were introduced in 2012 after consultation with Service Managers, DMTs, SMT and JMT. Following a review of the initial set of five Service Standards, five further measures were introduced from Quarter 2 2017/18.

Service Standards are the measures judged to be the most important to our customers and therefore the mostly likely to influence the overall satisfaction with how the Council performs.

The following pages contains the Council's performance against the Service Standards within the Panel's remit.

SS01: Percentage of Household Planning Applications processed within eight weeks

Service Standard	To end of Quarter 1 2019/20	Performance by Month	Further Information																																																				
80% (Nationally set target)	100%  (Q1 2018/19: 98.9%)	 <table><tr><th>Month</th><th>2018/19 (%)</th><th>2019/20 (%)</th><th>Target (%)</th></tr><tr><td>Apr</td><td>100</td><td>100</td><td>80</td></tr><tr><td>May</td><td>100</td><td>100</td><td>80</td></tr><tr><td>Jun</td><td>100</td><td>98</td><td>80</td></tr><tr><td>Jul</td><td>100</td><td>100</td><td>80</td></tr><tr><td>Aug</td><td>100</td><td>100</td><td>80</td></tr><tr><td>Sep</td><td>100</td><td>100</td><td>80</td></tr><tr><td>Oct</td><td>100</td><td>100</td><td>80</td></tr><tr><td>Nov</td><td>100</td><td>100</td><td>80</td></tr><tr><td>Dec</td><td>100</td><td>100</td><td>80</td></tr><tr><td>Jan</td><td>95</td><td>100</td><td>80</td></tr><tr><td>Feb</td><td>100</td><td>100</td><td>80</td></tr><tr><td>Mar</td><td>100</td><td>100</td><td>80</td></tr></table>	Month	2018/19 (%)	2019/20 (%)	Target (%)	Apr	100	100	80	May	100	100	80	Jun	100	98	80	Jul	100	100	80	Aug	100	100	80	Sep	100	100	80	Oct	100	100	80	Nov	100	100	80	Dec	100	100	80	Jan	95	100	80	Feb	100	100	80	Mar	100	100	80	88 household planning applications have been processed in Quarter 1 2019/20 compared with 93 in the same period last year.
	Month		2018/19 (%)	2019/20 (%)	Target (%)																																																		
	Apr		100	100	80																																																		
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## **Section 2: Key Performance Indicators (KPIs)**

Service Standards are not the only set of measures used to interrogate the performance of the Council. Alongside the review of Service Standards, a set of Key Performance Indicators, derived from the links between the service plans and Budget Resolution were developed. These are attached as a Dashboard.

All KPI changes that were proposed during Quarters 3 and 4 2018/19 have been implemented.

### **Section 3: Carlisle Plan on a Page Delivery**

The current Carlisle Plan covered the period 2016-18 and many of the key actions are now either delivered or considered business as usual and feature within existing service plans. It is therefore the suggestion to close some of the key actions. The table below lists the suggested actions for closure:

<b>Title</b>	<b>Narrative</b>
03. Support the delivery of a Carlisle Enterprise Zone at Kingmoor Park	Considered business as usual and will be delivered through service planning
04. Support the development of Carlisle Airport as a regional gateway	The Carlisle Lake District Airport commenced commercial passenger flights on 4 July. Ongoing support will continue through service planning
05. Identify and deliver further projects aligned with the Cumbria Local Enterprise Partnership's Strategic Economic Plan	Awaiting development of Economic and Housing Strategy
10. Continue to support the delivery of the city region Skills Plan aligned to business growth, sustainability requirements and the LEP Skills Strategy	Awaiting development of Economic and Housing Strategy
11. Proactively develop business support through supporting the Growth Hub	Considered business as usual and will be delivered through service planning
23. Complete the delivery of a programme of public realm improvements throughout the city: fingerpost signage; interpretation boards and gateway signage	Phase 1 complete
30. and 31 Prepare and publish an updated Housing Strategy and develop and implement a Housing Delivery Action Plan	Awaiting development of Economic and Housing Strategy

