
District Executive

Thursday 6th June 2019

9.30 am

**Council Chamber, Council Offices,
Brympton Way, Yeovil, BA20 2HT**

(disabled access and a hearing loop are available at this meeting venue)



Members listed on the following page are requested to attend the meeting.

The public and press are welcome to attend.

If you would like any further information on the items to be discussed, please contact the Democratic Services Specialist on 01935 462148 or democracy@southsomerset.gov.uk

This Agenda was issued on Wednesday 29 May 2019.

Alex Parmley, *Chief Executive Officer*



This information is also available on our website
www.southsomerset.gov.uk and via the mod.gov app

District Executive Membership

Jason Baker
Mike Best
John Clark
Adam Dance
Sarah Dyke
Peter Gubbins
Henry Hobhouse
Val Keitch
Tony Lock
Peter Seib

Information for the Public

The District Executive co-ordinates the policy objectives of the Council and gives the Area Committees strategic direction. It carries out all of the local authority's functions which are not the responsibility of any other part of the Council. It delegates some of its responsibilities to Area Committees, officers and individual portfolio holders within limits set by the Council's Constitution. When major decisions are to be discussed or made, these are published in the Executive Forward Plan in so far as they can be anticipated.

Members of the Public are able to:-

- attend meetings of the Council and its committees such as Area Committees, District Executive, except where, for example, personal or confidential matters are being discussed;
- speak at Area Committees, District Executive and Council meetings;
- see reports and background papers, and any record of decisions made by the Council and Executive;
- find out, from the Executive Forward Plan, what major decisions are to be decided by the District Executive.

Meetings of the District Executive are held monthly at 9.30 a.m. on the first Thursday of the month in the Council Offices, Brympton Way.

The Executive Forward Plan and copies of executive reports and decisions are published on the Council's web site - www.southsomerset.gov.uk.

The Council's Constitution is also on the web site and available for inspection in Council offices. The Council's corporate priorities which guide the work and decisions of the Executive are set out below.

Questions, statements or comments from members of the public are welcome at the beginning of each meeting of the Council. If a member of the public wishes to speak they should advise the committee administrator and complete one of the public participation slips setting out their name and the matter they wish to speak about. Each individual speaker shall be restricted to a total of three minutes. Answers to questions may be provided at the meeting itself or a written reply will be sent subsequently, as appropriate. Matters raised during the public question session will not be debated by the Committee at that meeting.

Further information can be obtained by contacting the agenda co-ordinator named on the front page.

District Executive

Thursday 6 June 2019

Agenda

1. Minutes of Previous Meeting

To approve as a correct record the minutes of the District Executive meeting held on 7th March 2019.

2. Apologies for Absence

3. Declarations of Interest

In accordance with the Council's current Code of Conduct (as amended 26 February 2015), which includes all the provisions relating to Disclosable Pecuniary Interests (DPI), personal and prejudicial interests, Members are asked to declare any DPI and also any personal interests (and whether or not such personal interests are also "prejudicial") in relation to any matter on the Agenda for this meeting.

Members are reminded that they need to declare the fact that they are also a member of a County, Town or Parish Council as a Personal Interest. Where you are also a member of Somerset County Council and/or a Town or Parish Council within South Somerset you must declare a prejudicial interest in any business on the agenda where there is a financial benefit or gain or advantage to Somerset County Council and/or a Town or Parish Council which would be at the cost or to the financial disadvantage of South Somerset District Council.

4. Public Question Time

5. Chairman's Announcements

Items for Discussion

6. The Castle Cary and Ansford Neighbourhood Plan Referendum (Pages 4 - 95)

7. Corporate Performance Report 2018-19: 4th Quarter (Pages 96 - 109)

8. SSDC Annual Achievements Report 2018-19 (Pages 110 - 122)

9. Commercial Assets Update Report (Pages 123 - 138)

10. District Executive Forward Plan (Pages 139 - 143)

11. Date of Next Meeting (Page 144)

Agenda Item 6

The Castle Cary and Ansford Neighbourhood Plan Referendum

Executive Portfolio Holder: Cllr. Val Keitch, Strategy and Housing
Ward Member(s) Cary - Cllr. Henry Hobhouse; Cllr. Kevin Messenger
Director: Netta Meadows, Director, Strategy and Support Services
Lead Specialist: Jan Gamon, Lead Specialist, Strategic Planning
Specialist: Leisa Kelly, Specialist, Strategic Planning
Contact Details: Leisa.kelly@southsomerset.gov.uk or 01935 462641

Purpose of the Report

1. To agree the Independent Examiner's report and recommendations for Proposed Modifications; and to set out the process for 'making' the plan following a favourable local referendum to be organised by the District Council.

Forward Plan

- 2 This report appeared on the District Executive Forward Plan with an anticipated Committee date of June 2019.

Public Interest

- 3 The Neighbourhood Plan represents the views of Castle Cary Town Council, Ansford Parish Council and other stakeholders on the preferred approach to future development in the town. This Plan has been the subject of Independent Examination by a qualified person and, if the Council agrees with the Examiner's report and recommendations for Proposed Modifications, the Plan will be subject to a referendum of all those in the community on the Electoral Register. The referendum will ask whether local residents agree with the modified Plan's content and if it should be used in the determination of planning applications.
- 4 The Neighbourhood Plan has been the subject of various events and meetings which have been used to engage with interested parties and public consultations. The Town and Parish Councils also have a dedicated website for the Neighbourhood Plan: [Castle Cary and Ansford Neighbourhood Plan](#)

Recommendations

- 5 That the District Executive:
 - a. agrees the Examiner's report and recommendations for Proposed Modifications to the Castle Cary and Ansford Neighbourhood Plan.
 - b. agrees to officers organising a referendum for local people on the Electoral Register. The aim of the referendum is to ascertain whether local residents want South Somerset District Council to use the Neighbourhood Plan for Castle Cary and Ansford to help it decide planning applications in the neighbourhood area.
 - c. delegates responsibility to the Director for Strategy and Support Services, in consultation with the Portfolio Holder for Housing, to make any final minor text amendments to the Neighbourhood Plan, in agreement with Castle Cary and Ansford Neighbourhood Plan Steering Group.

Background

- 6 Neighbourhood planning helps local communities play a direct role in planning for the areas in which they live and work. The plan can show how the community wants land in its area to be used and developed. If a plan is 'made' following a successful referendum, it becomes part of the development plan for that area. Planning applications are determined by local planning authorities in accordance with the adopted development plan, unless material considerations indicate otherwise.
- 7 The Castle Cary and Ansford Neighbourhood Area designation was approved by the District Council in June 2015. Since then, the Neighbourhood Plan for the area was prepared and a 'Pre-Submission' Plan was consulted upon by the local Steering Group in February 2018 (Regulation 14). This initial consultation was followed by formal submission of the Plan in November 2018 and the District Council carried out formal consultation in line with procedures set out in the relevant Regulations (Regulation 16). The Plan has now been the subject of independent examination and this report relates to the District Council's decision on the Examiner's recommendations and the next step of a local referendum.

The Castle Cary and Ansford Neighbourhood Plan

8. The Castle Cary and Ansford Neighbourhood Plan sets out a vision for the Town & Parish and the Stakeholders' main objectives. The Plan summarises the consultation process and evidence base which informed its preparation. It also includes policies seeking to guide future development in the Town & Parish relating to Housing, Employment and Business, Traffic Transport and Infrastructure, Community Services and facilities; and Built and Natural Environment.
9. The Neighbourhood Plan's objectives are set out as follows~;

Designing for the Neighbourhood – the aim is to ensure that all new development respects the special character of the market town of Castle Cary and the parish of Ansford, in particular that new housing developments are of good quality, are energy efficient and have as low an environmental impact as possible

Housing – the main aims are to support the level of new dwellings required by the South Somerset Local Plan, giving priority to the re-development or re-use of brownfield sites within the existing urban area, and to affordable and social housing to meet local needs, with a mix of shared ownership/tenancy types. To ensure that the growing community is supported by the necessary infrastructure, with new housing provision, employment growth and provision of roads and additional community facilities progressing in an integrated manner

Employment and Enterprise – the main aims are to broaden the employment base of the town by supporting an environment in which enterprise can flourish, attracting new employers and creating new jobs for local people of all ages. To ensure that the growing community is supported by the necessary infrastructure, with new housing provision, employment growth and provision of roads and additional community facilities progressing in an integrated manner.

Tourism – the main aim is to support increased tourism to the town and the wider area by preserving and promoting the area's heritage and retaining its special character.

The Town Centre - the main aims are to support, encourage and promote a range of shops and businesses in the town centre, protect the market, and maintain the free parking and public toilets. To promote and support safe travel for all, by better management of traffic movements into and through the town centre; seeking improvements to public transport, cycle paths, footpaths and rights of way, parking provision;

Transport Infrastructure & Accessibility - the main aims are to promote and support safe travel for all, by better management of traffic movements into and through the town centre; seeking improvements to public transport, cycle paths, footpaths and rights of way, parking provision; and improving links to town centre shops, schools and the railway station.

Education, Social & Community Assets – the main aims are to foster and promote opportunities for education, training, sporting activities, cultural stimulation and fun - for people of all ages. To ensure that the growing community is supported by the necessary infrastructure, with new housing provision, employment growth and provision of roads and additional community facilities progressing in an integrated manner.

The Natural & Built Environment – the main aim is to maintain and enhance the urban green spaces and the natural environment within the countryside surrounding both parishes, for the enjoyment of all.

- 10 Alongside the Neighbourhood Plan itself, the Regulations require that a statement is submitted which states how the Plan meets the specified 'Basic Conditions', a Consultation Statement; and confirmation that the Plan meets the Strategic Environmental Assessment and Habitats Regulations and other European legislation.
- 11 On receipt of the Submission Documents, the District Council carried out the required public consultation for a period of six weeks under Regulation 16 in November 18/ January 2019; this included a notice in the press; and hard copies of the Submission documents being made available at Castle Cary Library. The District Council also wrote to all authorities, utility providers, a wide range of stakeholders and other bodies considered to have an interest in the Plan, including those that the Neighbourhood Plan Steering Group had consulted themselves. The submission documentation was also made available on the Council's website.
- 12 A total of 8 responses were received and the District Council also presented its own comments; these were all sent to the Examiner.
- 13 The Examiner's Report concludes that the correct procedure for the preparation and submission of the Castle Cary and Ansford Plan was followed and that it meets the 'Basic Conditions', subject to the policy modifications being made. The Examiner has proposed 16 minor modifications which we are content to accept. The Examiner's Report (Appendix A) and document (Appendix B) in accordance with these proposed changes is appended to this report. The original Submission Plan, supporting documents and summary of representations received are all available on the District Council's website <https://www.southsomerset.gov.uk/your-council/your-council-plan-and-strategies/planning-policy/neighbourhood-planning/>
- 14 If the District Council accepts the Examiner's recommendations, the next stage would be to hold a local referendum in Castle Cary and Ansford. The prescribed question that needs to be asked is:

"Do you want South Somerset District Council to use the Neighbourhood Plan for Castle Cary and Ansford to help it decide planning applications in the neighbourhood area?"

If more than 50% of those who vote say Yes, the Neighbourhood Plan is 'made' (or adopted); and it becomes part of the statutory Development Plan for the District Council and needs to be taken account of in the determination of planning applications.

Financial Implications

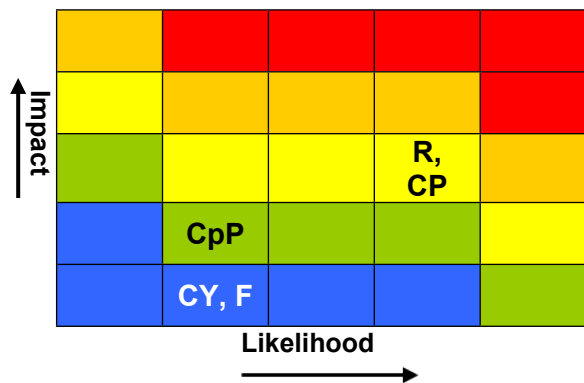
- 15 Under the Community Infrastructure Levy Regulations, 15% of Community Infrastructure Levy receipts are generally passed directly to those parish and town councils (in England) where development has taken place. In England, communities that draw up a neighbourhood plan and

secure the consent of local people in a referendum, will benefit from 25% of the levy revenues arising from the development that takes place in their area.

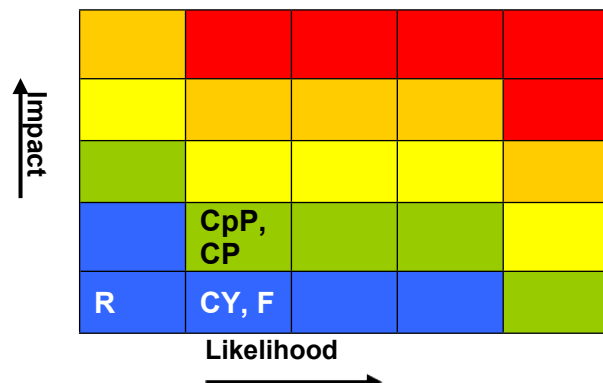
- 16 The District Council does not have the option to decline to hold the Referendum as this is required by legislation; and the associated costs will need to be absorbed into existing budgetary arrangements. However, the Council will claim a grant of up to £20,000 towards the costs of progressing the Neighbourhood Plan from the Ministry for Housing, Communities and Local Government once the date of the Referendum has been set.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

- 17 The Castle Cary and Ansford Neighbourhood Plan accords with the Council's aims to increase the focus on jobs and economic development, protect and enhance the quality of our environment; and to enable housing to meet all needs. The District Council's values include supporting people and communities, enabling them to help themselves; and the Neighbourhood Plan has been prepared by the local community who wish to have an influence on future development in the town. The Council Plan states that it will focus on supporting communities to develop and implement Neighbourhood Plans.

Carbon Emissions and Climate Change Implications

- 18 The Castle Cary and Ansford Neighbourhood Plan does not directly address carbon emissions or climate change and no such issues arise.

Equality and Diversity Implications

- 19 No significant changes to a Service, Policy or Strategy are proposed, directly and, therefore, it is not necessary to undertake an Equality Impact Assessment.

Privacy Impact Assessment

20 It is not necessary to process personal data so, therefore, a Data Protection Impact Assessment (DPIA) is not needed.

Background Papers

Appendix A – Examiner’s Report

Appendix B – Castle Cary and Ansford Neighbourhood Plan



Intelligent Plans
and examinations

Report on Castle Cary & Ansford Neighbourhood Plan 2016 -2028

An Examination undertaken for South Somerset District Council with the support of the Castle Cary Town Council and Ansford Parish Council on the September 2018 submission version of the Plan.

Independent Examiner: Jill Kingaby BSc (Econ) MSc MRTPI

Date of Report: 3 May 2019

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Main Findings - Executive Summary

From my examination of the Castle Cary & Ansford Neighbourhood Plan (the Plan/CCANP) and its supporting documentation including the representations made, I have concluded that subject to the policy modifications set out in this report, the Plan meets the Basic Conditions.

I have also concluded that:

- The Plan has been prepared and submitted for examination by a qualifying body – Castle Cary Town Council & Ansford Parish Council;
- The Plan has been prepared for an area properly designated – Castle Cary and Ansford parishes as shown on the Map on Page 2;
- The Plan specifies the period to which it is to take effect – 2016 - 2028; and
- The policies relate to the development and use of land for a designated neighbourhood area.

I recommend that the Plan, once modified, proceeds to Referendum on the basis that it has met all the relevant legal requirements.

I have considered whether the referendum area should extend beyond the designated area to which the Plan relates and have concluded that it should not.

1. Introduction and Background

Castle Cary & Ansford Neighbourhood Plan 2016 - 2028

1.1 Section 2 of the Plan entitled “Castle Cary and Ansford Today” provides a concise but comprehensive description of the designated area and its main characteristics. Castle Cary and Ansford together form a market town, with some 3,360 people occupying 1,640 dwellings¹. The Plan area is located roughly midway between Shepton Mallet to the north and Yeovil to the south, and lies approximately 7 kilometres (kms) north of the A303, the principal west-east road through South Somerset. The area is relatively self-contained with some 58% of persons in employment either working at home or commuting less than 20kms to work. There is a range of employment opportunities locally, ranging from agriculture (dairy, cheese and cider farming) to light industry centred on the Torbay Road. There are also jobs related to retailing, tourism and other service industries. Castle Cary town centre has a weekly market and many independent shops located within a historic setting. It attracts trade from outlying villages and beyond, as well as from the Neighbourhood Plan area.

¹ Statistics from the 2011 Census.

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- 1.2 The Neighbourhood Plan area contains 4 conservation areas, some 112 listed buildings and structures and 2 scheduled monuments. Many of the older buildings in Castle Cary & Ansford are constructed from honey-coloured limestone, extracted from a nearby quarry at Hadspen, giving the built environment a distinctive and attractive appearance. The town centre, which is based on High Street, Fore Street and Market Place is intensively developed with a variety of old buildings and other structures, including the war memorial surrounded by water and the Round House. Castle Cary rail station, situated about 1 mile north of the town centre, provides services to London and Penzance, as well as Bristol, Bath, Trowbridge, Yeovil, Dorchester and Weymouth. However, the timing of trains means that services are not generally convenient for commuting to work. Access for pedestrians and cyclists across the A371 along a hilly, rural track is not ideal, and there is limited parking at the station. Much of the Plan area comprises countryside, giving a green and attractive landscape setting to Castle Cary & Ansford, with much high quality agricultural land (graded 1, 2 or 3a).
- 1.3 As described in section 3 below, a working group was set up in July 2014, to prepare a neighbourhood plan for the two parishes of Castle Cary and Ansford. The CCANP was submitted for examination in November 2018.

The Independent Examiner

- 1.4 As the Plan has now reached the examination stage, I have been appointed to examine the CCANP by South Somerset District Council (SSDC), with the agreement of the parishes of Castle Cary and Ansford.
- 1.5 I am a chartered town planner and former government Planning Inspector, and have prior experience examining neighbourhood plans. I am an independent examiner, and do not have an interest in any of the land that may be affected by the submitted plan.

The Scope of the Examination

- 1.6 As the independent examiner, I am required to produce this report and recommend either:
- (a) that the neighbourhood plan is submitted to a referendum without changes; or
 - (b) that modifications are made and that the modified neighbourhood plan is submitted to a referendum; or
 - (c) that the neighbourhood plan does not proceed to a referendum on the basis that it does not meet the necessary legal requirements.
- 1.7 The scope of the examination is set out in Paragraph 8(1) of Schedule 4B to the Town and Country Planning Act 1990 (as amended)('the 1990 Act'). The examiner must consider:

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- Whether the Plan meets the Basic Conditions;
- Whether the Plan complies with provisions under s.38A and s.38B of the Planning and Compulsory Purchase Act 2004 (as amended) ('the 2004 Act'). These are:
 - it has been prepared and submitted for examination by a qualifying body, for an area that has been properly designated by the Local Planning Authority;
 - it sets out policies in relation to the development and use of land;
 - it specifies the period during which it has effect;
 - it does not include provisions and policies for 'excluded development';
 - it is the only neighbourhood plan for the area and does not relate to land outside the designated neighbourhood area;
 - whether the referendum boundary should be extended beyond the designated area, should the Plan proceed to referendum; and
- Such matters as prescribed in the Neighbourhood Planning (General) Regulations 2012 ('the 2012 Regulations').

1.8 I have considered only matters that fall within Paragraph 8(1) of Schedule 4B to the 1990 Act, with one exception. That is the requirement that the Plan is compatible with the Human Rights Convention.

The Basic Conditions

1.9 The 'Basic Conditions' are set out in Paragraph 8(2) of Schedule 4B to the 1990 Act. In order to meet the Basic Conditions, the neighbourhood plan must:

- Have regard to national policies and advice contained in guidance issued by the Secretary of State;
- Contribute to the achievement of sustainable development;
- Be in general conformity with the strategic policies of the development plan for the area;
- Be compatible with and not breach European Union (EU) obligations; and

- Meet prescribed conditions and comply with prescribed matters.

1.10 Regulation 32 of the 2012 Regulations prescribes a further Basic Condition for a neighbourhood plan. This requires that the making of the Plan does not breach the requirement of Chapter 8 Part 6 of the Conservation of Habitats and Species Regulations 2017².

2. Approach to the Examination

Planning Policy Context

- 2.1 The Development Plan for this part of SSDC, not including documents relating to excluded minerals and waste development, is the South Somerset Local Plan adopted March 2015. A Local Plan Review is underway, with consultation on Preferred Options expected in June 2019, and plan adoption in 2021. The emerging plan is therefore at a relatively early stage of production.
- 2.2 The planning policy for England is set out principally in the National Planning Policy Framework (NPPF). The Planning Practice Guidance (PPG) offers guidance on how this policy should be implemented.
- 2.3 A revised NPPF was published on 24 July 2018, with a further revised version on 19 February 2019, replacing the previous 2012 NPPF. The transitional arrangements for local plans and neighbourhood plans are set out in paragraph 214 of the 2018 (and subsequent 2019) NPPF, which provides that 'The policies in the previous NPPF will apply for the purpose of examining plans, where those plans are submitted on or before 24 January 2019'. A footnote clarifies that for neighbourhood plans, 'submission' in this context means where a qualifying body submits a plan to the local planning authority under Regulation 15 of the 2012 Regulations. The Plan was submitted to the District Council in November 2018. Thus, it is the policies in the original, 2012 NPPF that are applied to this examination and all references in this report are to the March 2012 NPPF and its accompanying PPG.

Submitted Documents

- 2.4 I have considered all policy, guidance and other reference documents I consider relevant to the examination, including those submitted which comprise:
- The Castle Cary & Ansford Neighbourhood Plan 2016-2028, September 2018;

² This revised Basic Condition came into force on 28 December 2018 through the Conservation of Habitats and Species and Planning (Various Amendments) (England and Wales) Regulations 2018.

- The Map on Page 2 of the Plan, which identifies the area to which the proposed Neighbourhood Development Plan relates;
- the Consultation Statement, September 2018;
- the Basic Conditions Statement, September 2018;
- all the representations that have been made in accordance with the Regulation 16 consultation;
- the Strategic Environmental Assessment and Habitats Regulations Screening Report, December 2017, prepared by SSDC; and
- the Neighbourhood Plan Working Group's answers (1 and 21 March 2019) to my questions of 15 February 2019³.

Site Visit

2.5 I made an unaccompanied site visit to the Neighbourhood Plan Area on 28 March 2019 to familiarise myself with it, and visit relevant sites and areas referenced in the Plan and evidential documents.

Written Representations with or without Public Hearing

2.6 This examination has been dealt with by written representations. The regulation 16 consultation responses clearly articulated objections to the Plan, and presented arguments for and against the Plan's suitability to proceed to a referendum. In February 2019, I sought answers from the CCANP working group on a number of matters which arose from my preliminary reading of the Plan and other documentation. Written responses dated 1 and 21 March 2019 were received. I have taken account of these in producing my report, and have considered the working group's observation that hearing sessions might help resolve some areas of disagreement with SSDC. However, I considered that hearing sessions were unnecessary, as I have received sufficient information from all parties.

Modifications

2.7 Where necessary, I have recommended modifications to the Plan (**PMs**) in this report in order that it meets the Basic Conditions and other legal requirements. For ease of reference, I have listed these modifications separately in the Appendix.

³ View at: <https://www.southsomerset.gov.uk/your-council/your-council-plan-and-strategies/planning-policy/neighbourhood-planning/>

3. Procedural Compliance and Human Rights

Qualifying Body and Neighbourhood Plan Area

- 3.1 The CCANP has been prepared and submitted for examination by the Castle Cary & Ansford Neighbourhood Plan working group, on behalf of Castle Cary Town Council and Ansford Parish Council who are qualifying bodies. An application for designation of the Neighbourhood Plan Area was approved by SSDC on 4 June 2015. It is the only neighbourhood plan for Castle Cary & Ansford, and does not relate to land outside the designated Neighbourhood Plan Area.

Plan Period

- 3.2 The Plan specifies clearly the period to which it is to take effect, which is from 2016 to 2028.

Neighbourhood Plan Preparation and Consultation

- 3.3 The working group for the CCANP started preparing the Plan in July 2014, following a public objection to an application for development of some 165 homes off Station Road. The local newsletter distributed to some 1,500 homes in Castle Cary and Ansford parishes and an e-mail message system established in 2014, the Cary Crier, were used to recruit members to the working group and initiate communication with local people on plan-making. This process started in Autumn 2014. The working group held a series of informal meetings between January 2015 and January 2016 with local groups and organisations (i) to raise awareness of the significance of neighbourhood planning, and (ii) to develop the working group's understanding of the main issues facing the area. A major public event, a drop-in session, at the Market House in October 2015, attracted some 170 people.
- 3.4 Early drafts of the Plan were discussed with officers at SSDC in the first half of 2016, but two planning appeals relating to housing development in the area were held in late 2016 with decisions issued in January 2017. These decisions necessitated a review and re-drafting of the Plan. In February 2018, a pre-submission plan was published under Regulation 14. This was widely publicised using a variety of techniques from the local Newsletter to all households, notification on the Town Council and Parish Council websites, and letters to major and small businesses and community organisations inviting them to meetings. SSDC, all statutory bodies and other organisations were consulted on the draft Plan between March and May 2018.
- 3.5 Appendix 15 of the Consultation Statement submitted with the Neighbourhood Plan gives a commentary on the main issues raised by the responses to the Regulation 14 draft. The working group amended the

Neighbourhood Plan to take account of the responses and comply with the regulations for plan-making. However, on behalf of Hannick Homes, it was argued that their response to the Regulation 14 consultation exercise, with valid planning policy arguments, had not been properly addressed. I confirm that I have read all the submissions (at Regulation 14 and 16) from Hannick Homes, and taken them into account in the examination.

