

SWT Executive

Wednesday, 15th June, 2022,
6.15 pm



Somerset West
and Taunton

The John Meikle Room - The Deane
House

[SWT MEETING WEBCAST LINK](#)

Members: Federica Smith-Roberts (Chair), Derek Perry (Vice-Chair), Benet Allen, Chris Booth, Dixie Darch, Caroline Ellis, Mike Rigby, Francesca Smith, Andrew Sully and Sarah Wakefield

Agenda

1. Apologies

To receive any apologies for absence.

2. Minutes of the previous meeting of the Executive

To approve the minutes of the previous meeting of the Committee.

(Pages 5 - 10)

3. Declarations of Interest

To receive and note any declarations of disclosable pecuniary or prejudicial or personal interests in respect of any matters included on the agenda for consideration at this meeting.

(The personal interests of Councillors and Clerks of Somerset County Council, Town or Parish Councils and other Local Authorities will automatically be recorded in the minutes.)

4. Public Participation

The Chair to advise the Committee of any items on which members of the public have requested to speak and advise those members of the public present of the details of the Council's public participation scheme.

For those members of the public who have submitted any questions or statements, please note, a three minute time limit applies to each speaker and you will be asked to speak before Councillors debate the issue.

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- 5. Executive Forward Plan** (Pages 11 - 12)

To receive items and review the Forward Plan.
- 6. Ecological Emergency Vision and Action Plan** (Pages 13 - 62)

This matter is the responsibility of Executive Councillor for Climate Change, Councillor Dixie Darch.
- 7. Report of the Task and Finish Group on Council Housing Zero Carbon Retrofit** (Pages 63 - 100)

This matter is under the responsibility of Executive Councillor for Housing, Councillor Francesca Smith.
- 8. Access to Information - Exclusion of the Press and Public (Appendices only)**

During discussion of the following item (Agenda Item 9 – Appendix 1 and 4 only, Agenda Item 10 – Appendix 2 and 3 only) it may be necessary to pass the following resolution to exclude the press and public having reflected on Article 13 13.02(e) (a presumption in favour of openness) of the Constitution. This decision may be required because consideration of this matter in public may disclose information falling within one of the descriptions of exempt information in Schedule 12A to the Local Government Act 1972. Executive will need to decide whether, in all the circumstances of the case, the public interest in maintaining the exemption, outweighs the public interest in disclosing the information.

Recommend that under Section 100A(4) of the Local Government Act 1972 the public be excluded from the next item of business (Agenda Item 9 – Appendix 1 and 4 only, Agenda Item 10 – Appendix 2 and 3 only) on the ground that it involves the likely disclosure of exempt information as defined in paragraph 3 respectively of Part 1 of Schedule 12A of the Act, namely information relating to the financial or business affairs of any particular person (including the authority holding that information).
- 9. Wellington Land Acquisition (The Green Spaces)** (Pages 101 - 134)

This matter is the responsibility of Executive Councillor for Economic Development, Planning and Transportation,

Councillor Mike Rigby.

10. North Taunton Woolaway Project - Vacant Possession of Site

(Pages 135 - 166)

This matter is the responsibility of Executive Councillor for Housing, Councillor Fran Smith.

A handwritten signature in black ink, appearing to read 'A Pritchard', with a horizontal line underneath.

**ANDREW PRITCHARD
CHIEF EXECUTIVE**

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Members of the public are welcome to attend the meeting and listen to the discussions. There is time set aside at the beginning of most meetings to allow the public to ask questions. Speaking under "Public Question Time" is limited to 3 minutes per person in an overall period of 15 minutes and you can only speak to the Committee once. If there are a group of people attending to speak about a particular item then a representative should be chosen to speak on behalf of the group. These arrangements do not apply to exempt (confidential) items on the agenda where any members of the press or public present will be asked to leave the Committee Room.

If you would like to ask a question or speak at a meeting, you will need to submit your request to a member of the Governance Team in advance of the meeting. You can request to speak at a Council meeting by emailing your full name, the agenda item and your question to the Governance Team using governance@somersetwestandtaunton.gov.uk

Any requests need to be received by 4pm on the day that provides 1 clear working day before the meeting (excluding the day of the meeting itself). For example, if the meeting is due to take place on a Tuesday, requests need to be received by 4pm on the Friday prior to the meeting.

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SWT Executive - 16 March 2022

- Present: Councillor Federica Smith-Roberts (Chair)
 Councillors Chris Booth, Dixie Darch, Caroline Ellis, Ross Henley, Mike Rigby, Francesca Smith and Andrew Sully
- Officers: James Barrah, Chris Hall, Alison North, Paul Fitzgerald, Clare Rendell, Tony Bryant, Sarah Povall, Kerry Prisco, Nicky Rendell, Malcolm Riches, Richard Sealy and Sue Tomlinson
- Also Present: Councillors Marcus Kravis, Libby Lisgo, Janet Lloyd, Vivienne Stock-Williams, Brenda Weston, Loretta Whetlor and Gwil Wren

(The meeting commenced at 6.15 pm)

89. Apologies

Apologies were received from Councillors M Kravis and D Perry.

90. Declarations of Interest

Members present at the meeting declared the following personal interests in their capacity as a Councillor or Clerk of a County, Town or Parish Council or any other Local Authority:-

Name	Minute No.	Description of Interest	Reason	Action Taken
Cllr C Booth	All Items	Wellington and Taunton Charter Trustee	Personal	Spoke and Voted
Cllr C Ellis	All Items	Taunton Charter Trustee	Personal	Spoke and Voted
Cllr L Lisgo	All Items	Taunton Charter Trustee	Personal	Spoke
Cllr J Lloyd	All Items	Wellington & Sampford Arundel	Personal	Spoke
Cllr M Rigby	All Items	SCC & Bishops Lydeard	Personal	Spoke and Voted
Cllr F Smith	All Items	Taunton Charter Trustee	Personal	Spoke and Voted
Cllr F Smith-Roberts	All Items	Taunton Charter Trustee	Personal	Spoke and Voted
Cllr V Stock-Williams	All Items	Wellington	Personal	Spoke
Cllr B Weston	All Items	Taunton Charter Trustee	Personal	Spoke
Cllr L Whetlor	All Items	Watchet	Personal	Spoke
Cllr G Wren	All Items	Clerk to	Personal	Spoke

91. **Public Participation**

No members of the public had requested to speak on any item on the agenda.

92. **Executive Forward Plan**

(Copy of the Executive Forward Plan, circulated with the agenda).

Councillors were reminded that if they had an item they wanted to add to the agenda, that they should send their requests to the Governance Team.

Resolved that the Executive Forward Plan be noted.

93. **Annual Pay Policy Statement 2022/23**

During the discussion, the following points were raised:-

- Councillors queried how Somerset West and Taunton Council (SWT) rates of pay compared to other Councils.
The HR Manager advised that research had been carried out to compare the rates and that SWT were slightly lower which was similar to Somerset County Council (SCC).
- Councillors were proud that SWT paid the living wage and that the Council paid officers well for the area.
- Councillors were pleased that the living wage had been adopted as the minimum wage for SWT, but they wanted to ensure that the living wage was put forward to the New Council for adoption.
The HR Manager advised that SCC was not at the same level due to different staffing sectors covered by the Council, but that they were looking at improving this going forward.
- Councillors asked whether market sector was applied to entice officers to certain roles.
The HR Manager advised that SWT used that process when they struggled to fill a post.

Resolved that the Executive recommended that the Pay Policy statement 2022/23 was approved by Full Council.

94. **Corporate Performance Report, Quarter 3 2021/22**

During the discussion, the following points were raised:-

- Councillors queried why there had been an increase in complaints received and whether it was due to Covid?
The Assistant Director for Customer advised that it was most likely linked to Covid and now services were reopening, that it was driving demand, but that they were carrying out work to improve the figures.
- Councillors praised the work carried out on emergency repairs.

- Councillors highlighted that officers were working hard to improve the results on the red indicators.

Resolved that the Executive noted the Council's performance report for quarter 3.

95. **2021/22 General Fund Financial Monitoring as at Quarter 3 (31 December 2021)**

During the discussion, the following points were raised:-

- Councillors queried the figures on page 34 of the agenda and the overspend due to the correction of out of hours payments for officers.
The Section 151 Officer would provide a written answer.
- Councillors requested that the comments made at Community Scrutiny on the lack of parking information were made out of frustration.
The Portfolio Holder for Parking and Transportation advised that the review on the parking strategy would be produced soon and would be brought to the Community Scrutiny Committee for feedback.
- Councillors were aware of the many impacts on the budget but were positive about the current position.

Resolved that the Executive noted the Council's forecast financial performance and projected reserves position for 2021/22 financial year as at 31 December 2021.

96. **2021/22 Housing Revenue Account Financial Monitoring as at Quarter 3 (31 December 2021)**

During the discussion, the following points were raised:-

- Councillors agreed it was a difficult time for residents and that SWT needed to ensure the residents were supported especially with the future increases in energy bills.
- Councillors highlighted that there was a slight overspend but understood that it was due to the current difficulties within the construction industry.
- Councillors were proud of the housing service provided by SWT.

Resolved that the Executive noted the HRA's forecast financial performance and projected reserves position for 2021/22 financial year as at 31 December 2022.

97. **Budget Approval - Electric Vehicle Charging Points**

During the discussion, the following points were raised:-

- Councillors queried whether SWT gave advice on how to buy an electric vehicle.
The Portfolio Holder for Climate Change advised that SWT was not able to give advice on the purchase of electric vehicles as it was too complex, but there were groups out in the community where residents could gain the information.

- Councillors were happy to support the report and were pleased to see an increase in the use of the charging points.

Resolved that the Executive recommended to Full Council the supplementary capital budget allocation of £120k, making a total of £270k of which £136k was secured funding from OZEV.

98. **Capital, Investment and Treasury Strategies 2022/23 to 2024/25**

During the discussion, the following points were raised:-

- Councillors queried that the Strategy seemed to focus on short-term borrowing and whether SWT should be looking at more longer-term schemes.
The Section 151 Officer stated that officers took advice from Arlingclose on borrowing and that they knew work would need to be done on what future borrowing looked like within the New Council.
- Councillors queried whether SCC had a Capital, Investment and Treasury Strategy, as it would mean the consolidation of the District investments if they didn't.
- Councillors were pleased with the Strategy.

Resolved that the Executive recommended to Full Council to approve the CIT Strategies and MRP Statement for adoption with effect from 1 April 2022.

99. **Wellington and Cullompton Railway Station Project - Approval of Revised Project Governance Arrangements**

During the discussion, the following points were raised:-

- Councillors queried why the report was not going to Full Council.
The Portfolio Holder for Planning and Transportation advised that the report was for the governance arrangements only, so therefore was an Executive decision.
- Councillors advised that Wellington Town Council were pleased to support the project.
The Portfolio Holder for Planning and Transportation thanked them for their support.
- Councillors agreed it was an exciting project and would make a big difference to the area.

Resolved that the Executive endorsed the governance arrangements set out in Appendix A.

100. **Wordsworth Drive and Coleridge Crescent Flats Regeneration, Taunton**

During the discussion, the following points were raised:-

- Councillors queried when the demolishing works would start?
The Assistant Director for Development and Regeneration advised that they needed to decant the flats first and that the shop was still under

lease. They hoped to be able to decant all the properties by April 2023 and then look to start works.

- Councillors thanked the Portfolio Holder for Housing for her cooperation in the comments made at Community Scrutiny Committee.
- Concern was raised that the future change in council would impact on the work.
- Councillors believed that the work on the decant of residents would have benefited from the experience of the North Taunton Woolaway Project.
- The Portfolio Holder for Housing advised she was keen to retain the land for housing developments but understood that it might need to be kept fallow for a period of time to attract subsidies and funding in the future.
- The Portfolio Holder for Housing thanked all for their comments.

Resolved that the Executive recommended to Full Council the following:-

- a) To approve the decanting of tenants from Wordsworth Drive Flats with the awarding of gold band status in April 2022. Gold band status would support tenants secure alternative suitable accommodation.
- b) To approve the decanting of tenants from Coleridge Crescent Flats with the awarding of gold band status at a time to be determined by the Director of Housing and Communities in conjunction with the portfolio holder for Housing.
- c) To approve the purchase through mutual consent one leasehold property at Wordsworth Drive flats and compensate the owner in line with statutory compensation requirements.
- d) To make available to the leaseholder the opportunity of a SWT Equity Loan to help secure alternative private accommodation.
- e) To note officers would agree the closure date and compensation with the shop leasee to ensure Wordsworth block was available for demolition.
- f) To approve the demolition of Wordsworth Drive and Coleridge Crescent Flats at a time to be determined by the Director of Housing and Communities in conjunction with the portfolio holder for Housing.
- g) Officers to return to the Council with options for the future use of the site.
- h) To approve a supplementary budget of £1,111,700 and to delegate the funding of the scheme to the Section 151 Officer.

(The Meeting ended at 7.30 pm)

EXECUTIVE

Executive Meeting	Draft Agenda Items	Lead Officer
15 June 2022	Ecological Vision and Action Plan	Katherine Church
venue =	Task and Finish Group Report on Council Housing Zero Carbon Retrofit	Marcus Prouse/Cllr Dave Mansell/Chris Brown/James Barrah
Exec RD = 3 June	Green Space Acquisition (confidential)	Jo O'Hara
Informal Exec RD = 4 May	North Taunton Woolaway Project Purchases	Jane Windebank
SMT RD = 20 April		
20 July 2022	GF Financial Monitoring – Outturn Position 2021/22	Kerry Prisco
venue =	HRA Financial Monitoring – Outturn Position 2021/22	Kerry Prisco
Exec RD = 8 July	Corporate Performance Report - Outturn Position 2021/22	Malcolm Riches
Informal Exec RD = 7 June	Information and Records Management Policy	Lauren Davis
SMT RD = 25 May	Digital Information Policy	Lauren Davis
	Member Information Policy	Lauren Davis
	Connecting our Garden Communities	Graeme Thompson
17 August 2022	KEEP CLEAR - TO ADD ITEMS, PLEASE SPEAK TO DIRECTORS	
venue =		
Exec RD = 5 August		
Informal Exec RD = 5 July		
SMT RD = 22 June		
21 September 2022	GF Financial Performance 2022/23 Q1	Kerry Prisco
venue =	HRA Financial Performance 2022/23 Q1	Kerry Prisco
Exec RD = 9 September	Corporate Performance Report Q1	Malcolm Riches
Informal Exec RD = 9 August	Firepool Design Guidance and Masterplan	Graeme Thompson
SMT RD = 27 July	CCTV	Sally Parry/Scott Weetch
	NO MORE ITEMS	
19 October 2022		
venue =		
Exec RD = 7 October		
Informal Exec RD = 6 September		
SMT RD = 24 August		
16 November 2022	Placeholder	Jonathan Stevens
venue =		
Exec RD = 4 November		
Informal Exec RD = 4 October		

SMT RD = 21 September		

Report Number: SWT 80/22

Somerset West and Taunton Council

Executive – 15 June 2022

Ecological Emergency Vision and Action Plan

This matter is the responsibility of Executive Councillor Member Cllr Dixie Darch

Report Author: Katherine Church, Project Manager, Climate Change

1 Executive Summary / Purpose of the Report

- 1.1 The Ecological Emergency Vision and Action Plan (EEVAP) is a joint initiative between Somerset West and Taunton and Sedgemoor District Councils. The vision sets out our ambitions for nature recovery and the action plan is the framework through which we will deliver these ambitions. This work builds on the nature-based actions listed within the Carbon Neutrality and Climate Resilience Action Plan (CNCR) with a particular focus on nature recovery.
- 1.2 If approved, the vision and action plan will embed ecological actions across work streams and will deliver ecological enhancement and protection across the two districts and beyond. In the advent of unitary, the EEVAP sets a precedent and a template for collaboration which can be duplicated across the county after vesting day.

Recommendations

Executive Committee are invited to comment on the recommendations that will be put to Full Council:

- 1.3 The ecological vision and action plan are approved.
- 1.4 Existing governance arrangements identified in the Somerset West and Taunton /Sedgemoor District Council Joint Climate Change Delivery Partnership are maintained and used as a framework for delivery and monitoring of the action plan.
- 1.5 Somerset West and Taunton with Sedgemoor District Council lead the creation and delivery of ecological recovery.
- 1.6 Annual reporting will be undertaken in conjunction with CNCR reporting.