34. Continue to develop and promote the Council's Empty Homes Service by delivering advice and information to empty homes owners	Considered business as usual and will be delivered through service planning. Progress will be monitored through new KPIs
36. Develop local solutions to ensure opportunities to maximise the delivery of affordable homes which respond to locally evidenced needs	Awaiting development of Economic and Housing Strategy
37. Work with landowners, developers, and partner agencies (e.g. HCA) to accelerate the delivery of sites	Awaiting development of Economic and Housing Strategy
41. Work with Carlisle Ambassadors to raise the profile of Carlisle through business engagement.	Ambassadors programme is now well embedded. Delivered through ED service planning
42. Encourage Carlisle Ambassadors to engage partners in promoting the Carlisle story/offer	Ambassadors programme is now well embedded. Delivered through ED service planning



The following pages provide an update on all the existing key actions as usual.

**Priority 1: Support business growth and skills development to improve opportunities and economic prospects for the people of Carlisle**

*Business Property & Infrastructure:*

<b>OUTCOME</b>	<b><u>2. City Centre redevelopment projects</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth / Business & Transformation
<b>Specific – What is the task</b>	Promote development opportunities and regeneration opportunities within the city centre (including Carlisle Station, Caldew Riverside, The Citadel, English Street and The Pools). Set out a strategy for the future vitality and viability of the city centre including development options for the regeneration opportunity sites (Carlisle Station, The Pools, Court Square, Caldew Riverside and the Citadel).
<b>Measurable – How will success be measured?</b>	Production of a city centre masterplan
<b>Achievable – Is it feasible?</b>	Yes
<b>Realistic – Resources available</b>	Consultancy support will be required to produce the masterplan. This will be funded by revenue budgets secured through the MTFP process.
<b>Time Bound – Start/end dates</b>	The preparation of the masterplan will commence Q3 2018-19, with a draft version produced by the end of Q4.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	Detailed appraisal of development options for the city centre regeneration sites currently being undertaken to support the business cases for the Borderlands Growth Deal
<b>Emerging issues / risks to the project</b>	Project currently on track

<b>OUTCOME</b>	<b><u>3. Support the delivery of a Carlisle Enterprise Zone at Kingmoor Park</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Support the delivery of Carlisle Kingmoor Park Enterprise Zone Implementation Plan and Marketing Strategy, as well as actively contributing to governance as a key partner.
<b>Measurable – How will success be measured?</b>	Delivery of approximately 200,000sqm of new employment related floor space, across 73ha creating an additional 3,000 jobs and representing private sector investment of £109m.
<b>Achievable – Is it feasible?</b>	Yes, detailed Implementation Plan in place and role required of partners clear.
<b>Realistic – Resources available</b>	Partnership governance arrangements in place.
<b>Time Bound – Start/end dates</b>	Zone effective from 1 <sup>st</sup> April 2016 with the retention of business rates for a period of 25 years.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	<ul style="list-style-type: none"> <li>• Continue to receive and determine a number of applications for Business Rate Relief in accordance with the Enterprise Zone Guidance.</li> <li>• Site masterplan being updated by site owners.</li> <li>• Future business rate income projections being developed.</li> </ul>
<b>Emerging issues / risks to the project</b>	Project currently on track

<b>OUTCOME</b>	<b><u>4. Support the development of Carlisle Airport as a regional gateway</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Support the development of Carlisle Airport as a regional gateway
<b>Measurable – How will success be measured?</b>	Airport offer expands to include increased freight and in addition passenger services.
<b>Achievable – Is it feasible?</b>	Through Economic Development Planning and Building Control Services professional advice and support.
<b>Realistic – Resources available</b>	Planning / Building Control advice
<b>Time Bound – Start/end dates</b>	There is currently no planned end date to this action.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	The Carlisle Lake District Airport commenced commercial passenger flights on 4 July. We will continue to work with Carlisle Airport to support any future development plans.
<b>Emerging issues / risks to the project</b>	None