- 3.6 Eight responses to the Regulation 16 consultation exercise, undertaken between November 2018 and January 2019, were received. I am satisfied that the consultation process has met the legal requirements for neighbourhood planning in the 2012 Regulations and that due regard has been had to the advice in the PPG on plan preparation and engagement.

Development and Use of Land and Excluded Development

- 3.7 The Plan sets out policies in relation to the development and use of land in accordance with s.38A of the 2004 Act. The Plan does not include provisions and policies for 'excluded development'.

Human Rights

- 3.8 SSDC has not suggested that the Plan would breach Human Rights (within the meaning of the Human Rights Act 1998). The Basic Conditions Statement advises that the CCANP has had regard to the fundamental rights and freedoms guaranteed under the European Convention on Human Rights and complies with the 1998 Act. The Plan, it is argued, has been produced in full consultation with the local community and wider stakeholders. From my independent assessment, I see no reason to disagree with the conclusion that the CCANP does not infringe human rights.

4. Compliance with the Basic Conditions

EU Obligations

- 4.1 The CCANP was screened for Strategic Environmental Assessment (SEA) by SSDC, as reported in the submitted Strategic Environmental Assessment and Habitats Regulations Screening Report, December 2017. This found that the draft objectives and policies of the Plan were unlikely to have significant environmental effects; consequently, it was unnecessary to undertake a full SEA. Having read the report, I support this conclusion.

- 4.2 The CCANP was further screened for Habitats Regulation Assessment (HRA), and it was concluded that the requirement for an assessment was not triggered. The Somerset Levels and Moors Special Protection Area/Ramsar is within South Somerset, and another European site is

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located close to the District boundary south-east of Crewkerne, Dorset. The impact on these sites was addressed in the HRA for the South Somerset Local Plan, and I consider that there is no need for a further assessment for this Neighbourhood Plan. Natural England agreed with this conclusion, as reported in Table 3 of SSDC's SEA and HRA Screening Report.

Main Issues

- 4.3 Having regard for the CCANP, the consultation responses and other evidence, and the site visit, I consider that there are four main issues relating to the Basic Conditions for this examination. These are:
- Whether the Plan takes an appropriately positive approach towards future new housing development;
 - Whether the Plan includes suitable policies for:(i) business development, (ii) the town centre, (iii) transport and (iv) community facilities, notably school provision, having regard for planned new housing development;
 - Whether the Plan's policies seek to conserve and enhance the natural and built environment appropriately; and
 - Whether the Plan addresses monitoring and future plan review adequately.

Issue 1 – New Housing Development

- 4.4 The CCANP states that there is a strong housing market in Castle Cary and Ansford, particularly for higher and mid-cost dwellings, but a shortage of affordable and social housing, especially for young local people⁴. Chapter 5 begins with 'Main Aims' for housing and, in accordance with the Basic Conditions for neighbourhood planning, expresses its support for the level of new dwellings required by the South Somerset Local Plan.
- 4.5 Policy SS5 of the Local Plan (Delivering new housing growth) states that Ansford/Castle Cary should deliver 374 new dwellings over the Plan period, 2006-28. Policy SS1 (Settlement Strategy) identifies Ansford/Castle Cary as a Local Market Town, beneath the Strategically Significant Town of Yeovil and Primary Market Towns of Chard, Crewkerne, Ilminster and Wincanton. Supporting text advises that market towns should provide 'locally significant development', having regard for the existing concentration of businesses, community facilities and services, and sustainable transport potential. Policy LMT1 of the Local Plan specifies a 'Direction of Growth' for Ansford/Castle Cary with new development north of Torbay Road and east and west of Station Road; the Direction of Growth should include a new link road.

⁴ Paragraph 2.2 of CCANP.

- 4.6 Table 5.1 of the CCANP indicates that only 68 new dwellings were completed in the area between 2006 and 2017, but current commitments should add 477 dwellings in the Direction of Growth and a further 88 dwellings on brownfield sites within the existing built-up area. I recognise that this gives a total of 653 new dwellings for likely completion 2006-2028 in Ansford/Castle Cary, which is considerably more than the Local Plan target of 374 dwellings. The figure of 653 exceeds the target of 496 dwellings set for Ilminster and is close to the target of 703 for Wincanton. Ilminster and Wincanton are 'primary market towns', and the numbers indicate that Ansford/Castle Cary could match the expectations for development in two of the four primary market towns. Paragraph 5.20 of the Local Plan is clear that smaller local market towns, such as Ansford/Castle Cary, should accommodate a lower level of housing growth than the larger, primary market towns. I am aware that good plans should provide some flexibility, in case planned schemes do not deliver as anticipated. With commitments for 653 dwellings (being 279 dwellings more than 374), the CCANP provides ample flexibility, in my view.
- 4.7 Somerset County Council stated that Table 5.1 of the Plan was out of date, and I note that its sources are the Five-year Housing Land Supply Paper, SSDC, and Annual Monitoring Report, September 2017. The Five-year Housing Land Supply Paper August 2018, however, shows similar figures for the named sites in Ansford/Castle Cary with an additional six sites for consideration in the Local Plan Review of options. These six potential sites could contribute a further 347 dwellings and bring the housing delivery figure for Ansford/Castle Cary, 2018-33, to 910 new dwellings. I consider that Table 5.1 need not be modified, as it makes clear the date to which it applies and as the Local Plan Review is at a relatively early stage. Having regard for the settlement hierarchy in South Somerset, and the number of sites currently available in Ansford/Castle Cary, I see no need for additional substantive housing schemes to be named in the Neighbourhood Plan.
- 4.8 The CCANP refers to the concerns of local people that any further release of greenfield sites for new housing development could hold back the re-use of brownfield sites within the town's boundaries, which have been vacant and undeveloped for some years. Hence, Policy HOU1 of the CCANP encourages the early development or redevelopment for housing on brownfield sites, in particular on five named sites. Policy HOU2 aims to strongly resist further proposals for new housing development within the Direction of Growth, unless there is clear evidence that an identified local need for affordable or social housing will be met.
- 4.9 Objection is raised to this approach on the grounds that neither national planning policy nor the Local Plan advocates a sequential assessment whereby brownfield sites should be developed before greenfield sites. It is argued that there is scant evidence of any research undertaken to

ascertain whether the named brownfield sites in Castle Cary and Ansford are developable or deliverable. In answer to my preliminary questions, the Working Group provided information for each of the five brownfield sites which suggests there is ongoing interest in acquiring planning permission for every site. I accept that their development would provide new housing in accessible locations, and help remove some unsightly features, for the benefit of the appearance of the built and natural environment. Encouraging the re-use of brownfield sites in Castle Cary and Ansford should therefore contribute to the achievement of sustainable development.

- 4.10 I also consider that Policy HOU1 is in general conformity with Policy SS7 of the Local Plan, which states that the Council will encourage early development of brownfield land. In addition, paragraph 7.112 of the Local Plan describes the BMI site as an important brownfield site for Ansford and Castle Cary, expected to deliver 89 dwellings within the plan period. I conclude that Policy HOU1 meets the Basic Conditions and does not require modification.
- 4.11 Regarding Policy HOU2, my attention was drawn to paragraph 7.120 of the Local Plan. This states: "*A North West direction of growth has been found to be the most sustainable location for Ansford/Castle Cary's future expansion of housing, employment and education proposals. well related to existing employment opportunities, the town centre, the town's Schools and least impact in respect of peripheral landscape.....*". The Direction of Growth was loosely defined in the Local Plan and it was originally envisaged that a Site Allocations Plan would set out a masterplan for expansion within the broad area. However, SSDC no longer intends to produce a Site Allocations Plan, and paragraph 5.2 of the CCANP points out that this has resulted in the absence of an overall masterplan for the Direction of Growth north-west of Ansford/Castle Cary.
- 4.12 Although criticism has been made of the reference to the lack of a masterplan in paragraph 5.2, I consider that it is useful to draw readers attention to this matter of fact, and to itemise the planning benefits which an overall masterplan could have provided, as in criteria a. to d. Whilst the CCANP should not restrict housing development by treating the figure of 374 as a ceiling, I see no requirement for immediately permitting development of all the pockets of land within the extensive Direction of Growth. I support the overall approach set out in section 3 of the Neighbourhood Plan (The Future – Issues facing the town) because it seeks to maximise the use of brownfield sites, achieve a balance of housing with employment and infrastructure provision, and maintain Ansford/Castle Cary's status in the settlement hierarchy as a small, historic market town in a rural setting.

- 4.13 The SSDC Five Year Housing Land Supply Paper, August 2018, indicated that there is only about a 4 year supply of sites in the District, and this shortfall could support the identification of additional housing in Castle Cary and Ansford. On behalf of Hannick Homes, it is stated that their "land at Clanville", within Ansford and the Direction of Growth, could be prevented from being progressed for housing development by the CCANP's housing policies. It is argued that this is contrary to national and local planning policy, especially as the Government's revised approach to housing need assessment and housing delivery may require South Somerset to raise its housing target. It is noted that the South Somerset Local Plan is currently under review. The Issues and Options Local Plan included Hannick Homes' site as suitable for housing and employment. It is contended that the lack of a five year supply of housing sites in South Somerset, and the inclusion of the Clanville site as 'developable' within the Five Year Housing Land Supply paper August 2018, mean that it should be promoted for development, and not held back by Policy HOU2 of the CCANP.
- 4.14 In reply to my questions on 1 March 2019, the CCANP Working Group stated its view that "*simply granting more and more permissions in one location at Castle Cary will [not] necessarily increase the overall rate of provision of housing, either locally or in the district as a whole.*" Paragraph 5.10 of the Plan refers to recent appeal decisions (Ref 3035753 & 3121541) wherein the Inspector supported the view that permissions now would not boost housing supply in the short-term. The Working Group also argued that a pause in permitting developments in the Direction of Growth would enable the impact of the first development schemes to be assessed, and the provision of new infrastructure to catch up. I support this approach noting that paragraph 16 of the NPPF encourages neighbourhoods to "*plan positively to support local development, shaping and directing development in their area that is outside the strategic elements of the Local Plan*".
- 4.15 I therefore recommend that Policy HOU2 is modified so that (i) it positively supports delivery of all the sites listed in Table 5.1, (ii) enables additional housing development to meet local need for affordable or social housing⁵, and (iii) commits to a review of the Plan within 5 years of being made, or earlier if the current Local Plan Review has been completed. In case that review demonstrates that additional housing development should take place in Ansford/Castle Cary, Policy HOU2 should in principle support further new development within the Direction of Growth in the longer term. **PM7** should be made to ensure that Policy HOU2 has regard

⁵ The town of Castle Cary and Ansford serves a wider rural hinterland as described in the SSDC Local Plan, paragraphs 7.121-4. In rural areas, paragraph 54 of the NPPF expects local planning authorities to be responsive to local circumstances and plan housing development to reflect local needs, particularly for affordable housing.

for national planning policy to boost housing supply, for general conformity with the strategic policies of the South Somerset Local Plan and to promote sustainable development in the area.

- 4.16 I also propose other modifications to the text in the CCANP so that it conveys a positive message for securing new housing development in the right places and at the right times, to meet the outstanding need in this part of South Somerset. Paragraph 3.1b. should be modified to delete the words "*further release of greenfield sites for housing is not welcomed...*" (my underlining). The Main Aims following paragraph 3.2 (the second bullet) and at the start of Section 5 should include a reference to the Direction of Growth. Paragraphs 5.6 to 5.11 should be modified to remove references to the "*excessive number of committed dwellings*" etc. which give the impression that the Local Plan target for Castle Cary and Ansford is a ceiling. **PM2, PM4 & PM6** would secure these changes and ensure that the Plan meets the Basic Conditions. Subject to the above modifications, I conclude that the CCANP will take an appropriately positive approach towards future new housing development.

Issue 2 - Policies for: (i) business development, (ii) the town centre, (iii) transport, and (iv) community facilities

- 4.17 Section 6 begins with two Main Aims for employment and enterprise in the area. These are to broaden the employment base enabling enterprises to flourish, and to ensure that employment growth is supported by necessary infrastructure and is consistent with new housing growth. I consider that these aims have had regard for the NPPF's objective to ensure that the planning system does everything it can to support sustainable economic growth, and to create jobs and prosperity. Paragraphs 6.1 and 6.2 of the CCANP refer to the Local Plan target for 19 hectares of new employment land to be provided in Ansford/Castle Cary between 2006 and 2028. Just under 9 hectares has been added, principally at the industrial estate north of Torbay Road, and a further 2 hectares received outline planning permission in 2016. SSDC observed that the amount of employment land and floorspace created so far at Ansford/Castle Cary is amongst the highest in the District. Paragraphs 6.3 & 6.4 of the Plan express support for small and medium-sized enterprises across a range of industries, and highlight opportunities for new employment land at the former BMI site north of High Street, and on land adjacent to the railway station.

- 4.18 Policy EMP1 is supportive of the delivery of new employment land, provided that significant visual or environmental harm or adverse impact on the local road network does not result. In view of the rural setting of Ansford/Castle Cary and its historic town centre, as well as the state of the local transport infrastructure (with some narrow and bendy rural roads), I consider Policy EMP1 to be appropriate and to meet the Basic Conditions. SSDC commented that Policy EMP2 replicates national policy

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in the NPPF and is unnecessary. However, its inclusion in the Neighbourhood Plan could provide some encouragement to local businesses unfamiliar with the NPPF, so I shall not recommend its removal.

- 4.19 Section 7 aims to promote tourism and Policy TOU1 supports the development of new or enhanced tourist facilities and visitor accommodation. As I saw at my site visit, Castle Cary has an attractive town centre with many distinctive and original old buildings and structures, and a strong rural character reflecting the importance of farming to its history and development. Policy TOU1 includes the aim to promote sustainable modes of travel (rail, cycling and walking) when new tourism facilities are developed, which should contribute to the achievement of sustainable development. Paragraph 2.5 of the Plan describes Castle Cary and Ansford as "*slightly more 'self-contained' than the national average (58% working at home or within 20kms)*". I consider that the policies for Employment & Enterprise and Tourism should enable continuing self-containment, with employment growth in a future period of anticipated housing and population growth. I am satisfied that sections 6 and 7 of the Plan meet the Basic Conditions, including general conformity with the strategic Local Plan Policy SS3: Delivering new employment land.
- 4.20 The town centre is a key feature defining the character of Ansford/Castle Cary. As paragraph 8.1 of the CCANP states, the town centre is at the social heart of the town and forms an important part of the local economy. I saw at my site visit the range of niche and independent retailers, as well as more basic food shops, hardware, post office and chemists' shops, alongside cafes and public houses. Also, there is a library, museum and galleries. The Plan advises that the weekly Tuesday market was revived in 2014, which also enhances the vitality of the centre. Free car parking at both the southern and northern ends of the town centre increases footfall in the centre, benefiting visitors from outside the area.
- 4.21 I am aware that many high streets and shopping centres are currently experiencing decline and shop closures, and appreciate the desire to maintain the town centre of Ansford /Castle Cary. New housing development is expected to increase spending in the town centre, and the South Somerset Retail and Main Town Centre Uses Study, 2017, identified scope for an additional 737sqm food retail space in Castle Cary. However, I recognise the difficulty of specifying sites to expand the existing town centre, especially to provide for larger modern retail outlets in this historic town. I consider that Policy TC1 to resist the loss of existing retail or similar floorspace is conservative but does not breach the Basic Conditions. The off-street public car parks and public conveniences next to the town centre are assets for shoppers and other visitors. I note SSDC's observation that the policy could enable a scenario where

commensurate car parking was provided in an alternative town centre location. The existing wording of the policy would not rule it out in my opinion. However it is applied, I consider that Policy TC2 to preserve town centre parking should support the vitality and viability of the area and aligns with the NPPF, paragraph 23.

- 4.22 Castle Cary and Ansford are located beside the A371 which connects Shepton Mallet to Wincanton and the A303. The A371 carries much through traffic as well as vehicles travelling to and from Ansford/Castle Cary. On my site visit, I observed significant numbers of HGVs as well as private cars and saw the risks to highway safety and smooth traffic movement posed at the 'local highway hotspots' named in paragraph 9.1 of the CCANP, on the A371 and B3153.
- 4.23 Paragraph 9.3 of the Plan confirms that no firm alignment has yet been approved for the new road between Station Road and Torbay Road in the Direction of Growth, which is required by Policy LMT1 of the Local Plan. Paragraph 9.9 of the CCANP states that the road should be aligned so as to remove the need for HGV traffic to use Clanville and Blackworthy Road to reach the industrial estate. SSDC observed that the input of Somerset County Council as the highway authority would be helpful in this section, and it highlighted potential problems with funding and delivery. The County Council has not commented on this part of the CCANP, but I consider that the need for further discussion between the Parish Councils and highway authority should be referenced. The absence of progress on this important piece of infrastructure strengthens my support for the proposal to postpone granting any more planning permissions for housing growth in the Direction of Growth in the short-term. **PMS** to modify paragraph 9.9 should be made to aid delivery of new housing and a link road in the area, in general conformity with the strategic Local Plan.
- 4.24 Pitcombe Parish Council requested that due consideration be given to the management of additional traffic on roads in its Parish, especially between Hadspen and Cole, as a result of new housing development in Ansford/Castle Cary. In my view, this is a matter for Somerset County Council as highway authority to address.
- 4.25 I consider that section 9 of the Plan sets out clearly the challenges which exist in Ansford/Castle Cary for the transport system. The NPPF promotes sustainable transport, and the Actions in this Neighbourhood Plan seek to secure an improved network of pedestrian and cycle routes, and maximise the potential to use public transport. These Actions fall outside the remit of my examination, in so far as they are community aspirations, but I nonetheless note they have had regard for the NPPF and would promote the achievement of sustainable development. Policy TRA1 is focused on improving safe routes for pedestrians and cyclists within the built-up area, and to the countryside with its rights of way network. I agree that this is

an area where improvements are needed to promote more sustainable travel behaviour. Many of the residential areas of Castle Cary and Ansford are relatively hilly, with cul-de-sacs which deny through movement. Walking or cycling to the railway station is not straightforward for many residents, partly because of the road layout. In addition, the railway station is separated from the northern edge of the built-up area of Ansford, and is reached on foot along a narrow tarmac path between open fields which is hilly and unlit.

4.26 SSDC observed that, unfortunately, a connecting bus service from the town centre to the railway station is unlikely to prove viable, primarily because of the diverse nature of terminal points and because the actual population is unlikely to provide the critical mass for services. Nevertheless, I see no reason why the Parish Councils should not investigate the scope to improve bus services as the local community wishes (paragraph 9.4 c.) or pursue the action set out in paragraph 9.8. The latter includes improved car parking capacity at the railway station, which could also contribute to more sustainable travel in the wider area. I consider that Policy TRA1 of the CCANP is in general conformity with the Local Plan's strategic Policies TRA1: Low carbon travel and TRA5: Transport impact of new development. I support the thrust of CCANP Policy TRA2 and consider it to be in general conformity with the strategic Local Plan policy for transport. However, I recommend modified wording to the first sentence because SSDC, and not Castle Cary and Ansford councils, will be determining the planning applications for employment and related development. As long as **PM9** is made, Policies TRA1 and 2 will meet the Basic Conditions.

4.27 Section 10 of the Plan concerns education, social and community assets. Paragraph 10.5 refers to building a new primary school in the Direction of Growth as part of outline planning permission, 15/02347/OUT. Even if this is only an outline permission with detailed matters requiring further approval, this does not provide justification for identifying an alternative site for the school. Although paragraph 10.5 of the Plan sets out the preference of the local community and Parish Councils to expand the existing site on Church Street, Somerset County Council with responsibility for schools and education does not agree and requires the removal of the proposal. The County Council's schools' commissioning team has undertaken feasibility studies and found that the existing school site will not be satisfactory to accommodate all primary school children in the future. The proposed new site would be reasonably connected to the built-up area of Ansford/Castle Cary in my opinion. Located in the Direction of Growth, an appropriate sized school with adequate hall, sporting and other facilities should be achievable. In order to secure general conformity with Policy LMT1 and its supporting information in paragraph 7.121 of the Local Plan, which expect delivery of a new primary school in the Direction of Growth, modifications to Policies INF1 & INF2,

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and paragraphs 3.1h., 10.4, 10.5, 10.8 and 10.10 should be made, as in **PM3, PM10 & PM11**.

- 4.28 The working group expressed concern that closure of the primary school would have a negative effect on the vitality of the town centre. Although I have seen no supporting evidence, I appreciate that some parents and teachers are likely to combine trips to school with use of the shops and other community facilities. The CCANP supports improvements to the highway network, including direct and safe routes for pedestrians and cyclists to the town centre through Policy TRA1; it also supports retention of the town centre car park. These measures should contribute to good access between a new primary school and the town centre, and I see no need for additional references to be made.
- 4.29 The first sentence in paragraph 10.2 should be modified to have regard to national policy, as not all planning permissions for housing and other developments will be accompanied by planning obligations. The figures quoted in this paragraph refer to the amounts already agreed with developers where permissions for significant development have been granted. This needs to be clarified, as in **PM10**. Somerset County Council provided more up-to-date information on the methodology and formula for funding education when new housing development is permitted. I agree that paragraph 10.4 should be modified to include the updates to the formula. Also, paragraph 10.8 and Policy INF2, as well as the Policies Map, should be modified to remove the references to providing new youth facilities on the site north of Torbay Road where planning permission has been granted for a new primary school. The working group advised that it wished to see new youth facilities within the wider area north of Torbay Road or alternatively within the existing primary school, following its closure. I consider that these preferences should be referenced in paragraph 10.8. **PM10 & PM11** are necessary to secure this outcome and for general conformity with the strategic policies of the Local Plan.
- 4.30 SSDC was critical of Policies INF2 and INF3 as Community Infrastructure Levy (CIL) funds are not tied to specific local projects, and it would not necessarily be the Parish Councils' decision as to where they are allocated. Although the Parish Councils would receive 25% of funds collected locally once the Neighbourhood Plan is made, the amounts are likely to be low in the short-term, as many of the allocated sites already have planning permissions. I recognise that the policies are aspirational but consider that they should be retained in the modified form of **PM11 & PM12**, which should contribute to the achievement of sustainable development.
- 4.31 Regarding Policy INF4, Protection of important social and community facilities, I agree with SSDC that there does not appear to be any objective assessment as to what makes the features listed in Appendix A special. Without such an assessment, there may be unreasonable

constraint on some of the facilities to adapt their usage or modernise themselves. I recommend that Policy INF4 is amended so that it is an "Action" rather than a policy, and that the Parish Councils seek to carry out further investigation and have some, if not all, facilities listed on the District Council's register in future. **PM13** should be made so that this part of the Plan contributes to the achievement of sustainable development.

- 4.32 As long as all the above modifications are made, I conclude that the Plan will include suitable policies which meet the Basic Conditions for: (i) business development, (ii) the town centre, (iii) transport and (iv) community facilities, notably school provision, having regard for planned new housing development.

Issue 3 – Natural and Built Environment

- 4.33 Section 11 of the CCANP sets out policy for the natural and built environment. I fully support the Main Aim "to maintain and enhance the urban green spaces and the natural environment within the countryside surrounding both parishes, for the enjoyment of all." Policy ENV1: Protection of Green Corridors and Natural Environment has regard for section 11 of the NPPF, is in general conformity with Policies EQ2, EQ4 & EQ5 of the Local Plan, and should contribute to sustainable development.
- 4.34 Quoting from the NPPF, in paragraph 11.4 the CCANP explains that seven Local Green Spaces (LGS) have been designated in Castle Cary and Ansford. I saw them at my site visit and noted that the majority are well-used by the local community, are well-related to residential areas or the town centre and are well-managed. None are unreasonably extensive tracts of land. However, as the NPPF cautions that LGS designations will not be appropriate for most green areas or open space, and as development management within LGSs should be consistent with policy for Green Belts, the tests for designation should be strictly applied. The Playing Field, Ansford, is east of Ansford Hill and outside the built-up area, bordered by countryside to the south and east. Its use as a playing field should be maintained especially as it is the home of junior sections of the local football club. However, in my opinion, it is not so special that it should be designated as LGS. Paragraphs 11.4 and Policy ENV2 should be modified to remove it from the LGS list as in **PM14** so that full regard is had to the NPPF. In addition, the Neighbourhood Plan Policies Map on Page 47 should be modified to remove the LGS, as in **PM16**. Otherwise, I am content that the remaining sites should be designated as LGS.
- 4.35 The CCANP deals with the built environment very succinctly in paragraphs 11.5 to 11.8. The community's strong desire to protect the local historic environment and setting of Castle Cary and Ansford is noted in Section 3 and in the Main Aim at the start of Section 4 of the Plan. Paragraph 7.103

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of the Local Plan refers to Ansford/Castle Cary's rich historic environment recognised by the town's four designated conservation areas and many listed buildings including the Grade II* listed All Saints Church. The area around the settlement has high archaeological potential and the remains of a motte and bailey castle. Although neighbourhood plans should not replicate Local Plans, I consider that users of the CCANP should be made aware of the existence of these heritage features. Their presence could have significant implications when development management decisions are made in the area. The reference to these features in paragraph 2.20 should be expanded, and a new map added to the Plan to illustrate the location of the Conservation Areas as well as the motte and bailey castle. **PM1** should be made to contribute to the achievement of sustainable development, and having regard for national policy.