2 Risk Assessment

- 2.1 The action plan is an extensive list of aspirational activities to be completed by 2030 whereby many of them will be delivered after unitary. The EEVAP is included within the LGR (Local Government Reorganisation) Environment and Climate Change Sub Group 1 workstream to ensure it remains within the ongoing workplan under the new Somerset Council.
- 2.2 The action plan is ambitious and requires the council to go above and beyond business as usual with a considerable amount of work to deliver its desired outcomes. Any draw on operational teams outside the agreed business plan will impact delivery performance. Immediate actions are therefore based on existing commitments although it is recognised that more resource is required as part of the council's statutory requirements to meet its obligations under the Environment Act 2021
- 2.3 The EEVAP requires adoption by both Sedgemoor District Council and Somerset West and Taunton to succeed. The plan has been developed in close collaboration with operations teams and input from Members from both councils with the partnership consultation panel being a critical point for review.

3 Background and Full details of the Report

- 3.1 In September 2020 Somerset West and Taunton Council (SWT) declared an Ecological Emergency (EE) complementing its Climate Emergency declaration made in February 2019.
- 3.2 SWT and SDC formed the Joint Climate Change Delivery Partnership in August 2021 optimising resources to deliver their joint ambitions to tackle climate change and the ecological emergency. A joint consultation panel forms part of the governance arrangements for this partnership and allows cross party members the opportunity to review activity and make recommendations to portfolio holders.
- 3.3 The EEVAP is owned by the Climate Change team, however actions are assigned to and delivered by services across SWT. Some of the actions will also be delivered by or in collaboration with partners.
- 3.4 The vision and action plan has been developed through an extensive collaborative process with input from both Members and staff across both SWT and SDC. SWT Members were briefed in January 2022 and this was followed by a Members' workshop in which ideas were captured and fed into the action plan draft prior to consultation with operational services. The inclusive approach means that we have been able to work quickly so that the action plan will be adopted in July 2022 and immediate actions delivered in financial year 22/23 prior to unitary. The plan also includes existing nature and ecological actions from the Council's Carbon Neutrality and Climate Resilience plan, as well as formalising activities the Council is already undertaking.
- 3.5 The vision provides a succinct overview of the challenges our natural world faces and our commitment to deliver ecological recovery. It sets out our four overarching ambitions:
 - **Wildlife and habitats**

Wildlife flourishes across our district's designated sites and wider ecological networks

- **Assets and Opens spaces**

Our open spaces and buildings are maintained and enhanced to enable wildlife to thrive and be more resilient to climate change

- **Our values**

We value the natural environment, and the ecosystem services it provides, informing our decision making.

- **People and nature**

Citizens engage with the natural environment through our well managed, accessible open spaces and through their informed lifestyle choices.

3.6 These four pillars are underpinned by our collaboration with partners at a national, regional and local community level.

3.7 There are a number of targets under each ambition which we are committed to achieving by 2030. This aligns with national and international ambitions. These sit within the vision document.

3.8 The actions within the plan are categorised under four main themes:

- ***Embedding nature recovery throughout all our own work within SWT and SD councils.***

Actions that the council can deliver directly through its decision making, policies and operational work streams.

- ***Working with partners including businesses to deliver ecological enhancement and protection.***

Actions that identify projects and initiatives in which SWT will influence and support other organisations to deliver shared goals for nature recovery across the district and further afield.

- ***Enabling citizens to connect and take action for nature***

Actions that work enable the local community and householders to engage with nature through direct action and through lifestyle choices.

- ***Governance: funding, measurement and reporting progress over time***

Actions that focus on building the framework through which all actions will be monitored and progress towards our targets and ambitions can be reported.

3.9 The action plan is structured into high level actions, which are broken down into projects and then sub-projects depending on the scale and strategic importance of the action. This structure supports delivery and reporting going forwards.

3.10 Many actions are not within the control of the Council to directly deliver and will be carried out by external partners and bodies. Council has a role to enable and support.

In addition, there are a number of lobbying and awareness raising activities that appear in the plan.

- 3.11 Each action has a time scale assigned to it. 'Immediate' will be delivered by end of 2022/23, and 'long term' by 2030.
- 3.12 This work demonstrates how we can work collectively across districts and shows leadership and commitment to nature recovery. The EEVAP provides a framework which is compatible with Local Nature Partnership outcomes and has the flexibility to be adopted by the new unitary Council.

4 Links to Corporate Strategy

- 4.1 This work falls under our Environment and Economy strategic priority "A low-carbon, clean, green and prosperous district that attracts high quality employment opportunities and encourages healthy lifestyle."

The document links to the following objectives:

Shape and protect our built and natural environment, supported by a refreshed Local Plan and develop our heritage, cultural and leisure offer including a clear vision and delivery plan for the Taunton Garden Town.

Provide and maintain green open spaces and parks, enhanced public spaces, as well as additional opportunities to safely walk or cycle in order to encourage active and healthy lifestyles

5 Finance / Resource Implications

- 5.1 Immediate actions are within the work plan and therefore do not have additional financial implications. However, there are several short – long term actions (post 2023 delivery) where additional resources will be required and will need to be agreed by the unitary authority from 2023/24 e.g. planning will require more resources to deliver the Local Plan and Biodiversity Net Gain.

6 Legal Implications

- 6.1 There are no identified implications from this report.

7 Climate, Ecology and Sustainability Implications

- 7.1 The EEVAP is the Council's comprehensive commitment to ecological protection and enhancement.

8 Safeguarding and/or Community Safety Implications

- 8.1 There are no identified implications of this report.

9 Equality and Diversity Implications

9.1 There are no identified implications of this report.

10 Social Value Implications

10.1 There are no identified implications of this report

11 Partnership Implications

11.1 The Council continues to work in partnership with other bodies to deliver ecological recovery, particularly through the Local Nature Partnership.

11.2 This is a joint piece of work with Sedgemoor District Council and timelines for adoption are slightly different. In Somerset West and Taunton, we aim to achieve adoption at Full Council scheduled on 5th July 2022 whilst in Sedgemoor District Council this is to be 20th July.

12 Health and Wellbeing Implications

12.1 Access to nature and open spaces plays an important role in our health and wellbeing. The EEVAP includes actions that will support this.

13 Asset Management Implications

13.1 Some of the actions require use of existing assets such as Somerset West and Taunton local nature reserves and open spaces, however the extent of our assets is limited and therefore ecological improvements will be delivered beyond the boundaries of our assets.

14 Consultation Implications

14.1 A Members' briefing was held in January 2022, with a subsequent workshop in February. The action plan has been developed in consultation with participants of **these events**.

15 Scrutiny Comments

15.1 Scrutiny committee heard and discussed this report on 25th May and they unanimously agreed to support the EEVAP. There was positive feedback from members regarding the content of the report such as local actions addressing the global challenges of resource use and biodiversity loss, and the benefits nature recovery brings to people. There was some concern about the EEVAP only covering Sedgemoor and SWT councils whilst we move to a unitary council in April 2023. It was explained that the decision to create EEVAP was made prior to unitary being confirmed. This work sets a precedent and framework which can be adapted for the new council and is included in the LGR within the Environment and Climate Change

Sub Group 1 workstream

- 15.2 A couple of comments were made which will be addressed in the vision document. These included concern of the focus being predominantly on Redlist species at the expense of other species that are currently fairing well. It was confirmed that the former are indicator species and other species will not be ignored.

16 The Democratic Path:

- **Scrutiny Committee – Yes (25/05/22)**
- **Executive – Yes (15/06/22)**
- **Full Council – Yes (5/07/22)**

Reporting Frequency: Annually

List of Appendices

Appendix A	Ecological Emergency Vision
Appendix B	Ecological Emergency Action Plan

Contact Officers

Name	Katherine Church
Email	k.church@somersetwestandtaunton.gov.uk
Name	Sue Tomlinson
Email	s.tomlinson@somersetwestandtaunton.gov.uk

Sedgemoor, and Somerset West and Taunton, District Councils' Joint Ecological Emergency Vision Document

Introduction

This Vision sets out our ambitions to address the ecological deterioration within our districts and within our district and to lessen our global impact on the natural world". It is accompanied by a comprehensive action plan that provides the practical steps to deliver ecological recovery. It builds on previous work to address the Climate Emergency, but with a specific focus on wildlife and habitats.

Background

In September 2020 Somerset West and Taunton Council (SWTC) declared an Ecological Emergency (EE) complementing its Climate Emergency declaration made in February 2019. Sedgemoor District Council (SDC) is in the process of declaring an EE and recognises the need to protect and enhance its natural environment. It released its Climate Emergency Strategy and Action Plan in January 2021 which includes nature focussed actions.

Never has the need for change been more critical. Our fragmented habitats and their wildlife are increasingly at risk from human activity including climate change, farming, pollution, land use change, overfishing, pesticide use and deforestation. These activities often occur within supply chains as we seek to satisfy the demand for more goods and services, at the expense of the world's natural resources, habitats and wildlife. Globally mammal, bird, amphibian, reptile and fish populations have declined by an average 68% between 1970-2016¹. Freshwater animals have experienced one of the largest declines (88%), with nearly one in three freshwater species being threatened with extinction².

In the UK, our actions continue to threaten species and since 1970, 41% of species are experiencing a decline in numbers, 15% are threatened with extinction and 27% are found in fewer places³. Without swift action further decline will continue and iconic species that are vulnerable to extinction such as the hedgehog will disappear from our shores.

In Sedgemoor and Somerset West and Taunton we are blessed with a rich tapestry of landscapes and habitats. These include the coastline along the Bristol Channel, the magnificent uplands of Exmoor National Park, the Mendip, Quantock and Blackdown Hills Areas of Outstanding Natural Beauty (AONBs), the lowland expanses of the Somerset Levels and Moors and our urban centres such as Bridgwater, Minehead and Taunton. Our districts are home to a mosaic of statutory designated sites, designated for particular habitats or species and include Special Protected Areas (SPAs), Special Areas of Conservation (SACs), Sites of Special Scientific Interest (SSSIs), Ramsar (internationally recognised waterfowl habitats), National Nature Reserves (NNRs) and local nature reserves (LNRs). It is now also home to the UK's first 'super' National Nature Reserve. All deliver a

¹ Lambertini, M., 2020. Living Planet Report 2020: Bending the Curve of Biodiversity Loss.

² Collen, B., Whitton, F., Dyer, E.E., Baillie, J.E.M., Cumberlidge, N., Darwall, W.R.T., Pollock, C., Richman, N.I., Soulsby, A.-M., Böhm, M., 2014. Global patterns of freshwater species diversity, threat and endemism. *Glob. Ecol. Biogeogr.* 23, 40–51. <https://doi.org/10.1111/geb.12096>

³ State of Nature Partnership, State of Nature 2019.

multitude of functions e.g., flood alleviation and recreation; comprise a range of habitats; and are home to a variety of species.

These important sites play a significant role in supporting wildlife, yet recent studies show that many are in an unfavourable condition. In Sedgemoor, 63% of its terrestrial SSSI habitat which should be in pristine condition is in an unfavourable declining or partially destroyed condition and in Somerset West and Taunton only 11 out of 35 describe as being in a favourable condition.

Our river catchments and waterways including the Rivers Axe, Sheppey, Brue in the north and Cary, Yeo, Tone and Parrett to the south are the lifeblood of our districts' habitats. Yet in 2019, none were in a good condition for nature in Sedgemoor. Similarly, in Somerset West and Taunton, catchments that had been previously rated as good for wildlife before 2013 have deteriorated in condition and more categorised as moderate or poor for nature according to Environment Agency's classification hierarchy. The plight of our rivers is influenced by human activity, particularly from farming and sewage disposal. The Somerset Levels and Moors (SLMs) is a designated RAMSAR wetland landscape recognised for its internationally important waterfowl, and resident insects, yet it is experiencing high levels of phosphate enrichment which threatens the nutrient balance of its waterways and the wildlife that depend on it.

The loss of habitats and species can have a wider impact affecting our communities and economy. Each species has an ecological role to play within a functioning ecosystem and their decline can negatively influence the ecosystem services that they provide. Insects, for example, are responsible for pollination, which is essential for agricultural and horticultural production, and for sustaining wildflowers. If pollinating insects went into serious decline the health of England's £100 billion food industry would be seriously damaged.⁴ Our natural world is essential for us to prosper and thrive and we must take action to protect and enhance it.

The crises of biodiversity loss, ecosystem degradation, and climate change are inter-connected; we cannot have a thriving natural world without a healthy climate. Our natural environment can play a key role in mitigating the effects of climate change through nature-based solutions but equally it can enable us to adapt to changes that we are already starting to experience. As such they are not considered in isolation of each other, however both councils recognise the need for a dedicated Ecological Vision and Action Plan (EEVAP). We will build on Somerset's Climate Emergency Strategy, SWTC's Carbon Neutrality and Climate Resilience (CNCR) Action Plan and SDC's Climate Emergency Action Plan which have already identified over 150 potential actions to support biodiversity enhancement and recovery.

Time for action

Nature has moved up the international, national and local political agenda. 2021's COP26⁵ focussed more on nature than ever before, calling all governments to endorse the *Leaders' Pledge for Nature*. Now over 90 world leaders are committed to reversing biodiversity loss by 2030 for sustainable development. In addition, the Environment Act achieved Royal Assent in November 2021. This will lead to the setting of national targets, plans and policies for improving the natural environment through increasing biodiversity, halting species decline by 2030, restoring habitats, improving air and water quality, and the transitioning to a circular economy through better resource efficiency and waste reduction.

⁴ Defra, The National Pollinator Strategy: For bees and other pollinators in England Nov 2014

⁵ The 26th United Nations Climate Change Conference held in 2021.

Of particular importance will be the requirement for a minimum of 10% biodiversity net gain (BNG) from all new developments (from 2023) and the delivery of the National Nature Recovery Network (NRN) through Local Nature Recovery Strategies which will be delivered in partnership with local government, NGOs, the private sector and the public.

In addition, improvement to water and air quality will over time reduce the risk of pollution and nutrient enrichment. These legally binding commitments provide the statutory framework through which we can help nature recover across our two districts and beyond.

With the charge of political momentum, we have an opportunity to lead changes at a local level, setting an example, encouraging and influencing others. This vision and the accompanying action plan will balance the urgency for carbon neutrality and resilience with the need to protect and build wildlife corridors, support natural processes and improve the condition of habitats to enable nature to recover.

We can support our natural environment by:

- Promoting and implementing sustainable land and woodland management,
- Protecting habitats and avoiding land use change that degrades the landscape and its inhabitants,
- Creating connectivity and wildlife corridors to improve species resilience,
- Improving soil, air and water quality,
- Maintaining genetic diversity,
- Reducing invasive species, reducing pollution e.g. plastics, chemicals excess nutrients and hazardous waste,
- Developing climate resilience in habitats.

Vision Statement

Our vision is a district where the needs of wildlife, people, and our local economies are integrated in a way that enables nature and our communities to thrive now and in the future.

Our Ambitions

There are four pillars through which we will achieve ecological recovery. These focus specifically on wildlife and habitat conservation; managing our own assets in a way that supports wildlife, through our decision making and policies and through our communities. All our ambitions are underpinned by the need to collaborate with partners at a local, regional and national level.

1) Wildlife

Wildlife flourishes across our districts' designated sites and wider ecological networks

To give wildlife the best chance of thriving, the habitats on which they depend need to be in a favourable condition. Our designated sites, such as local nature reserves and SSSIs, play a key role, along with the wider environment and wildlife corridors such as rivers, roads and urban centres. These will be managed in a way that both protects existing wildlife populations from further deterioration and enhances conditions to help increase the abundance of species that are in decline. Key species including those that are both on the IUCN's Red List of threatened

species⁶ and are County Notable such as the Hazel Dormouse along with other species will be monitored as indicators of habitat condition. Working with partners will be key in delivering this ambition, particularly through the Somerset Local Nature Partnership (SLNP) – a collaboration of over 20 organisations working together to deliver the statutory Local Nature Recovery Strategy and the NRN.

2) Assets and open spaces

Our open spaces and buildings are maintained and enhanced to enable wildlife to thrive

We own and manage a variety of open spaces and properties across the districts and there are many ways in which these can contribute to nature recovery, for example, through pollinator friendly grassland management practices. When carried out appropriately these approaches offer positive ways to support wildlife whilst still delivering other functions such as recreational use.

3) Our values

We value the natural world and ecosystem services it provides, informing our decision making

As a council we value nature for its intrinsic value and for the ecosystem services that it provides, helping to protect against the effects of climate change. We recognise the part it plays in our sense of place and cultural heritage; in providing us with food and fuel, in regulating natural processes such as water and air purification and how all these supporting our local economy. Our policies and procedures reflect this, empowering our staff to make decisions and deliver services that minimise ecological impact both locally and globally to go beyond our statutory obligations to protect nature.

4) People and Nature

Citizens engage with the natural environment through our well managed, accessible open spaces and through their informed lifestyle choices

Whilst policies drive the platform for change, ecological protection and improvements can only be implemented at a localised, grassroots level. The more citizens engage and value nature, the more they will take steps to look after it too. Often it is our open spaces that provide the opportunity for people to connect and take action for nature. Equally citizens can make informed choices in the home, whether in the garden or through their purchasing choices. We will work with partners to support and inform citizens on how they can get involved and be part of the solution.