*Strategy & Planning:*

<b>OUTCOME</b>	<b><u>5. Identify and deliver further projects aligned with the Cumbria Local Enterprise Partnership's Strategic Economic Plan</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Identify and deliver further projects aligned with the Cumbria Local Enterprise Partnership's Strategic Economic Plan
<b>Measurable – How will success be measured?</b>	Development of project pipeline; alignment of priorities and projects with Cumbria LEP Strategic Economic plan to ensure they are supported by the LEP and/or attract funding.
<b>Achievable – Is it feasible?</b>	Through engagement with the LEP and Technical Officers Group
<b>Realistic – Resources available</b>	Corporate Director/Senior Officer time
<b>Time Bound – Start/end dates</b>	Local Industrial Strategy to be adopted late 2019. This will feature on a future Scrutiny agenda.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	Continued engagement with the LEP and sub groups to ensure support to the LIS and emerging projects.
<b>Emerging issues / risks to the project</b>	None

<b>OUTCOME</b>	<b><u>6. Progress the Borderlands Initiative</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Progress the Borderlands Initiative
<b>Measurable – How will success be measured?</b>	By way of the successful continuation of the innovative and long-term partnership and the level of additional public and private sector investment secured as a direct result of the initiative.
<b>Achievable – Is it feasible?</b>	Yes. A co-ordinated approach to support regional economic development through partnership working will help to attract additional investment. Progression of 'The Borderlands Proposal' will rely on support from both the UK and Scottish Government.
<b>Realistic – Resources available</b>	Corporate Director of Economic Development and Borderlands Project Officer time to support the Initiative. In addition, partners have contributed towards a centralised fund to enable the appointment of consultancy support to develop a suite of strategic outline business cases and other evidence base requirements. It is anticipated that additional financial revenue resources will be required to provide support to move from Heads of Terms to Final Deal, which will be considered as part of the 2019/20 budget process.
<b>Time Bound – Start/end dates</b>	The Borderlands Partnership submitted the Borderlands Inclusive Growth Deal Proposal 2018 to UK and Scottish Government on 28 <sup>th</sup> September 2018. It is anticipated that a Heads of Terms agreement on a Deal could be reached by the end of the calendar year/early 2019. Thereafter it can typically take twelve months to agree and sign a Deal based on the experience of other areas. The Deal would then progress to the implementation and delivery phase, timescales for which would be dependent on individual projects or programmes.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	£345M Borderlands Inclusive Growth Deal awarded March 2019. Heads of Terms signed June 2019 prior to the summer recess of the Scottish Government.
<b>Emerging issues / risks to the project</b>	None

<b>OUTCOME</b>	<b><u>7. Infrastructure Delivery Plan</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Maintain an up to date Infrastructure Delivery Plan and develop proposals to address identified issues.
<b>Measurable – How will success be measured?</b>	Progress and issues will be reported through the annual statutory Authority Monitoring Report.
<b>Achievable – Is it feasible?</b>	Regular dialogue with infrastructure providers set up and maintained.
<b>Realistic – Resources available</b>	Can be delivered within existing staff resource and budget allocation.
<b>Time Bound – Start/end dates</b>	The Plan is aligned to the Carlisle District Local Plan 2015-30. Comprehensive update critical to development of masterplan and delivery strategy for St. Cuthbert's Garden Village.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	Strategic infrastructure requirements including quantity and location are in the process of being drawn up as part of stage 2 masterplanning.
<b>Emerging issues / risks to the project</b>	None

<b>OUTCOME</b>	<b><u>8. Develop a St Cuthbert's Garden Village Masterplan covering housing, design, employment land, community facilities, transport and infrastructure</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	The development and adoption of a masterplan covering St. Cuthbert's Garden Village.
<b>Measurable – How will success be measured?</b>	Masterplan will be incorporated into a Development Plan Document (DPD) which will require approval by Council. Masterplan to be delivered in 2 parts: Part 1 is visioning and concept framework; Part 2 is detailed framework plans.
<b>Achievable – Is it feasible?</b>	Production of DPD governed by Government Regulations, with policy and guidance also set out nationally
<b>Realistic – Resources available</b>	The project is detailed in the Council's approved Local Development Scheme (LDS). An adequate allocation has followed through the process of the MTFP. Additional funding to accelerate delivery and enhance quality has been forthcoming through inclusion in the Government's Locally Led Garden Villages Programme. Further Garden Village Capacity Funding applied for as and when funding rounds are announced.
<b>Time Bound – Start/end dates</b>	Mandate forthcoming from LDS which was approved in July 2016. Inclusion in Garden Village programme confirmed on 2nd January 2017. Anticipated adoption date of DPD April 2020.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	<ul style="list-style-type: none"> <li>• Appointed Aspinall Verdi as specialist viability and deliverability consultancy support</li> <li>• Procured Hive Land and Planning as landowner engagement consultancy support</li> <li>• AECOM appointed as specialist Sustainability / Habitat Regulation Assessment consultancy support</li> <li>• 3rd July major landowner, developer and land agent forum held.</li> </ul>
<b>Emerging issues / risks to the project</b>	Project risks continue to be monitored and reviewed. No risk warrants being reported at the current time.