- 4.36 Policy DP1 expects all new development to be designed to the highest standards and to respect the unique character of the area. This approach has due regard for section 7 of the NPPF, which begins by stating that the Government attaches great importance to the design of the built environment, and views good design as a key aspect of sustainable development. In my view, the policy is in general conformity with Policies EQ1, 2 & 3 of the Local Plan on Addressing Climate Change, General Development Design and the Historic Environment. However, Policy DP1 refers the reader to a series of design principles to be used when assessing development proposals which, in my view, will require some modification. It would also assist if the criteria on Pages 14-18 were headed by the title "Design Principles".
- 4.37 Wessex Water advised that, as a utility company, it will need to undertake maintenance and improvement works over the Plan period. Such works will need to be functional and consideration of security, health and safety may have to override good appearance. Another party commented that it goes beyond national planning policy to require all new housing to be carbon neutral. Government's standards for energy efficiency are set through Building Regulations. As the criterion describes a carbon neutral outcome as ideal, I consider that it is not overly restrictive. However, a reference to Building Regulations could usefully be added. I accept that Policy DP1 and the subsequent design principles require modification to ensure that they are not too onerous. I have put forward modifications to paragraph 4.1 in **PM5**, having regard for paragraphs 59 and 60, as well as 173 of the NPPF. This states that plans should be deliverable, and the scale of development identified in a plan should not be subject to such a scale of obligations and policy burdens that the ability to be developed viably is threatened.
- 4.38 The wording of the first criterion under Security and Safety should be changed, as it could be too restrictive of rear garden provision. The third criterion should relate to "*housing suitable for people of varied ages ...*" as

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the age of residents cannot be specified in planning policy. Criterion a. under Access and Movement could prevent development alongside existing main roads, and the reason for avoiding cul-de-sacs could usefully be explained. As SSDC, rather than Castle Cary and Ansford councils, will be determining planning applications, criterion d. should be modified. **PM5** should be made having regard for national policy and for the achievement of sustainable development. Providing **PM1, PM5, PM14 & PM16** are made, I conclude that the Plan will seek to conserve and enhance the natural and built environment appropriately and meet the Basic Conditions.

Issue 4 - Monitoring and Reviewing the Neighbourhood Plan

- 4.39 Respondents to the Regulation 16 consultation exercise expressed concern that the CCANP did not indicate how monitoring will be undertaken, and when the Plan will be reviewed. Local Plans are now subject to a statutory requirement to be reviewed at least every 5 years⁶ and, in practice, this will be likely to have a consequential impact on the need to review neighbourhood plans. Furthermore, NPPF paragraph 47 requires local planning authorities to identify and update annually a supply of specific deliverable housing sites. In essence, this necessitates monitoring of site availability and delivery, and ongoing assessment of the effectiveness of local planning policy. As SSDC is currently reviewing its Local Plan and looking forward to 2036, I consider that given these particular circumstances, the CCANP should include a commitment for monitoring and review, having regard to paragraph 184 of the NPPF which advises the ambition of the neighbourhood should be aligned with the strategic needs and priorities of the wider local area.
- 4.40 The working group commented that the primary responsibility for monitoring development should lie with the SSDC and its annual reports. However, the Parish Councils will be well placed to observe the rate of housing and other development in the Direction of Growth, and elsewhere (eg. on brownfield sites). Depending on the new housing target for SSDC taken forward in the forthcoming Local Plan, and any revised policy for the distribution of new housing development across the District, Ansford/Castle Cary may need to accommodate additional housing growth. The Parish Councils should also monitor progress on plans for the provision of a new link road and primary school, as well as employment land, in the Direction of Growth. A new section 12 should be added to the Plan to address Monitoring and Review. I have taken account of the working group's suggested text in putting forward **PM15**. This modification will ensure that the Plan meets the Basic Conditions and addresses monitoring and future Plan review adequately.

⁶ Regulation 10A(1)(a) of the Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended).

5. Conclusions

Summary

- 5.1 The Castle Cary and Ansford Neighbourhood Plan has been duly prepared in compliance with the procedural requirements. My examination has investigated whether the Plan meets the Basic Conditions and other legal requirements for neighbourhood plans. I have had regard for all the responses made following consultation on the Neighbourhood Plan, and the evidence documents submitted with it.
- 5.2 I have made recommendations to modify a number of policies and text to ensure the Plan meets the Basic Conditions and other legal requirements. I recommend that the Plan, once modified, proceeds to referendum.

The Referendum and its Area

- 5.3 I have considered whether or not the referendum area should be extended beyond the designated area to which the Plan relates. The CCANP as modified has no policy or proposals which I consider significant enough to have an impact beyond the designated Neighbourhood Plan boundary, requiring the referendum to extend to areas beyond the Plan boundary. I recommend that the boundary for the purposes of any future referendum on the Plan should be the boundary of the designated Neighbourhood Plan Area.

Overview

- 5.4 I appreciate the hard work which has been carried out by the working group of local people appointed by Castle Cary and Ansford Parish Councils to prepare this Neighbourhood Plan, over a number of years since Summer 2014. This historic market town is projected to grow significantly in size over the coming years, and the working group has been challenged to find an appropriate approach to manage that growth, whilst not preventing a boost in housing supply, as required by national and local plan policy. I congratulate the working group on producing a Plan which seeks to balance the competing requirement to accommodate sustainable growth whilst conserving the assets of the existing town and its community. I hope that the CCANP will be made and will contribute to effective and beneficial development management within Castle Cary and Ansford in the near future.

Jill Kingaby

Examiner

Appendix: Modifications

Proposed modification number (PM)	Page no./ other reference	Modification
PM1	Page 9 paragraph 2.20	<p>Last sentence should read:</p> <p>The NP has 2 scheduled monuments (<i>the Motte and Bailey Castle and Round House lock-up</i>), 4 Conservation Area, <i>as illustrated on Map ...</i>, and some 112 Listed Buildings and structures.</p> <p>Add a map to illustrate the location of the key heritage assets, principally the 4 conservation areas and 2 scheduled monuments within Ansford/Castle Cary.</p>
PM2	Page 10 paragraph 3.1b.	<p>while we accept the need for some additional housing and any further release of greenfield sites for housing is not welcomed while <i>and</i> there is a good supply of available brownfield sites. <i>Any further release of greenfield sites for housing should be paused pending a review of recent permitted development and longer term housing requirements.</i></p>
PM3	Page 11 paragraph 3.1h.	<p>The primary school is at capacity ...its existing site., as it is centrally located and its presence here supports the town centre economy. <i>However, opportunities for expansion there are very limited and a new primary school is planned within the Direction of Growth.</i></p>
PM4	Page 12	<p>Main Aims – second bullet</p> <ul style="list-style-type: none"> To support the level of new dwellings priority to the <i>sites committed for development within the Direction of Growth</i>, the re-development or re-use of brownfield sites
PM5	Pages 13 to 18	<p>4.1 The NP councils ... developers on all such matters. <i>Good design is essential for good planning and making places</i></p>

		<p><i>better for people. However, development can take many forms, and should not be subject to an onerous set of requirements that may hold back necessary and affordable development. The following principles will be applied to secure high quality in the built environment, but also having regard for development to meet functional requirements, achieve secure and safe environments, and be viable.</i></p> <p>New heading at the top of Page 14</p> <p><i>Design Principles</i></p> <p>Security and Safety</p> <p>a. Private, semi-private ... Rear gardens <i>New housing</i> adjoining public spaces and footpaths should be avoided <i>laid out with</i> as these do not provide <i>regard to securing good surveillance</i> particularly whereParking courts should, <i>where possible,</i> be overlooked.</p> <p>b. ..</p> <p>c. Developments should provide for <i>housing suitable for people of a</i> variety of ages and types of residents, <i>where the scale and site characteristics allow,</i> to encourage 'passive surveillance'</p> <p>Access and Movement</p> <p>a. The road network should not <i>necessarily</i> be the dominant factor in any layout design: roads should be designed as <i>to provide</i> open spaces as well as routes <i>to give access.....Cul-de-sacs especially those without through access for pedestrians and cyclists</i> are to be avoided.</p> <p>b. ..</p> <p>c. ..</p>
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		<p>d. All such foot and cycle routes are to be agreed between discussed by developers, SSDC and the NP councils before ...</p> <p>Environmental Footprint</p> <p>c. We expectmethods and function, but as a minimum complying with Government Building Regulations.</p>
PM6	Page 20, 21 & 22	<p>5.6 This situation, of an apparently excessive a very high number</p> <p>5.8 ...This reinforces concerns that there are 'excessive' over high numbers of</p> <p>5.11In the light of; and for the time being, to resist pause further release .. can be shown. The delivery of housing schemes listed in Table 5.1 within Ansford/Castle Cary will be monitored. A review of the neighbourhood plan within the next five years will include assessment of the impact of ongoing development on the town's infrastructure and role as a smaller local market town. The review will consider the need for additional development within the DofG, for example to compensate for any non-delivery of the schemes in Table 5.1.</p> <p>5.14The NP councils will work with SSDC and local landowners to monitor progress on the delivery of new housing in Castle Cary and Ansford, and monitor compliance with emerging housing policy in the South Somerset Local Plan 2016-36.</p>
PM7	Page 23	<p>Policy HOU2</p> <p>HOUSING DEVELOPMENT IN THE DIRECTION OF GROWTH</p> <p>While there remains within the direction of growth will be strongly resisted paused unless ...met elsewhere. Whilst</p>

		additional sites to those already committed for development are available within the Direction of Growth, these will not be brought forward for development unless the emerging South Somerset Local Plan requires their release, and it can be demonstrated that further housing development would not have a significantly adverse effect on the character of this modest market town and its infrastructure.
PM8	Page 35 paragraph 9.9	The NP councils will continue to press for a link road between Torbay Road and Station Road, liaising with SCC as local highway authority and SSDC, to deliver Policy LMT1 of the Local Plan which expects a link road to be provided prior to the completion of growth in housing, employment and education in the area. on an The alignment of the new road such as to should remove the need for HGV
PM9	Page 36	Policy TRA2 HGV TRAFFIC AT LOCAL HIGHWAY HOTSPOTS The NP councils will require that t Transport assessments associated
PM10	Pages 37 to 40	10.2 Planning permissions granted for significant housing and other developments are have all been accompanied 10.3 Education is criticalalready provided in town. 10.4 Castle Cary Community Primary School a Additional accommodation... that has already been approved; a guideline formula for providing new school places when new houses are built suggests that approximately ...new houses built. <ul style="list-style-type: none"> • Early years 5 pupils per 100 dwellings

		<ul style="list-style-type: none"> • Primary 32 pupils per 100 dwellings • Secondary 14 pupils per 100 dwellings <p>(Source: Somerset County Council 2019)</p> <p>In virtually all cases school education.The issue which arises is how and where such funds should be used.</p> <p>10.5 One option, to build The provision of a new primary school to the west of the town, is included as a possibility in the form of a reserved site in the outlineHowever, Even though provision in that location is not supported by all the local community as it would lead to increasedwould enable further expansion. Somerset County Council schools commissioning team has undertaken feasibility studies which demonstrate that the current school site will not be satisfactory for the future. The proposed new site in the Direction of Growth, granted planning permission in June 2016 (Ref: 15/02347/OUT), will accommodate an appropriate sized school with adequate hall, sports facilities and other requirements. Any suggestion that primary school strongly resisted.</p> <p>10.8 There is an urgent need any other activities. The site earmarked for a new primary schoolall weather play area. Our preferred option is for a site to be found within the Torbay Road development area, as indicated on the policies map. Alternatively, in the event of the existing primary school being vacated, consideration should be given to use of part or all of the building for youth and community facilities. Planning obligations already</p>
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		10.10 The District Council ... Although LP policy LMT1 allows ... Direction of Growth, the preferred option ... existing primary school site, and therefore that is provided under the following policy.
PM11	Page 41	<p>Policy INF1 EXPANDING PRIMARY SCHOOL PROVISION</p> <p>The NP councils will seek to ensure that future growth of the Castle Cary ... to the town centre. primary school provision takes place at the selected site in the Direction of Growth to meet the needs of the Ansford/Castle Cary community.</p> <p>Policy INF2 YOUTH FACILITIES PROVISION</p> <p>The NP councils will press for liaise with SSDC and seek funding where possible from relevant s106 and CIL funds within the NP area sources to be allocated towards appropriate youth facilities,7 giving priority primary school.</p>
PM12	Page 41	<p>Policy INF3 COMMUNITY HALL PROVISION</p> <p>The NP councils will press for liaise with SSDC and seek funding where possible from relevant s106 and CIL funds within the NP area sources to be allocated towards</p>
PM13	Pages 40 and 41	<p>10.11 The LP includes Policy INF3 and a Appendix A makes clear the current facilities to which this policy should be applied within the NP area The facilities listed represent those which the local community sees However, the NP councils will take action to see that these are maintained and protected.</p> <p>ACTION</p> <p>The NP Councils will continue to work on the identification of important social and community facilities, and seek their listing on the SSDC register of Assets of Community Value where appropriate. The NP Councils will</p>

		<p>seek to ensure that important facilities are maintained and protected.</p> <p>Policy INF4 should be deleted.</p>
PM14	Page 45 and 46	<p>Paragraph 11.4 f. Playing field, Ansford —the home of the junior sections of the local football club</p> <p>Policy ENV2 LOCAL GREEN SPACES</p> <p>The following locations</p> <ul style="list-style-type: none"> • Playing field, Ansford • Jubilee
PM15	Page 46 and 47	<p>New section 12: MONITORING AND REVIEW</p> <p>12.1 The NP will run concurrently with the South Somerset Local Plan and apply until March 2028. It is, however, a response to the needs and aspirations of the local community as understood today, and it is recognised that current challenges and concerns are likely to change over the plan period. It is, therefore, essential for the long term success of the Plan that developments in the NP area are monitored and reviewed against the Plan’s Aims and Policies.</p> <p>12.2 It is expected that SSDC will continue to monitor progress relating to the number of dwellings including affordable homes which are delivered during the Plan period. Hence, monitoring of Policy HOU2 will be achieved by reference to SSDC’s series of annual monitoring reports and housing land availability reports.</p> <p>12.3 The NP Councils will liaise with SSDC and other stakeholders to monitor progress on employment and other development, as well as housing, in Castle Cary and Ansford. In particular, progress on a new link</p>

		<p>road and primary school in the Direction of Growth will be monitored.</p> <p>12.4 The NP Councils will liaise with SSDC and SCC to monitor the impact of new development on:</p> <ul style="list-style-type: none"> • The self-containment of the area (which may be eroded if new housing development outstrips the creation of new employment space and jobs); • Transport infrastructure, bearing in mind the identified hotspots on the A371 and B353 and the limitations to public transport in the area; • The vitality of the town centre with its diversity of retail outlets and other community facilities; • The historic character and appearance of the old market town in a rural setting. <p>12.5 The NP Councils in liaison with SSDC will consider the case for further development within the Direction of Growth following review of the current NP.</p> <p>12.6 At a more general level, the NP Councils will be responsible for maintaining and periodically revisiting the Plan to ensure relevance to current community needs. It is intended that a review of all the issues and needs of the community will take place every 5 years. However, SSDC are in the process of preparing a Local Plan Review to cover the period up to 2036, and in order to achieve general conformity with strategic policies, it may be necessary to review the NP before the end of the 5 year timescale. The NP councils will monitor progress on the revised LP, particularly once it has become a material consideration in</p>
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		<p><i>the determination of planning applications, and will commence review of the NP if it becomes clear that updating is required. We note that SSDC currently anticipate the following timescale for preparation of the revised LP:</i></p> <ul style="list-style-type: none"> • <i>Public consultation on preferred options: mid-2019</i> • <i>Public consultation on publication plan: early 2020</i> • <i>Submission to Sec of State: late 2020</i> • <i>Examination of plan: 2021</i> • <i>Adoption of plan: 2021.</i>
PM16	Page 47	<p>Map of Neighbourhood Plan Policies</p> <p>This should be modified:</p> <ul style="list-style-type: none"> • To show the Preferred location for a new primary school, and not the Preferred location for youth facilities. • To omit the Playing field Ansford as a Local Green Space.



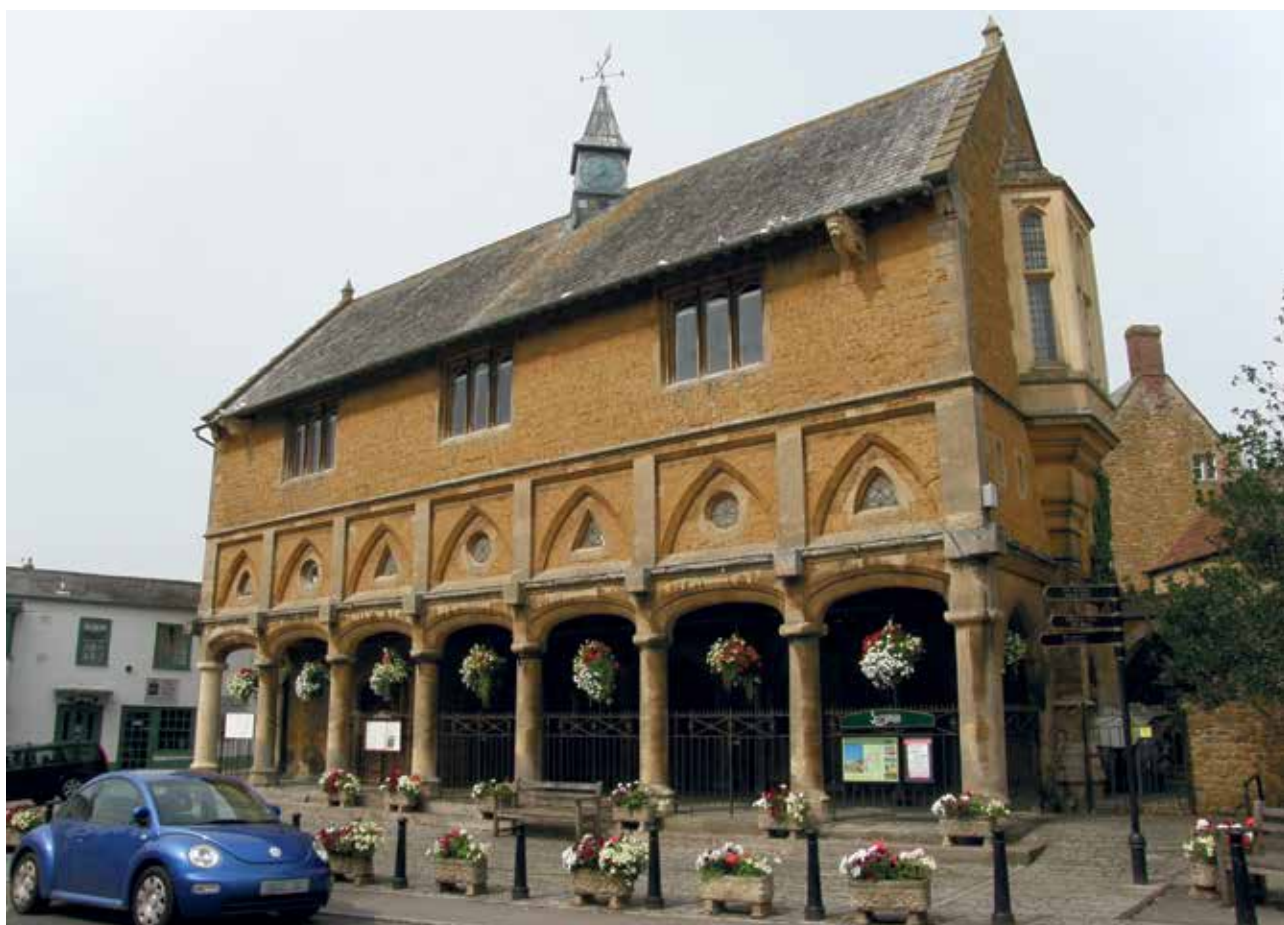
CASTLE CARY & ANSFORD

Neighbourhood Plan 2016–2028

Modified in accordance with the recommendations of the
Independent Examiner for submission to local referendum
June 2019

OUR VISION

Our vision for Castle Cary and Ansford is to allow for sustainable growth in housing and employment, together with community facilities to meet local needs, whilst promoting an attractive environment that continues to protect and enhance the unique character and heritage of the town.

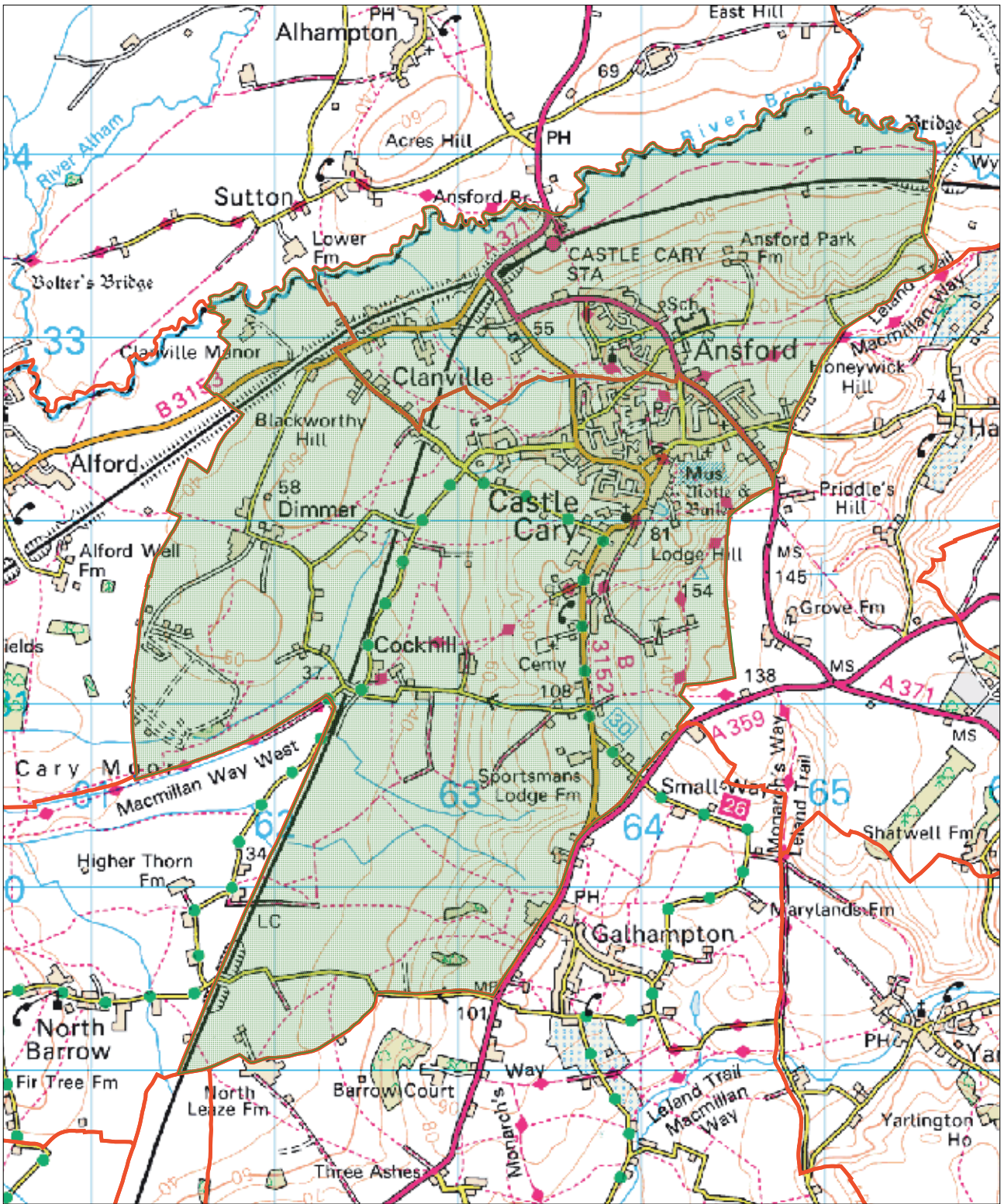


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The Old Fire Station



Map of Neighbourhood Plan Area: the parishes of Castle Cary and Ansford

I. INTRODUCTION

- 1.1 This is the first Neighbourhood Plan (NP) for the parishes of Castle Cary and Ansford, and has been prepared on behalf of Castle Cary Town Council and Ansford Parish Council by a working group of local people. It covers the period up to 2028 (in line with the South Somerset Local Plan adopted in 2015).
- 1.2 When the process is complete and the plan is 'made', the NP will sit alongside the Local Plan (LP) as a part of the statutory development plan for our area and provide guidance to developers and others on what we seek to achieve in and for our neighbourhood.
- 1.3 The NP gives the local communities direct power to develop a shared vision for Castle Cary and Ansford, and to shape the economic, social and environmental development of the area. It establishes a template to ensure that local people get the right type of development for their community, encouraging the types of growth the community needs and discouraging inappropriate development.
- 1.4 The Neighbourhood Plan has been the subject of two consultation stages, in accordance with the NP regulations. Numerous responses were received, as recorded in the relevant reports, and the plan was submitted for formal independent examination in November 2018.
- 1.5 The examiner's report was published in May 2019; she concluded that subject to the policy modifications set out in the report, the Plan meets the Basic Conditions and recommended that the Plan, once modified, proceeds to Referendum on the basis that it has met all the relevant legal requirements.
- 1.6 This document incorporates all the modifications recommended by the examiner and the way is now open for a local referendum, following which the NP attains the same legal status as the Local Plan – it becomes part of the statutory development plan and must be taken into account during the consideration of all planning applications.
- 1.7 We start with a brief look at the town as it is today, considering the main issues facing us and setting out the overall aims for the plan. Subsequent chapters provide explanation and justification for the policies relating to different topic areas.