Targets

Targets to be delivered by 2030			
Wildlife	Assets & open spaces	Our values / Influencing	People and nature

⁶ The International Union for Conservation of Nature’s Red List of Threatened Species is the global standard for assessing the risk of extinction that individual species of animal, fungus, and plant face. It is a critical indicator of the health of the world’s biodiversity. Currently, there are more than 142,500 species on the IUCN Red List, with more than 40,000 species threatened with extinction. <https://www.iucnredlist.org/>

1a	Large scale tree planting and other nature recovery projects across the district and wider area are delivered with partners	2a	Open spaces are well managed to support wildlife either directly by the council or through the community groups with the support of the council.	3a	The environmental and ecological well-being of our district is integrated into all policy decisions made by the council.	4a	1 in 4 citizens take action for wildlife (aligned with Somerset Wildlife Trust's Team Wilder campaign)
1b	Habitats across the district including the councils' designated sites are in a favourable condition.	2b	All grassland areas are managed in accordance with best practice grassland management to support wildlife where appropriate.	3b	Procurement policies enable the purchase of products and services that support ecological protection and improvement at a local, national and international level.	4b	All pupils complete one term of environmental education by the time they leave primary school.
1c	Our green and blue infrastructure connect to the wider environment and contribute to Somerset's NRN.	2c	The use of chemicals is minimised, and alternatives are used where possible.	3c	All planning decisions consider ecological footprint of all new developments and contribute to a minimum of 10% biodiversity net gain.	4c	All publicly owned open spaces have a community group, good interpretation and signage and are accessible to the public.
1d	Wildlife flourish in our district. In particular Species Red List and County notable species (specifically Hazel dormouse, lapwing and Grizzled skipper) thrive in our district and wider area.	2d	All plants are grown or sourced in peat free growing medium and contribute to climate change resilience and nature recovery.	3d	We collaborate with others and lobby government to ensure policies protect our wildlife and natural environment.	4d	Businesses play their role in supporting wildlife recovery.
				3e	Our staff understand the importance that		

					nature plays and have the skills and knowledge to consider it in their decisions making and implementation of their roles.		
				3f	We monitor and communicate our progress towards nature recovery.		

Mission

We will achieve our ambitions and targets through four overarching activities:

1. Embed nature recovery throughout all our own work within SWTC/SDC
2. Work with partners including businesses to deliver ecological enhancement and protection
3. Enable citizens to connect and take action for nature
4. Measure and communicate progress over time

Embed nature recovery throughout all our own work within SWTC/SDC

AT SWTC/SDC we aim to reverse the degradation of our habitats and loss of biodiversity. We will embed nature in all our decision making and policies to deliver actions that protect and enhance it and build its resilience against climate change. This includes actions within our towns and villages through planning and through the management and maintenance of council owned assets.

We will:

- Build the business case for nature protection and enhancement by using appropriate methods based on natural capital and ecosystem services to inform all our decision making.
- Develop and implement planning policies to support ecological protection and improvement include +10% biodiversity net gain (BNG) for all new developments as soon as is reasonably possible;
- Develop and Implement a Green Procurement strategy which takes into account ecological impact for all purchases and enables staff to make sustainable choices.
- Embed ecological protection and enhancement within all green and blue infrastructure plans including Taunton Garden Town and river and coastal flood mitigation projects to contribute towards the delivery of the NRN;
- Manage our outdoor spaces in a way that supports wildlife enhancement alongside public accessibility and carbon sequestration;
- Prioritise management and maintenance of our LNRs to create exemplar sites;
- Develop and implement a grassland strategy to support pollinators and invertebrates;
- Develop a tree strategy to plant and maintain the right trees in the right place;

- Implement nature-based solutions to support climate mitigation and adaptation including flood and coastal flood management;
- Stop the use of peat-based composts;
- Committee and council reporting to include ecological implications, alongside those for climate and sustainability.

Work with partners including businesses to deliver ecological enhancement and protection

At the heart of our efforts is our collaboration with partners across the region. In particular, we will work with the Somerset Local Nature Partnership to develop the Local Nature Recovery Strategy and deliver the Nature Recovery Network (NRN), and align with initiatives such as Somerset Wildlife Trust's Wilder Somerset 2030 plan and Exmoor's National Park's Nature Recovery Vision to deliver shared ambitions.

We will:

- Work with partners through the Local Nature Partnership to develop and deliver a Local Nature Recovery Strategy
- Contribute towards State of Nature and NRN for Somerset by identifying opportunities to connect existing council land assets to create wildlife corridors, sequestration/stores and improve the landscape's resilience to climate change;
- Support efforts to secure land that will contribute to NRN and landscape scale projects.
- Work with Somerset Wildlife Trust, Exmoor National Park, the Mendip Hills, Quantock Hills and Blackdowns Hills AONBs, and other councils across Somerset in a co-ordinated approach to delivering shared goals such as a Peat Action Plan and Tree Strategy, a Pollinator Action Plan, and protocols around biosecurity and invasive species control;
- Work with partners to deliver good water and soil quality and healthy aquatic (including wetlands) and terrestrial habitats;
- Work with partners to deliver actions which address the issues of nitrate and phosphate loading within the two districts;
- Work with Heart of the South West Local Enterprise Partnership and support businesses to help deliver nature recovery through their operations and supply chains;
- Promote ways to reduce, reuse and recycle and support initiatives to reduce single use plastics and fly tipping;
- Lobby government to support ecological enhancement and protection.

Enable citizens to connect and take action for nature

Our communities play a vital role in making the big step change needed to tackle the EE. There are many actions individuals and groups can take, from volunteering their time to restore sites for wildlife at home and within their locality to making lifestyle choices that support greener living or campaigning for systemic change. The pandemic highlighted how nature has a positive impact on our health, well-being and our sense of place. We will work with community groups to enable people to connect with nature and help them take an active role in engaging with and protecting it. We will also work with our partners to drive behaviour change in our homes, schools, and businesses.

We will:

- Create opportunities to connect the community e.g. ('Friends of' groups/mental health groups/behaviour change/schools/private gardens/businesses) with nature;
- Use our open spaces and nature reserves as opportunities to communicate to citizens about the importance of the natural world;
- Develop a communications plan linked with climate change to inform householders of actions taken by the councils and partners;
- Work with partners to deliver a behaviour change campaign to support householders to make informed lifestyle choices;
- Support campaigns that lobby government to support nature recovery.

Governance: Funding, monitoring, and reporting progress over time.

Monitoring progress towards nature recovery is vital in determining the efficacy of the actions taken to deliver it and enables SWTC/SDC to communicate progress and successes to our stakeholders. The Environment Act requires local authorities to produce a Biodiversity Report every five years, describing the actions taken and their impact, including action taken on BNG. Monitoring helps to develop a continuous improvement culture, facilitating a performance review, risk management and change process. Working with partners, we will set targets that will align with local, national, and international ambitions and we will develop KPIs, and SMART objectives. We will work with partners to develop baseline data and agree a methodology so that we have consistency across the county which will enable smooth transition into unitary.

We will:

- Co-ordinate and have oversight of all SDC/SWTC ecological improvement activities so that they can be reviewed and continually improved;
- Monitor our progress against targets and ambition and intervene where appropriate to ensure we keep on track;
- Work with new and established community groups to deliver best practice monitoring over time;
- Develop a fundraising strategy to deliver actions where there is insufficient budget and/or resources.

We will take action in broadly four ways:

Delivering – those actions where the Council can directly deliver a defined outcome;

Enabling – those actions where the Council's role is to facilitate delivery of defined outcomes, for instance, funding or officer time;

Supporting – those actions where the Council can support or encourage the delivery of a defined outcome, namely working with groups or organisations;

Lobbying – those actions where the Council's primary role is to promote and push for change, e.g., a change to policy, legislation or funding.

Unitary

Working in partnership, SDC and SWT are currently joint owners of the EEVAP and responsible for its delivery. As we move into unitary in 2023, this work will continue to be delivered by the new council. The framework by which this work has been created sets a precedent through which

ecological recovery can be delivered and progress monitored by the rest of the county and which can be adapted in accordance with localised needs.

Definitions

Ecology – the study of the interactions between organisms and their environment

Ecological Emergency - organisms, the habitats in which they live are in severe decline and are threatened to the point where they are no longer self-sustaining.

Nature - the physical world, its processes and everything in it (such as flora, fauna, mountains, oceans etc.) that is not made by humans.

Wildlife – all organisms (fauna and flora) that live or grow wild in an area.

Ecosystem - the complex interaction of a community of organisms and its environment functioning as an ecological unit

Habitat - a place where an organism lives in which all the environmental conditions enable an organism to survive. For an animal, that means everything it needs to find and gather food, select a mate, and successfully reproduce. For a plant, a good habitat must provide the right combination of light, air, water, and soil.

Natural Capital - natural assets in their role of providing natural resource inputs and environmental services for economic production. They comprise three principal categories: natural resource stocks, land and ecosystems.

Ecosystem Services - the benefits provided by ecosystems that contribute to making human life both possible and worth living. They include:

- Products or provision services e.g. food and raw materials,
- Regulating services e.g. forested ecosystems provide carbon sequestration and climate regulation,
- Supporting services e.g. nutrient cycling, and
- Cultural services e.g. recreation, health and wellbeing.

Sedgemoor and Somerset West and Taunton Districts' Proposed Ecological Emergency Action Plan

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
Theme 1: Embed nature recovery throughout all our own work within SWT/SDC												
Action 1	Build the business case for nature protection to inform decisions across the council											
1.1	Pilot innovative projects that demonstrate the business case for nature.	short	SDC/ SWT	1.1.1	Undertake cost analysis of new grass cutting management plan.	Immediate	SWT	1	2	3	2b/3d/3b	Deliver
1.2	Undertake review of mechanisms for decision making which include ecological improvement and protection.	short	SDC/ SWT					1		3	1b/3a	Deliver
1.3	All staff undertake training to understand biodiversity loss and how they can have a role in supporting it.	Short	SDC/ SWT							3	3e	Enable
Action 2	Develop and implement planning policies that support ecological protection and improvement											
2.1	As part of the new unitary Local Plan develop policies that support nature recovery, including Local Nature Recovery Strategy, and	medium	SDC/ SWT	2.1.1	Work with Somerset County Council and others to develop Interim Planning guidance statement that explicitly seeks to secure ecological	Immediate	SDC/SWT	1		3	1c/ 3c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type	
	Biodiversity Net Gain (links to CNCR 133).				protection and enhancement, supporting Biodiversity Net Gain and Nature Recovery Networks consistent with adopted Local Plans and NPPF requirements.								
				2.1.2	Review and update existing local validation requirements/guidance and include multifunctional landscapes that deliver benefits such as SUDS; ecological protection and enhancement; climate mitigation; retention of soil function (structure and health).	short	SDC/SWT	1		3		1c/ 3c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
				2.1.3	Develop Local Plan policies and guidance, setting out expectations with regards to on-site measures to protect habitats, biodiversity, and protected species delivery a minimum of 10% BNG from new developments (links to CNCR 141).	Medium	SDC/SWT	1		3	1c/ 3c	Deliver
				2.1.4	Within interim planning guidance encourage the incorporation of simple on sites measures within a development that can help contribute to addressing biodiversity decline (e.g. bee bricks, nesting, roosting and hibernation boxes) where appropriate.	short	SDC/SWT	1		3	1c/ 3c	Support

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
				2.1.5	Develop Local Plan policies requiring retention and protection of ancient trees and habitats within new development sites (links to CNCR 134).	Medium	SDC/SWT	1		3	1c/ 3c	Deliver
				2.1.6	Develop Local Plan and corporate policies requiring replacement of any trees that are removed using right tree right place principle or with other habitats that have a better impact on biodiversity, and are consistent with forthcoming Biodiversity Net Gain requirements. (Amended CNCR 135).	Medium	SDC/SWT	1		3	1c/ 3c	Deliver
				2.1.7	Develop local Plan policies that maximise brownfield site	Medium	SDC/SWT	1		3	1c/ 3c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type	
					development opportunities.								
				2.1.8	Develop local Plan policies that support nature positive farming practices and diversification that can deliver more viable ecosystem services (CNCR Ref 114 amended).	Medium	SDC/SWT	1		3		1c/ 3c	Deliver
				2.1.9	Develop Local Plan policies that protect existing and allocated land and set requirements to support new traditional orchards and allotments (CNCR 110 amended).	Medium	SDC/SWT	1		3		1c/ 3c	Deliver
				2.1.10	Develop local plan and policies that protect and create pollinator habitats (CEAP 94).	Medium	SDC/SWT	1		3		1c/ 3c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
								1	3			
2.2	Ensure ecological conditions of planned developments are enforced and where appropriate take action where breaches are identified.	short	SDC/SWT	2.2.1	Build capacity and capability of planning team by appointment of additional tree, ecology, landscape and enforcement officers and provide training to existing staff to monitor compliance of tree and biodiversity net gain policies and deliver ecological protection under LGR (CNCR 288 amended).	short	SDC/SWT	1		3	1c/ 3c	Deliver
2.3	Support developers to integrate high quality landscapes and SUDS in all new developments to support flood management and water quality (links to CEAP 100).	short	SDC/SWT	2.3.1	Review and update existing local validation requirements/guidance and include multifunctional landscapes that deliver benefits such as SUDS; ecological protection and enhancement;	short	SDC/SWT	1		3	1c/ 3c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type	
					climate mitigation; retention of soil function (structure and health).								
				2.3.2	Signpost developers to Somerset Council's SUDS guidance when published.	short	SDC/SWT	1		3		1c/3d	Support
				2.3.3	Provide guidance to developers on delivering phosphate neutral developments and monitor effect of measures P neutral measures.	short	SWT	1		3		1c/ 3c	Support
2.4	Landscape management schemes on new developments deliver high quality habitats that support wildlife and have long-term maintenance plans in place meeting 10% Biodiversity Net Gain requirement as a minimum.	Short	SDC/ SWT					1		3		1c/3c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
								1	3	4		
2.5	Request that all construction/ sustainability method statements for all new developments include soil resource plans for the best and most fertile soils.	short	SDC/ SWT					1	3		1c/3c	Deliver
2.6	Firepool development in Taunton is delivered as an exemplar site that integrates ecological protection and enhancement into the fabric of the site design.	long	SWT					1	3		1c/3c	Deliver
2.7	Support and encourage parish or town councils to develop neighbourhood plans that protect and enhance biodiversity and habitat recovery.	ongoing	SDC/ SWT					1	3	4	1c/3c/4a	Support
Action 3	Embed ecological protection and enhancement within all green and blue infrastructure plans, and river and coastal flood mitigation projects to contribute towards the delivery of the Nature Recovery Networks											
3.1	Complete a new Green and Blue Infrastructure Strategy for the district drawing together opportunities to improve access to green spaces, active travel	Immediate	SWT					1	3		1c/3c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
	linkages, reinstate and create green landscape linkages, improve biodiversity, re-wild and regenerate the landscape and increase carbon sequestration and climate resilience (CNCR 120).											
3.2	Review and integrate ecological improvements within green infrastructure design delivering multi-functional benefits that support nature recovery networks.	short	SDC/ SWT					1		3	1c/3a	Deliver
3.3	Consider ecological protection and improvement within all coastal flood mitigation projects and where appropriate implement nature-based solutions.	Long	SDC/ SWT	3.3.1	Continue Berrow Dunes, Bridgwater (LNR/SSSI) management and The Meads Eco Park to support rare habitats and a nature-based solution for higher risk of tidal flooding (relates to CEAP 97).	Immediate	SDC	1		3	1c/ 3a	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
				3.3.2	Deliver Longrun Meadow flood mitigation project.	Medium	SWT	1		3	1c/3a	Deliver
3.4	Consider ecological protection and improvement within all river flood mitigation projects and where appropriate implement nature-based solutions.	Medium	SDC/ SWT	3.4.1	Parrett Barrier includes mitigation measures to protect wildlife e.g. inclusion of eel and fish passes within the design.	short to medium	SDC	1		3	1c/3a	Enable
				3.4.2	Deliver e-meandering of Tone in Vivary Park, Taunton supporting the creation of habitats and wildlife.	Medium	SWT	1		3	1c/3a	Deliver
Action 4	Manage assets to support healthy habitats and biodiversity											
4.1	Retrofit artificial nesting, roosting and hibernations boxes to council owned property to support key species in the region.	Immediate -short	SDC/ SWT	4.1.1	Identify opportunities to deliver nesting boxes inappropriate place.	Immediate	SDC/SWT	1	2	3	1d/2e/3a	Deliver
4.2	Manage heritage properties to support nature recovery.	Long	SDC/ SWT	4.2.1	Incorporate ecological protection within development of Toneworks heritage site,	Long	SWT	1	2	3	1d/2e/3a	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions				Targets	Delivery Type
					Wellington alongside cultural importance.								
4.3	Sedgemoor software upgrade and refurbishment considers environmental impacts of equipment and manages old equipment following the waste hierarchy principles i.e. reuse and recycle where possible thus reducing impact of raw material extraction.	Immediate	SDC					3				3b	Deliver
Action 5	Manage our outdoor spaces in a way that supports wildlife enhancement alongside public accessibility and usability; and carbon sequestration (links to CNCR 271)												
5.1	Develop and implement a grassland strategy to support pollinators and invertebrates (linked to CEAP 94).	Short	SDC/SWT	5.1.1	Conduct annual review of grassland management and determine success, and continual improvement.	Medium	SDC/SWT	1	2	3		1b/2b/3a	Deliver
5.2	Review, update and implement LNR and other open spaces management plans to support wildlife (CNCR 142 adapted).	Immediate	SWT	5.2.1	Children's Wood & Hankridge improvements.	Immediate	SWT	1	2		4	1b/1d/2a/4c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
								1	2	3		
5.4	Work with Plantlife to develop wildflower areas to promote rare arable weed species. Improve reedbed habitats.	Immediate	SDC					1	2		1b/2c	Deliver
5.5	Nursery practices support ecological recovery.	medium	SWT	5.5.1	Replace peat compost with peat free compost within the nursery.	Immediate	SWT		2	3	2d/3b	Deliver
				5.5.2	Review current nursery practices with a view to encouraging wildlife with plants grown and distributed across the districts e.g. bedding plant vs perennials; pollinator attractors; and trees (target 2,000 whips) (relates to CNCR 144).	short	SWT		2	3	2a3b	Deliver
5.6	Review use of chemicals e.g. herbicides/ pesticides across outdoor spaces according to ecological value of sites.	short	SDC/ SWT	5.6.1	Review use of herbicide/ pesticides across council owned assets with ambition to	Immediate	SDC/SWT		2	3	2c/3b	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
					minimise usage and find alternatives where appropriate.							
				5.6.2	Support Parish Councils to reduce the use of chemicals on parish owned sites.	Short	SDC/SWT	2			2c	Support
5.7	Use drought-resistant / pollinator friendly plants in verges and flower displays to help prepare for the changing climate, such as extreme weather events like flooding, droughts (CEAP F18).	short	SDC/SWT					2			2d	Deliver
5.8	Build capacity and capability of Open Spaces team to deliver ecological improvements across outdoor spaces.	medium	SWT	5.8.1	Upskill /train operatives to implement ecological best practices across districts. E.g. train the trainer opportunities/ peer to peer/ species identification such as invasive species.	Immediate	SDC/SWT	1	2	3	1a, 1d, 2a, 2b, 3e	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type	
				5.8.2	Recruit strategic and planning expertise to oversee longer term ecological goals of open spaces.	short	SWT	1	2	3	1b, 2a,3e	Deliver	
Action 6 Develop and implement a tree strategy to plant and maintain the right trees in the right place													
6.1	Create a tree planting strategy for district.	Immediate	SDC/ SWT					1	2		1a/2d	Deliver	
6.2	Deliver right tree/right place planting, hedgerow creation and other relevant projects on Council owned land and other holdings contributing towards the Nature Recovery Network and Green infrastructure (CNCR 121 amended).	Immediate	SDC/ SWT	6.2.1	Work with partners to deliver and expand on proposals for planting at least 11,000 trees as part of the Somerset Forest (CNCR 298).	Short	SWT	1			1a	Enable	
				6.2.2	Working with the Highways Authority and Somerset County Council to identify roadside areas where tree planting is possible.	short	SDC/SWT	1		3	1a/1c/3d	Deliver	
6.3	Support community groups to deliver right tree/ right place and develop a toolkit/	short	SDC/ SWT					1	2		4	1a/1c/4a	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions				Targets	Delivery Type
	guidance for community tree planting in line with the Nature Recovery Network Strategy (CNCR 285/143 amended).												
6.4	Work with partners to develop and deliver on an Ash Die Back Action Plan to ensure replacement of affected trees and utilisation of wood for biomass energy and also making sure some remain on site as invertebrate habitat (CNCR 131).	Immediate	SDC/ SWT					1	2			1a/1c/2a	Deliver
6.5	Work with town and parish councils and community groups to identify opportunities to deliver community woodlands and other habitats to support biodiversity (CNCR 295 amended).	Short	SDC/ SWT	6.5.1	Deliver the Maidenbrook Country Park, including the planting of 4,500 trees and creation of active travel routes linking Monkton Heathfield and Nerrols (CNCR action 292).	Short	SWT	1			4	1a/1b/4c	Support