*Skills Development:*

<b>OUTCOME</b>	<b><u>10. Continue to support the delivery of the city region Skills Plan aligned to business growth, sustainability requirements and the LEP Skills Strategy</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Continue to support the delivery of the city region Skills Plan aligned to business growth, sustainability requirements and the LEP Skills Strategy
<b>Measurable – How will success be measured?</b>	Successes in relation to skills improvements and better alignment with key sectors will be determined by the LEPs emerging Local Industrial Strategy and Carlisle City Council emerging Economic Strategy.
<b>Achievable – Is it feasible?</b>	The emerging Economic Strategy and Local Industrial Strategy will contribute significantly towards the achievement of this objective through the exploration of the requirements of key sectors operating and expanding within the area and the alignment of these requirements with the education offer of local education providers.
<b>Realistic – Resources available</b>	<p>Whilst the delivery of the skills plan will be challenging, the emerging Economic Strategy and Local Industrial Strategy will continue to support its delivery and may, in some cases, enhance this through targeted sector work to establish the skills requirements of key sectors.</p> <p>Carlisle City Council is currently working with training providers who deliver apprenticeships within the District to better understand the take up of apprenticeship opportunities and what the City Council can do to encourage take up of apprenticeships, particularly within key sectors.</p>
<b>Time Bound – Start/end dates</b>	<p>The Local Industrial Strategy is currently being consulted on and will be adopted in 2019.</p> <p>The emerging Economic Strategy is anticipated to be adopted 2019 in when there is a clearer indication of the timescale and scale of a number of significant projects that Carlisle</p>



	City Council are currently involved in, such as the Borderlands Inclusive Growth Deal, as well as a greater understanding of the potential impact of external factors such as Brexit.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	Continued engagement with the LEP and sub groups to ensure support to the LIS and emerging projects.
<b>Emerging issues / risks to the project</b>	None

Working with business:

<b>OUTCOME</b>	<b><u>11. Proactively develop business support through supporting the Growth Hub</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Proactively develop business support through supporting the Growth Hub
<b>Measurable – How will success be measured?</b>	Actions and activities undertaken to support businesses will be defined through the emerging Economic Strategy. This will include supporting the activities of the Growth Hub. Success of business support will be measured through annual review of the Economic Strategy actions (once adopted).
<b>Achievable – Is it feasible?</b>	The emerging Economic Strategy will contribute significantly towards the achievement of this objective through the exploration of the requirements of businesses and therefore linking requirements with targeted support, including through the Growth Hub.
<b>Realistic – Resources available</b>	Whilst the delivery of business support is often challenging due to limited resources, the emerging Economic Strategy will provide some tangible actions linked to business support, including supporting the Growth Hub.
<b>Time Bound – Start/end dates</b>	The end date of the key action will be coterminous with the Economic Strategy action plan.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	2018/19 funding agreement continues to be implemented and outcomes monitored. Decision in principle reached regarding match funding for the Growth Hub across 2019/20.
<b>Emerging issues / risks to the project</b>	Consideration being afforded to future years arrangements particularly given Brexit and uncertainties on any replacement previously EU funded initiatives.