Fore Street

2. CASTLE CARY AND ANSFORD TODAY

- 2.1 Castle Cary and Ansford together form a thriving local market town with a population of some 3,360 people and 1,640 dwellings (2011 Census). Residents have many different views on why people like living in the town but whether people have been here for generations or for just a few years it is held in high regard and seen as a desirable place in which to live.

HOUSING AND EMPLOYMENT OPPORTUNITIES

- 2.2 There is a strong housing market, particularly for higher and mid-cost dwellings, but a shortage of affordable and social housing, particularly for local young people.
- 2.3 Employment opportunities in the area cover a wide range: retailing, agriculture, services, manufacturing, tourism, education and social work are all represented. Industrial employment is largely centred on the Torbay Road light industrial site on the west side of the town. Current occupiers include Centaur Services, Crown Pet Foods and Tyre Renewals Ltd, as well as a range of smaller businesses.
- 2.4 There are also many dairy farms and diverse technical support services within the wider local area. Local people employed in agriculture are mainly contractors: using complex equipment and machinery or skills; in livestock management; production of food at source e.g. cheese and cider making; agricultural engineering and veterinary support.
- 2.5 Census data on travel to work shows that some 1900 people were in employment in the NP area, with 11% working from home, and 47% travelling less than 20km to their place of work. This is consistent with the general pattern prevailing in South Somerset and suggests that, on this criterion, the town is slightly more 'self-contained' than the national average (54% working at home or within 20km).

A THRIVING TOWN CENTRE

- 2.6 The town centre with its weekly market and strong retail presence is the hub of the local area, and known locally as a good shopping destination with a pleasant and friendly market town atmosphere. As an attractive historic centre with many independent shops and supporting services, it draws trade not only from residents, but from outlying villages and, increasingly, visitors from further afield. At the same

time, the centre provides employment for many local people and the market house, library and museum represent the administrative and community hub of the town.

- 2.7 The two free car parks within walking distance of the town centre, and free on-street parking spaces on and around the High Street, are seen to be crucial in attracting people into the town centre to shop.
- 2.8 However, the main route through the town centre (High Street and Fore Street) is noted for its traffic congestion, exacerbated by the narrow roads and on-street parking. While some take the view that this helps to create a busy and bustling atmosphere, it can make it less easy for pedestrians to move through the centre.

GOOD EDUCATION AND COMMUNITY FACILITIES

- 2.9 The town has a rich and varied social and cultural life, from sports clubs and carnival clubs to amateur dramatics and craft groups.
- 2.10 The town is well served by primary and secondary schools, and there is a range of good pre-school and nursery facilities, as well as long-established independent schools nearby. The Castle Cary Community Primary School is centrally located and has a very good reputation locally. It is close to capacity, some of which is provided by 'temporary' accommodation (now 20 years old). Secondary education is provided by Ansford Academy, at Maggs Lane on the north edge of the town, with further education provided through colleges in Yeovil, Street or Bruton. The Academy has a good reputation locally, and is not expected to exceed its capacity.



The Tuesday market

- 2.11 Caryford Community Hall, in Maggs Lane, is the principal community hall serving the settlements of Castle Cary and Ansford, providing the only multi-purpose community facility in the area and the only venue capable of accommodating large numbers, and with significant dedicated car parking provision. There is a range of other venues including three churches and a modern sports/leisure centre.
- 2.12 Caryford Community Hall, the Market House, Ansford Academy and the Methodist Schoolroom all offer venues for WEA, U3A and other courses for adults. The Town Council's 'Learning at the Market Place' initiative (LAMP), has an extensive and thriving variety of courses/classes for adults. The Carymoor Environmental Trust has carried out pioneering land restoration and habitat creation work on 100 acres of capped landfill at Dimmer, and their Environmental Education Centre provides inspirational outdoor learning for schools and community groups.
- 2.13 The Donald Pither Memorial Field provides a large open space, football and cricket pitch plus clubhouse and a children's play space. Adjoining these playing fields is the town's bowls club. The Ansford Academy has its own sports pitches and there is a further football pitch adjoining Caryford Hall. The town's rugby club has its own ground and club house approximately ½ mile north of the railway station (just outside the NP area). Allotments are available ½ mile south of the town.
- 2.14 Fairfield, recently acquired by the Town and Parish Councils, has now become available for public recreation purposes, with paths, pump-track, meadow gym, sensory garden, adventure trail and open grass areas for community events such as the annual fair.

Fairfield pump-track



A REASONABLE TRANSPORT NETWORK

- 2.15 The area is fortunate in having a railway station within one mile of the town centre, with good access to the national rail network (Paddington to Penzance), and also to the regional network with direct services to Bristol, Bath, Trowbridge, Yeovil, Dorchester and Weymouth. However, there is insufficient parking at the station and the rail services available are often not conducive to daily commuting in the immediate area, with the first direct train to the county town of Taunton not leaving until 10.32am.
- 2.16 Bus services currently connect to Shepton Mallet, Yeovil, Wells, Wincanton and Street and there is a C.A.T. bus (Community Accessible Transport – ring and ride) for use by the elderly and disabled. Again, timetables are rarely convenient for journeys to and from work.
- 2.17 Enhancement of the A303, the principal traffic route west-east through South Somerset, will ultimately lead to better access on a regional basis. The A371 passes through Ansford and serves as the main route north to Bath and Bristol and south to Wincanton and the A303. The road is the main route for HGVs to Shepton Mallet and Evercreech and also serves the industrial and commercial operations on Torbay Road industrial estate. Nevertheless, in spite of its status as part of the major road network, it has a major ‘pinch-point’ requiring traffic light control at Ansford, and a severe bend at the Castle Cary railway bridge which often requires large vehicles to use both sides of the carriageway.
- 2.18 Of the minor roads, the B3153 is also heavily used by HGVs for the Torbay industrial estate, the landfill site and recycling



Castle Cary station

centre at Dimmer. This is a narrow road, with many sections too narrow to allow large vehicles to pass safely, and has no footway for much of its length; the nature and speed of traffic and the potentially dangerous conditions experienced by drivers, pedestrians and cyclists continue to cause serious concerns for local residents, particularly at Clanville.

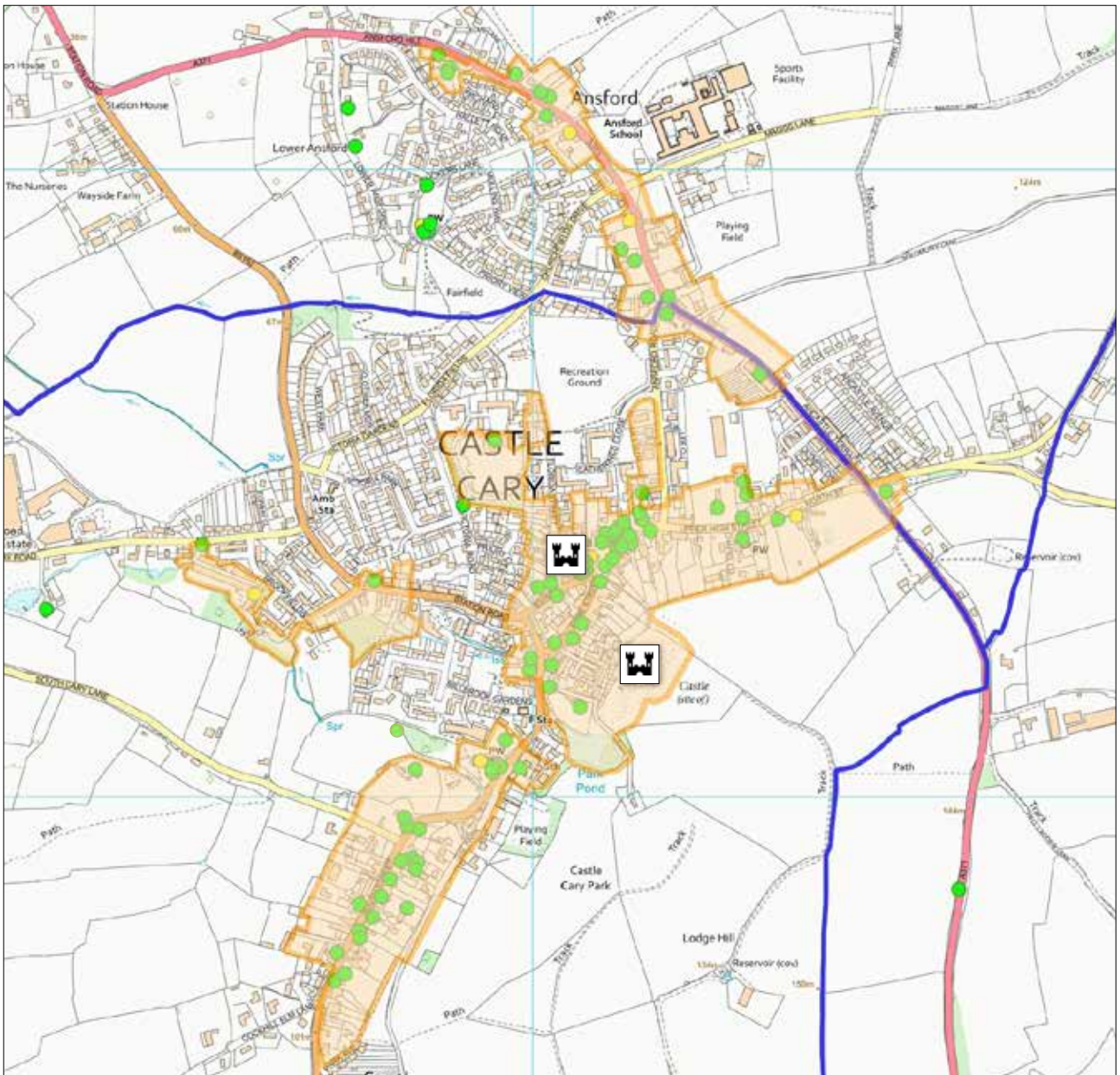
- 2.19 The town currently has no specifically defined pedestrian, cycle or wheelchair routes or facilities either into and out of the town centre or to places of employment, education or recreation. Pedestrian access to the rail station is along an unlit footpath which is poorly signed and marked.

A DISTINCTIVE SETTING – THE BUILT AND NATURAL ENVIRONMENT






- 2.20 Castle Cary and Ansford benefit from the excellent building that took place during periods of prosperity. Many of the older buildings are constructed from the honey-coloured limestone from the nearby quarry at Hadspen; no other town is so dominated by historic, and later, buildings constructed from this particular material, which gives a strong and locally distinctive character to the town. The NP has 2 scheduled monuments (the Motte and Bailey Castle and Round House lock-up), 4 Conservation Areas, as illustrated on the map overleaf, and some 112 Listed Buildings and structures.
- 2.21 Apart from the incursion of the railway in the second half of the 19th century the wider countryside retains much of its early landscape – in contrast to what has happened in many other parts of the country. The farmland is also of high quality, with many areas graded 1, 2 or 3a (and therefore amongst the best and most versatile in the country).

The town centre
from Lodge Hill





Map showing key heritage assets

-  Conservation areas
-  Scheduled monuments
- Listed buildings:
 -  Grade II
 -  Grade II*
-  Parish boundaries

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3. THE FUTURE – ISSUES FACING THE TOWN

- 3.1 Local residents (and the evidence we found) have told us that:
- a. there is concern that many potential development sites within the existing boundaries of the town have lain vacant and undeveloped for some years; we feel that priority should be given to resolving the issues which need to be addressed to enable such sites to come forward and provide new housing and employment close to the town centre and other facilities
 - b. while we accept the need for some additional housing within the ‘Direction of Growth’ identified in the Local Plan, permissions have already been granted for a very substantial number of new dwellings here, and there is a good supply of available brownfield sites. Any further release of greenfield sites for housing should be paused pending a review of recent permitted development and longer term housing requirements
 - c. if not matched by increased employment and improvements to infrastructure and the town centre, significant housing developments could undermine the sustainability or self-containment of the town
 - d. future development needs to be carefully planned if the town is to keep its reputation as a classic, historic market town situated in beautiful rolling countryside; new development needs to have good access to the town centre, the many local attractions and events, and the wider transport network

South Street



- e. attracting new investment and businesses to the area should be supported through the provision of new employment sites, better infrastructure and maintenance of existing employment sites; this would help to reduce the proportion of local residents travelling long distances to work
- f. there is concern that large volumes of heavy goods vehicles have disproportionate adverse effects: therefore not all types of business will be seen as suitable unless the road network can be improved
- g. tourism is important to Castle Cary's economic prosperity and should be supported
- h. the primary school is at capacity and will need to expand, ideally on its existing site. However, opportunities for expansion there are very limited and a new primary school is planned within the Direction of Growth
- i. the rail connection is a significant benefit to local people and the local economy, but the timetabling of local services, parking and access to the station for those without a car, all need to be improved
- j. new development should respect the distinctive character and historic charm of the area, and the important green spaces and corridors linking to the countryside – as these are enjoyed by local residents and visitors alike.



At work in the Horsehair Factory

3.2 Taking account of these issues in the context of the historic character of the area, we have established the following series of main aims to form a framework for this Neighbourhood Plan.

MAIN AIMS

- to ensure that all new development respects the special character of the market town of Castle Cary and the parish of Ansford, in particular that new housing developments are of good quality, are energy efficient and have as low an environmental impact as possible
- to support the level of new dwellings required by the South Somerset Local Plan, giving priority to the sites committed for development within the Direction of Growth, the re-development or re-use of brownfield sites within the existing urban area and to affordable and social housing to meet local needs, with a mix of shared ownership/tenancy types
- to broaden the employment base of the town by supporting an environment in which enterprise can flourish, attracting new employers and creating new jobs for local people of all ages
- to ensure that the growing community is supported by the necessary infrastructure, with new housing provision, employment growth and provision of roads and additional community facilities progressing in an integrated manner
- to support increased tourism to the town and the wider area by preserving and promoting the area's heritage and retaining its special character
- to support, encourage and promote a range of shops and businesses in the town centre, protect the market, and maintain the free parking and public toilets
- to promote and support safe travel for all, by better management of traffic movements into and through the town centre; seeking improvements to public transport, cycle paths, footpaths and rights of way, parking provision; and improving links to town centre shops, schools and the railway station
- to foster and promote opportunities for education, training, sporting activities, cultural stimulation and fun – for people of all ages
- to maintain and enhance the urban green spaces and the natural environment within the countryside surrounding both parishes, for the enjoyment of all.

4. DESIGNING FOR THE NEIGHBOURHOOD

MAIM AIM

- to ensure that all new development respects the special character of the market town of Castle Cary and the parish of Ansford, in particular that new housing developments are of good quality, are energy efficient and have as low an environmental impact as possible.

4.1 The NP councils give the greatest importance to the detailed design of new development, based on the need to maintain and enhance the unique character of the town and its attractiveness as a place to live, a place to work and a destination for tourists. The following policy reflects the importance placed on this aspect of planning for a sustainable community; whilst primarily focussed on housing developments, the principles are applicable to the design of new buildings of all types and the NP councils will seek early consultation with developers on all such matters. Good design is essential for good planning and making places better for people. However, development can take many forms, and should not be subject to an onerous set of requirements that may hold back necessary and affordable development. The following principles will be applied to secure high quality in the built environment, but also having regard for development to meet functional requirements, achieve secure and safe environments, and be viable.



The George Hotel,
Market Place

POLICY DP1

The NP councils will expect all new development to be designed to the highest standards and to respect the unique character of Castle Cary and Ansford. The design principles set out below identify the criteria which will be used to assess all types of new development.

DESIGN PRINCIPLES

CHARACTER AND SETTING

- a. The design of new development should take into account neighbouring uses, and particular regard should be given to how the physical aspects of the site, such as changes in level, are considered.
- b. Historic street patterns and the grain of the surroundings should be respected. The materials used should also relate to surrounding building and be of high quality and in harmony with the colour palette generally used in the Castle Cary area.
- c. Regional materials and vernacular architectural styles are to be utilised and reflected in the fenestration, detail and design of buildings, and local forms used to reinforce its geographical distinctiveness. If a contemporary approach is used, the design and build should be informed by surrounding townscape or landscape.

Bridgewater Buildings on
Mill Lane



- d. Large-scale developments should be designed to produce separate areas or 'places' with their own identity, and avoid the appearance and feel of large suburban-style estates. Rows of garages look poor and lack identity; small groups or courts are to be preferred.
- e. Existing trees and hedges are to be retained wherever possible and can be used to delineate the boundaries of the development so that the whole forms a harmonious composition which relates well with the existing landscape. Other features such as ponds and streams should be retained and used to help reinforce interest and local identity, and planted areas or community buildings used to create focal points where no natural features are evident.

SECURITY AND SAFETY

- a. Private, semi-private and public spaces should be clearly defined using walls, fences, gates and changes in surface. New housing adjoining public spaces and footpaths should be laid out with regard to securing good surveillance particularly where high fencing or hedging is used to protect residential amenity. Parking courts should, where possible, be overlooked.
- b. The design of developments should encourage resident interaction, but also include private amenity space.
- c. Developments should provide housing suitable for people of a variety of ages and types of residents, where the scale and site characteristics allow, to encourage 'passive surveillance' throughout the day and night.
- d. Gated estates are not appropriate and will be resisted.



New housing faced in Cary stone

ACCESS AND MOVEMENT

- a. The road network should not necessarily be the dominant factor in any layout design: roads should be designed to provide open spaces as well as to give access. Buildings should relate well to the road to ease accessibility and general surveillance. Cul-de-sacs, especially those without through access for pedestrians and cyclists, are to be avoided.
- b. Carriageways, footpaths and verges often define the setting of new estates and should therefore be designed not only to provide inclusive accessibility, but also an attractive setting with its own distinctive identity. This needs to avoid repetitive monotony and to utilise a variety of surface textures.
- c. Where practical, cycleways and footpaths should be segregated from roadways. These footpaths and cycle paths should be designed so that they can be used by mobility scooters and double buggies and lead directly to the town centre or link to routes that do. Opportunities should be taken to link such routes into adjoining areas and to provide ease of access to the surrounding countryside.
- d. All such foot and cycle routes are to be discussed by developers, SSDC and the NP councils before construction starts.
- e. Sufficient car parking and storage for bicycles and mobility scooters should be integrated and designed as unobtrusively as possible. Electric car charging points should be provided as part of developments to cater for future demand.

A footpath in Ansford



ENVIRONMENTAL FOOTPRINT

- a. Consideration should be given to how high standards of environmental performance can be integrated into the design. Passive and renewable energy sources, use of locally sourced materials and porous hard standing surfaces are examples.
- b. The impact of sunlight, wind, views and privacy should also be considered in the design and layout of new developments. For example, developments should be appropriately orientated to maximise the use of solar gain and light and minimise exposure to prevailing weather.
- c. We expect all new housing to achieve the highest standards of energy conservation ideally being carbon neutral both in construction materials/methods and function, but as a minimum complying with Government Building Regulations.
- d. Opportunities should be sought to secure homes that are adaptable to the needs of a range of users – such as those working from home, or those with less mobility.

RECREATION AND WELLBEING

- a. Open recreational spaces should be designed into new larger developments so that they are available to serve the whole community.

All Saints' Church



5. HOUSING

MAIN AIMS

- to support the level of new dwellings required by the South Somerset Local Plan, giving priority to the sites committed for development within the Direction of Growth, the re-development or re-use of brownfield sites within the existing urban area and to affordable and social housing to meet local needs, with a mix of shared ownership/tenancy types
- to ensure that the growing community is supported by the necessary infrastructure, with new housing provision, employment growth and provision of roads and additional community facilities progressing in an integrated manner.

5.1 Policy SS5 of the adopted Local Plan (LP) sets a target for Castle Cary and Ansford of at least 374 dwellings from 2006 up to 2028; the LP provides for a 'direction of growth' (DofG), to the north-west of the town beyond the existing development area boundary, within which 'a permissive approach will be taken when considering housing proposals . . .'. The LP states (para 5.67) that the overall scale of growth (ie. 374 homes) and the wider policy framework will be key considerations 'with the emphasis upon maintaining the established settlement hierarchy and ensuring sustainable levels of growth'.

5.2 The LP does not provide for an overall masterplan to be prepared for the DofG, or require prospective developers to

North Street



prepare one. Consequently, there has been no specific guidance on any of the following points:

- a. Phasing and the sequential release of sites, and how the acceptability of development proposals, either within or in excess of the minimum target, should be assessed in relation to matters such as:
 - i. impact on the settlement hierarchy
 - ii. impact on the level of self-containment of the town
 - iii. impact on local infrastructure capacity
- b. The protection of areas of higher visual sensitivity, including views of and from the Grade II Listed St Andrews Church
- c. The need for pedestrian, cycle and other types of access to the town centre, railway station and other parts of the town
- d. The need for green infrastructure, wildlife and recreational corridors connecting between the centre of the town to the station, employment sites and wider countryside.

5.3 The LP was formally adopted in March 2015, following which there has been significant interest shown in residential and other forms of development within the DofG. Planning permissions have now been granted on five large sites within this area for a total of 477 dwellings; construction work has started on two of these sites. In addition, there are still permissions on brownfield sites for some 88 dwellings, most of which have yet to be started. The table below summarises the current housing development pipeline.

5.4 With over 650 dwellings either completed or with permission, the available supply is substantially in excess of the minimum requirement of 374 in the LP period – by almost 75%. At the same time, it is evident that the average rate of completion during the first 11 years of the period was only 6 dwellings per annum, compared with an average rate of 17 per annum required to achieve 374 dwellings over the whole plan period.

5.5 With 68 dwellings completed, it would be expected that the NP area should now be looking to provide another 306 in the remaining 11 years of the plan period, or about 28 per annum; permissions granted now amount to 565 dwellings which is equivalent to just over 20 years supply at this rate.

5.6 This situation, of a very high number of committed dwellings in the NP area, has to a significant extent arisen as a result of the failure of SSDC to secure a five-year supply of housing land over the district as a whole, in particular on large sites

Table 5.1: Housing completions and permissions as at April 2017

Site	Dwellings	Notes
Nursery site	24	
Hillcrest School	24	
Constitutional Club	8	
The Priory	13	Under construction
Other sites (various < 5)	19	6 under construction
All brownfield sites	88	Permitted
Torbay Road	165	OPP 21.06.2016
West of Station Road	75	OPP 2016, RM approved 21.10.2016
Well Farm	37	Under construction 2017
Wayside Farm	125	OPP on appeal 12.01.2017
East of Station Road	75	Under construction 2018
All sites in Direction of Growth	477	Permitted
Current commitments	565	with Planning Permission
Completed in period 2006–2017	68	
Total contribution to 2006–2028 LP Housing Requirement of 374	653	

OPP: outline planning permission RM: reserved matters

Sources: SSDC Five-year Housing Land Supply Paper, 09.2017; SSDC Annual Monitoring Report, 09.2017

at Yeovil and to a lesser extent at Chard and Crewkerne. The outcome has been that, even though Castle Cary and Ansford are ‘doing their bit’ for housing supply, there is a perception that the ‘direction of growth’ is being interpreted as an ‘area of growth’ to solve issues of housing shortage which are actually occurring elsewhere in the district.