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
								1	2	3		
6.6	Work with community groups to develop a Tree Warden Scheme to provide a network of volunteers to help water and maintain trees across the district (CNCR action 297)/ CEAP Ref 92).	Short	SDC/ SWT					1		4	1a/4c	Enable
6.7	Implement and monitor 3 for 1 trees principle across district.	Immediate	SWT					1		4	1a/4c	Deliver
6.8	Deliver major urban tree planting schemes on Council-owned land (CNCR action 128 amended).	Immediate	SDC/ SWT					1			1a	Deliver
6.9	Support partners to work with farmers and landowners to bring forward, encourage and enable tree planting and hedgerow creation, restoration and expansion (CNCR action 138 amended).	Short	SDC/ SWT					1		3	1a/3d	Support
Action 7	Develop and Implement a Green Procurement strategy that takes into account ecological impact for all purchases and enables staff to make sustainable choices that minimise our impact on globally important habitats. (links to CNCR 184)											

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
7.1	Adopt an interim procurement statement setting out an expectation that suppliers and their supply chains are actively working towards reducing their carbon and ecological footprint (adapted CNCR action 91).	Immediate -short	SDC/ SWT						3		3b	Deliver
7.2	Review existing social value policy as part of LGR to include ecological protection and enhancement alongside climate change.	Short	SDC/ SWT						3		3b	Deliver
7.3	Procurement of food within local authority control (mainly corporate refreshments) from initially local, then national and international 'wildlife friendly' sources (CNCR 274 amended).	Short	SDC/ SWT						3		3b	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type	
7.4	Deliver training to all officers responsible for commissioning services and purchasing goods to ensure they understand how they should take account of climate and ecological considerations during the procurement process (CNCR 266 amended).	Immediate	SDC/ SWT							3		3b/3e	Deliver
Theme 2: Work with partners including businesses to deliver ecological enhancement and protection													
Action 8	Work with partners through the Local Nature Partnership to develop and deliver upon a Local Nature Recovery Strategy (CNCR 119)												
8.1	Work with the Local Nature Partnership to complete a Nature Recovery Network Strategy including an interactive online map and user guide (CNCR 120).	Immediate	SDC/ SWT						1		3	1b/3c	Support
8.2	Working with partners, co-create a Vision for the natural environment in Somerset, develop a strategy for implementing the Vision (CNCR 122).	Immediate	SDC/ SWT						1		3	1b/1c/3c	Support

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
								1	2	3		
8.3	Identify and map partners at national and local level including those with significant land holdings and designated sites.	Immediate	SDC/ SWT					1		3	1b/1c/3c	Support
8.4	Promote Team wilder with Parish/Ward and community groups .	Immediate	SDC/ SWT							4	4a	Support
8.5	Work with partners to develop access to nature social prescribing programmes and communicate the health and wellbeing benefits of engaging with the natural environment (CNCR 287).	short	SDC/ SWT							4	4a/4b/4c	Support
8.6	Deliver training on the Nature Recovery Network Strategy, data and map to all relevant officers, Members and communities (CNCR 283).	short	SDC/ SWT					1	2	3	1a/1c/2a/2b/2c/2d/2e/3a/3e	Support
Action 9	Contribute towards State of Nature and National Recovery Network for Somerset by identifying opportunities to connect existing council land assets to wildlife corridors, and improving the landscape's resilience to climate change.											
9.1	Work with partners within the LNP to map beelines (Buglife) as	Short	SDC/ SWT					1		3	1d/3d	Support

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type	
	part of pollinator action plan and LNRS.												
9.2	Work with partners to develop a Land Management Strategy to protect and enhance soils through more regenerative agricultural processes (CNCR 112).	short						1		3		1b/3d	Support
9.3	Work with town and parish councils and community groups to develop, co-ordinate, support and train a Community Nature Network of volunteers to help deliver the NRN (CNCR 284, links to CNCR 143).	Short								3	4	3d/4a	Support
9.4	Work with partners to establish a "Wilder Somerset Fund" aiming for a combined pot of £500,000 per year to deliver the actions of the Nature Recovery Network (CNCR 290).	Short								3		3d	Support
9.5	Support efforts to secure land that will contribute to NRN and	Long	SDC/ SWT	9.5.1	Work with partners to seek long-term	Long	SWT	1		3		1a/3d	Support

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
	large landscape-scale projects.				phosphate mitigation							
9.6	Work with the Wildfowl and Wetland Trust to create large-scale wetland habitats at The Meads Eco Park, Bridgwater .	Immediate	SDC					1	2 a		1b/ 1c/2a	Deliver
Action 10	Work with Somerset Wildlife Trust; Exmoor National Park Authority, Quantock Hills AONB, Blackdowns Hills AONB, Mendips AONB and other council allies across Somerset in a co-ordinated approach to delivering shared goals such as Peat Action Plan and Tree strategy, pollinator action plan, and biosecurity and invasive species control											
10.1	Provide funding to Exmoor National Park to help deliver SWT tree planting objective.	Immediate	SWT					1		3	1a/1b/3d	Enable
10.2	Work with partners to develop a Somerset Land Use Strategy comprising of a soil strategy, water quality strategy, peat strategy, land use capacity/potential, planning for sea level rise (CNCR action 289).	Short	SDC/ SWT	10.2.1	Work with Somerset County Council and other NE County Wide to deliver nutrient catchment management plan	short	SDC/SWT			3	3d	Support
10.3	Work with partners to set out how to restore peatlands in Somerset by establishing a Peat Partnership, revitalising the Somerset Levels and	Immediate	SDC/ SWT	10.3.1	Support initiatives that help peat based businesses find alternative business models.	Immediate to short	SDC/SWT	1		3	1a/3d	Support

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type	
	Moors Peatland Task Force and working with the IUCN Peatland Programme (CNCR 130).												
10.4	Work with partners to deliver Somerset Forest (ring around the Levels) (CNCR 344).	Short	SDC/SWT					1			1a	Support	
10.5	Identify opportunities with partners and create nature-based projects that enhance coastal and offshore biodiversity e.g. salt marshes.	Short	SDC/SWT					1	3		1a/3d	Support	
Action 11	Work with partners to deliver good water and soil quality and healthy aquatic (including wetlands) and terrestrial habitats												
11.1	Work with partners and local groups to deliver actions which address the issues of nitrate and phosphate loading on RAMSAR sites.	Immediate	SDC/SWT	11.1.1	Work with partners to seek longterm phosphate mitigation measures.	Long	SWT	1		3		1a/3d	Support
				11.1.2	Support best farming practices and promote to farmers through partners.	Immediate to short	SDC/SWT	1		3		1a/3d	Support

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
								1	2	3		
				11.1.3	Develop Cotford St Luke into a wetland habitat as part of Phosphate Mitigation Interim measures and put into place appropriate long term management plans.	Medium	SWT				1c/2a/3a	Deliver
Action 12	Work with Heart of the South West Local Enterprise Partnership and other partners to support businesses help deliver nature recovery through their operations and supply chains											
12.1	Work with partners to encourage green business/technology / green jobs into district using Somerset's USP; university links (links to CNCR 89? 337 and 338).	Immediate	SDC/ SWT							3	3d	Enable
12.2	Support the LNP to develop a communications campaign to sell the economic case for landowners and farmers changing land use/management practices (CNCR 114, 280, 281, and 282).	Immediate	SDC/ SWT							3	3d	Support

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
12.3	Signpost/support businesses to best practices to deliver ecological protection (links to CNCR 92, 242 and 244).	Short	SDC/SWT	12.3.1	Review options to incentivise businesses to take action for the wildlife e.g. grant opportunities/ tool and resources.	Immediate - short	SDC/SWT			3	3d	Enable
			SDC/SWT	12.3.2	Support Leisure and tourism sector to support nature recovery e.g. avoidance of single use plastics.	Immediate - short	SDC/SWT			4	4d	Support
12.4	Work with partners to develop a University in Taunton and Research and Innovation Park at Taunton with a focus on the circular economy, innovation in manufacturing processes, and delivering carbon neutrality and ecological recovery in the South West (adapted from CNCR 337).	Medium	SWT							3	3d	Enable
Action 13	Lobby government to support ecological enhancement and protection.											

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type	
								1	3				
13.1	Lobby Government to introduce a national ban on peat extraction (CNCR action 129).	Immediate	SWT					1		3	1b/3e	lobby	
13.2	Lobby Highways England to plant hedges along the M5 motorway (CNCR 116).	Immediate	SWT					1		3	1b/3e	lobby	
13.3	Lobby government to get water companies to do necessary work to remove Phosphates.	Immediate	SDC/ SWT					1		3	1b/3e	lobby	
13.4	Identify other key areas to lobby for wildlife enhancement & protection e.g. neonicotinoids, sewage discharge.	Immediate	SDC/ SWT					1		3	1b/3e	lobby	
Theme 3: Enable citizens to connect and take action for nature													
Action 14	Create opportunities to connect the community such as 'friends of' groups, schools, and householders with nature												
14.1	Provide or signpost good practice guidance and funding opportunities to community groups on habitat creation (Links to CNCR 139,155, 292 and 318).	Short	SDC/ SWT	14.1.1	Develop an information pack, standard agreement and communications campaign for community groups and parish councils who wish to	Immediate	SDC/SWT	1			4	1b/4a	Enable

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
					manage Council-owned open spaces.							
				14.1.2	Drive forward Environmental Champions Scheme to encourage residents of all ages and backgrounds to take action for wildlife (CEAP 6).	Immediate	SDC/SWT			4	4a	Deliver
				14.1.3	Work with partners to improve ecological benefits of Steam Coast Trail and communicate to users.	short	SWT	1	2	4	1c/2a/4c	Deliver
14.2	Support local groups to take part in activities on council owned open spaces that support wildlife.	Short	SDC/SWT	14.2.1	Ecosculpture and skills development project in partnership with Hestercombe House.	Immediate	SWT	1	2	4	1c/2a/4a	Enable
14.3	Support initiatives that help to remove litter particularly along our coastline.	Immediate	SDC/SWT						2	4	2a/4a/4c	Enable

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions				Targets	Delivery Type
								1	2	3	4		
	Work with town and parish councils and community groups to provide opportunities for local people to get involved with planting trees and habitat creation (CNCR action 296 adapted).	Immediate	SDC/ SWT					1	2		4	1c/2a/4a	Enable
	Investigate engagement with West Country Rivers Trust's citizen science program - monitoring water quality to feed into Natural England's County Water improve strategy 22/23.	Immediate	SWT							3		3f	Support
Action 15	Use our open spaces and nature reserves as opportunities to communicate to citizens about the importance of the natural world												
15.1	Develop communications for all open space sites to engage citizens about habitat and wildlife on site.	medium	SDC/ SWT	15.1.1	Create signage and interpretation for grassland management.	Immediate					4	4c	Deliver
15.2	Maintain and where necessary improve access to council owned local wildlife sites and local nature reserves.	Immediate	SDC/ SWT								4	4c	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions	Targets	Delivery Type	
Action 16	Develop an ecological emergency communications plan linked with climate change to inform householders of actions taken by the councils and partners and how they can get involved (links to CNCR action 123)										
16.1	Promote/signpost resources to support householders take action for nature.	Immediate	SDC/SWT	16.1.1	Make householders aware of Somerset prepared/ Team Wilder/Environmental Champions and other groups that deliver nature recovery.	Immediate	SDC/SWT		4	4a	Deliver
Action 17	Work with partners to deliver behaviour change campaigns and communications to support householders and businesses to make lifestyle choices to reduce consumption and protect local and globally important wildlife habitats.										
17.1	Work with partners linking up with existing communications e.g. Wildlife Trust's Team Wilder, active travel links to our AONBs.	Immediate	SDC/SWT	17.1.1	Promote nature recovery by protecting and Restoring Somerset - Pride in looking after our area including communities within it. Having pride in our home of Somerset.				4	4a	Support
17.2	Working with partners communicate to council tenants and other householders about ideas that support wildlife within gardens e.g. wilding garden lawns.	Immediate	SDC/SWT						4	4a	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions				Targets	Delivery Type
17.3	Communication to allotment growers -best practice for wildlife (links to CNCR 107).	Immediate	SDC/ SWT							4	4a	Deliver	
17.4	Increase awareness in businesses and young people of the value of local pollinators, improving knowledge and understanding of pollinators in the area (CEAP 160).	Immediate	SDC					1		4	1d/4d	Support	
17.5	Develop an awards scheme focusing on celebrating climate and ecological action in the community (CNCR 323 adapted).	Short	SDC/ SWT							4	4a	Support	
17.6	Champion our nature recovery outside designated sites and link into Green Infrastructure strategy.	short						1		4	1c/4a	Support	
17.7	Deliver community and school workshops building awareness about nature recovery and how they can take action for wildlife (and climate change) (relates to CEAP 102).	Immediate	SDC/ SWT							4	4a	Support	