**Priority 3: Continue to improve the quality of our local environment and green spaces so that everyone can enjoy living, working in and visiting Carlisle**

*City Centre Public Realm*

<b>OUTCOME</b>	<b><u>23. Complete the delivery of a programme of public realm improvements throughout the city: fingerpost signage; interpretation boards and gateway signage</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Complete the delivery of a programme of public realm improvements throughout the city: fingerpost signage; interpretation boards and gateway signage
<b>Measurable – How will success be measured?</b>	Installation of new fingerpost signage, interpretation boards and gateway signage
<b>Achievable – Is it feasible?</b>	Yes
<b>Realistic – Resources available</b>	Can be progressed to completion within existing staff capacity and allocated budget
<b>Time Bound – Start/end dates</b>	Installation of fingerpost signage and interpretation boards completed Q4 2017-18 Gateway Signage – to be delivered in the next public realm improvement programme. Appraisal of projects and indicative costing to commence in Q3 2018-19 with a provisional programme produced by the end of Q4.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	Ongoing dialogue with Cumbria County Council regarding design and delivery. Public realm improvements included within the Future High Street Fund bid.
<b>Emerging issues / risks to the project</b>	The delivery of the phase 2 programme will be dependent on approval for the release of the remaining budget.

**Priority 4: Address current and future housing needs to protect and improve residents' quality of life**

*Housing Strategy:*

<b>OUTCOME</b>	<b><u>30. and 31 Prepare and publish an updated Housing Strategy and develop and implement a Housing Delivery Action Plan</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Preparation and adoption of an up to date Housing Strategy inclusive of a housing delivery action plan, informed by appropriate stakeholder consultation and engagement as an integral part of the process.
<b>Measurable – How will success be measured?</b>	Housing Strategy adopted by Council and action plan complete.
<b>Achievable – Is it feasible?</b>	Yes
<b>Realistic – Resources available</b>	Can be progressed within existing staff capacity and base budgets
<b>Time Bound – Start/end dates</b>	Strategy planned to be adopted by Council in 2019.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	An update on Housing need and Housing Strategy will be presented to Economic Growth Scrutiny Panel on 5 September, which will include an update on the new Strategic Housing Market Assessment (SHMA)
<b>Emerging issues / risks to the project</b>	No issues to report at present.

*Housing Quality/Access:*

<b>OUTCOME</b>	<b><u>34. Continue to develop and promote the Council's Empty Homes Service by delivering advice and information to empty homes owners</u></b>
<b>SMT OWNER</b>	Mark Lambert
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Continue to develop and promote the Council's Empty Homes Service by delivering advice and information to empty homes owners. An Empty Home is defined as a property that has been empty for six months or more and is 'substantially unfurnished.'
<b>Measurable – How will success be measured?</b>	Number of empty homes. Whilst there is no target, the long-term trend should be a reduction in empty homes.
<b>Achievable – Is it feasible?</b>	
<b>Realistic – Resources available</b>	A dedicated officer has been in post since January 2018.
<b>Time Bound – Start/end dates</b>	There is no specific end date to this action.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	There has been a significant increase of overall Empty Homes rising from 916 to 963. Although 265 properties have successfully been removed from the Mar 19 list a larger than normal amount of 312 new properties has been added offsetting the success. Of these 302 are termed as Long-Term Empty having been empty for 2 years or more down from 317 in Mar 19. This increase is largely due to delays in the probate process.
<b>Emerging issues / risks to the project</b>	No new risks identified.

<b>OUTCOME</b>	<b><u>36. Develop local solutions to ensure opportunities to maximise the delivery of affordable homes which respond to locally evidenced needs</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Develop local solutions to ensure opportunities to maximise the delivery of affordable homes which respond to locally evidenced needs.
<b>Measurable – How will success be measured?</b>	Gross no. of new affordable homes, measured against need as evidenced by the SHMA (Strategic Housing Market Assessment). This is reported annually.
<b>Achievable – Is it feasible?</b>	We will work proactively towards maximising the affordable housing delivery, through working in partnership with local Housing Associations, developers, HCA, and strategic partnership groups – such as the Cumbria Housing Supply Group and Cumbria LEP
<b>Realistic – Resources available</b>	Will be managed within existing staffing resources
<b>Time Bound – Start/end dates</b>	HCA's Affordable Homes Programme 2016-21
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	Affordable housing completions during 2018-19 totalled 120 - 66 for Social / Affordable Rent and 54 intermediate low cost home ownership (discounted sale and shared ownership). The total delivered represents a significant increase on the previous year.
<b>Emerging issues / risks to the project</b>	No issues to report at present.