- 5.7 Such a situation has caused understandable concern for local people: the census of 2011 showed 1643 dwellings in the combined parishes; the addition of another 650 represents an increase of almost 40%. Whilst that scale of increase might be

acceptable over 20 years, the prospect of it occurring over a much shorter period generates local concerns about the types of change that might occur to the special character of the town, and resentment at apparently unfair treatment by the planning system.

- 5.8 In addition to the above, there is still one significant undeveloped brownfield site, the former BMI site at Cumnock Road, which is potentially capable of providing a further 80 dwellings (at the time of writing, this is subject to an application for a development of 81 dwellings). Overall, therefore, the potential for additional housing within the settlement boundary is far from being exhausted, current permissions and additional potential amounting to approximately 168 dwellings, or about 45% of the total minimum requirement for the Local Plan period. This reinforces concerns over high numbers of permissions for houses on greenfield sites in the direction of growth, moreover that these will cause investment to be diverted away from brownfield sites which have lain dormant and unsightly for many years.
- 5.9 Furthermore, although substantial numbers of new dwellings have been approved, such permissions have not been accompanied by equivalent permissions for employment development. While it is accepted that there can be little control over the choices people make for their workplace, there are concerns that substantial housing provision without appropriate local employment opportunities will lead to a reduction in the self-containment of the town and additional traffic on the local highway network.



The BMI brownfield site

- 5.10 The NP councils do not accept that by simply granting more and more planning permissions, the outcome will be to increase the short-term supply of housing in their area. Indeed, this is precisely the conclusion reached by the inspector who determined the two appeals which resulted in permissions being granted for development of a total of 200 dwellings in the DofG in January 2017. Whilst he did allow the appeals, he made the point that ‘the granting of permissions for either of these two schemes, in addition to those recently granted by the Council are, in my view, unlikely to add significantly to the rate of housing delivery at A/CC in the next five years, if indeed any more are delivered. They would be unlikely to boost the supply of housing in South Somerset now, although they could contribute significantly in the years thereafter’ (Appeal refs 3035753 para 51 and 3121541 para 52).
- 5.11 In the light of all these factors, with over 550 dwellings now approved and the great majority yet to be started, combined with significant brownfield sites still to come forward, the NP proposes a two-pronged approach: to place a clear emphasis on encouraging the early development of available sites within the settlement area boundary, especially those which have remained derelict or unsightly for many years; and, for the time being, to pause further release of greenfield sites in the DofG unless clear justification, based on strictly local circumstances, can be shown. The delivery of housing schemes listed in Table 5.1 within Ansford/Castle Cary will be monitored. A review of the neighbourhood plan within the next five years will include assessment of the impact of ongoing development on the town’s infrastructure and role as a smaller local market town. The review will consider the need for additional development within the DofG, for example to compensate for any non-delivery of the schemes in Table 5.1.

ACTIONS

- 5.12 The NP councils will work with SSDC and local landowners to help ‘unlock’ and bring forward the earliest possible development of brownfield sites to help meet the remaining housing land supply requirements to 2028.
- 5.13 The NP councils will work with local service providers to help highlight and resolve any phasing issues that need to be considered in the delivery of housing, employment and infrastructure.
- 5.14 The NP councils will work with SSDC and local landowners to monitor progress on the delivery of new housing in Castle Cary and Ansford, and monitor compliance with emerging housing policy in the South Somerset Local Plan 2016–36.

POLICY HOU1

HOUSING DEVELOPMENT WITHIN THE SETTLEMENT AREA

The NP councils will encourage and support early development or redevelopment for housing purposes of brownfield sites within the settlement area, in particular:

- Nursery site
- Hillcrest School
- Constitutional Club
- BMI site
- Red House.

POLICY HOU2

HOUSING DEVELOPMENT IN THE DIRECTION OF GROWTH

While there remains a substantially greater supply of permissions for housing development within the NP area than the LP minimum requirement, further proposals for housing development within the direction of growth will be paused unless there is clear evidence that the additional housing will help meet a clearly identified local need for affordable or social housing (that need arising from within the NP area and its hinterland) that is not capable of being met elsewhere. Whilst additional sites to those already committed for development are available within the Direction of Growth, these will not be brought forward for development unless the emerging South Somerset Local Plan requires their release, and it can be demonstrated that further housing development would not have a significantly adverse effect on the character of this modest market town and its infrastructure.

The brownfield site at Hillcrest School



6. EMPLOYMENT & ENTERPRISE

MAIN AIMS

- to broaden the employment base of the town by supporting an environment in which enterprise can flourish, attracting new employers and creating new jobs for local people of all ages
- to ensure that the growing community is supported by the necessary infrastructure, with new housing provision, employment growth and provision of roads and additional community facilities progressing in an integrated manner.

- 6.1 The LP target is to see about 19 hectares of employment land developed up to 2028, which should support the provision of around 270 jobs. The latest District Council monitoring report (September 2017) shows that between 2006 and 2017 the net gain in employment land was just under 9ha, and approximately 16,000sq.m of floorspace, with a small area (500sq.m and 0.2ha) under construction. The report notes that by far the most significant element of the gain was due to a single development – the Royal Canin petfood factory (13,500sq.m on 8.1ha, a relatively small amount of floorspace on such a large area of land).
- 6.2 As part of the proposals for adjoining land north of Torbay Road a further 2 hectares of employment land received outline planning permission in 2016 (Ref 15/02347/OUT, 21 June 2016). Land to the North-West of this site alongside the

At the Torbay Road trading estate



railway line appears to be ideally suited to provide longer term opportunities for employment uses, particularly as development here is unlikely to impact on nearby homes or other sensitive uses.

- 6.3 It is important for the continuing self-containment of the town that sufficient employment land is provided to correspond with the development of new housing. Further opportunities for smaller-scale employment development may also exist, such as the former BMI site to the north of the High Street, and land adjacent to the railway station where there is already some small scale developed employment land on the north side of the station. Any such development should not prejudice the provision of sufficient parking for rail users.
- 6.4 All types of employment-generating development are welcomed. However, in order to reduce the reliance of the area on a small number of large-scale employers, the NP councils will give particular encouragement to:
- a. small and medium scale enterprises of all kinds, especially those able to provide apprenticeships
 - b. light industrial and high tech occupiers within Class B1
 - c. businesses related to agriculture
 - d. nursery units suitable for small-scale and micro-businesses
 - e. small scale office development.

**POLICY EMP1
DELIVERY OF FURTHER
EMPLOYMENT LAND**

The development of land for employment uses, particularly those falling within Use Classes B1 and B2, will normally be supported, provided that this can be accommodated without significant visual or environmental harm or adverse impact on the local road network.

**POLICY EMP2
EXPANSION OF EXISTING
EMPLOYMENT PREMISES**

The NP councils will normally give support to proposals for the expansion of existing employment premises, particularly those which maintain or increase the level of employment opportunities.

- 6.5 Large-scale warehouse and logistics uses (Use Class B8) give rise to particular local concerns regarding the number of very large heavy goods vehicles which are frequently generated by such uses and the routes which they are forced to take through the NP area using roads which are not suited to their size and weight. This issue is addressed further in the Transport chapter and Policy TRA2.

ACTIONS

- 6.6 The NP councils will work with Somerset County Council (SCC), SSDC and the emerging Chamber of Commerce to promote Castle Cary and Ansford as a location for modern employment development.
- 6.7 The NP councils will encourage SSDC to improve the infrastructure and layout of the Torbay Road site (which is owned by the District Council) and facilitate its future expansion.

At work on the farm



7. TOURISM

MAIN AIM

- to support increased tourism to the town and the wider area by preserving and promoting the area's heritage and retaining its special character.

- 7.1 Castle Cary lies in the South Somerset countryside, shaped over the centuries not by great and powerful landowners but largely by farming and associated industries and markets. Its history is still reflected in its present layout, buildings, open spaces and its people.
- 7.2 It is not surprising that the area is a popular tourist destination with both day trippers who come for a special event or are passing through, and tourists who have booked accommodation and stay for one or more days.
- 7.3 Local attractions include the town itself, with its own rural life museum, together with the surrounding countryside and its extensive network of footpaths and bridleways (many of which link to national trails), and numerous historic buildings, museums and other destinations and events. Long-established tourist destinations have more recently been supplemented by Hauser & Wirth Somerset and will shortly be joined by Emily Estate at Hadspen House, expected to open in spring 2019.
- 7.4 The Town Council's recent development of an excellent website and a Facebook page provide a valuable source of information about local events and accommodation. Good quality brochures and maps of the neighbourhood are widely available, some sponsored by local businesses. Further publicity and attractive and helpful signage on access routes into the town, and to places of interest within the town itself, can also help maintain the area's profile as a popular tourist destination.
- 7.5 The NP councils see the encouragement of tourism as bringing about a wide range of benefits, in particular by supporting employment and economic activity in areas such as visitor accommodation, restaurants and pubs, retail and other town centre activity.

ACTIONS

- 7.6 The NP councils will work with SCC, SSDC and local attractions to support and enhance Castle Cary and Ansford as an attractive and accessible destination for tourists, using active and imaginative marketing of the area, and improved signage into and within the town.
- 7.7 The NP councils will encourage the organisation and promotion of local events, investment in the provision of accommodation and catering, and the protection and improvement of the network of country footpaths in the area for walkers.
- 7.8 The NP councils will work with SCC and local landowners to keep all current footpaths open for ramblers.

POLICY TOUT NEW AND ENHANCED TOURIST FACILITIES AND VISITOR ACCOMMODATION

The development of new or enhanced tourist facilities and visitor accommodation will be supported provided they are of a scale appropriate to the size and function of Castle Cary/Ansford as a local Market Town, do not harm the Town's environmental, cultural or heritage assets and, where appropriate, are accessible through sustainable modes of travel including rail, cycling and walking.

The Round House lockup



8. THE TOWN CENTRE

MAIN AIMS

- to support, encourage and promote a range of shops and businesses in the town centre, protect the market, and maintain the free parking and public toilets
- to promote and support safe travel for all, by better management of traffic movements into and through the town centre; seeking improvements to public transport, cycle paths, footpaths and rights of way, parking provision; and improving links to town centre shops, schools and the railway station.

- 8.1 The LP defines Castle Cary/Ansford as a Local Market Town on the basis of its strong employment, retail and community role. In this Plan we seek to maintain and promote this position, especially with tourism becoming increasingly important. Meetings with local businesses and the local community have clearly shown that the town centre is at the social heart of the town and forms an important part of the local economy. The town centre provides quality shopping with many niche and independent traders and a range of supplementary services.
- 8.2 The town centre boundary is defined in the LP and is based around the High Street, Market Place, Bailey Hill and Fore Street. There are some sixty-nine outlets, of which seven were recorded as vacant in January 2017, though observation shows that the number and location of vacancies is constantly changing. The wide range of outlets, most of which are privately owned and managed, provide an important source of local employment. Town centre shopping is supplemented by the weekly Tuesday morning market, which was revived in 2014.
- 8.3 There are two free car parks within walking distance of the centre and free on-street time limited parking spaces. These parking facilities are seen to be crucial to the town centre retailers in terms of maintaining footfall and the number of available spaces will need to be increased as the town grows.
- 8.4 A key issue for the town centre concerns the conflict between: the attractive and inviting character created by its conservation area status and numerous historic buildings; and the restrictions which such historic buildings impose on the

A view up the High Street



requirements of modern retailing. The result is that there is virtually no existing space suitable for retailers requiring larger display and sales areas.

- 8.5 The South Somerset Retail Study (GVA Grimley for SSDC, 2010 update) highlights the combination of narrow pavements and traffic congestion in some parts of the centre, suggesting that this is compounded by on-street parking and the absence of pedestrian crossing points and pedestrianised areas, and makes it difficult for shoppers to move around the centre. By contrast, however, some local traders have suggested that a level of traffic congestion contributes to a vibrant, bustling atmosphere and makes it easier for pedestrians to negotiate the shopping streets.
- 8.6 The South Somerset Retail and Main Town Centre Uses Study (Lichfields for SSDC, 2017) suggests that there is some scope for additional food retail space to be provided in the town, suggesting a figure of 737sq.m, approximating to the size of a small supermarket or convenience store. However, there appears to be little scope for any significant expansion of the centre beyond its existing boundaries to respond to demands for new retail space caused by increases in population. In a situation where the NP councils are presently unable to identify any specific retail development opportunities, they rely on national and LP policy which indicates a clear preference for new retail development to be located within or immediately adjacent to the existing town centre.
- 8.7 At a time when new housing is being encouraged and significant permissions have already been granted, the absence

of significant scope for town centre expansion points to a need to ensure the retention of all existing shop and related town centre uses in the town centre. Consequently, when responding to situations where planning permission is required, the NP councils will resist proposals for changes of use within the town centre which involve the loss of any type of main town centre use (as defined in Appendix B).

ACTIONS

- 8.8 The NP councils will work with SCC to investigate innovative traffic management and parking solutions to improve the experience of those visiting or using the town centre and better manage and control through traffic.

TOWN CENTRE POLICIES

- 8.9 As discussed above, policy TC1 seeks to avoid loss of all existing retail and related uses where an application for planning permission is required. This is intended to apply to all Class A uses together with other main town centre uses (as defined in Appendix B), which provide shop window frontages contributing to town centre vitality.
- 8.10 The main purpose of policy TC2 is to make sure that development in the Town Centre does not reduce the availability of shopper parking, through the under-provision of on-site parking or the reduction in the number of available spaces.

POLICY TC1 LOSS OF RETAIL OR SIMILAR PREMISES

The NP councils will not support any proposals for change of use within the town centre which involve the loss of floorspace used for main town centre uses, as defined in Appendix B.

POLICY TC2 TOWN CENTRE PARKING

Development which would either directly or indirectly reduce the public car parking provision in the Town Centre will not be supported.

9. TRANSPORT INFRASTRUCTURE & ACCESSIBILITY

MAIN AIMS

- to promote and support safe travel for all, by better management of traffic movements into and through the town centre; seeking improvements to public transport, cycle paths, footpaths and rights of way, parking provision; and improving links to town centre shops, schools and the railway station.

- 9.1 Managing the impact of new development on the road network is a key issue for the local highway authority, not only in terms of increased capacity and potential safety issues, but also from a sustainability objective to ensure that there are reasonable alternatives to the car for people living, working and visiting the area. Many local roads are used by more than just local traffic, and many local businesses and services cater for a much wider area. Many of the existing roads are unsuitable for HGVs, and there are known 'local highway hotspots' where the impact of very large vehicles is a cause for concern on traffic and environmental grounds:
- a. the B3153 at Clanville where the road narrows to a point where the central white line has been removed to acknowledge that two large vehicles cannot pass each other; this is a location where there is no pedestrian footway and residential property is in close proximity; HGV traffic from Torbay Road and Dimmer is forced to use this route because of the low bridge just to the west.
 - b. the A371 at Cumnock Road, Ansford, where the road is so narrow that signal control has been in operation for many years. Whilst various improvements have recently been carried out, there remain concerns about the proximity and speed of large vehicles and their relationship with residential property.
 - c. the A371 at Ansford Hill, between Tuckers Lane and Elms Lane, another 'pinch point' where the road narrows to an extent where the central white line has been removed: lorries are known to clash with each other here and, again, there is no pedestrian footway.

- d. the Ansford railway bridge on the A371, where HGVs coming south have to use the entire width of the road as they come over the bridge at the junction with the B3153.
- 9.2 The town also lacks a comprehensive network of safe routes for pedestrians and cyclists travelling into and out of the town centre and to places of employment, education or recreation.
- 9.3 Policy LMT1 of the LP requires that, as part of any expansion within the direction of growth, a road will be expected to be provided between Station Road and Torbay Road prior to completion of the expansion. The stated purpose of this road (LP para 7.120) is ‘to improve access and egress to new and existing employment and better integration of the development within the town’. A planning permission (reference 15/02347/OUT) has been granted for 165 dwellings and 2ha of employment land off Torbay Road, and while this includes a condition requiring construction of a link road by the developer, no firm alignment has yet been approved. Illustrative plans show a road which is superficially in accordance with the LP policy, but the NP councils remain concerned that it would not achieve adequate traffic and environmental benefits and, in the event of further planning applications being made, will continue to press for a route which removes the need for HGV traffic to use Clanville and Blackworthy Road.
- 9.4 Key points that came through the local consultations were the need to:
 - a. investigate innovative traffic management and parking solutions to improve the experience of those visiting or using



The B3153 at Clanville

the town centre and better manage and control through traffic (this is included under the Town Centre section above)

- b. provide safe pedestrian and cycle routes within the town and connecting to the employment sites, schools and railway station – these should be suitably signed and lit, accessible by wheelchair users, and with convenient crossing points or segregated from traffic (where vehicles numbers are high).
 - c. investigate the scope for a bus service connecting the town centre to the railway station, and maintain and improve bus services in general.
 - d. work with Great Western Railway on the provision of additional car parking spaces at the train station and the provision of additional services for commuters and visitors.
- 9.5 Castle Cary railway station to the north of the town is the most used railway station in South Somerset. However, the current lack of car parking capacity is constraining growth at this station, not only in terms of limiting the potential for more users but also by limiting the stopping patterns for trains at the station – as already indicated, the first train westbound to Taunton currently departs at 10.32, far too late for most journeys to work. Increasing car parking at the station would facilitate better stopping patterns for trains and subsequently better opportunities for local people and visitors to use rail transport for all types of journeys. Extending the car park has the support of Network Rail and the Train Operating Company (GWR). The latter has applied to the LEP for a contribution to expand the car park. Increasing car parking capacity has been identified as a key piece of infrastructure in the South Somerset Infrastructure Delivery Plan (IDP) [*South Somerset Infrastructure Delivery Plan Update 2015/16 page 25 para 8.3. Priority 2 = infrastructure that is required to support new development proposed in the Local Plan, but the precise timing and phasing is less critical and development can commence ahead of its provision*].
- 9.6 As noted above, there are significant local concerns about the environmental and road safety implications of HGV traffic on the B3153 at Clanville, and at three separate places along the A371 through Ansford – these are shown as ‘Highway hot-spots’ on the policies map, and Policy TRA2 below will be applicable to any development requiring a transport assessment. Local concerns relating to HGV traffic at Clanville have already been recognised in three separate appeal decisions between 2014 and 2018 (appeal references 2210452, 3024073 and 3186158).

ACTIONS

- 9.7 The NP councils will work with SCC and local landowners to provide an improved network of pedestrian and cycle routes throughout the town and connecting to the railway station and the wider area, for both everyday and recreational use. Particular priority will be given to improving the footpath from Ansford Hill to the railway station.
- 9.8 The NP councils will work with SCC and local transport providers (bus and rail) to improve local services and facilities to maximise the potential to use public transport. Particular emphasis will be placed on improving the car parking capacity at Castle Cary railway station. The NP councils recognise the importance of Community Accessible Transport for those without access to their own vehicle and will seek to ensure that this service is maintained.
- 9.9 The NP councils will continue to press for a link road between Torbay Road and Station Road, liaising with SCC as local highway authority and SSDC, to deliver Policy LMT1 of the Local Plan which expects a link road to be provided prior to the completion of growth in housing, employment and education in the area. The alignment of the new road should remove the need for HGV traffic to use Clanville and Blackworthy Road. A preferred route is shown on the policies map.

Dangerous bend on the A371 Ansford railway bridge



TRANSPORT POLICIES

9.10 Policy TA5 of the Local Plan seeks to ensure that all new development addresses its own transport implications and is designed to maximise the potential for sustainable transport. What the following policies do is raise awareness of local issues and opportunities, so that these are taken into account in assessing development proposals and prioritising future investment in the transport infrastructure.



POLICY TRA1 OPPORTUNITIES TO IMPROVE THE TRANSPORT NETWORK

Development proposals should provide or maintain a safe and convenient highway network that, where appropriate, meets the following requirements:

- the provision of new or improved links to the existing highway network to promote a choice of reasonably direct and safe routes for pedestrians and cyclists into the town centre, main employment sites, and to the railway station, linking to the key route network
- the provision of opportunities for enhanced, attractive walking and cycling routes linking to the wider rights of way network into the countryside.

POLICY TRA2 HGV TRAFFIC AT LOCAL HIGHWAY HOTSPOTS

Transport assessments associated with applications for employment and similar development should make specific reference to the environmental and road safety implications of HGV and other traffic at the local highway hotspots identified on the policies map: B3153 at Clanville; A371 at Cumnock Road, Ansford; A371 Ansford Hill between Tuckers Lane and Elms Lane; A371 railway bridge at the junction with B3153.

10. EDUCATION, SOCIAL & COMMUNITY ASSETS

MAIN AIMS

- to foster and promote opportunities for education, training, sporting activities, cultural stimulation and fun - for people of all ages
- to ensure that the growing community is supported by the necessary infrastructure, with new housing provision, employment growth and provision of roads and additional community facilities progressing in an integrated manner.

10.1 Any significant development of housing within Castle Cary and Ansford or in the surrounding rural parishes that depend on the town for their services, will inevitably have an impact on local service provision. At public consultation meetings residents have consistently expressed strong views on the retention and enhancement of the town's social and community infrastructure, with the various social clubs and public facilities such as the community halls, churches, library, post office and meeting rooms, being seen as vital to the well-being and vitality of the town.

10.2 Planning permissions granted for significant housing and other developments have all been accompanied by planning obligations (Section 106 agreements) setting out the contributions which developers have agreed to pay towards local infrastructure. Full details are set out in the annual 'Parish Account' issued by SSDC, but the following list provides a summary of potential capital contributions in different categories as at March 2017 (all figures are rounded and subject to index-linking when the relevant contribution becomes payable):

Community halls	£240,770
Youth facilities	£81,156
Sports pitches	£202,878
Changing rooms	£379,311
Equipped play areas	£349,663
Primary education	£2,801 per dwelling

Source: SSDC 2017

10.3 Education is critical in making sure local people have the skills and training to reach their own individual potential, understand the world in which we live, and to support a

prosperous local economy. This should stretch from pre-school/nursery right through to further education opportunities, many of which are already provided in town.

10.4 **Castle Cary Community Primary School** Additional accommodation is likely to be needed to correspond with the amount of housing that has already been approved; a guideline formula for providing new school places when new houses are built suggests:

- Early years 5 pupils per 100 dwellings
- Primary 32 pupils per 100 dwellings
- Secondary 14 pupils per 100 dwellings

Source: Somerset County Council 2019

In virtually all cases, currently approved housing developments are accompanied by planning obligations requiring developers to provide funds to be allocated for primary school education.

10.5 The provision of a new primary school to the west of the town, is included as a reserved site in the outline planning permission for 165 homes and other development off Torbay Road (reference 15/02347/OUT). Even though provision in that location is not supported by all the local community, Somerset County Council schools commissioning team has undertaken feasibility studies which demonstrate that the current school site will not be satisfactory for the future. The proposed new site in the Direction of Growth, granted planning permission in June 2016 (Ref: 15/02347/OUT), will accommodate an appropriate sized school with adequate hall, sports facilities and other requirements. Any suggestion that primary age children could be bussed to surrounding village schools would be strongly resisted.

Castle Cary
Community
Primary School



- 10.6 **Ansford Academy** in Maggs Lane provides secondary education up to GCSE level. The school can accommodate 720 pupils and currently has in the region of 600. The buildings date from 1939 and are on a spacious site which could allow for future expansion if required.
- 10.7 The recent loss of the **Constitutional Club** as a venue has made the need for improvements to Caryford Community Hall a matter of some urgency. Additional meeting rooms, and improved toilets, kitchen and bar are being planned and funding sought. Planning obligations already require developers of major housing schemes to provide funds to be allocated to community hall provision, and the NP councils consider that priority should be given to appropriate improvements at Caryford when these funds become available.
- 10.8 There is an urgent need for new premises for a youth club and the premises used by the Scouts and the Army and Air Cadets are far from ideal. The **Swainson Building** (owned by SCC) was previously used by the youth club but is now largely occupied by the ToyBox Pre-school, leaving little space for any other activities. Our preferred option is for a site to be found within the Torbay Road development area, as indicated on the policies map. Alternatively, in the event of the existing primary school being vacated, consideration should be given to use of part or all of the building for youth and community facilities. Planning obligations already require developers of major housing schemes to provide funds to be allocated for the provision of youth facilities, and the NP councils will press for these to be allocated towards appropriate services in the area.



Ansford Academy

- 10.9 The potential to expand the town's leisure facilities including indoor and outdoor sports courts and pitches, and a swimming pool, will also need to be considered. In particular, further equipped play areas may need to be included within larger housing development to provide a reasonable choice and distribution around the town.

EDUCATION, SOCIAL & COMMUNITY INFRASTRUCTURE POLICIES

- 10.10 The District Council as the local planning authority secures the provision of (or financial contributions towards) education, social and community facilities that are necessary to enable new development to proceed, and is committed to working with various service providers to ensure these are delivered in a timely fashion. LP policy LMT1 allows for the provision of education within the Direction of Growth and that is provided under the following policy.
- 10.11 The LP includes policy EP15 to resist the loss of local shops and post offices, public houses, community or cultural facilities and other services that contribute towards the sustainability of a local settlement. Appendix A makes clear the current facilities within the NP area which the local community sees as contributing most significantly to the character and sustainability of the town and enhancing its market town status. Thus far it has not been seen as necessary or appropriate to designate them formally as 'Assets of Community Value' under the Localism Act 2011. However, the NP councils will take action to see that these are maintained and protected.