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions	Targets	Delivery Type
Action 18	Promote ways to reduce, reuse and recycle; support product durability, energy efficiency and renewable energy generation.									
18.1	Work with Somerset Waste Partners on Recycle More (Refer to CNCR actions 253 - 270).	Immediate	SDC/ SWT					3 4	3d/4a	Support
Theme 4: Governance' funding, monitoring and reporting progress over time										
Action 19	Co-ordinate and have oversight of all SDC/SWTC ecological improvement activities so that it can be reviewed and continually improve.									
19.1	Develop methodology to enable the council to monitor progress towards ambitions and targets.	Immediate	SDC/ SWT					3	3f	Deliver
19.2	Agree method by which progress of actions will be monitored over time. E.g. through Pantana (SDC) or other.	Short	SDC/ SWT					3	3f	Deliver
Action 20	Work with partners to agree a methodology to measure progress against our KPIs and targets (relates to CNCR146)									
20.1	Committee and council reporting to include ecological impact, alongside those already for climate and sustainability.	Immediate	SDC/ SWT					3	3f	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions			Targets	Delivery Type
20.2	Work with partners to disseminate best practice monitoring methodology to local community groups in order to feed into Somerset species monitoring for LNRS.	Immediate	SDC/ SWT							3	3f	Deliver
Action 21	Develop a fundraising strategy to deliver action plan where there are insufficient budget and resources.											
21.1	Produce and communicate a list of potential woodland creation grants, and forward plan bids where possible (Amended CNCR 138)	Immediate	SDC/ SWT							3	3a	Deliver
21.2	Seek funds to support ecological protection and improvement projects.	Immediate	SDC/ SWT	21.2.1	Build Up a Tree Fund with businesses and stakeholders (already seeded by the council) to deliver tree planting days with local residents and community groups to increase tree coverage (SDCA CEAP 92).	Immediate	SDC	1			1a	Deliver

Ref. No	Project	Term	District	Ref. No	Sub-project	Term	District	Ambitions				Targets	Delivery Type
								1	2	3	4		
				21.2.2	Toneworks, Wellington.	Immediate	SWT	1	2	3	4	1d/2e/3c/4a	Deliver
				21.2.3	Steam Coastal Trail	Immediate	SWT	1		3	4	1c/3c/4a	Deliver
				21.2.3	Hibernation boxes	Immediate	SWT/SDC	1	2		4	1c/2e/4a	Deliver

Key:

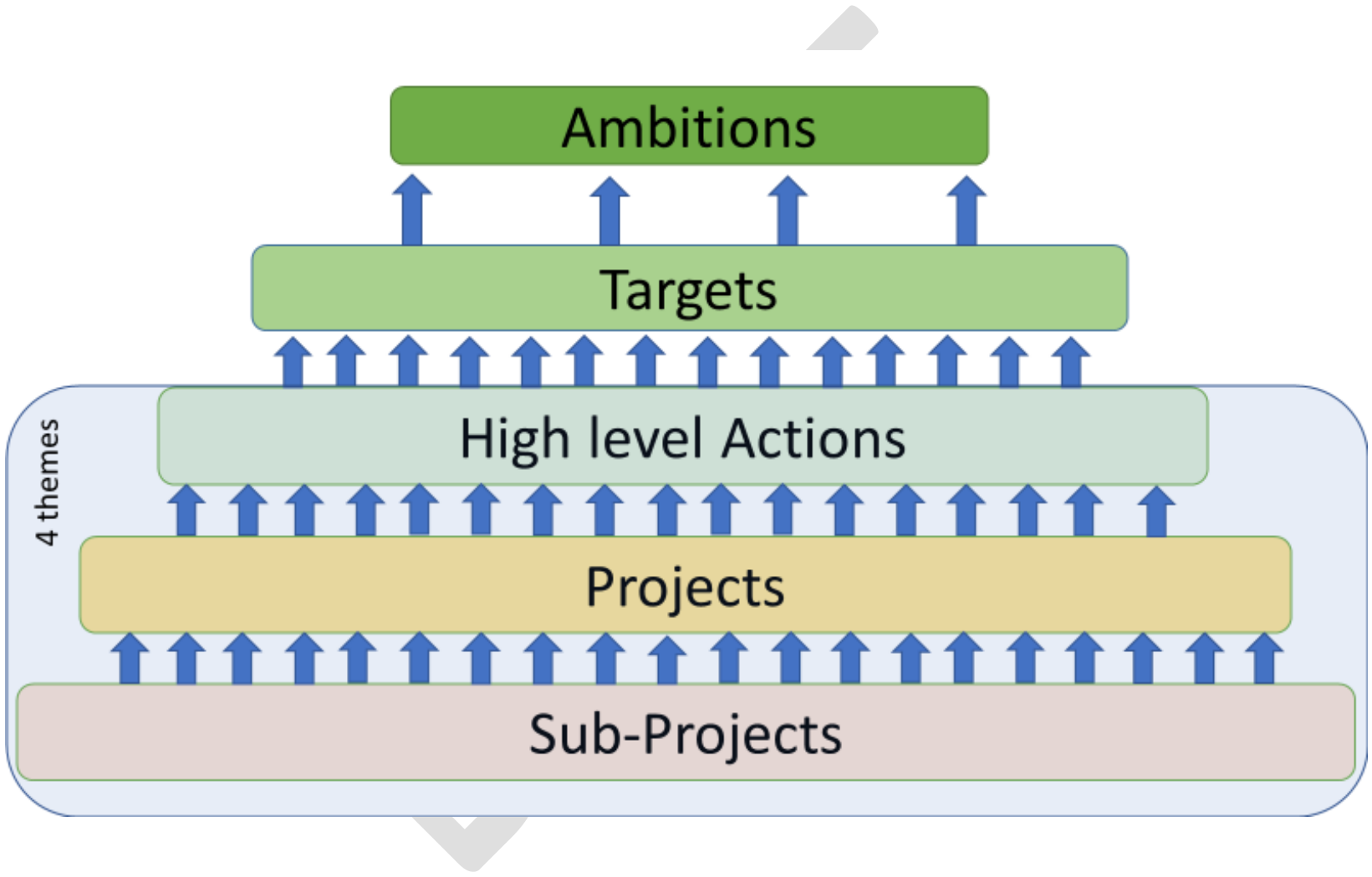
Term:
Immediate – financial Year 2022/23
Short - 2023-2025
Medium 2025-2028
Long 2028-2030

Delivery
Deliver – those actions where the Council can directly deliver a defined outcome/
Enable – those actions where the Council’s role is to facilitate delivery of defined outcomes, for instance changes to policy.
Support – those actions where the Council can support or encourage the delivery of a defined outcome, namely working with groups or organisations.
Lobby – those actions where the Council’s primary role is to promote and push for change, e.g., a change to policy, legislation or funding.

District

SDC -Sedgemoor District Council
SWT – Somerset West District Council

Action Plan Project Hierarchy:



The Action Plan will deliver the following ambitions and targets:

Collaborating with partners							
Ambitions							
Wildlife		Assets & open spaces		Our values			
Our targets by 2030:							
1a	Large scale tree planting and other nature recovery projects across the district and wider area are delivered with partners	2a	Open spaces are well managed either by community groups with support by the local authority or directly by the council	3a	The environmental and ecological well-being of our district is integrated into all policy decisions made by the council.	4a	1 in 4 citizens take action for wildlife (aligned with Somerset Wildlife Trust's Team Wilder campaign)
1b	Habitats across the district including the councils' designated sites are in a favourable condition.	2b	All grassland areas are managed in accordance with best practice grassland management to support wildlife where appropriate	3b	Procurement policies enable the purchase of products and services that support ecological protection and improvement at a local, national and international level.	4b	All pupils complete one term of environmental education by the time they leave primary school
1c	Our green and blue infrastructure connect to the wider environment and contribute to Somerset's nature recovery network	2c	The use of chemicals is minimised, and alternatives are used where possible.	3c	All planning decisions consider ecological footprint of all new developments and contribute to a minimum of 10% biodiversity net gain.	4c	All publically owned open spaces have a community group, good signage and are accessible to the public.
1d	County notable and red list species (specifically Hazel dormouse, lapwing and Grizzled skipper) thrive in our district and wider area	2d	All plants are grown or sourced in peat free growing medium and contribute to climate change resilience and nature recovery.	3d	We collaborate with others and lobby government to ensure policies protect our wildlife and natural environment.	4d	Businesses play their role in supporting wildlife recovery
		2e	All council owned buildings support ecological recovery where appropriate	3e	Our staff understand the importance that nature plays and have the skills and knowledge to consider it in their decisions making and implementation of their roles		
				3f	We monitor and communicate our progress towards nature recovery		

Report Number: SWT 82/22

Somerset West and Taunton Council

Executive – 15 June 2022

Report of the Task and Finish Group on Council Housing Zero Carbon Retrofit

This matter is under the responsibility of Executive Councillor for Housing, Cllr Francesca Smith

Covering Report Author: Marcus Prouse – Specialist – Governance and Democratic

1 Executive Summary / Purpose of the Report

- 1.1 On 3rd March 2021 the Scrutiny Committee resolved to establish a cross party Task and Finish Group for Council Housing Zero Carbon Retrofit to investigate this topic in further depth and to report back to the Scrutiny Committee. The Committee also approved Terms of Reference which are attached at Appendix C. The Group and its members have met regularly since that date as detailed in their report (Appendix A).
- 1.2 At the Community Scrutiny Committee meeting on 22nd January 2022 the report was considered and the Committee resolved to note the report of the Task and Finish Group on Council Housing Zero Carbon Retrofit. The Committee resolved to submit the entirety of the report of the Task and Finish Group to the Executive and the Leader of Council for review. The Chair of the Task and Finish report agreed support for the report going to the Executive.

2 Recommendations

- 2.1 The Executive resolve:
- 2.2 To note the report of the Task and Finish Group on Council Housing Zero Carbon Retrofit and thank Councillors on the Group for their efforts.
- 2.3 Request officers to consider the recommendations in the report, in particular, during the forthcoming development of the Low Carbon Retrofit Strategy and Delivery Plan. Officers will also reflect on the report as they prepare a significant Social Housing Decarbonisation Fund Wave 2 bid to be submitted late summer 2022.
- 2.4 Request that this Draft Strategy returns through the Democratic Path (via Community

Scrutiny) by January 2023 for Full Council in March 2023.

3 Risk Assessment (if appropriate)

- 3.1 There are potential risks associated with this issue and these are identified in Appendix B. The 2030 Carbon Neutrality target is identified on the Corporate Risk Register.

4 Background and Full details of the Report

- 4.1 As its title suggests a Task and Finish Group is set up for the specific purpose of undertaking a review and reporting back within a defined timescale.
- 4.2 Now the evidence has been gathered, the Task and Finish group's report had been submitted to the relevant Scrutiny Committee outlining details of the review process, evidence gathered, conclusions and subsequent recommendations. The Scrutiny Committee has considered the report and decided to recommend the report on to the Executive.

5 Links to Corporate Strategy

- 5.1 This topic clearly relates to two of the Strategic Themes 'Our Environment and Economy' and 'Homes and Communities' in the Council's Corporate Strategy 2020-2024 which aim for "a low-carbon, clean, green and prosperous district that attracts high quality employment opportunities and encourages healthy lifestyle." Also, "A district which offers a choice of good quality homes for our residents, whatever their age and income, in communities where support is available for those who need it." The topic and report specifically looks to address the first objective of the Environment and Economy theme to "Work towards making our District carbon neutral by 2030 - deliver projects based on a Carbon Neutrality and Climate Resilience Plan that work toward this goal (for example installing electric vehicle charging points across the District)".

6 Finance / Resource Implications

- 6.1 This report does not directly contain any resource implications and therefore no assessment of costs has been carried out to date.
- 6.2 A full calculation of the costs associated with the proposal would need to be undertaken to allow members to make informed decisions as part of the work on the forthcoming Low Carbon Retrofit Strategy and Delivery Plan.
- 6.3 The Task and Finish Groups Report recommendations have not been calculated and therefore the impact on the HRA Business Plan or SWT is unknown. It should be noted that the HRA Business Plans short term pressures are significant in part reflecting its ambitious programme of compliance, decent homes works, small scale, retrofit projects and a large housing development programme.
- 6.4 The Housing service is preparing a retrofit strategy and delivery plan which aims to achieve zero carbon and any statutory milestones en-route to zero carbon. The Retrofit and Delivery plan is timetabled to complete by March 2023. The Delivery Plan will be aligned to many of the recommendations of the Task and Finish Groups report, be costed, be aligned to the HRA Business plan and presented to Members for approval.

7 Legal Implications (if any – delete if not applicable)

7.1 None as a direct result of establishing this Group. The final report and any decision will need to consider the principles of decision-making.

8 Climate and Sustainability Implications

8.1 There are clear climate and sustainability implications considered in both the report of the Group and the Officer response (Appendices A and B).

9 Safeguarding and/or Community Safety Implications (if any – delete if not applicable)

9.1 None as a direct result of this report at this stage.

10 Equality and Diversity Implications (if any – delete if not applicable)

10.1 None as a direct result of establishing this Group. Members of the Group are responsible for making the recommendations in the final report (Officers are not part of the decision-making process) and in so doing must observe the equality and diversity policies of the Council.

11 Social Value Implications (if any – delete if not applicable)

11.1 None as a direct result of this report at this stage.

12 Partnership Implications (if any – delete if not applicable)

12.1 None as a direct result of this report at this stage.

13 Health and Wellbeing Implications (if any – delete if not applicable)

13.1 None as a direct result of this report at this stage.

14 Asset Management Implications (if any – delete if not applicable)

14.1 None as a direct result of this report at this stage.

15 Data Protection Implications (if any – delete if not applicable)

15.1 None as a direct result of this report at this stage.

16 Consultation Implications (if any – delete if not applicable)

16.1 None as a direct result of this report at this stage.

17 Community Scrutiny Comments / Recommendation(s)

17.1 During the debate at the Community Scrutiny Committee on 27th January 2022 the following points were raised:

17.2 It was asked about fuel poverty and whether any work had been done elsewhere in the country to identify the fuel poverty tipping point. Officers responded that fuel poverty had been an issue in social housing for a long time. Officers would look to measure the

impact of retrofit in terms of fuel poverty as part of the assessment of various options.

- 17.3 It was asked what impact Unitary would have upon any decisions the Council may make in relation to this subject. Officers responded that the HRA would still face the same issues when the new authority was formed. The money in the HRA was ringfenced, there was a 30-year business plan and business would have to continue. The HRA would combine with Sedgemoor's when the new authority formed and partnership working with Sedgemoor had already begun. Financial decisions which bound the new authority would have to be made in accordance with the legislation. However, the ringfencing of the HRA funds and the 30-year business plan would enable some work to continue.
- 17.4 It was asked about the kilo watt hours per year per square meter measurement and whether this was based floor area or footprint of the area. Officers responded that the measurements tended to be based on square meterage. The calculation has since been clarified The square meterage includes which includes any external facing walls, roofs and floor, so this provides a power consumption measure recognising the dwellings exposure and how hard the heating system needs to work. There would be a need to understand the energy usage for different archetypes and forms, for example a traditionally built bungalows, flats and houses or different non-traditional construction types by bungalows, flats and houses. This work is underway.
- 17.5 It was raised that the cost of a fuel did not relate to the amount of energy in it. Even with gas prices rising, electricity was still around three times more expensive.
- 17.6 It was asked if funds could be borrowed from the Public Works Loans Board for investment in retrofit. It was responded by officers that money could be borrowed but generally in the business plan the revenue set aside against depreciation of the housing stock was generally what funded the capital replacement programme. Ultimately action would be determined by affordability and what could be achieved alongside all the other costs the HRA faced. A range of treasury options for funding any work was always considered. Support was expressed for insulating homes.
- 17.7 It was raised that properties in higher exposure zones, namely zones 4 and 3, were not best suited to have things such as cavity wall insulation or ground source heat pumps. Instead, retrofit solutions in these zones would be more expensive. It was asked if this had been considered. Officers responded that the comments were noted and when a strategy was brought forward these aspects would be considered. Officers have since clarified that all retrofit work funded by government grants are required to follow the PAS 2035 process. The PAS process is set up to ensure a 'no regrets' approach to investment. SWT has engaged PAS 2035 co-ordinators to support its strategic thinking and consider its investment through Social Housing Decarbonisation Fund (SHDF) waves 1 and 2 and LADS 2.
- 17.8 It was raised that there were government grants available for insulation being fitted in homes. Officers responded that there were a range of government grants available, some of which were open to the Council as a Landlord, such as the SHDF, warmer homes, LADS 1 & 2.
- 17.9 It was suggested that it would be worthwhile making a commitment to when properties should be insulated by in addition to when gas boilers should cease to be installed. The Chair of the Task and Finish Group agreed that deadlines for installing insulation as well

as deadlines for gas boilers ceasing to be installed would be important.