<b>OUTCOME</b>	<b><u>37. Work with landowners, developers, and partner agencies (e.g. HCA) to accelerate the delivery of sites</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Work with landowners, developers, and partner agencies (e.g. HCA) to accelerate the delivery of sites.
<b>Measurable – How will success be measured?</b>	Number of Net New Homes Per Annum - Performance measured against Local Plan housing target (478 in 2018/19 and 2019/20) and anticipated rates of delivery in housing trajectory.
<b>Achievable – Is it feasible?</b>	Whilst out with the direct control of the Council, there are several actions the Council can and is taking to support the realisation of this objective. These actions including potentially new activities will be detailed and coordinated through the Housing Strategy which is under development.
<b>Realistic – Resources available</b>	Can be delivered within existing staff resource and budget allocation. Need for additional resources will be flagged, if necessary, through the development of the housing strategy and consequently pursued through the Medium Term Financial Planning process.
<b>Time Bound – Start/end dates</b>	Linked to the Carlisle District Local Plan 2015-30.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	Work continues as previous quarter.
<b>Emerging issues / risks to the project</b>	None

**Priority 5: Promote Carlisle regionally, nationally and internationally as a place with much to offer - full of opportunities and potential**

*Business Growth:*

<b>OUTCOME</b>	<b><u>41. Work with Carlisle Ambassadors to raise the profile of Carlisle through business engagement.</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Work with Carlisle Ambassadors to raise the profile of Carlisle through business engagement.
<b>Measurable – How will success be measured?</b>	Membership numbers are maintained at > 100 or increase. Four themed meetings held per year. Ambassadors are engaged in activities which promote Carlisle and the Carlisle offer.
<b>Achievable – Is it feasible?</b>	Delivery of quarterly Carlisle Ambassador meetings themed around economic priorities. Programme agreed annually and delivery supported by ED Admin team.
<b>Realistic – Resources available</b>	External marketing and relationship management support procured, Corporate Director and Officer support in place to provide direction and project management
<b>Time Bound – Start/end dates</b>	Established 2013 with programme of activity and outputs reviewed on an annual basis. 2018-19 programme currently being delivered with review of proposal for 2019-20 to be considered Q3 2018-19.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	The second Carlisle Ambassador meeting of 2019 took place on 13 June. Twenty-four businesses showcased on the theme of Corporate Social Responsibility. The meeting held at Carlisle Racecourse was fully booked with attendees travelling from the North East and Manchester. Membership continues to grow, with over 190 businesses now members. Carlisle Young Ambassadors event is taking shape and creating growing interest across new business sectors.
<b>Emerging issues / risks to the project</b>	None to report at present.



<b>OUTCOME</b>	<b><u>42. Encourage Carlisle Ambassadors to engage partners in promoting the Carlisle story/offer</u></b>
<b>SMT OWNER</b>	Jane Meek
<b>Scrutiny Panel</b>	Economic Growth
<b>Specific – What is the task</b>	Encourage Carlisle Ambassadors (CA) to engage partners in promoting the Carlisle story/offer
<b>Measurable – How will success be measured?</b>	Media statistics: Circulation figures, On line views Website / YouTube, Facebook, Twitter, LinkedIn, Blogs etc. Increased sharing of Carlisle success stories by Carlisle Ambassadors in their sector and CA support for joint promotional opportunities such as Northern Powerhouse or GP Recruitment
<b>Achievable – Is it feasible?</b>	Engagement through Carlisle Ambassador Initiative and Marketing Sub Group
<b>Realistic – Resources available</b>	External marketing and relationship managed support procured, Marketing Sub Group of Carlisle Ambassadors to be implemented
<b>Time Bound – Start/end dates</b>	Established 2013 with programme of activity and outputs reviewed on an annual basis. 2018-19 programme currently being delivered with review of proposal for 2019-20 to be considered Q3 2018-19.
<b>Progress in Quarter 1 2019/20 against project plan / key milestones achieved</b>	Carlisle Ambassadors presence at Lakes Hospitality Trade Show in February and Shout Network Greater Manchester Business Expo has resulted in interest in Carlisle. The Carlisle stand, promoting place was a refreshing change at the event and attracted a lot of attention. Several businesses from the Manchester area have made contact to discuss opportunities in Carlisle. Discussions with the Shout Network has resulted in plans to hold a large business expo here in Carlisle in 2020.
<b>Emerging issues / risks to the project</b>	None