The Environmental
Centre, Carymoor



ACTION

The NP Councils will continue to work on the identification of important social and community facilities, and seek their listing on the SSDC register of Assets of Community Value where appropriate. The NP Councils will seek to ensure that important facilities are maintained and protected.

**POLICY INF1
PRIMARY SCHOOL PROVISION**

The NP councils will seek to ensure that future growth of primary school provision takes place at the selected site in the Direction of Growth to meet the needs of the Ansford/ Castle Cary community.

**POLICY INF2
YOUTH FACILITIES PROVISION**

The NP councils will liaise with SSDC and seek funding where possible from relevant s106 and CIL sources to be allocated towards appropriate youth facilities.

**POLICY INF3
COMMUNITY HALL PROVISION**

The NP councils will liaise with SSDC and seek funding where possible from relevant s106 and CIL sources to be allocated towards local community hall provision, giving priority to improvements at Caryford Community Hall.



Market House Undercroft leading to the Shambles

11. THE NATURAL & BUILT ENVIRONMENT

MAIN AIM

- to maintain and enhance the urban green spaces and the natural environment within the countryside surrounding both parishes, for the enjoyment of all.

THE NATURAL ENVIRONMENT

- 11.1 The South Somerset Local Plan defines green infrastructure as the mosaic of natural landscape features, spaces and corridors that lie within and between developed areas. They are essential elements of the character and appearance of an area and contribute positively to cultural heritage, the health and well-being of the local community and the general quality of life. In addition to enriching visual amenity they offer opportunities for informal recreation and provide wildlife habitats and the connectivity between them.
- 11.2 Castle Cary and Ansford is a compact settlement surrounded by countryside with a number of green links from the town centre to the surrounding countryside. A particularly important connection between the town and its surrounding countryside is via the Donald Pither Memorial Field, Fairfield and the land between Well Farm and the approved Well Farm housing area, which then opens out onto the fields to the east of Station Road up to the A371. The fields to the east of Station Road with their hedgerows, trees and old orchards provide a prominent

Cary Moor Drove on the
Macmillan Way



and important part of the local landscape alongside Station Road, one of the main entrance routes to Castle Cary. With the other approved housing developments to the west of Station Road and north of Torbay Road the maintenance of this green corridor and green gateway to the town centre becomes more important.

- 11.3 In public meetings and presentations the local community has clearly stated that it wishes to see footpaths and tracks kept open and in a usable state, and that the countryside around the town is highly valued by the residents, it provides the unique setting for Castle Cary and Ansford and is used by walkers, cyclists, birdwatchers and horse riders. As such, the countryside, trees, hedgerows and limited woodland around Castle Cary and Ansford need protecting, as do the green spaces within the town and green links to the countryside. The NP councils' purchase of Fairfield for retention as open space is widely supported.
- 11.4 National policy (NPPF para 77) allows local communities, through neighbourhood plans, to designate sites as 'Local Green Spaces'. Such spaces are required to be well-related to the community that they serve, not to be extensive tracts of land, and must be demonstrably special to a local community and hold a particular local significance, for example because of their beauty, historic significance, recreational value (including as a playing field), tranquillity or richness of wildlife. The open areas listed below are considered to comply with these criteria; none are extensive areas, all are well related to the community and each has a particular local significance:



Sheep at Cockhill

- a. **Donald Pither Memorial Playing Field** and adjoining playground to the south – occupying land donated to the town by the parents of a man who died in the second world war, this is the central open space in the town and its most important playing field and play-space
- b. **Fairfield** – recently purchased jointly by the NP councils, the traditional location for the annual fair has now been transformed into a place for all types of public recreation purposes, with paths, pump-track, meadow gym, sensory garden, adventure trail and open grass areas for community events
- c. **Moat Garden** – a small community garden created with the help of lottery funding and now owned by a local charitable organisation, this provides a place with wildlife interest for quiet relaxation close to the town centre
- d. **Millennium Wood** – former glebe land associated with the parish church, planted as part of the millennium celebrations with trees donated by local people
- e. **EatCary community garden** – a community venture dedicated to sharing horticulture, gardening, cooking and healthy eating
- f. **Jubilee Garden, Ansford** – formerly the site of the Ansford war memorial, now a small landscaped garden.

The Donald Pither
Memorial Field



THE BUILT ENVIRONMENT

- 11.5 Castle Cary and Ansford are linked settlements: Castle Cary is a beautiful small market town with many fine buildings integrated into an informal meandering street pattern with a central Market House and cobbled apron; Ansford is an enlarged village with a conservation area at its core and sporadic traditional former farmhouses set amongst newer detached housing and small estates of 30–40 year old properties.
- 11.6 The LP recognises that the historic environment is a valuable part of South Somerset’s cultural heritage and contributes significantly to the local economy and identity of the district, adding to the quality of life and well-being of residents and visitors. Whether in the form of individual buildings, archaeological sites, historic market towns or landscapes, the conservation of this heritage is important for the present and future generations. All new development should respect this heritage, and seek to reinforce the distinctive local character through, for example, the use of local materials where appropriate. The community consultations clearly highlighted the very strong desire to protect the local historic environment and setting of Castle Cary and Ansford, and the desirability of repairing and bringing empty and derelict listed buildings back in to full use as soon as possible.



Setts on the Pitching

ACTIONS

- 11.7 The NP councils will work with the owner of the land between Well Farm and the Well Farm housing development (and excluded from the development area) to maintain that land as open space providing the green link between the town centre and the open fields running out to the A371.
- 11.8 The NP councils will encourage SSDC to enforce the repair, refurbishment and appropriate use of vacant and dilapidated listed buildings.

NATURAL AND BUILT ENVIRONMENT POLICIES

- 11.9 The following policies add to the Development Management advice and guidance and highlights those particular green spaces, features and views that are locally valued.

POLICY ENV1 PROTECTION OF GREEN CORRIDORS AND NATURAL ENVIRONMENT

The NP councils will seek to protect existing green corridors, footpath links, hedgerows and other natural features of the local environment, and to institute new or replacement features as opportunities arise.

POLICY ENV2 LOCAL GREEN SPACES

The following locations are designated as Local Green Spaces where development will only be permitted if it would maintain or enhance their use as a local green space:

- Donald Pither Memorial Playing Field and adjoining playground to the south
- Fairfield
- Moat Garden
- Millennium Wood
- EatCary community garden, Ansford
- Jubilee Garden, Ansford

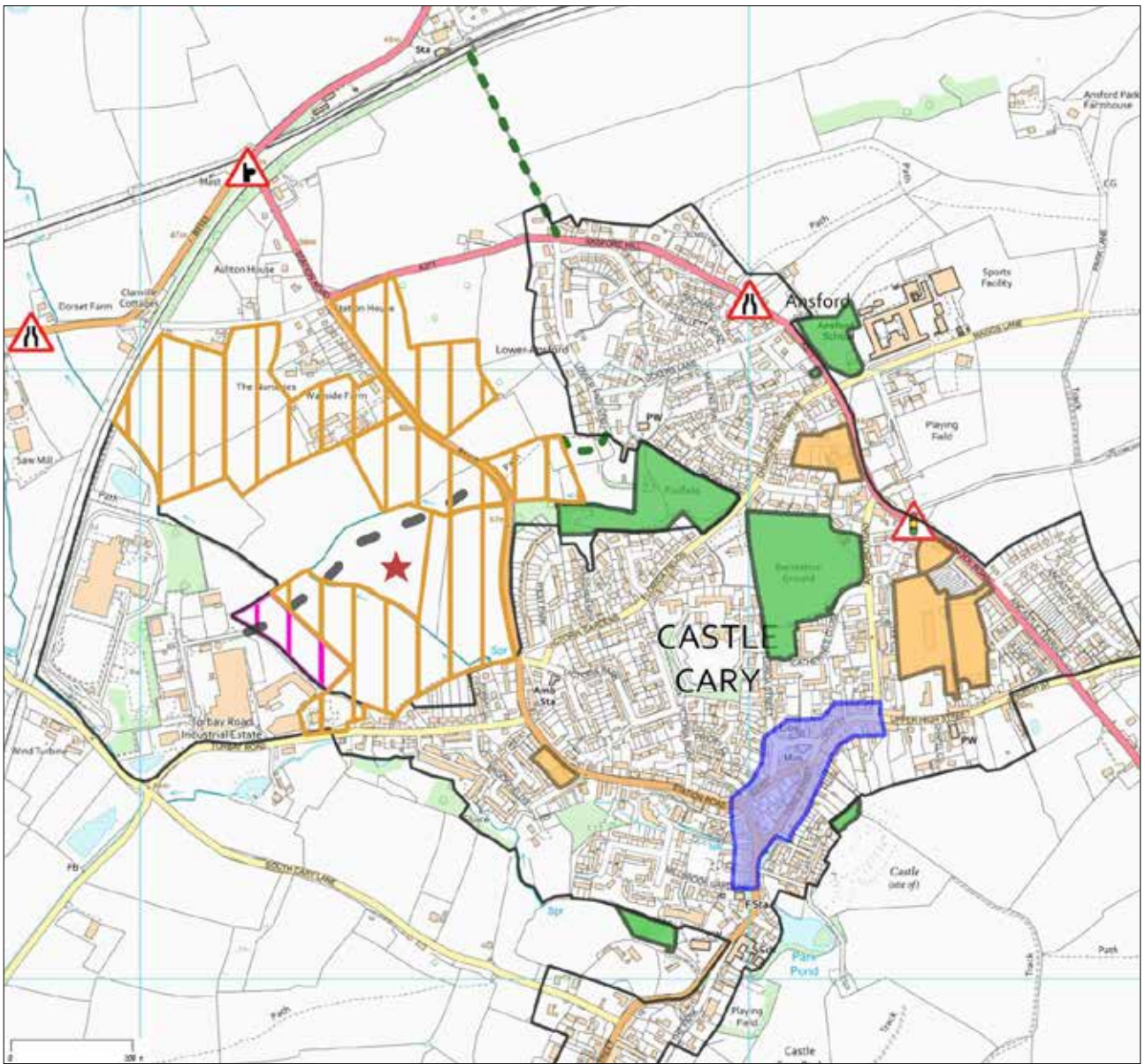
12. MONITORING AND REVIEW

- 12.1 The NP will run concurrently with the South Somerset Local Plan and apply until March 2028. It is, however, a response to the needs and aspirations of the local community as understood today, and it is recognised that current challenges and concerns are likely to change over the plan period. It is, therefore, essential for the long term success of the Plan that developments in the NP area are monitored and reviewed against the Plan's Aims and Policies.
- 12.2 It is expected that SSDC will continue to monitor progress relating to the number of dwellings including affordable homes which are delivered during the Plan period. Hence, monitoring of Policy HOU2 will be achieved by reference to SSDC's series of annual monitoring reports and housing land availability reports.
- 12.3 The NP Councils will liaise with SSDC and other stakeholders to monitor progress on employment and other development, as well as housing, in Castle Cary and Ansford. In particular, progress on a new link road and primary school in the Direction of Growth will be monitored.
- 12.4 The NP Councils will liaise with SSDC and SCC to monitor the impact of new development on:
- The self-containment of the area (which may be eroded if new housing development outstrips the creation of new employment space and jobs);
 - Transport infrastructure, bearing in mind the identified hotspots on the A371 and B3153 and the limitations to public transport in the area;
 - The vitality of the town centre with its diversity of retail outlets and other community facilities;
 - The historic character and appearance of the old market town in a rural setting.
- 12.5 The NP Councils in liaison with SSDC will consider the case for further development within the Direction of Growth following review of the current NP.

12.6 At a more general level, the NP Councils will be responsible for maintaining and periodically revisiting the Plan to ensure relevance to current community needs. It is intended that a review of all the issues and needs of the community will take place every 5 years. However, SSDC are in the process of preparing a Local Plan Review to cover the period up to 2036, and in order to achieve general conformity with strategic policies, it may be necessary to review the NP before the end of the 5 year timescale. The NP councils will monitor progress on the revised LP, particularly once it has become a material consideration in the determination of planning applications, and will commence review of the NP if it becomes clear that updating is required. We note that SSDC currently anticipate the following timescale for preparation of the revised LP:











- Public consultation on preferred options: mid-2019
- Public consultation on publication plan: early 2020
- Submission to Sec of State: late 2020
- Examination of plan: 2021
- Adoption of plan: 2021.







Map of Neighbourhood Plan Policies

Policies

-  Development Area defined in Local Plan
-  HOU1 Brownfield housing sites for early development
-  TC1, TC2 Town Centre
-  TRA1 Pedestrian and cycle links for improvement
-  TRA2 Highway hotspots:
-  Sharp bend
-  Narrow road
-  Narrow road with signal control
-  INF1 Preferred location for new primary school
-  ENV2 Local Green Spaces

For information

-  Housing development approved in LP Direction of Growth
-  Employment development approved in LP Direction of Growth
- Preferred route for Link Road

Scale: 1:10,000

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CASTLE CARY & ANSFORD COMMUNITY ASSETS

CASTLE CARY TOWN CENTRE

The Market House – Shambles,
Undercroft, Clerk’s office, Public
information point

The Market House – Museum

The Post Office, Bailey Hill

The Round House, Bailey Hill

The Library, Bailey Hill

The Fire Station

Castle Cary Medical Centre, Millbrook
Gardens

Bramcote Dental Practice, Woodcock
Street

Castle Cary Community Primary School

All Saints Church

The Methodist Church and Schoolroom

The George Hotel, Market Place

The White Hart (PH)

The Horsepond Inn (PH)

The Bay Tree (PH)

Scout Hall

Cadet Hall

Public toilets – Millbrook Gardens and
Catherine’s Close

ANSFORD

St Andrew’s Church

Caryford Hall

The Swainson Building

Ansford Academy

1610 Fitness and Leisure

OUTDOOR SPACES

Cobbles & pitching outside the
Market House

Lodge Hill – site of castle and
observation point

Cemetery and Cemetery Chapel

Fairfield

Moat Garden

Millennium Wood

The Horsepond and War Memorial

Donald Pither Memorial field and
childrens’ playground

Coombe Bottom (Ansford)

Castle Cary football field (Ansford)

Jubilee Garden (Ansford)

EatCary Community Garden (Ansford)

Carymoor Environmental Centre

Castle Cary allotments

Cary Marsh Nature Reserve

APPENDIX B

MAIN TOWN CENTRE USES

The following definition is adapted from that in the NPPF:

Retail development; leisure, entertainment facilities and more intensive sport and recreation uses (including cinemas, restaurants, bars and pubs); offices (including financial and professional services falling within class A2); and arts, culture and tourism development.

APPENDIX C

THE NEIGHBOURHOOD PLAN WORKING GROUP

The Castle Cary and Ansford Neighbourhood Plan group was formed in April 2015 as a result of a Castle Cary Town Council Planning meeting in the Methodist Church Schoolroom which was attended by around 80 members of the public who had come to protest against a development of 165 houses off Station Road. Volunteers from the community offered their services to help the Town Council (and Ansford Parish Council) to write a Neighbourhood Plan.

The volunteers were:

- Major General (retired) Barry Lane – Former Chief Executive of Cardiff Bay Development Corporation.
- David Holt – a Chartered Surveyor with some 40 years property experience. (Left the group in May 2017)
- Rob Angell – a consultant specialising in decision making through problems structuring, facilitation and negotiation.
- Michael Bainbridge – a manager in the NHS with many years' experience of public sector planning and infrastructure
- Graham House – a retired town planning consultant with over 40 years' experience in both public and private sectors (Joined the group in March 2017)

From Town and Parish Councils

- Liz Stokes – Chair of Castle Cary Town Council – retired January 2017
- Nigel Begg – Ansford Parish Council. Architect
- Pek Peppin – CCTC Chair of Planning

We acknowledge support, advice and assistance from Pam Williams, Neighbourhood Development Officer, SSDC.

The team would like to thank the following for providing photographs: Rob Angell, Nigel Begg, Peter Biggenden, Justin Birch, Colin Kay, Judi Morison, Richard Lansdell, Pek Peppin, Angela Piggott and Sally Snook; and we offer apologies to anyone who has been accidentally omitted from this list.

GLOSSARY OF ABBREVIATIONS

NP	Neighbourhood Plan
LP	Local Plan – in this document referring to the South Somerset Local Plan 2006–2028, adopted March 2015
CCTC	Castle Cary Town Council
APC	Ansford Parish Council
NP councils	Castle Cary Town Council and Ansford Parish Council
SSDC	South Somerset District Council
SCC	Somerset County Council
NPPF	National Planning Policy Framework
HGV	Heavy goods vehicle
DofG	Direction of growth
OPP	Outline planning permission
RM	Reserved matters





Castle Cary Town Council
The Market House
Castle Cary BA7 7AH
01963 359 631

Ansford Parish Council
c/o Taddywoody
Lamyatt BA4 6NQ
01749 812 225

www.castlecaryansfordnp.uk

Agenda Item 7

Corporate Performance Report 2018-19: 4th Quarter

<i>Executive Portfolio Holder:</i>	<i>Val Keitch, Housing and Strategy</i>
<i>Director:</i>	<i>Netta Meadows, Director of Strategy and Support Services</i>
<i>Lead Specialist:</i>	<i>Charlotte Jones, Lead Specialist People, Performance and Change</i>
<i>Lead Officer:</i>	<i>Cath Temple, Specialist - Performance</i>
<i>Contact Details:</i>	<i>Cath.temple@southsomerset.gov.uk or (01935) 462587</i>

Purpose of the Report

1. This report sets out the current position of the Council's agreed key performance indicators and covers the period from January to March 2019 (Q4). The report also includes an end of year update on the eight priority projects included in the 2018-19 Council Plan Annual Action Plan.

Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date of June 2019.

Public Interest

3. The Council is accountable to the local community for its performance. We publish performance monitoring information to demonstrate outcomes and to highlight opportunities to learn and improve for the future.

Recommendations

4. The District Executive is asked to note and comment on the report.

Background

5. The Council monitors a set of key performance indicators (KPIs) which are published on our website www.southsomerset.gov.uk on a quarterly basis.

Quarter 4 performance

6. The attached report includes our performance from January to March 2019 measured against 26 KPIs. *(Please note that the outcome of four further KPIs covering the full year of 2018-19 are included but are unnumbered. This will be amended before the report is published on the website.)*
7. The report also includes the end of year position for the eight priority projects within the 2018-19 Council Plan Annual Action Plan, setting out our achievements against the projects' milestones and explaining what will happen next.
8. The last two years has seen significant activity and change across the whole of South Somerset District Council (SSDC). We have delivered many key parts of our Transformation programme, at pace and with significant staff changes, while working hard to ensure that our key business areas continue to deliver for the communities we serve. This has included significant financial benefits, alongside the implementation of new ways of working (in terms of processes and systems) within a

completely new organisational model. This has not been without its challenges, and we fully recognise that at times customer service has been affected.

9. We have a committed group of leaders, managers and staff who are working hard to deliver services to our residents whilst also transforming what we do. Moving to our new ways of working presents some challenges, yet our teams have demonstrated commendable professionalism, dedication and hard work, and should be justifiably proud of all we have achieved over the past two years.
10. The changes we have to make are not yet complete and we have a good awareness of the considerable work that remains ahead for us as an organisation. This includes completing the redesign of our services and supporting our customers to take up new digital channels, together with embedding new ways of working within the 'One Team'.
11. The attached report shows that in certain key areas, in quarter 4, there were some dips in performance below targets or agreed service levels. Overall 17 out of 21 KPIs are either showing a steady position or are improving and 8 out of 13 of our KPIs with targets set are either on or above target. Comments are included from the relevant lead officer. We will continue to monitor these closely and take action as appropriate.

Financial Implications

12. There are no direct financial implications related to this report.

Risk Matrix – this report is for information only – no risk profile.

Council Plan Implications

13. This report is consistent with the Council Plan 2016 – 2021

Carbon Emissions and Climate Change Implications

14. There are no direct implications

Equality and Diversity Implications

15. There are no direct implications

Privacy Impact Assessment

16. There are no direct implications

Background Papers

Council Plan 2016-2021 & Annual Action Plan 2018/19

Corporate Performance Report

Q4 2018/19

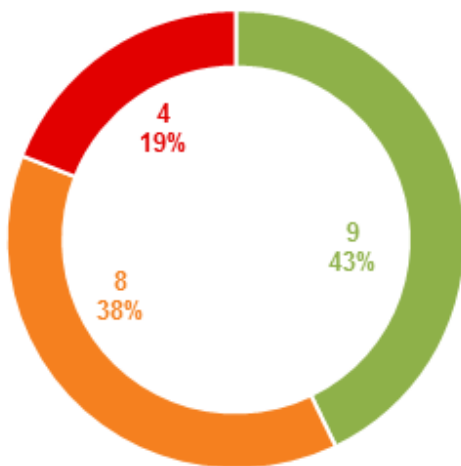
There are two sets of comparisons for the data. One is compared against a target the other compares the current result with past performance to give a direction of travel.

For direction of travel – there has been an overall improvement in the direction of travel for this quarter. We are hopeful that the review being undertaken by Somerset Waste Partnership into their reporting will improve our metrics in those relevant areas.

For targets - red means we are significantly below target, amber means on target, and green means we are ahead of the target. 12 of our 13 KPIs were either below or above target this quarter. We attribute this to there being no formal target-setting process in place at the start of this year. Some of the targets within this report will need consideration when the new performance management framework is in place during 2019.

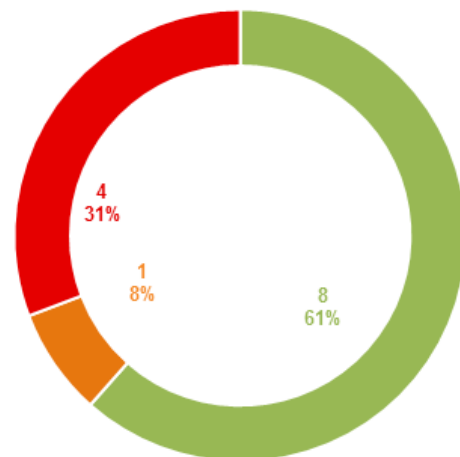
The summary is as follows:

Direction of travel:



Improved Constant Worse

Performance against targets:



Above Target On Target Below Target

The following tables show the detailed position of each KPI.

[NB There are some comments required from lead officers which will be gathered and added before publication, or provided as a verbal update.]



High quality cost effective services

Q4 2018/19

1 Council Tax collection rates (%)

Q4	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	28.68	56.7	83.72	97

The amount of Council Tax collected from the start of the year to the end of the quarter, as a percentage of the estimated amount that would be collected by the end of the year if everyone liable paid what they were supposed to.

2 NNDR (business rates) collection rates (%)

Q4	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	33.49	58.3	82.4	98

The amount of business rates collected from the start of the year to the end of the quarter, as a percentage of the estimated amount that would be collected by the end of the year if everyone liable paid what they were supposed to.

Commentary for points 1 & 2 - Given the impact on resources since January, overall I am pleased with this figure. We are currently working on our debt recovery strategy for 2019, we are aiming to deliver similar results for 2019-20.
Karen Case - Specialist, Revenues

3 Calls to Customer Focussed Team answered within 120 seconds (%)

Q4	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	59.5	61.4	75.9	80

The number of calls answered within 120 seconds, as a percentage of all calls answered.

We are monitoring calls to see where the demand is and changing our telephone messages and social media to try and reduce some of the demand and encourage our customers to go online. Call wait times are longer at the moment as we need to invest time in our team so they can train and learn new technology to support the new way of working. Once this training is complete and systems are embedded I'm confident we will see a shift to online services. This will allow us more time to support the customers who need us and in the meantime we continue to have a call back service if our customers choose not to wait on the line.

Sharon Jones - Customer Focussed Manager



4 Calls to Customer Focussed Team abandoned by customer (%)

Q4 38.7	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	10.2	9.5	9.2	Target not set

The number of customers ending their call before it is connected, expressed as a percentage of total calls.

The abandonment rate increased as we now have the functionality for the customer to leave a message for a call back which would be counted as an abandoned call. We do believe we have handled more at the first point of contact as the case team have commented on how the demand on them has reduced and this is something we will continue to monitor. Taking a sample from January it works out that around 7% of the abandoned calls ended due to request for a call back, this means the actual abandoned call rate was around 24%.

Whilst this is still high, I believe that it means that some customers have listened to our messages and had their enquiry answered or gone online so I don't feel this is a negative sign. Our election line had an abandonment rate of 44% this was due to the information within the call messages which we believe gave the customers the answers they needed.
Sharon Jones - Customer Focussed Manager

5 Speed of processing of new Housing Benefit claims



Q4 30 	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	33	28	27	21

The (mean) average number of days between receipt of the claim and the decision, for all new housing benefit claims decided during the quarter.