- 17.10 It was asked if any research had been done into tenants' reception to improvement works for the purpose of achieving net zero. A representative of the Task and Finish Group suggested it would be best to work with tenants who were supportive first and then expand from there. There would be disruption during installation but there would be benefits in terms of reductions to energy bills.
- 17.11 It was asked how practical converting the Council's housing stock would be, for example in relation to radiators. It was suggested that looking into central heating systems for groups of houses may be worthwhile as these could use existing radiators. The Chair of the Task and Finish Group responded that each property would have to be looked at individually for what the best solution was. Central Heating Systems and Heat Networks had been looked at by the group. They could be beneficial but could also be expensive although there was some government support.
- 17.12 The Chair of the Task and Finish Group noted that gas in gas boilers and electricity in heat pumps had been compared by the group. At the current time electricity and gas were quite close to each other in terms of how clean they were as an energy source, but electricity would continue to become cleaner. A heat pump halved the carbon used compared to gas. Heat pumps were more expensive to buy and install currently but there were government grants and costs should decrease over time.
- 17.13 It was raised that plans and information on retrofit should be publicised to the public and it was suggested it would be beneficial to look beyond the Council's own housing stock as the Council's own housing stock was only a small percentage of the homes in the district. Concerns were raised about fuel poverty.
- 17.14 It was asked how much had already been done to retrofit the Council's housing stock and what was left to be done and what the costings for retrofit would be. The Chair of the Task and Finish Group responded that the group had looked at the costs of retrofit and included some examples but that no precise costings had been done. It would however be a sizeable sum to undertake a complete retrofit of the Council's housing stock.
- 17.15 The Chair of the Working Group expressed that they hoped their work had helped to inform what the Housing Directorate would bring forward in their strategy. The group intended the recommendations to act as a steer for officers.
- 17.16 The Committee resolved to approve recommendation 2.2 of the report: To note the report of the Task and Finish Group on Council Housing Zero Carbon Retrofit.
- 17.17 The Chair suggested that the Committee pass the report in its entirety to the Executive and the Leader. This would exclude the committee recommending the report to Full Council, with this decision left to the Executive.
- 17.18 Officers responded that ahead of the report going to the Executive they would add further officer commentary and detail and that they would look at the wording of the recommendations to ensure it would not bind the Council to anything which would not be achievable financially. The Chair of the Task and Finish report agreed support for the report going to the Executive.

17.19 The Committee resolved to submit the entirety of the report of the Task and Finish Group to the Executive and the Leader of Council for review.

Democratic Path:

- **Scrutiny – Yes – 27/01/21**

Reporting Frequency: Once only

List of Appendices (background papers to the report) (delete if not applicable)

Appendix A	Report of the Task and Finish Group
Appendix B	Officer Response document
Appendix C	Terms of Reference

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Somerset West and Taunton Council

Report of the Task and Finish Group on Council Housing Zero Carbon Retrofit



Report Contents

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- 1) Introduction
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- 10) Gas and electricity prices
- 11) Comparing heat pumps and gas boilers (carbon and costs)
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- 15) Survey of registered social landlords and Homes in Sedgemoor
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- 17) SWT challenges and emerging plans

About the Task and Finish Group

This cross-party group was established by Scrutiny Committee on 3rd March 2021 to investigate Council housing zero carbon retrofit and to report back to the Scrutiny Committee for Somerset West and Taunton Council (SWT).

The membership of the group was:

- Cllr Dave Mansell – Chair
- Cllr Norman Cavill – Vice-Chair
- Cllr Ian Aldridge
- Cllr John Hassall (from August 2021)
- Cllr Alan Wedderkopp (to June 2021)

Portfolio Holders invited to attend meetings:

- Cllr Dixie Darch – Climate Change
- Cllr Fran Smith – Housing

Officers supporting the group:

- James Barraah – Director of Housing, SWT
- Chris Brown – Assistant Director Development and Regeneration, SWT
- Marcus Prouse – Specialist, Governance and Democratic, SWT
- Andrew Randell – Democracy and Governance Case Manager, SWT

The group held 8 online meetings from 13 May 2021 to 2 November 2021.

Presentations at group meetings were provided by:

- James Barraah – Director of Housing, SWT
- Paul Sweeting – Finance Business Partner, SWT
- Joanne Stringer – Senior Regional Asset Manager for South West, Sanctuary Housing
- Nigel Griffiths – Policy Adviser, Sustainable Traditional Buildings Alliance, and Director, NRS Griffiths Ltd
- Ian Hutchcroft – Market Development, Energiesprong UK
- Chris Brown – Assistant Director Development and Regeneration, SWT

1) Introduction

- 1.1 The task and finish group thank all those who gave presentations at our meetings and engaged in helpful discussions.
- 1.2 As shown by the report contents list, we considered a wide range of issues relevant to the retrofit of insulation and heating systems to the Council's existing housing stock. This included a number of approaches and projects by councils and other social landlords around the UK.
- 1.3 We are keen to see retrofit projects and a programme that moves towards a zero carbon target for the Council's housing stock. We noted that a whole house approach is now widely recognised as essential to this aim and to effective retrofit work.
- 1.4 New retrofit proposals were prepared by officers as the group's work progressed and we were pleased to note there was a high degree of alignment with our emerging conclusions and recommendations. It was also helpful that the Government's Heat and Buildings Strategy was finally published just before we concluded.
- 1.5 Government funding will be important to support the installation of retrofit measures, and correct market price signals too, such as electricity becoming a lower cost heating choice relative to fossil fuel gas.
- 1.6 Having reviewed the information presented to the group, we have prepared the following recommendations. Some are recommended for adoption by the Council, which we invite Scrutiny Committee and the Executive to consider.

2) Recommendations for Council adoption

- 2.1 A standard or guide is needed for the net zero retrofit of the Council's housing stock, such as the new LETI Climate Emergency Retrofit Guide. Insulation needs to be an integral part of the approach adopted, with the aim of ensuring high levels of energy efficiency are achieved consistent with a net zero UK.
- 2.2 A programme for net zero retrofit may be achieved in stages following a planned whole house approach. Each stage should add to work undertaken in previous stages and not replace it. First, the building fabric should be improved through a range of insulation measures, including external wall insulation where possible. Air tightness and ventilation will need to be considered at the same time. In the next stage, gas or oil boilers should be replaced with zero carbon heating systems, such as heat pumps or a shared heating network. Boiler replacement may occur at the end of its life, unless there are reasons for doing so earlier, such as low energy efficiency. With improved insulation, it should be possible to keep homes warm while running boilers on lower settings to reduce energy use and costs.
- 2.3 A target date be set of 2025 or 2027 by when no new gas boilers will be fitted to the Council's housing stock. Where it can be afforded and be effective,

replacement gas boilers should not be provided before this date and, if possible, an earlier target date be set. This target aims to recognise the pressures of the Council's capital programme and the need to ensure the Housing Revenue Account (HRA) remains financially sound.

- 2.4 Solar photo-voltaic and thermal panels, batteries and heat storage should be provided where there is a business case for this investment, taking into account the potential income from comfort plan or similar payments and the savings to tenants.
- 2.5 Especially during the early stages of introducing new insulation and heating systems, support needs to be provided to tenants on their features and use. Where possible, new measures should be provided first to tenants who most welcome their introduction. An effective communication programme on their benefits should be established, together with sufficient on-going support.
- 2.6 A report be prepared on a retrofit programme, including costs and potential funding, to achieve net zero for the Council's housing stock by 2030, 2035 and 2040, without offsetting. The net zero target should cover heating, use of appliances and lighting, and, as far as possible, should minimise the carbon and environmental impact of measures installed. This report should be presented to Community Scrutiny Committee, Executive and Full Council in 2022/23, with a recommendation on a target date for a full net zero retrofit programme.
- 2.7 Funding for a retrofit programme should include:
 - 2.7.1 Funding announced by Government, including in their new Heat and Buildings Strategy and Net Zero Strategy: Build Back Greener, October 2021.
 - 2.7.2 The contribution that can be made by the Council's planned and responsive maintenance budgets, where these already include boiler replacement, insulation and other related measures.
 - 2.7.3 Comfort plan or similar contributions from tenants to retrofit investment, but only where each tenant is guaranteed energy bills at least 25% lower than they would otherwise have incurred.
 - 2.7.4 Long term investment possible through the Housing Revenue Account.
 - 2.7.5 Estimates for any funding gap remaining that may need to be sought from Government.
- 2.8 Further investigations and studies should be undertaken to identify the potential contribution and role for:
 - 2.8.1 Community heating networks with ground source heat pumps, using shared source arrays and either individual or shared heat pumps, which supply blocks of flats, either individually or in small groups.

- 2.8.2 Larger district or neighbourhood scale heating networks, where opportunities may arise, possibly alongside larger private sector development.
- 2.8.3 Increasing local renewable energy generation through the Local Plan and planning process, and directly by the council as a landowner, developer and purchaser of power in enabling renewable energy development.
- 2.9 Retrofit projects should be monitored to check their performance, tenant satisfaction and to learn lessons to improve future work. Monitoring should also identify if further support needs to be provided for tenants with the new measures. Results should be reported to Council Members.
- 2.10 Progress and adoptable lessons should continue to be reviewed for Energiesprong, the Optimised Retrofit project in Wales and examples of good practice net zero retrofit schemes.
- 2.11 The Council should seek to work with other social landlords in Somerset to share good practice and joint programmes where benefits, including lower costs, would arise.
- 2.12 Disposal of properties within the Council housing stock that cannot meet net zero objectives should be avoided and be an option of last resort.

3) Recommendations for Government and other agencies

- 3.1 Replace or improve Energy Performance Certificates (EPCs) to ensure they are well aligned towards meeting zero carbon objectives, including by incorporating or being used with an energy intensity target.
- 3.2 Move social and environmental levies from electricity to gas, taking account of the need to make such changes fairly and not to increase fuel poverty.
- 3.3 Introduce and apply carbon taxation to provide market signals that support net zero retrofit without making lower income households worse off.
- 3.4 Provide sufficient funding to social landlords to enable net zero retrofit of all their housing stock.

4) 2019 proposal for SWT housing retrofit

- 4.1 In December 2019, a report was prepared for SWT on providing warm and affordable homes for Council tenants and aiming to achieve net zero emissions in the Council's housing stock by 2050¹. Compared to a 1990 baseline, this report proposed:
 - 65% carbon reduction in our housing stock by 2030.

¹ A Strategic Asset Investment Proposal for Housing in Relation to Achieving Affordable Warmth and Carbon Neutrality – Somerset West and Taunton Council, December 2019

- 85% carbon reduction in our housing stock by 2040.
 - Carbon neutrality in our housing stock by 2050.
- 4.2 For carbon neutrality, it was proposed to achieve 80% carbon emission reductions by 2050 and offsetting the remaining 20% “by investing in local community initiatives, such as local tree plantations, PV (photo-voltaic solar panels) to community-based schemes and other credible, transparent and auditable carbon reduction measures”.
- 4.3 To achieve an 80% carbon reduction, the report states that an average EPC rating of mid-band B would be needed for all SWT properties. It also states that properties that could not achieve a low band C “will need to be considered for disposal or regeneration”.
- 4.4 The 2019 report built on a pilot scheme in Wellington in 2016², which installed double glazing, external wall insulation, positive input ventilation and air source heat pumps to 131 homes, increasing the EPC (Energy Performance Certificate) ratings of the council properties from E or F to C.
- 4.5 The average cost for retrofitting the Council’s housing stock to this standard was estimated to be:
- Traditional construction properties - £16,500
 - Non-traditional construction properties - £30,000
- £11,000 of the cost per property could be covered as it would otherwise have been incurred as part of works necessary for meeting the Decent Homes Standard target.
- 4.6 The total additional cost impact for the Council’s stock of 5,747 properties was estimated at £49.8m over 30 years or £1.66m per annum.
- 4.7 However, this retrofit proposal for the Council’s housing stock was not adopted, as it was deemed unaffordable. This was explained in a report to Full Council on 18 February 2021, as follows:

“The capacity to deliver a zero carbon retrofit (either within 10 years or 30 years) was modelled but both placed significant pressure on the business plan with debt continuing to rise at the end of the period and leaving no headroom for unforeseen circumstances, which is not recommended. The business plan is currently unable to deliver both a development programme and a zero carbon retrofit programme. Unless there is significant government funding we will face future choices between our later years development plans versus retrofit as delivering both is not currently affordable, but this is a decision for a later time as the market and approach to retrofit matures.”³

² Wellington Warmer Homes: Close Out Report and Future Strategy – Low Carbon Expert, November 2018

³ Para 5.9, SWT report to Special Full Council, 18 February 2021 - HRA Revenue and Capital Budget Setting 2021/22 including 30-Year Business Plan Review.

5) Targeting zero carbon

- 5.1 Somerset West and Taunton Council declared climate and ecological emergencies in 2019 and 2020. The Council's first corporate objective is to "work towards making our District carbon neutral by 2030"⁴.
- 5.2 The sooner carbon neutrality is achieved the better, as climate change is already having serious and growing impacts, which will get worse as greenhouse gases continue to accumulate in the atmosphere and in the oceans. There are dangers that system tipping points will be breached so further accelerating the impacts and creating risks that parts of the planet become uninhabitable, due to heat, weather extremes or sea level rise.
- 5.3 Greenhouse gas emissions, such as carbon dioxide and methane, arise from several sources, including the burning of fossil fuels, waste decomposition and some agricultural and industrial practices.
- 5.4 For buildings and homes, most carbon emissions arise from heating systems and power supplies. These can be reduced by insulation and increasing energy efficiency, installing zero carbon heating systems and using zero carbon electricity.
- 5.5 Progress is being made to decarbonise power networks, especially electricity. In time, it is expected that the electricity supply will be fully zero carbon. The gas supply may become carbon neutral through conversion to biogas or hydrogen, although there are doubts whether enough can be supplied or if it could be carbon neutral. These alternative gas sources may be limited by the land needed, the high costs and the inefficiency of processes involved⁵.
- 5.6 Heat pumps will be a major new source of heating. They extract heat from external sources, such as the air, ground or water, which is converted to a low-level heat that can efficiently heat well-insulated homes. For each unit of electricity used by a heat pump, 2-4 units of heat energy can be supplied. Good insulation is necessary for the efficient operation of heat pumps, especially in the coldest months, and reduces the amount of energy needed for effective heating.
- 5.7 The method for assessing Energy Performance Certificates (EPCs) is currently not well-aligned for measuring progress towards net zero carbon or indicating its achievement (see more on this in section 12).
- 5.8 As temperatures rise with global heating, cooling for homes is becoming increasingly important too. This is best achieved by design measures to prevent over-heating from direct sunlight, including shading and insulation.

⁴ SWT, Corporate Strategy 2020-2024.

⁵ Ignore hype over hydrogen heating, government told – BBC, 14 May 2021: www.bbc.co.uk/news/business-57103298

6) Whole house retrofit

6.1 Presentations by Nigel Griffiths and Ian Hutchcroft to the task and finish group highlighted the benefits of a whole house approach for insulation measures to avoid risks from thermal bridges, impermeable layers and insufficient ventilation in creating condensation, damp and mould.

6.2 The Centre for Alternative Technology also highlight the benefits of an integrated whole house approach to retrofit⁶:

“Taking individual measures without proper attention to detail and consideration of the ways different elements interact can make a house worse rather than improving it. Upgraded glazing and draught-proofing can increase damp problems if there isn’t suitable ventilation. Leaving ‘cold bridges’ through a thick insulation layer will concentrate heat loss and may be prone to condensation.

“The ‘whole house retrofit’ approach is intended to avoid these pitfalls. Instead of piecemeal efficiency measures, this systematic approach looks at all aspects of insulation, draught-proofing, ventilation and heating to create a structured plan. Such a retrofit is a big job, and you can treat it like a new build by engaging a specialist architect or retrofit expert to oversee the project and tailor the plan to your home. Houses in rows or blocks can be looked at together, as this should make accurate detailing easier as well as reducing costs.