## Economic Growth Scrutiny Panel Performance Dashboard 2019/20 - to end of Quarter 1

<b>Key</b>	
↓	Performance is deteriorating (compared to same period last year)
↑	Performance is improving (compared to same period last year)
→	No change in performance (compared to same period last year)
✗	Off target
▲	Close to target (within 5%)
✓	On target

On Target?	New Code	Measure	Q1 Performance 2019/20	Q1 Performance 2018/19	Trend	Target	Comments
▲	CSe22	Actual city centre revenue as a percentage of city centre expenditure (including recharges)	56.9%	56.8%	↑	61%	
✓	ED02	Building Control to process S80 demolition notices within six weeks (statutory duty)	100%	100%	→	100%	
✓	ED03b	Building Control to decide 100% of all applications within the statutory period of 5 weeks or 2 calendar months (with the consent of the applicant)	100%	93.9%	↑	100%	
✓	ED11	% of valid full plan applications determined or checked by Building Control within 5 working days	26%	N/A	N/A	25%	New measure for 2019/20
✓	ED12	% of valid full plan applications determined or checked by Building Control within 15 working days	100%	N/A	N/A	95%	New measure for 2019/20. Amendment to old ED03a
✓	ED13	% of site inspections carried out by Building Control on the date agreed	99.4%	N/A	N/A	99%	New measure for 2019/20. Amendment to old ED01
✓	ED05	Proportion of major planning applications completed in 13 weeks or within agreed time extension	91%	83%	↑	60%	10/11 completed within deadline or agreed extension
✓	ED06	Proportion of minor planning applications completed in 8 weeks or within agreed time extension	98%	97%	↑	80%	127 applications
✓	ED07	Proportion of 'other' planning applications completed in 8 weeks or within agreed time extension	99%	98%	↑	80%	72 applications
✓	ED08	Proportion of Tree Preservation Orders (TPO) confirmed within 6 months	100%	100%	→	100%	
✓	ED09	Proportion of hedgerow removal notifications determined within 6 weeks	N/A	N/A	N/A	100%	0 notifications
✓	ED10	Proportion of Tree Preservation Order applications determined within statutory period of 8 weeks	100%	100%	→	100%	10 applications

# Economic Growth Scrutiny Panel

Agenda  
Item:

**A.5**

Meeting Date: 05 September 2019  
Portfolio: Cross-cutting  
Key Decision: No  
Within Policy and Budget Framework  
Private/Public Public

Title: Overview Report  
Report of: Overview and Scrutiny Officer  
Report Number: OS.22/19

## Purpose / Summary:

This report provides an overview of matters related to the Scrutiny Panel's work. It also includes the latest version of the work programme.

## Recommendations:

Members are asked to:

- Note the items (within Panel remit) on the most recent Notice of Key Executive Decisions
- Review the current work programme and resolutions and make recommendations for the future work programme

## Tracking

Executive:	<b>Not applicable</b>
Scrutiny:	<b>EGSP 05/09/19</b>
Council:	<b>Not applicable</b>

## 1. Notice of Key Decisions

1.1 The Notice of Key Executive Decisions was published on 16 August 2019 and was circulated to all Members. It is also available to the public on the Council's website:  
<http://cmis.carlisle.gov.uk/cmis/CouncilDecisions/KeyDecisionsoftheExecutive.aspx>

1.2 The Panel may wish to consider whether there are any items within their remit that they would like to be added to the work programme.