It has been a challenging quarter with a number of staff having left at the end of December, a backlog of work and a peak period in demand around annual billing/benefit year end work. A smaller number of claims are being received due to the full rollout of Universal Credit which means a longer delay on just a few claims can have a big impact on the average speed of processing. There are measures now in place to address these issues and the team is working to reduce the volume and age of claim forms outstanding.
Ian Potter - Lead Specialist Vulnerable Customers





6 Speed of processing of Housing Benefit changes of circumstances

Q4 4 	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	7
	5	6	5	

The (mean) average number of days between validation and decision for new housing benefit claims that were decided during the quarter.



7 Speed of processing of new Council Tax Support claims

Q4 45 	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	30
	41	47	45	

The (mean) average number of days between validation and decision for new Council Tax Support claims that were decided during the quarter.

In addition to the challenges outlined in item 5, a significant proportion of Council Tax Support (CTS) applicants are now also claiming Universal Credit (UC). We have made it easier for this group to apply by accepting the DWP notification that they have claimed UC as a claim for CTS. It can take up to 42 days for DWP UC decisions to reach us. This delays assessment of the Council Tax Support application. We will reflect this in target setting for 2019/20 as it is beyond our and the applicants control.
 Ian Potter - Lead Specialist Vulnerable Customers.



8 Speed of processing of Council Tax Support changes of circumstances

Q4 7 	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	7
	7	9	11	

The (mean) average number of days between validation and decision for change of circumstances notifications about Council Tax Support claimants that were decided during the quarter.



9 Major planning applications determined within target time (%)



Q4 100 	Past Performance %			Our Target**
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	60
	88	91.3	93.8	

The percentage of all valid major* applications (determined in the quarter) that were determined within 13 weeks or within a period agreed with the developer.

*'Majors' have a building footprint over 1000 m² at least 10 dwellings, 10 or more gypsy/traveller pitches, or a site area over 1 hectare (half an acre for dwellings).

**Our target is the national minimum service level

10 Minor planning applications determined within target time (%)

Q4 93.7 	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	70
	88	90.2	97.6	

The percentage of all valid minor* applications (determined in the quarter) that were determined within 8 weeks or within a period agreed with the developer.

*'Minors' do not meet the definition of major, but are for new dwellings or gypsy or traveller pitches, or relate to industrial or retail sites.



11 Speed of processing – % of ‘other’ planning applications determined within target time

Q4	Past Performance %			Our Target
	Q1	Q2	Q3	80
	(18-19)	(18-19)	(18-19)	
96.4	93	95.4	85.5	

The percentage of all valid ‘other’* applications (determined in the quarter) that were determined within 8 weeks or within a period agreed with the developer.

*‘Others’ do not meet the definition of major or minor. They include householder applications (eg extensions), changes of use, listed building alterations, etc.

12 Household waste & recycling – missed collections

Q4	Past Performance %			Our Target
	Q1	Q2	Q3	
	(18-19)	(18-19)	(18-19)	
2535	2538	2947	2085	Target not set

Number of times households reported a missed bin collection.

These figures are Somerset wide, Somerset Waste Partnership is unable to accurately break down the figures by district.

13 % of SSDC owned properties with a performance assessment in place

Q4	Past Performance %			Our Target
	Q1	Q2	Q3	
	(18-19)	(18-19)	(18-19)	
50	34	34	34	Target not set

A complete performance assessment for a property is made up of a number of factors, such as income and energy efficiency. These assessments will be kept up to date and used to make decisions about properties, such as disposal.



14 Annual average income yield increase of business services

Q4	Past Performance %			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
-				

A further update will be provided when the Financial information is available.

15 Take up of digital services (%)

This is measured in 2 ways:

- i) availability - services available through digital platform(s), expressed as a percentage of all services that can be delivered digitally
- ii) take up - the number of service requests submitted digitally, as a percentage of all service requests (by any channel)

This will be measured from Q1 2019/20 when our new on-line services become available.


16 Calls to Customer Focussed Team resolved at the first point of contact (%)

- i) Resolved on the line – the user need is met during the phone call
 - ii) Resolved without 2nd contact – without the customer calling back
- A representative random sample will be taken across the quarter.

We have developed a measure for this indicator and it will be measured from 1st April 2019.




17 Working age population claiming unemployment benefits (%)

Q4 1.87 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	1.85	1.78	1.80	Target not set

The percentage of the working age population (15 to 64 years) claiming benefits mainly because they are unemployed. (Seasonally adjusted by the Office for National Statistics)

18 Working age population in employment (%)

Q4 82.9 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	77.9	76.8	80.6	Target not set

The percentage of the working age population (15 to 64 years) claiming benefits mainly because they are unemployed. (Seasonally adjusted by the Office for National Statistics)



19 Fly-tips cleared within 5 days (%)

Q4 95.5 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	90
	100	95.35	94	

The number of reported fly-tips cleared within 5 days, expressed as a percentage of all fly-tips.

20 Number of fly-tips reported

Q4 222 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	249	215	179	Target not set

The number of unique reports of fly-tips in the District.

21 Household recycling rates

Q4 50.31 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
	52.85	55.1	54.1	Target not set

The weight of household waste sent for reuse, recycling, composting or anaerobic digestion, expressed as a percentage of the weight of all waste collected. The data for this metric is for the whole county because Somerset Waste Partnership cannot derive this data at the district level.

The EU target is for UK households to recycle 50% by 2020. In 2018/2019 reporting period, Somerset Waste Partnership achieved 52.41%

Quality of decision making (planning) - appeals lost as a % of all decisions.

The number of refusal of planning permission overturned by the Planning Inspectorate at appeal, expressed as a percentage of all decisions made. For the rolling period 2016-2018 this was 7.3%.



22 Number of households in temporary accommodation

Q4 42 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	Target not set
	24	42	34	

The number of households who we have placed in hostels, registered social landlord properties or bed and breakfasts, to discharge our homelessness duties, and who were living there on the last day in the quarter. We are awaiting commentary around the increase in numbers.

23 Average length of stay in temporary accommodation (days)

Q4 6 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	7
	7	2	9	

The (mean) average total amount of time (in days) spent in bed and breakfasts by households who we placed there to discharge our homelessness duties, and who left that accommodation during the quarter.

(This was kept high by one particularly difficult case, where there were long delays in finding suitable alternative accommodation for a disabled person. If we exclude that one case from the data, the average stay in B&B was a much more promising 3 days).

24 Assessment of applications to join Somerset Homefinder (%)



Q4 79 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	Target not set
	52	71	72	

The percentage of valid Homefinder applications made by South Somerset residents, that received a banding decision within 21 days.



25

Number of cases of homelessness helped or prevented

Q4 70 	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	10% annual increase
	39	61	75	

The total number of households who either:

- thought they were at risk of homelessness, but were able to stay in their home for at least 6 more months
- were homeless, but secured accommodation

And where, in either case, the council took positive action to improve the situation.

% affordable homes completed on qualifying sites

Affordable homes completed (for occupation) as a % of all new housing completions on all sites with 11 or more dwellings, or a combined internal floor area over 1000m². 121 homes, equating to 18.6% of all new housing completions.

Number of additional affordable homes

Number of additional affordable homes through enabling work - 122.

% of new dwellings completed against targets in the Local Plan

Expressed as a % of homes completed, compared with targets set in the Local Plan. There were 652 homes completed for the 2018/19 period. The planned figure for this period was 725, meaning that the % completed was 89.93%.



26

Number of reports of anti-social behaviour

Q4	Past Performance			Our Target
	Q1 (18-19)	Q2 (18-19)	Q3 (18-19)	
440	491	566	384	Target not set

Includes abandoned vehicles, noise, littering, dog complaints, smoke, dangerous waste and fly posts, but not fly tips or dead animals.



Agenda Item 8

SSDC Annual Achievements Report 2018-19

Executive Portfolio Holder: Cllr Val Keitch, Housing and Strategy
Director: Netta Meadows, Strategy and Support Services
Service Manager: Charlotte Jones, Lead Specialist - People, Performance and Change
Lead Officer: As above
Contact Details: charlotte.jones@southsomerset.gov.uk or 01935 462565

Purpose of the Report

1. This report presents a summary of outcomes achieved against the Council Plan Annual Action Plan for the year April 2018 to March 2019.

Public Interest

2. South Somerset District Council (SSDC) is an ambitious and forward-thinking council that is committed to transforming, improving and adapting to be ready for the future. We place our residents and businesses firmly at the centre of everything we do and we are incredibly proud of the work we have achieved alongside our communities in 2018/19.

Recommendations

3. That the District Executive:-
 - a) notes and comments on the attached achievements report at Appendix A.
 - b) recommends to Council to approve the 2018/19 achievements report for publication.

Council Plan and Annual Action Plan 2018-19

4. The Council Plan 2016 - 2021 sets out what the Council wants to achieve in support of our vision for South Somerset - ***a place where businesses flourish, communities are safe, vibrant and healthy; where residents enjoy good housing and cultural, leisure and sporting activities.*** An Annual Action Plan for 2018-19 was agreed by Full Council in February 2018 which included eight priority projects and 32 areas of focus under five themes: - Protecting Core Services; Economy; Environment; Housing and Healthy, Self-reliant Communities.
5. Our Council Plan shows our ambitions to make major changes in the way that we operate and deliver services over the next few years whilst continuing to deliver services and priority projects that meet the needs of our residents, visitors and businesses.
6. Just some of last year's highlights and achievements are –
 - A balanced budget was delivered with no cuts to services
 - Launched or refreshed exciting regeneration projects which will support three of our key towns in South Somerset – Yeovil, Chard and Wincanton
 - A 10-year Economic Development Strategy was launched to ensure we are well-placed to attract new businesses, help start-ups and encourage diversity and innovation.
 - We are becoming a more commercial organisation, investing in projects that will provide essential income to pay for our highly-valued services.

- Alongside this we are transforming customer service with new technology, providing dedicated resources to support those who are most vulnerable, continuing our great work to alleviate homelessness and working hard to protect the environment.
- The Council received or is shortlisted for a range of national awards or commendations for our work.

7. The attached draft report in Appendix A provides an overview of just some of the great work being undertaken across the Council as we continue to commit to our goals of being great to work for, excellent to work with, leading the way and delivering for our communities.

Financial Implications

8. None.

Council Plan Implications

9. This is the annual report relating to the delivery of the Council Plan

Carbon Emissions and Climate Change Implications

10. None

Equality and Diversity Implications

11. None

Privacy Impact Assessment

12. None.

Background Papers

13. Council Plan 2016-2021 and Annual Action Plan 2018-19



**South Somerset
District Council**

End of year Achievement Report

2018 - 2019



Page 112

Find out about our achievements for South Somerset



**Protecting
Core Services**



Economy



Environment



Housing



**Healthy, Self-reliant
Communities**

Our Vision for South Somerset:

A place where businesses flourish, communities are safe, vibrant and healthy; where residents enjoy good housing, and cultural, leisure and supporting activities.



Priority project:

The Council agrees a small number of priorities each year as part of our Council Plan annual action plan. Priority projects contribute to the achievement of the Council's ambitions for South Somerset. You can read more about the Council's priority projects for [2018-19 here](#).

South Somerset District Council (SSDC) is an ambitious and forward-thinking council that is committed to transforming, improving and adapting to be ready for the future. We place our residents and businesses firmly at the centre of everything we do and we are incredibly proud of the work we have achieved alongside our communities in 2018/19.

A balanced budget was delivered with no cuts to services while launching exciting regeneration projects which will support three of our key towns in South Somerset – Yeovil, Chard and Wincanton.

A 10-year Economic Development Strategy has been launched to ensure we are well-placed to attract new businesses, help start-ups and encourage diversity and innovation.

We are becoming a more commercial organisation, investing in projects that will provide essential income to pay for our highly-valued services. Alongside this we are transforming customer service with new technology, providing dedicated resource to support those who are most vulnerable, continuing our great work to alleviate homelessness and working hard to protect the environment.

This is all in addition to the excellent additional value we provide for residents including free school holiday Playdays, a superb network of parks and open spaces, waste and recycling collections, leisure, arts and entertainment services including swimming facilities at Wincanton and Yeovil, The Octagon Theatre and Westlands.

This achievements report provides you with an overview of just some of the great work being undertaken by SSDC as we continue to commit to our goals of being great to work for, excellent to work with, leading the way and delivering for our communities.



**Protecting
Core Services**



Economy



Environment



Housing



**Healthy, Self-reliant
Communities**



Protecting core services

2018-19

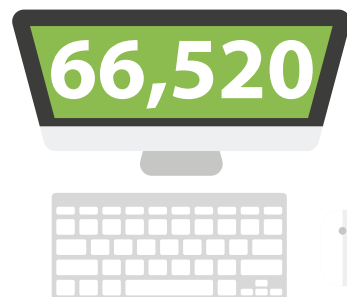
In order to protect front line services we set out to:

- Transform customer services through technology
- Provide access to services to suit our customers' needs
- Actively manage assets and resources to ensure the best financial or community return
- Seek business opportunities for the council
- Work with partners to achieve economies, resilience and influence

£2.5m

saving through Transformation.
Our ambitious Transformation Programme has continued to make good progress without cutting services and helping to generate £2.2m in commercial income by 2021.

 **Shortlisted for two national MJ awards**
for Workforce Transformation and as Best Commercial Council.



66,520 transactions were completed through our website using our on-line forms - an increase of 25% from 2017-18

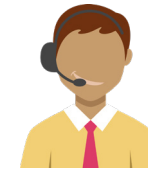
71%

of planning applications were submitted on-line, saving time and money. We handled 1823 applications for planning consent, **93% within the target time.**



Customers signed up for our new customer account in just six weeks! We launched our new website and customer account in February 2019, providing services 24/7 to be convenient for our customers.

76,474 Council tax bills were issued to households across South Somerset. **71% of households pay by direct debit.**



120,756

calls to our customer contact centre in 2018/19. Our Customer Access Points in Yeovil, Chard and Wincanton provided face to face help and advice across the district.



Enhanced our property portfolio through prudent, ambitious and exciting investments now providing an annual income of £1.3m



39,000

people following all SSDC's Facebook accounts and almost 20,000 twitter followers. There has been a **44% growth in SSDC's Facebook page** since April 2018 and March 2019, with a post reaching an average of 32,000 users a month.



Priority Project



To promote a strong and growing economy with thriving urban, rural and land based businesses and improving productivity we aspired to:

- Work with businesses and use our assets
- Provide advice and support
- Deliver initiatives that ensure worker skills meet the employers' needs
- Lobby for and support infrastructure improvements to enable growth
- Capitalise on our high quality culture, leisure and tourism opportunities to bring people into the district

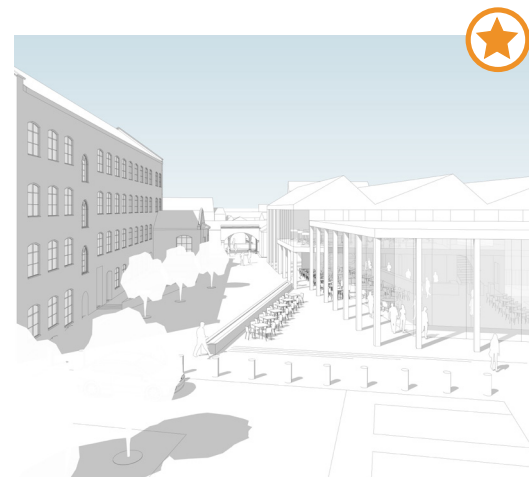
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Yeovil Refresh

Our ambitious plan for the regeneration of Yeovil town centre has progressed well. New investment by third parties in Glovers Walk and Old Market Site will stimulate development in the town centre.

SSDC has commenced work to produce separate access and public realm improvement strategies.



Chard Regeneration

Plans for the regeneration of Chard town centre are progressing and the Council is working towards a new community leisure centre, improved services and public space for the residents of Chard. Over 500 residents attended a public consultation event in March 2019, helping to shape detailed plans.



Wincanton Regeneration

Our priority is to regenerate Wincanton town centre as a key location in the east of the district. We undertook public consultation during January – March 2019 to help shape a new strategy and action plan to regenerate Wincanton Town Centre.

All three of these Priority Projects will continue into 2019-20. You can read more about our plans for 2019-20 in the updated [Council Plan](#).



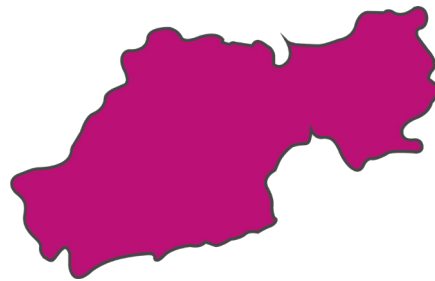
Priority Project



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- Lobby for and support infrastructure improvements to enable growth
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Page 196



Local Plan

Completed the first stage of our revised Local Plan for South Somerset 2016-2021 – including public consultation on the Issues and Options.

A303 The Public Examination of the A303 Sparkford to Ilchester dualling project opened in December. We are helping to examine and address the impacts on our local highways and heritage, while gaining economic benefits for the district.

£10,000 of grants

awarded to 29 local initiatives promoting a 'Digital High Street' and training provided to over 200 businesses through 24 events arranged in partnership with the South Somerset Market Towns Investment Group.



We provided support and advice to food businesses who may be affected by Brexit in particular relation to export certification.



9000 sq ft of new business space

opened at the Yeovil Innovation Centre in August, accommodating around 80 new work spaces. **92.5%** of all the buildings materials and construction waste was recycled.

Supporting SMEs

(Small to Medium Enterprises)

In 2018 we supported a programme of networking events and digital marketing training sessions for local businesses - 15 different digital events were offered including cyber security, cloud computing and basic web design.



10 year strategy

We created a new ten year strategy for economic prosperity and growth in South Somerset covering rural and urban economies, transport, communications, skills, workspace, innovation and investment – making South Somerset a great place to do business.



The Council is sponsoring a HNC/HND in **Business course for 16 students** from local employers in partnership with **Yeovil College.**



Priority Project



To keep South Somerset clean, green and attractive we worked in partnership to:

- Promote recycling and minimise waste
- Promote the use of 'green' technology
- Maintain and promote access to our Country Parks and open spaces to promote good mental and physical health
- Keep streets and neighbourhoods clean and attractive
- Continue to support long term flood resilience
- Promote a high quality built environment in line with Local Plan policies
- Support communities to develop and implement local, parish & neighbourhood plans

Page 17



£233,000 awarded

to the Council by the National Heritage Memorial Fund enabling the purchase of 73 acres of "at risk" heritage land at Ham Hill.

Secured Green heritage award for Ham Hill



Investigated 443 abandoned vehicles and removed 29 to help keep streets and neighbourhoods clean and attractive.



£11,000

raised by our supporters and dedicated community groups through local fundraising providing investment back into our Country Parks and Local Nature Reserves.

2894

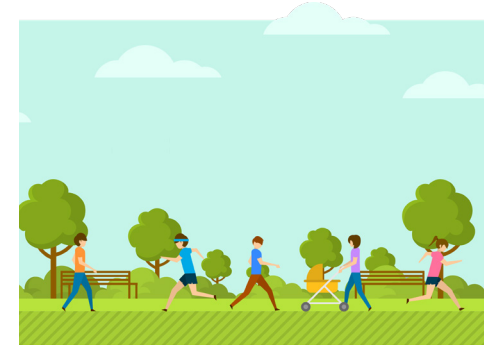


Volunteering days at our countryside sites at Yeovil, Chard and Ham Hill



Green Flag Awards

retained at Ham Hill and Yeovil Country parks and Chard Reservoir Local Nature Reserve.



Awarded a South West in Bloom, **five star Best Park Award** for Yeovil Country Park



Yeovil won Gold

for South West In Bloom for the second year running. SSDC also received the Abiss Memorial Trophy for the best municipal display in the region, and as a result was selected to represent the South-West nationally in the 'large town category' later in 2019.





To keep South Somerset clean, green and attractive we worked in partnership to:

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- Promote the use of 'green' technology
- Maintain and promote access to our Country Parks and open spaces to promote good mental and physical health
- Keep streets and neighbourhoods clean and attractive
- Continue to support long term flood resilience
- Promote a high quality built environment in line with Local Plan policies
- Support communities to develop and implement local, parish & neighbourhood plans



Investment into one of the largest battery energy (25MW) storage sites in the UK – a potential to generate c.7.5% return.

96%

amount of fly tips were cleared within

5 days

Highly commended by the Institute of Groundsmanship (IOG) for the quality of maintenance at Yeovil Recreation Centre



Reduced our use of single use plastics, and commenced a review of our own approach to recycling and reuse.

230

trees planted



1647

litter and dog bins emptied.



Flood resilience

Supported the work of the Somerset Rivers Authority




13,468



households subscribed to a garden waste collection service through the Somerset Waste Partnership.

2894

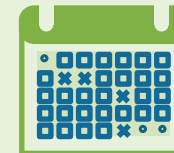
days



countryside volunteer days donated to help manage natural green spaces, enhancing them for people and for nature

353 pupils

from schools participated in educational sessions at the country parks to learn about the natural world and Somerset's heritage



38 public events

were delivered by countryside rangers

7037 adults and children

enjoyed events at at the country parks and local nature reserves, from bat walks to pond dipping.

Restoration of the Valley gardens of Ninesprings

was completed and a new boardwalk was installed at Riverside Walk to help improve access.



£106,000 awarded

by the Heritage Lottery Fund for project works at Yeovil Country Park.



To enable the provision of housing that meets the future and existing needs of residents and employers we worked with partners to:

- Minimise homelessness and rough sleeping
- Work with the private rented sector to improve the standard and availability of rented accommodation
- Tackle fuel poverty
- Work to minimise the impact of personal or household debt
- Enable people to live independently for as long as they are able



Priority Project

82

disabled facilities grants (DFGs) allowed residents to continue to live independently in their homes.



86 Houses in Multiple Occupation

(HMOs) were licensed to ensure standards for tenants are maintained in rented accommodation.

Operated the Severe Weather Emergency Provision for 16 nights and as a result **helped 28 people with emergency accommodation and follow up support.**



Working with our partner, the Centre for Sustainable Energy (CSE), **we have supported 283 households** (of which 53 had reported health conditions) to improve the energy efficiency of their homes, improving quality of life, reducing risk associated with excess cold and with an average annual financial saving of £119.



New homes completed in South Somerset including **122 affordable homes**

delivered by partnership working with housing associations and developers.



Provided 11-unit temporary accommodation property for homeless families with self-contained bedsits and shared communal facilities, and commenced work to bring our property in Sherborne Road, Yeovil back into use for six more units of temporary housing.

Commended by the housing team

at the Ministry of Housing, Communities and Local Government for our approach to increasing the availability of temporary accommodation.



254

households received timely advice and support which prevented homelessness



Worked in partnership with the fire service to install

142

smoke detectors in homes of vulnerable people.

Worked in partnership with Citizens Advice South Somerset (CASS) to provide

57

people with specialist debt advice to prevent them from becoming homeless



careline

www.carelinesouthsomerset.co.uk

2,034

customers supported by Careline to help them stay safe at home.



Healthy, Self-reliant Communities

2018-19

To build healthy, self-reliant, active communities we committed to:

- Support communities so that they can identify their needs and develop local solutions
- Target support to areas of need
- Help people to live well by enabling quality cultural, leisure, play, sport & healthy lifestyle facilities & activities
- Work with partners to tackle health issues such as diabetes and hypertension, and mental health
- Work with partners to keep our communities safe



1161

food inspections to help ensure safe places for communities to eat and buy food.



96% of 1613 registered food premises in the FHRs have a food rating of 3 or above.

(FHRs) Food Hygiene Ratings Scheme

359

investigations of noise complaints, helping to address causes or factors of poor mental health and wellbeing.



370

rat treatments and provided advice for 412 rat calls to help keep neighbourhoods clean and safe.

98 stray dogs collected, reunited or rehomed.



Our newly refurbished Westlands Entertainment Venue achieved excellent growth last year – the number of meetings and conferences is up 41% and income from food and drink sales up 73%.

The Octagon Theatre and Westlands Entertainment Venue set a new box office record selling over

152,000 tickets!

(63% on-line) across both venues, and supported by 2,107 days donated by our magnificent volunteers.

Westlands has received a 'Certificate of Excellence' from Trip Advisor for achieving consistently excellent reviews on the website. The Octagon Theatre has qualified for 'Certificate of Excellence Hall of Fame' after achieving a 'Certificate of Excellence' for the past five years.

TAXI

To help keep our communities thriving, connected, healthy and safe we licensed more than 963 premises and taxis and issued over 786 temporary permissions for local events and festivals.



7 new play and youth facilities

We cared for play and youth facilities across the district carrying out 3,300 safety inspections and creating new play and youth facilities at 7 locations with a total of £264,000 invested, £249,000 through the council.



12,500+

people attended children's play days across the district with support from SSDC including 6000 visitors to the National Play Day event at Yeovil Country Park.

Construction of a woodland Play Zone at Ham Hill Country Park.