“Research has shown that spending more money and time on a deeper level of retrofit actually decreases the payback time when compared to measures added without consideration of how elements will interact.”

6.3 Nigel Griffiths suggested the whole building approach to retrofit should be expanded to include human health and wellbeing, local economy (supply of materials and labour) and building communities, as well as to water efficiency, sustainable drainage, the impact of materials, re-greening and local facilities. In Wales, the Government takes a more rounded approach due to the Wellbeing of Future Generations Act.

6.4 To address the performance gap that can arise from retrofit measures that are poorly planned or installed, PAS 2035 is a new standard for effective energy retrofits of existing buildings⁷. PAS 2035 drives a whole house and fabric first approach, and specifies roles and responsibilities for those involved, including for retrofit coordinators and assessors.

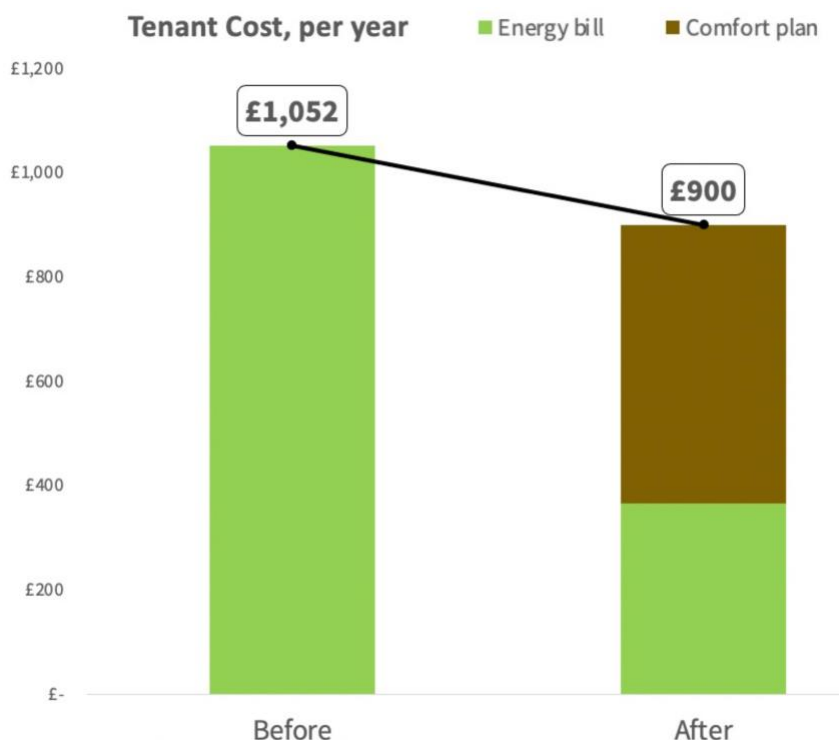
6.5 Social housing retrofit projects are now required to comply with the PAS 2035 standard to receive Government funding, which has prompted PAS 2035 training to be provided for SWT officers. Adopting PAS 2035 should ensure risks of thermal bridging and internal condensation are minimised.

⁶ cat.org.uk/energy-saving-retrofits

⁷ www.trustmark.org.uk/tradespeople/pas-2035

7) Energiesprong approach and case studies

- 7.1 Energiesprong (energy leap) is an approach to retrofit developed in the Netherlands and widely adopted there, with 5,700 homes installed and thousands more planned.
- 7.2 Energiesprong covers insulation, heating, cooling and home energy generation and storage. It is implemented through a specification, which requires whole house retrofit and allows competitive procurement. Costs are reduced by manufacturing components in a factory, which are mostly fitted externally. On-site installation can be undertaken quickly and doesn't require tenants to move out, minimising disruption.
- 7.3 Installers provide a long-term performance guarantee to ensure long-term benefits are delivered and maintained.
- 7.4 Energiesprong has an investment model, which aims to be self-financing through long term savings achieved and government support programmes for energy efficiency and renewable generation. This requires supply costs to be reduced with economies of scale achieved by sufficiently large-scale adoption. As part of the savings realised, tenants make comfort plan payments for their energy and heating, with lower bills for these services than previously, as shown below. A fuel poverty fund can be used to support those who cannot afford their energy bills.



- 7.5 Further value can be gained with the Energiesprong approach by extending or adding homes at the same time.

- 7.6 Energiesprong UK⁸ has received funding from the European Union and the Government, and a delivery team able to work with local authorities and social landlords.
- 7.7 There have been pilot schemes in the UK, including in Nottingham, Essex and Devon, and others in France and Germany.



Nottingham – Energiesprong applied to 7 of 9 properties in a terrace.



Energiesprong project in Maldon, Essex on right (similar house without on left)

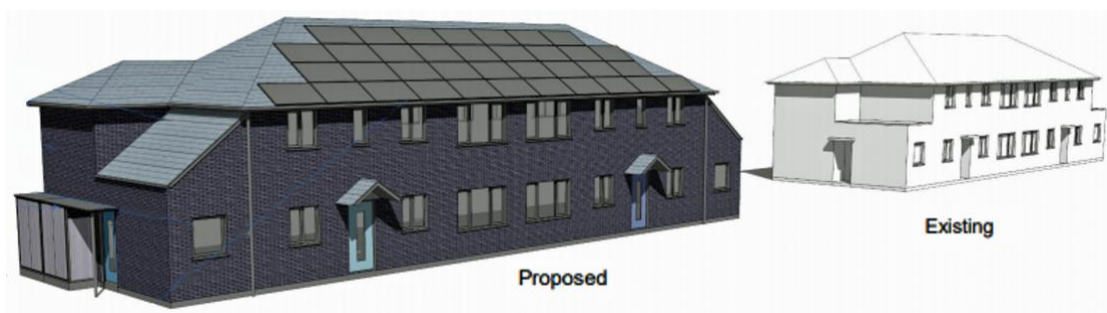
- 7.8 Sanctuary Housing have undertaken an Energiesprong pilot project in partnership with Devon County Council in Paignton, which has been partly funded by a European Regional Development Fund grant. Key elements of

⁸ www.energiesprong.uk/about

the work at two blocks of flats (design shown below), due to be completed this autumn, are:

- Solar panels
- External wall insulation
- Thermally efficient windows and doors (triple glazed)
- Ground source heat pump – communal system for each block
- Floor insulation – between properties and solid ground floors
- Removal of gas appliances and heating systems.

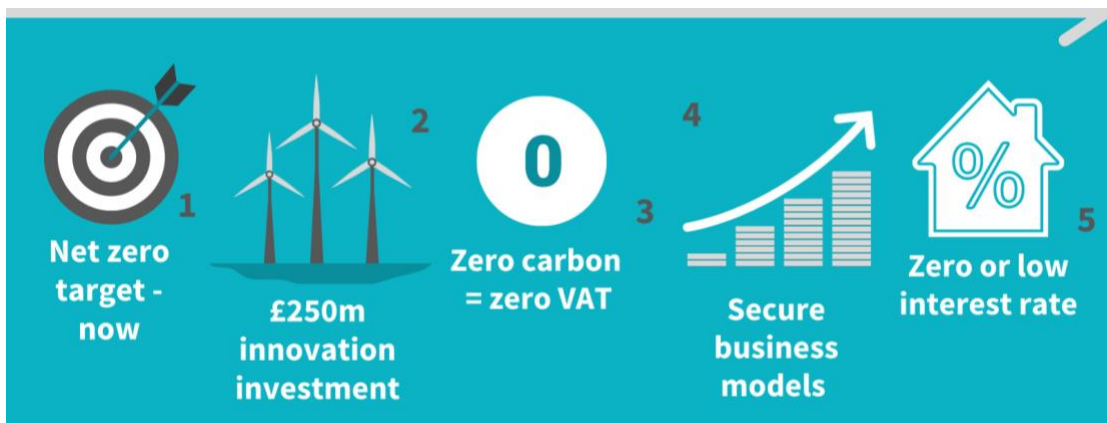
7.9 There have been delays to the project due to Covid, with some supply difficulties and a problem with the initial design of wall insulation panels, which has been addressed. The retrofit work has 10-year performance guarantees to minimise ongoing repairs and maintenance costs.



- 7.10 Sanctuary is at the design stage for a second pilot project for 13 terraced bungalows in Torquay.
- 7.11 Sanctuary costs have been about £84,000 per unit. With increased scale and more mature supply chains, costs of £56,000 per unit are expected.
- 7.12 The cost of the pilot projects has still been cost neutral for Sanctuary over a 10-year investment period, due to grant funding, renewable heat incentive payments, and savings on planned and responsive maintenance costs.
- 7.13 Government funding for a whole house retrofit competition has been awarded to two Energiesprong projects in Sutton (91 non-traditional construction homes) and Nottingham (172 homes on two sites, including flats and houses). There is a similar project in Cornwall for 83 1950s semi-detached homes. These retrofits are all aiming to deliver an energy performance of at most 30 kWh/m²/yr.
- 7.14 In a presentation to the group, Ian Hutchcroft, provided information on a Retrofit Accelerator Homes Innovation Partnership involving ten social landlord projects. This aims to build the scale of delivery necessary for economies to be achieved with the Energiesprong approach. For a grant-funded initial prototype stage, retrofit costs of about £85,000 per home are expected. Costs should fall, as the partnership moves to a pilot stage and

then onto a commercialisation stage, with the volume of homes retrofitted increasing. A final framework stage will be open to other social landlords and is expected to allow Energiesprong retrofit at about £55,000 per property.

- 7.15 Energiesprong UK now estimate income and savings of about £55,000 per property for a retrofit investment over 30 years. This includes about £15,000 from comfort plan charges to tenants, maintenance savings of £28,000 and renewable energy income of £12,000.
- 7.16 Previously, Energiesprong costs and savings delivered at scale have been estimated at about £35,000 per property⁹.
- 7.17 The group felt Energiesprong has merit as an approach and includes good features, but the costs currently look too high, even delivered at scale. There was also concern on whether all the income and savings forecast could be realised, including for the comfort plan.
- 7.18 Currently, the comfort plan cannot be implemented in the UK in the same way as in the Netherlands. Although Energiesprong UK projects have been able to introduce similar charges for tenants. In Nottingham, there is a communal energy standing charge. For future projects, a specific tenant contract has been prepared. However, these approaches are not ideal, as they cannot guarantee the income over the 30-year investment period, so Energiesprong is still seeking Government support to allow comfort plan charges in the UK.
- 7.19 Energiesprong, with more than 25 industry organisations, have called for 5 policy interventions¹⁰ (as shown in image below) to help allow deep retrofit in the UK. These asks are designed to unlock:
- Zero carbon retrofit at scale
 - Paid for by energy and maintenance savings
 - Delivered by a new high-tech British industry
 - Guaranteed actual performance, comfort and costs long term
 - Warm, affordable, desirable homes for life.



⁹ Green Alliance, 2019 - Reinventing Retrofit

¹⁰ www.energiesprong.uk/newspage/unlocking-net-zero-retrofit-at-scale-in-the-uk-our-5-asks-of-government

8) Other approaches to retrofit

- 8.1 In his presentation to the group, Nigel Griffiths mentioned a good programme for retrofit being established in Wales.
- 8.2 To decarbonise Welsh homes, investment of £14.5bn has been proposed, including £5.5bn for social housing (£24,000 per property) and £4.8bn for homes in fuel poverty (£36,000 per property)¹¹.
- 8.3 In November 2020, Wales launched the £20 million Optimised Retrofit Programme¹² to test and trial a whole-building approach to decarbonise social homes. The trial period will also identify capacity, skills and capability gaps in the delivery system.
- 8.4 A study¹³ by the Welsh School of Architecture at Cardiff University has recommended:
- “There should be no distinction between performance standards for retrofit and newbuild. Similarly, there should be no distinction between standards based on tenure or housing type.
 - “Some houses have constraints around retrofit, mostly related to character and historic features. However the justification for ‘acceptable fails’ must be carefully defined so as not to jeopardise decarbonisation targets.
 - “All other housing must be retrofitted beyond SAP90, to achieve an EPC A rating.”
- 8.5 Green Square Accord has transformed an apartment block of 22 homes in Darlaston (below). This has been upgraded through the installation of a whole house wrap of timber framed panels, dramatically improving the insulation and reducing electricity bills for the residents¹⁴.



¹¹ www.futuregenerations.wales/resources_posts/homes-fit-for-the-future-the-retrofit-challenge/

¹² <https://gov.wales/written-statement-optimised-retrofit-programme-2020-21> and www.optimised-retrofit.wales

¹³ gov.wales/sites/default/files/publications/2019-07/decarbonising-welsh-homes-stage-2-report.pdf

¹⁴ accordgroup.org.uk/news/2021-07-01/retrofit-whole-house-wrap-project-delivers-lower-fuel-bills-for-residents

- 8.6 In Cornwall, a whole house retrofit pilot project has been launched to install energy efficiency measures to 83 of the council's poorest performing homes¹⁵. Costs are expected to be about £45,000 per property, with measures chosen to suit the property including:
- loft, external wall and ground floor insulation
 - ground source heating
 - block and decommission chimney
 - single room ventilation with heat recovery to kitchen and bathroom
 - double glazing
 - solar power.
- 8.7 A 2018 project in North Camden, retrofitted a block of 15 flats to the EnerPHit standard (equivalent to Passivhaus for new build). This achieved a very low heat demand, but at a cost of £93,000 per flat¹⁶.

9) LETI climate emergency retrofit guide

- 9.1 LETI (originally the London Energy Transformation Initiative) is a network of over 1,000 built environment professionals that are working together on the path to a zero carbon future.
- 9.2 On 21 October 2021, LETI published their Climate Emergency Retrofit Guide¹⁷. This sets out what good retrofit looks like, and advises on how to deliver efficient, resilient and healthy homes. This includes defining energy use requirements, as well as highlighting the potential risks of poor retrofit. The guide was written by a group of over 100 construction industry professionals representing leading architecture and engineering firms, academia and non-governmental organisations.
- 9.3 LETI's recommendations for a net zero compliant retrofit are:
- Follow a whole building retrofit plan.
 - Follow the LETI retrofit hierarchy:
 - 1) Reduce the space heating demand and energy use intensity as far as is practicable for the building/situation.
 - 2) Remove fossil fuel heat sources and replace with low carbon alternatives. LETI believes that the main option for this over at least the next decade will be heat pumps.
 - 3) Generate renewable energy on site wherever feasible – but do not pursue this at the detriment of items 1 or 2 above.
 - Meet the LETI Energy Use Intensity targets which will often result in a 60-80% reduction in total energy consumption.

¹⁵ www.cornwallhousing.org.uk/residents-area/repairs-and-maintenance/whole-house-retrofit

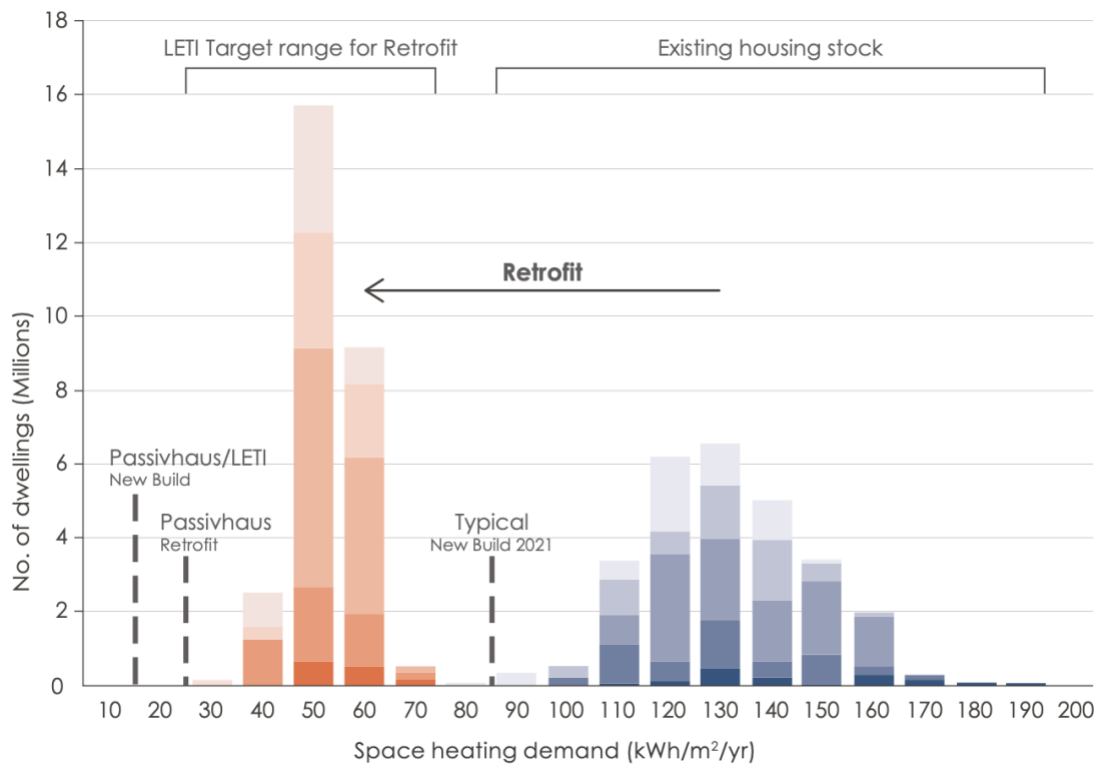
¹⁶ www.passivhaustrust.org.uk/news/detail/?nId=867

¹⁷ www.leti.london/retrofit

9.4 LETI's principles for good retrofit also include:

- Prioritise occupant and building health.
- Measure the performance.
- Think big!
- Consider impact on embodied carbon.