## 2. References from Executive

2.1 None

## 3. Progress on resolutions from previous meetings

3.1 The following table sets out the meeting date and resolution that requires following up. The status is presented as either "completed", "pending" (date expected), or "outstanding". An item is considered outstanding if no update or progress has been made after three panel meetings. All the completed actions will be removed from the list following the meeting.

3.2 All written responses are available to view on the Council's website under the relevant panel and date:

<http://cmis.carlisle.gov.uk/cmis/Committees/CurrentCommittees.aspx>

	Meeting date	Minute reference	Action	Status
1	18/07/19	EGSP 49/19	2) That an update on the Expression of Interest which had been submitted to the Historic England's High Street Heritage Action Zone Fund be added to the Work Programme.	Complete
2	18/07/19	EGSP 50/19	2) That the following items be scheduled in the 2019/20 work programme for the Panel; - Environment Strategy to be scheduled for 17 October 2019 - Joint Inquiry Day with Health and Wellbeing Scrutiny Panel to be programmed to feed into the October meeting	Complete  Pending
3	18/07/19	EGSP 50/19	3) That the Overview and Scrutiny Officer make arrangements for the Panel to visit the Enterprise Zone.	Pending Date agreed: 10:00 – 12:00, Wednesday 16 <sup>th</sup> October.

#### **4. Statutory Guidance on Overview and Scrutiny in Local and Combined Authorities**

**4.1** In May 2019, Ministry of Housing Communities and Local Government published guidance for local authorities to help them carry out their overview and scrutiny functions effectively. This is statutory guidance, which means that local authorities should have regard to it when carrying out their functions.

**4.2** The guidance places a high value on authorities having a strong organisational culture, with commitment from senior officers and Members, that welcomes challenge and values the role of scrutiny. Topics that are covered by the guidance include:

- culture;
- resourcing;
- selecting committee members;
- power to access information;
- planning work;
- evidence sessions.

#### **5. CONTRIBUTION TO THE CARLISLE PLAN PRIORITIES**

**5.1** The overview and scrutiny of the Carlisle Plan items that match the panel remit contribute towards ongoing policy development.

**Contact Officer: Rowan Jones**

**Ext: 7257**

**Appendices**

**1. Scrutiny Panel Work Programme 2019/20**

**attached to report:**

**Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers:**

- None

#### **CORPORATE IMPLICATIONS:**

**LEGAL -**

**FINANCE –**

**EQUALITY –** This report raises no explicit issues relating to the public sector Equality Duty.

**INFORMATION GOVERNANCE –**

## APPENDIX: SCRUTINY PANEL WORK PROGRAMME 2019-20

Title	Lead Officer	Meeting Date
End of Year Performance Report	Gary Oliver	13/06/2019
Borderlands Inclusive Growth Deal/key projects	Steven Robinson	18/07/2019
Housing Needs and Housing Strategy	Garry Legg	05/09/2019
St. Cuthbert's Garden Village	Garry Legg	05/09/2019
Performance Report	Gary Oliver	05/09/2019
Economic Strategy (Tourism Action Plan)	Garry Legg	17/10/2019
Environment Strategy		17/10/2019
Joint Inquiry Day with H&WSP to consider a range relevant Highways issues, but to include the Councils role in relation to road safety, connectivity in the context of major infrastructure developments, Health and Safety and encouraging walking and cycling.	Steven O'Keeffe	October 19
Borderlands Inclusive Growth Deal/key projects	Steven Robinson	28/11/2019
St. Cuthbert's Garden Village	Garry Legg	28/11/2019
Performance Report	Gary Oliver	28/11/2019
Budget setting	Alison Taylor	28/11/2019
Flood risk management and community resilience	Steven O'Keeffe	28/11/2019
Performance Report	Gary Oliver	27/02/2020
Borderlands Inclusive Growth Deal/key projects	Steven Robinson	09/04/2020
Local Enterprise partnership (LEP)	Garry Legg	09/04/2020
Enterprise Zone	Garry Legg	09/04/2020
Scrutiny Annual Report	Rowan Jones	09/04/2020
Free After Three Car Parking	Colin Bowley	TBC
Business support/High Street Fund	Steven Robinson	TBC
Update on Expression of Interest for Historic England's High Street Heritage Action Zone	Steven Robinson	TBC