Healthy, Self-reliant Communities

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- Work with partners to tackle health issues such as diabetes and hypertension, and mental health
- Work with partners to keep our communities safe

i 10

Local Information Centres helped with running costs, providing help and information to thousands of visitors

170

volunteer days

donated to help support local access to heritage

Created a First World War commemorative walks guide for Yeovil, funded by the South West Museums development fund and launched with a series of locally led events.

£9,000

awarded to **Access for All** who work to promote accessibility and to increase the social inclusion of people with disabilities to enjoy equality of opportunity.

£26,500

awarded to five community organisations promoting the arts and activities for young people in South Somerset including Somerset Rural Youth project, Action Track, Take Art, Somerset Art Works and Somerset Film.

£205,000

of financial support was awarded to Citizens Advice South Somerset (CASS). **Last year CASS helped 5362 residents gain help and advice.** Advice on benefits led to £223,091 of additional household income and overall the **CASS volunteers provided nearly 1000 hours per month** of time to help others in their community. In addition **we provided £74,000 to SPARK, who assist, promote and train volunteers** across the district.

£167,000

of grants to 47 community led projects, which helped to create investment of over £560,000 into supporting improved local quality of life. Here are just some examples...

- 
- 1 Outdoor Gym at Barrington
 - 2 Refurbishment of the kitchen at Chard Rugby Club
 - 3 Activity and adventure hub, Stoke-Sub-Hamdon
 - 4 Crewkerne Food Festival
 - 5 Somerton Local Information Centre
 - 6 Purchase of land for allotments, Ilchester
 - 7 Radio Ninesprings
 - 8 Celebration of local heritage in Barwick and Stoford
 - 9 South Cadbury defibrillator project
 - 10 Wincanton Christmas Extravaganza
 - 11 Templecombe in Bloom

Looking ahead - Our future plans for 2019-20



Protecting
Core Services



Economy



Environment



Housing



Healthy, Self-reliant
Communities

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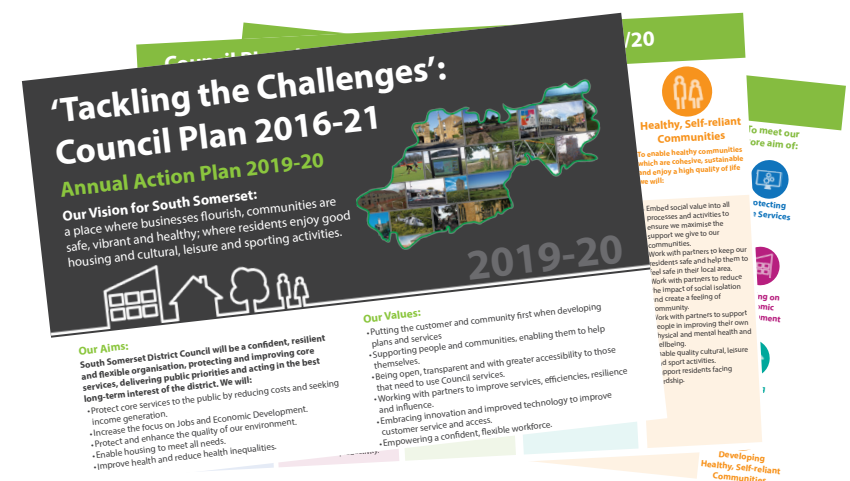
Looking ahead to 2019-20 we are set for another year full of ambition for South Somerset – while still facing many of the challenges arising from reduced Government funding and rising demand for services. We are committed to protecting vital front line services, while increasing our digital services to provide 24/7 access to customers.

Our Council Plan for 2016-21, agreed by Full Council in 2016, shows our ambitions to make major changes in the way that we operate and deliver services over the next few years whilst continuing to deliver services and priority projects that meet the needs of our residents, visitors and businesses.

Our Annual Action Plan for 2019-20 includes 32 areas of focus across our five Council Plan themes: Protecting Core Services, Economy, Environment, Housing and Healthy, Self-Reliant Communities. We have also identified six priority projects for the coming year, with dedicated resources and detailed plans to support their progress and long term contribution to the well-being of South Somerset. This year's Annual Action Plan also includes a series of local priorities for each of our four areas – North, South, East and West.

Council Plan 2016-21

You can read about our Council Plan annual action plan for 2019-20 [here](#).



Agenda Item 9

Commercial Assets Update Report

Executive Portfolio Holder: John Clark, Economic Development including Commercial Strategy
Director: Clare Pestell, Commercial Services and Income Generation
Service Manager: Robert Orrett, Commercial Property, Land and Development Manager
Contact Details: Robert.orratt@southsomerset.gov.uk or 01935 462075

Purpose of the Report

1. To update members on commercial investments and management of the existing asset portfolio since the last half yearly update in December 2018.

Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date of 6th June 2019.

Public Interest

3. This report is to update members on progress made to date since the previous update in December 2018 in purchasing new commercial investments that have been acquired to deliver the objectives of SSDC's Financial Strategy agreed in September 2017 and the Commercial Strategy agreed in August 2017. The aim of this report is to give Members and the public an update on the performance and impact of the commercial strategy to date including its contribution to mitigating the impact of reductions in Government funding and protecting services.
4. Due to the sensitive commercial nature of investment acquisitions, and the need to manage risk and protect the value of the Council's investments over the long term, certain detailed information is included in a confidential appendix and not to be disclosed.

Recommendations

5. That the District Executive:
 - a. Note progress made to date in acquiring new commercial investments
 - b. Note progress being made in securing income from our existing assets
 - c. Note progress being made in disposals and transfers of existing assets, resulting in a reduction of future liabilities associated with these assets.

Background

6. While presenting the "Commercial Services Income Update" report to District Executive in February 2018, members requested regular updates to show progress made in meeting the Commercial Strategy (approved by Council in August 2017). Following the update to Members in December 2018, this report is for noting the progress made to date by the

Commercial Property Team and their work on new investments as well as management of the existing asset portfolio.

7. This report is a succinct update of high level figures for new investments since December 2018, updated to 1 May 2019. It also updates members on work being carried out to increase income from existing assets and reduce liabilities. The Commercial Property Team has been stable in terms of staffing since the last report.
8. The former Property and Engineering team, combined with the more recently created Commercial Property, Land and Development Team all becoming the Commercial Property, Land and Development Team from January 2019. The team covers the broad range of property services functions within SSDC, including purchasing new commercial investments and management of the existing asset portfolio.
9. SSDC has a wide and varied range of assets that have been accumulated via various means over the years. The creation of South Somerset Homes (SSH) in 1998 meant that many assets were transferred via a Large Scale Voluntary Transfer (LSVT) to SSH, now Yarlinton, albeit numerous tranches of land were retained for strategic purposes, i.e. potential ransom strips.
10. After the LSVT, SSDC retained a portfolio of assets that mainly comprised of operational offices, listed buildings, industrial units, car parks and an assortment of land, i.e. grass verges, open spaces and ransom strips. These assets do not generate a substantial annual income and are now in many cases costing SSDC money through increased maintenance and running costs. Some, however, provide opportunities to generate value through development, sale receipts and development to also provide Council Tax, business rates and New Homes Bonus grant funding.
11. As part of the Commercial Strategy, Council approved a commercial approach to Land and Property management in August 2017.

Commercial Investments

12. Since the introduction of the Commercial Strategy, SSDC has purchased a number of investment properties. This report summarises the high level figures to demonstrate the annual income achieved via rent or sales.
13. The financial strategy includes an ongoing annual net income target of £2m for commercial investment income by April 2021. This target is net of all costs of borrowing, acquisition, risk reserve and staffing and equates to a 7% return from the investment and a 3% return to the revenue budget. The investments made to date are aiding progress towards this target with commercial income in the 2019 / 20 revenue budget and beyond to protect and support services to the communities.
14. The Council currently has a £36m investment portfolio, comprising eight assets, providing a gross income (before cost of borrowing) of £1.75m per annum, with capital sales expected at Marlborough prior to the end of 2019.

15. A further five investment assets (totalling £17.5m) are under offer, which will increase gross income to £2.84m in 2020. By 2020 the portfolio is expected to deliver a gross return of 7.03%.
16. These have been funded through internal borrowing to date meaning that as well as getting the return on investment, the council is also benefiting from charging of interest on the internal loan. However, the Council is now at a point where it needs to utilise external borrowing. All borrowing will be asset backed (i.e. if the Council wished to pay off the borrowing it will have an asset to sell to achieve this) and are required to produce a rate of return for the Council which meets the Commercial Strategy targets and therefore, covers interest, capital debt repayment and produces additional income to support the revenue budget. In making investments the Council seeks to meet its corporate ambitions as set out in the Council Plan to maximise the benefits to the communities of South Somerset. The costs and funding of each investment is set out in Confidential Appendix, table 1.

Market Commentary

17. Globally the economic outlook is characterised by softening momentum and high uncertainty. In January 2019 the International Monetary Fund estimated global growth to be 3.7% during 2018, softer than earlier predictions, and has suggested continued weak growth in 2019 is likely. In January 2019 the Financial Times reported on the British Chambers of Commerce's suggestion that the UK economy is in a 'weak holding pattern'. They lay the blame at the feet of Brexit and particularly the lack of clarity on how it will be effected, with businesses holding back from any major investment until they understand how Brexit will impact the economy.
18. Brexit is likely to have unforeseen impacts, the majority of which are expected to be negative, at least in the short term. The government's own model suggests a 9.3% hit to GDP over 15 years should 'no-deal' prevail, with a best case 3% under the Chequers deal. In the long term, the independent strength of the UK economy versus the other nations in the EU is likely to be countered by the loss of the benefits of free trade within the EU and purchasing power that the EU enjoys, so the future remains occluded. Oxford Economics have predicted a growth rate of 2.0% by 2020.
19. 2018 saw £62.1 billion invested in commercial property in the UK, indicative of the ongoing appetite, with £8.5 billion invested in December alone. However, growth has begun to tail off; in February all property values dropped 0.3%, largely attributable to the retail sector which lost 1% of its capital value, while industrial and office stock saw nominal increases of 0.2% and 0.1% respectively. Colliers International forecast commercial property returns to slow to 1.2% in 2019, with income return growing 4.8% but capital values shrinking by 3.5%.
20. Markets are still more competitive than when the Commercial Strategy was approved which has meant that opportunities meeting the target returns for the Council have been harder to uncover. Nevertheless the Council remains active in its acquisition process and

the local market is aware of the desire to buy well. We remain confident in achieving the objectives set in the Commercial Strategy for 2021.

M&S, Yeovil

21. Continues to provide annual revenue to SSDC. M&S announced a 7% increase in profits in 2018, and continues to transform its business model, shifting towards food and signing a new home delivery deal with Ocado. Despite a turbulent year, M&S shares on 24th April 2019 were 3.3pts up on the same date in 2018. M&S has announced a significant number of store closures as it continues to modernise its business. Yeovil has not been affected by any proposals thus far. SSDCs investment is linked to a long term lease to M&S.

Wilko, Yeovil

22. The property is tenanted until 2025 by a strong covenant and performs well as an anchor store to the town. There are no indications from Wilko that there is any intention to leave Yeovil. With the sale of Glovers Walk and regeneration of this area of town on the horizon we expect that this will remain the case for the foreseeable future.

Residential Development, Marlborough

23. This development has progressed well and is a few weeks away from practical completion. The three new build houses are effectively complete. The 15 apartments are formed by refurbishment of an existing building. As would be expected, this element has involved a significant number of individual unknown items needing to be resolved. These, combined with the agreed design improvements and some winter weather impact, have extended the construction programme. It remains our expectation that the scheme will be sold out prior to the end of 2019.
24. Agents' forecasts for the Marlborough location show that the capital value of similar residential units has grown this year. The sales of completed homes should generate a healthy receipt for SSDC, that can be reinvested into our town centre regeneration schemes. The additional community benefit of this scheme is that whilst it is out of SSDC area we are using local contractors wherever possible, aiding the local economy.

Energy Storage Scheme

25. The on-site project roll out was completed in April. Members and press were invited to a successful site visit day in March which helped raise awareness.
26. Testing and energisation of the facility is now in the control of National Grid and Western Power Distribution, and we hope to be energised in the coming months. We are working with them to advance final legal agreements and national testing standards sign off as quickly as possible.

27. The valuation of the site, as at 31 March 2019, for our accounts purposes confirmed that the facility and land was valued at more than the project costs expended. This may well rise in terms of the investment Market Value, once energisation and trading was established. Therefore, we expect the investment valuation to have significantly increased by the end of this financial year end and will seek an updated valuation at this time.

Unit 1-2 Dunball Industrial Estate, Bridgwater

28. Purchased in January 2019, this property marks the first industrial investment made by the Council. Industrial property is currently the best performing sector of the commercial property market due to supply and demand imbalance. It was identified as a purchase due to its situation adjacent J23 of the M5 and the likely increase in demand as a result of work at Hinkley Point.

Linden House, Bristol

29. Purchased in February 2019 as a result of the identification of the Central Bristol office market having historically low availability and rental voids. The long-leasehold, quality Grade B offices have been tenanted by the developer, a FTSE 250 covenant, since its construction in 2003.

Imperial House, Newport

30. Purchased in March 2019 this Grade A office is single let as the HQ to a national covenant who formed locally. It is amongst the best office buildings in Newport and is within a mile of J28 of the M4. The office is in excellent condition having been constructed in the 1990's and wholly refurbished in 2013. The opportunity was identified following the removal of the Severn Bridge toll which brings Bristol within half an hour's drive, and is likely to see an upturn in rents locally.

Hotel and Retail

31. A headlease interest in a brand new development comprising hotel and retail unit which will generate a secure long term rental income to SSDC.

Properties Currently Under Offer

32. Properties currently under offer are reviewed in the Confidential Appendix.

Commercial Investments Considered and Rejected

33. SSDC consider some 40 investment opportunities each month. We have a regularly updated set of criteria for agents identifying target yield, lot size, sector, unexpired term, location and tenant.

34. The Commercial Property Team continue to ensure that SSDC's name is in the market place and we are developing a reputation for acting quickly and professionally. This

ensures that SSDC is offered the most attractive opportunities and does not overpay for property.

35. SSDC's Commercial strategy also aims to create a risk-mitigated and balanced portfolio and therefore we will continue to be highly selective, in order to meet our strategic objectives.

Asset Management Update

36. Since the previous update to District Executive in December 2018, a number of enquiries have been received regarding the potential disposal of SSDC assets. These disposals can deliver estate management savings to SSDC, reducing our asset costs for the future and in turn improving the overall quality, values and returns of the wider portfolio.
37. We have sustained a focus on seeking to identify and deliver small development sites within existing SSDC landholdings. To date 12 pre-applications have been submitted and a number of these have received a favourable response from SSDC Planning. Two outline planning applications have been submitted. The first application is due before committee in June. The second application is in the very early stages and an update will be provided in due course. Following a review of all the available SSDC land ownership data a number of other opportunities have been identified and are subject to further investigation.
38. There are a number of residential and non-residential opportunities in the pipeline and Disposal Assessment Group (DAG) will be updated further as these opportunities progress.

The following provides an overall update:

Agreed terms on SSDC existing assets (further detail shown in Confidential Appendix):

- Extension of Chard Cemetery on SSDC owned land (yard at Zembard Lane and rear of 2 Crimchard)
- Sale of land adjacent 3 Belvedere Road, Yeovil to deliver estate management savings
- Lease for West Street Car Park store to a local charity to provide them with a place to operate from
- Licences for a number of Mobile Banking facilities to operate within SSDC car parks
- Refurbishment of a vacant housing property which will enable the disposal of a smaller, less efficient property

Current Negotiations on SSDC existing assets

- Churchfields, Wincanton potential redevelopment (subject to the relocation of occupants) a report will be brought to District Executive with a final recommendation when negotiations and research has been completed.
- Land rear of Poppy Close and Jasmine Close – potential disposal of land for garden extension
- Potential Community Asset Transfer of West Chinnock Recreation Ground to the Parish Council
- Renewal of lease for Chard Museum to enable future planning and funding

Completions relating to SSDC Assets

- Disposal of land North of Pent House, Penn Hill Park (Yeovil)
- Renewal of lease for business based in Dovecot building, Bruton
- Sale of Amenity Land at 74 Holyrood Terrace, Chard
- Sale of Amphora House in Langport
- Lease of units at Yeovil Small Business Centre
- Licence for youth club, Langport to utilise a section of the car park for outside activities

Disposals to Parish Councils & CAT's of SSDC Assets

- Community Asset Transfer of the Market House, Castle Cary to Castle Cary Town Council

Acquisitions

- Ham Hill Country Park has three landowners and the District Council recently purchased 74 acres of core Country Park land from one of the private landowners. Purchase enables its permanent inclusion in the Country Park and secures the ownership of the sites car parks, ice cream pitch and 14 key heritage assets.

Financial Implications

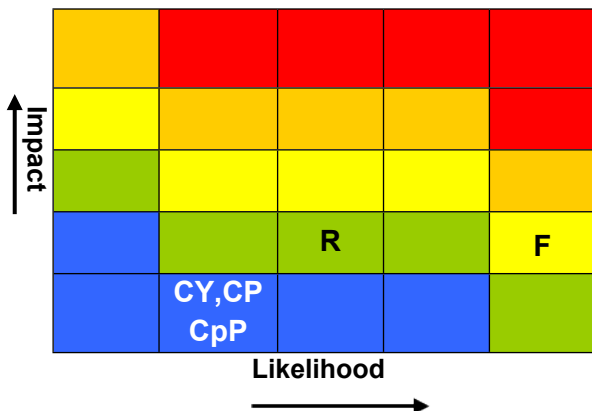
39. The financial implications for the progress with commercial investments and of asset management activity are set out above within the report and also in further detail in the Confidential Appendix.
40. SSDC has approved a large sum for commercial investment. The commercial strategy has been live for 21 months, and good progress has been made by establishing the team to

deal with acquisition, ongoing management and ultimate disposal of land and property assets including investment properties.

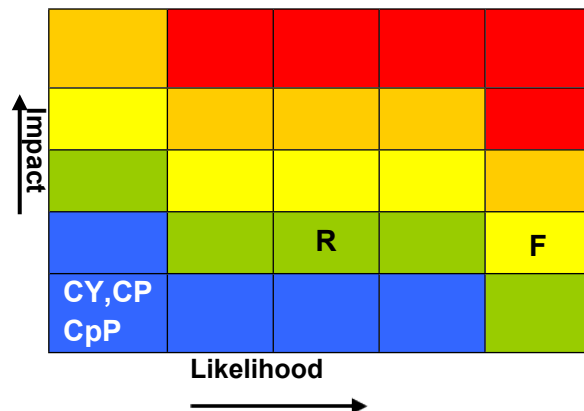
41. This report demonstrates that a number of acquisitions have been progressed, and some have been considered and rejected for a variety of reasons. This demonstrates the strategy is working, with the overall outcome that SSDC is making good progress in acquiring a balanced portfolio of investments that is on track to meet overall income generation targets within the financial strategy.
42. Detailed and robust due diligence has been completed with extensive involvement of SSDC’s finance and legal specialists together with external advisors (e.g. valuers, tax specialists, legal advisers, sector specialists) to support the property team in completing robust business cases that underpin recommendations and investment decisions. The decisions made have been through the agreed governance arrangements as approved by SSDC with the Investment Assessment Group providing unanimous recommendations to the Chief Executive and Council Leader for final decisions. Arrangements have been reviewed by Internal Audit and the minor improvements recommended have been implemented
43. The financial implications of completed acquisitions including costs, income and funding arrangements will continue to be incorporated in budget setting and monitoring processes, in line with SSDC’s financial procedures framework.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

This report links to the following Council Plan objectives:

- Protecting Core Services
- Take a more commercial approach to become self-sufficient financially
- Supporting the Regeneration of Chard, Yeovil and Wincanton
- Supporting local businesses

Carbon Emissions and Climate Change Implications

None

Equality and Diversity Implications

This report is for information purposes only

Privacy Impact Assessment

There is no personal information included in this report

Background Papers

- SSDC Commercial Strategy 2017
-

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

Document is Restricted

Agenda Item 10

District Executive Forward Plan

Executive Portfolio Holder: Val Keitch, Leader, Housing and Strategy
Lead Officer: Angela Cox, Democratic Services Specialist
Contact Details: angela.cox@southsomerset.gov.uk or (01935) 462148

1. Purpose of the Report

1.1 This report informs Members of the current Executive Forward Plan, provides information on Portfolio Holder decisions and on consultation documents received by the Council that have been logged on the consultation database.

2. Public Interest

2.1 The District Executive Forward Plan lists the reports due to be discussed and decisions due to be made by the Committee within the next few months. The Consultation Database is a list of topics which the Council's view is currently being consulted upon by various outside organisations.

3. Recommendations

3.1 The District Executive is asked to:-

- I. approve the updated Executive Forward Plan for publication as attached at Appendix A;

4. Executive Forward Plan

4.1 The latest Forward Plan is attached at Appendix A. The timings given for reports to come forward are indicative only, and occasionally may be re scheduled and new items added as new circumstances arise.

5. Consultation Database

5.1 The Council has agreed a protocol for processing consultation documents received by the Council. This requires consultation documents received to be logged. At the current time there are no outstanding consultation documents.

6. Background Papers

6.1 None.

Appendix A - SSDC Executive Forward Plan

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
July 2019	Capital & Revenue Budget out-turn reports 2018/19	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Paul Fitzgerald, Section 151 Officer	District Executive
July 2019	Allowenshay Private Water Supply	Portfolio Holder - Environment	Director Service Delivery	Vicki Dawson, Lead Specialist (Environmental Health)	District Executive
July 2019 July 2019	SSDC Annual Performance Report 2018/19	Portfolio Holder - Strategy & Housing	Director Strategy and Support Services	Cath Temple, Specialist (Performance)	District Executive South Somerset District Council
July 2019	Office Accommodation Review	Portfolio Holder - Strategy & Housing	Chief Executive	Alex Parmley, Chief Executive	District Executive
July 2019	Transformation Project Progress Report	Portfolio Holder - Strategy & Housing	Chief Executive	Alex Parmley, Chief Executive	District Executive
August 2019	Commercial Strategy 2017-2021 - mid term review and update	Portfolio Holder - Economic Development including Commercial Strategy	Director Commercial Services & Income Generation	Clare Pestell, Director (Commercial Services & Income Generation)	District Executive
August 2019	Homelessness and Rough Sleepers Strategy	Portfolio Holder - Strategy & Housing	Director Strategy and Support Services	Leisa Kelly, Specialist (Strategic Planning)	District Executive

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
August 2019	Capital & Revenue Budget monitoring reports for Quarter 1	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Nicola Hix, Lead Specialist (Finance)	District Executive
August 2019	Quarterly Performance and Complaints Monitoring Report	Portfolio Holder - Strategy & Housing	Director Strategy and Support Services	Cath Temple, Specialist (Performance)	District Executive
September 2019 February 2020	SSDC Financial Strategy 2020/21	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Paul Fitzgerald, Section 151 Officer	District Executive South Somerset District Council
November 2019	Capital & Revenue Budget monitoring reports for Quarter 2	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Nicola Hix, Lead Specialist (Finance)	District Executive
November 2019	Quarterly Performance and Complaints Monitoring Report	Portfolio Holder - Strategy & Housing	Director Strategy and Support Services	Cath Temple, Specialist (Performance)	District Executive
December 2019	Commercial Asset Update Report	Portfolio Holder - Economic Development including Commercial Strategy	Director Commercial Services & Income Generation	Robert Orrett, Commercial Property Manager	District Executive
December 2019	Draft 2020/21 Budget Update	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Paul Fitzgerald, Section 151 Officer	District Executive

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
February 2020	Capital & Revenue Budget monitoring reports for Quarter 3	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Nicola Hix, Lead Specialist (Finance)	District Executive
February 2020	Quarterly Performance and Complaints Monitoring Report	Portfolio Holder - Strategy & Housing	Director Strategy and Support Services	Cath Temple, Specialist (Performance)	District Executive
February 2020 February 2020	2020/21 Revenue and Capital Budget	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Paul Fitzgerald, Section 151 Officer	District Executive South Somerset District Council
February 2020 February 2020	2020/21 Capital Strategy	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Paul Fitzgerald, Section 151 Officer	District Executive South Somerset District Council
February 2020 February 2020	2020/21 Investment Strategy	Portfolio Holder - Finance, Legal & Democratic Services	Director Strategy and Support Services	Paul Fitzgerald, Section 151 Officer	District Executive South Somerset District Council
TBC	Leisure Contracts	Portfolio Holder - Health & Well-Being	Director Service Delivery	Lynda Pincombe, Specialist (Strategic Planning)	District Executive

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
TBC	Dualling of A303 from Sparkford to Ilchester	Portfolio Holder - Protecting Core Services	Director Strategy and Support Services	Specialist (Strategic Planning)	District Executive

Agenda Item 11

Date of Next Meeting

Members are asked to note that the next scheduled meeting of the District Executive will take place on **Thursday, 4th July 2019** in the Council Chamber, Council Offices, Brympton Way, Yeovil commencing at 9.30 a.m.