9.5 The energy performance transition required for UK dwellings to achieve the LETI target range is shown in the following chart.



9.6 LETI energy performance targets are:





9.7 The LETI guidance can be used alongside PAS 2035.

10) Gas and electricity prices

10.1 A comparison from 2019, showed typical electricity prices of 12.5 – 13p per kWh and typical gas prices of about 2.8p per kWh (with similar ranges of standing charges)¹⁸. Most of a gas bill comes from wholesale, network and operating costs. Electricity bills also include about 23% (3p/kWh) from social and environmental levies, which are only 2% (0.06p/kWh) for gas¹⁹.

10.2 However, gas is a fossil fuel producing greenhouse gases when burnt, whereas electricity is increasingly a cleaner source of power derived from renewable energy, especially wind power (on and off shore).

10.3 The higher levies on electricity send the wrong market signal and the lower levies on gas do not reflect its environmental impact costs.

10.4 To encourage the use of electricity for heating, social and environmental levies should be switched from electricity to gas, so that both better reflect their carbon and environmental costs.

11) Comparing heat pumps and gas boilers (carbon and costs)

11.1 Heat pumps extract heat from an external source (air, ground or water) and are powered by electricity. A heat pump can supply 2-4 units of heat energy for each unit of electricity input.

11.2 Fossil fuel gas boilers are powered by natural gas.

11.3 Current UK carbon emissions²⁰ for electricity and gas are:

- Electricity - 0.212 kg CO₂ equivalent per unit (kWh)
- Natural gas - 0.204 kg CO₂ equivalent per unit (kWh).

11.4 If a heat pump gives 2.5 units of heat for each unit of electricity used, the carbon emissions from currently using a heat pump are 0.085 kg CO₂e per

¹⁸ www.ukpower.co.uk/home_energy/tariffs-per-unit-kwh

¹⁹ www.ofgem.gov.uk/publications/infographic-bills-prices-and-profits

²⁰ www.gov.uk/government/publications/greenhouse-gas-reporting-conversion-factors-2021

kWh. There are some efficiency losses when using gas boilers and heat pumps, which are thought to be similar²¹. Therefore, carbon emissions from a heat pump will normally be less than half those from a gas boiler and will be even less where heat pumps are operating more efficiently.

- 11.5 The electricity grid is continuing to decarbonise so the reductions in emissions from using heat pumps over gas boilers will continue to increase.
- 11.6 The efficiency of a heat pump will fall in the coldest weather, but it should still supply at least 2 units of heat for every unit of electricity used.
- 11.7 Sufficient insulation is required for heat pumps to operate efficiently throughout the year, including in the coldest months. Better insulation will increase heat pump efficiency, as well as reducing the energy used for heating and increasing the carbon savings.
- 11.8 The table below shows fuel costs (2019 as above) for different heating systems, taking account of the efficiency multiplier achieved by heat pumps.

Heating system	Efficiency	Cost per kWh	Cost of useful heat per kWh
Electric heating	100%	13p	13p
Condensing boiler	88%	3p	3.4p
Heat pump	x 2.5	13p	5.2p
Heat pump	x 3.5	13p	3.7p

12) Energy Performance Certificates

- 12.1 Energy Performance Certificates (EPCs) are used to indicate the energy and carbon performance of new homes and the existing housing stock in the UK. They are used as a guide by residents, the Council and Government.
- 12.2 Both Nigel Griffiths and Ian Hutchcroft were critical of EPCs, as they are currently based on energy costs and so reflect how costs vary for different energy sources. EPC ratings are not a good indicator for the use of energy or carbon emissions and can also be out-of-date in their assessments.
- 12.3 EPCs are based on the Standard Assessment Procedure (SAP), which has developed over more than 20 years. SAP is currently being reviewed and the next version needs to be improved²², so it can be used as a true measure of energy efficiency, which better addresses carbon impact and fuel poverty.

²¹ Page 118, Heat Pumps for the Home (2nd Edition) – John Cantor, 2020

²² Making SAP and RdSAP 11 Fit for Net Zero: Summary, 6 August 2021 - [issuu.com/deepgreenengineering/docs/making_sap_and_rdsap_11_fit_for_net_zero-summary](https://www.issuu.com/deepgreenengineering/docs/making_sap_and_rdsap_11_fit_for_net_zero-summary)

13) Ground source heat pumps

- 13.1 Ground source heat pumps are more efficient than air source as they extract heat from below ground where the temperature stays around 10°C all year, protected from temperature extremes²³.
- 13.2 Where sufficient land is available, a horizontal collection loop can be laid with pipes in trenches approximately 1.5m below ground level. If space is tight, a vertical loop can be installed, which generally reaches between 50m and 90m deep²⁴.
- 13.3 Ground source heat pumps are more expensive than air source, but also have few moving parts, so should last for many years and require minimal maintenance (see reference 24 in footnote).

14) Community and district heating

- 14.1 Heat networks are expected to increase as the UK transitions to net zero. Heat is supplied through a network of highly insulated pipes from an energy source to homes, businesses and public buildings in the area. Community heating supplies heat to several buildings in a small area, such as a group of blocks of flats. District heating connects multiple buildings over a large area²⁵.
- 14.2 Heating sources could be waste heat from an industrial process, such as energy from waste incinerator, or, for community heating, a large biomass boiler or a ground source heat array.
- 14.3 There are examples of new heat networks bringing ground source heating to 500 homes in Cornwall²⁶ and to 364 homes in seven tower blocks in Sunderland²⁷, and heat from an energy from waste plant to 1,983 homes and many businesses in Leeds²⁸.
- 14.4 Changeworks and the Centre for Sustainable Energy have produced a report on increasing interest by social landlords in heat networks²⁹.
- 14.5 Government support is available for heat networks³⁰.

²³ cat.org.uk/info-resources/free-information-service/energy/heat-pumps

²⁴ Ultimate Guide to Ground Source Heat Pumps – Nigel Griffiths, July 2019 at www.self-build.co.uk/ground-source-heat-pumps-guide

²⁵ energysavingtrust.org.uk/what-district-heating

²⁶ heatthestreets.co.uk/

²⁷ www.kensacontracting.com/largest-gas-replacement-programme-with-ground-source-heat-pumps-in-tower-blocks-commences-in-sunderland

²⁸ www.carbontrust.com/our-projects/supporting-leeds-visionary-district-heating-network

²⁹ www.cse.org.uk/projects/view/1313

³⁰ www.gov.uk/guidance/heat-networks-overview

15) Survey of registered social landlords and Homes in Sedgemoor

- 15.1 A survey was circulated to social landlords with housing in Somerset West and Taunton and to Homes in Sedgemoor. Three completed forms, one written response and one telephone response were received.
- 15.2 The main aims of the survey were to learn about retrofit projects undertaken or planned, their objectives and levels of information and advice.
- 15.3 Two smaller social landlords had not undertaken projects or had any planned. One lacked information and sources of affordable guidance.
- 15.4 A larger regional social landlord had reviewed their stock, which identified 9,000 below EPC band C. Funding had been received to upgrade 370 of these, with the primary aims being to achieve band C and reduce high heating costs. They had an installation team that was being trained for PAS 2035 and were keen to work with partners. Cost was a challenge for whole house retrofit and they had a policy not to increase rents based on energy performance.
- 15.5 Magna provides social housing that includes stock previously transferred from West Somerset Council. Recent retrofit projects have replaced night storage heaters with air source heat pumps, upgraded previous cavity wall insulation from fibre to beads where needed, and topped up loft insulation to 300mm.
- 15.6 Magna's supply and investment strategy aims to ensure all their homes meet EPC C within 10 years, with an aspiration to achieve net zero carbon backed by investment provision in their business plan. Homes with low EPCs may be progressed beyond C to achieve net zero carbon.
- 15.7 Magna have a retrofit coordinator and assessor and are adopting PAS 2035 for new retrofit work. Working with AWS and other social landlords, they are preparing a retrofit strategy and plan a pilot for a whole house approach, which may follow LETI guidance. Engaging with tenants is seen as very important, as well as the need to improve local retrofit supply and skills.
- 15.8 Homes in Sedgemoor have a stock of 3,969 properties. Previously, they had programmes for loft and cavity wall insulation. External wall insulation and air source heat pumps have been installed in some properties and a ground source heat pump to a block of flats. Cavity wall and loft insulation programmes are ongoing and future projects planned under the Social Housing Decarbonisation Fund.
- 15.9 Primary objectives for Homes in Sedgemoor were to solve damp problems, reduce high heating costs, achieve band C and A or B, to reduce carbon emissions and switch to LED lighting. They have a retrofit coordinator and energy support advisor. They have joined the Net Zero Collective³¹ and are undertaking monitoring of 5 properties prior to retrofit to learn more about impacts on costs, energy efficiency and tenants.

³¹ netzerocollective.co.uk

16) Government policy and funding

16.1 The Government's Clean Growth Strategy (BEIS³², 2017) set a target for social housing to achieve Energy Performance Certificate (EPC) band C by 2035, "where practical, affordable and cost effective".

16.2 The Government's new Heat and Buildings Strategy (BEIS, October 2021) describes how the energy performance for buildings, including social housing, will be improved. It states (page 125):

"While we continue to build our evidence base and make strategic decisions, we need to take action in the 2020s to improve the energy performance of our buildings and prepare for and begin the switch to low-carbon sources of heat.

"To balance the certainty and stability needed for market growth, ensure we remain on track for Net Zero, and build-in flexibility and consumer choice, in the 2020s we will:

- introduce and improve energy performance standards.
- develop our policies on smart and flexible technology.
- begin phasing out use of fossil fuel sources of heat.
- build and support low-carbon heat markets.

16.3 Minimum EPC ratings will continue to be used (page 126), with EPCs to be developed through an Action Plan published in 2020 (page 127).

16.4 The press release³³ for the new strategy highlights the following points:

"The government and industry will work together to help meet the aim of heat pumps costing the same to buy and run as fossil fuel boilers by 2030, with big cost reductions of between a quarter and a half by 2025 expected as the market expands and technology develops.

"The Heat and Buildings Strategy sets out how we are taking 'no-regrets' action now, particularly on heat pumps, whilst supporting ongoing trials and other research and innovation on our future heating systems, including on hydrogen. We will make a decision on the potential role for hydrogen in heating buildings by 2026, by learning from our Hydrogen Village pilot. Heat pump technology will play a key role in all scenarios, so for those who want to install them now, we are supporting them to do so.

"To ensure electric heat pumps will be no more expensive to run than gas boilers, ministers want to reduce the price of electricity over the next decade by shifting levies away from electricity to gas. A call for evidence is expected to be published with decisions made in 2022.

"With heat in buildings being one of the largest sources of UK carbon emissions, accounting for 21% of the total, there is an urgent need to deliver a mix of new, low-carbon heating solutions to meet our legally-binding target to

³² Secretary of State for Business, Energy and Industrial Strategy

³³ www.gov.uk/government/news/plan-to-drive-down-the-cost-of-clean-heat

end the UK's contribution to climate change by 2050.

“... experts are clear there will need to be a mix of new, low-carbon heating solutions into the future for different property types in different parts of the country – such as electric heat pumps, heat networks and potentially hydrogen.

“... the UK currently has 40% of homes receiving a band C energy rating - up from just 9% in 2008 - and the government will continue to drive improvements to poorer performing homes, in line with the government's commitment for as many homes as possible to achieve EPC band C by 2035 where cost-effective, practical and affordable, and to ensure as many fuel poor homes as reasonably practicable achieve a band C rating by the end of 2030.

“... funding support will be targeted to those who need it most through schemes such as the Social Housing Decarbonisation Fund and Home Upgrade Grant, while improvements to public sector buildings will continue to be made through the Public Sector Decarbonisation Scheme.”

16.5 On socially rented housing, the new strategy states (page 137):

“... the UK Social Housing Decarbonisation Fund (SHDF) Demonstrator, launched in 2020, ... awarded £62 million of funding to social landlords across England and Scotland to test innovative approaches to retrofitting at scale. The Government has announced up to £160 million funding in financial year 21/22, delivering up to January 2023 as the first wave of the SHDF, which is England only. We are investing a further £800 million over financial years 2022/23 to 2024/25.

“We will also consider setting a long-term regulatory standard to improve social housing to EPC band C, with levers required to decarbonise the stock in line with Net Zero. We will consult the sector before setting any regulatory standard.”

16.6 The SHDF Demonstrator competition requires retrofit to achieve “an end use energy demand target of at least 50 kWh/m²” (same as LETI target) and compliance with PAS 2035³⁴.

16.7 The SHDF Wave 1 funding competition requires retrofit to achieve “at least a minimum energy efficiency rating threshold of EPC band C and are expected to improve properties to a space heating demand target of 90 kWh/m²/year or better”, as well as compliance with PAS 2035³⁵.

17) SWT challenges and emerging plans

17.1 SWT are developing plans for the Housing Revenue Account (HRA) to economically retrofit the Council's housing to meet carbon saving targets, whilst also ensuring tenants remain in well-managed, maintained and

³⁴ Social Housing Decarbonisation Fund Demonstrator: guidance notes – BEIS, Sept 2020

³⁵ Social Housing Decarbonisation Fund: competition guidance notes – BEIS, August 2021

compliant properties in great neighbourhoods.

- 17.2 A financially sound investment strategy should be achieved by:
- Learning from others and from our own pilots.
 - Investment in processes and training (PAS 2035).
 - Accurate and up to date data.
 - Maximising grant funding where it supports strategic priorities.
 - Developing a whole house approach to ensure works are specified and installed 'Right First Time' and avoiding the creation of sick housing.
 - Create communities, tenants and a workforce who are advocates for low carbon retrofit.
- 17.3 Challenges include: affordability, competing HRA business plan pressures and risks, funding criteria, achieving PAS 2035, delivering pilots and new initiatives, targets set for 2030 and 2050, and ensuring no regrets, best practice and taking account of wider matters.
- 17.4 SWT's stock of 2,700 homes has a high proportion of non-traditional houses, a significant proportion of sheltered housing and pre-1940s stock and a wide range of property archetypes. 8% have EPC ratings of A or B, 48% are C, 35% are D, and 8.5% are E or F.
- 17.5 The HRA's capital programme has on-going commitments, especially to maintenance and disabled adaptations. In addition, the capital programme has a large commitment to new build and housing replacement up to 2026/27.
- 17.6 Currently, there are Local Authority Delivery Scheme (LADS) projects with Green Homes Grant funding, improving heating for a small number of low-income households, including mobile homes. The Warm Homes Fund currently provides support to install air source heat pumps.
- 17.7 SWT has joined a consortium of 8 social landlords, including Homes in Sedgemoor, to bid for £4m from Wave 1 of the Social Homes Decarbonisation Fund (SHDF). If successful, SWT's share would be £380k for 24 units. Wave 2 applications are expected to be invited during 2022, when SWT officers anticipate bidding for funding to improve 200-300 units from EPC D to C. Prospects will be improved if the Wave 1 consortium bid and delivery is completed successfully.
- 17.8 Successful retrofit will need to work well with tenants (customer) and address property fabric (insulation, air tightness and ventilation) and heat and power (electricity, other non-fossil fuels, heat pumps, solar electricity and water heating, batteries). Consideration is being given to adopting the new LETI Retrofit guidance.
- 17.9 The LETI Climate Emergency Design Guide for new builds, published in January 2020, is being used for SWT's zero carbon affordable homes pilot³⁶.

³⁶ Report to Full Council – 7 July 2020: Zero Carbon Affordable Homes Pilot

Housing Directorates response to RA response to Report of the task and Finish Group on Council Housing Zero Carbon Retrofit

The housing directorate welcomes such a comprehensive investigation of low carbon retrofit of SWT homes. The task and finish group's investigation considered, in depth, many of the key areas which will need to be addressed as the council works to produce a Low Carbon Retrofit Strategy and Delivery plan by March 2023.

The Housing Directorate would agree with the Groups comment (1.4) that there was a high degree of alignment between the thoughts of officers and the emerging conclusions and recommendations of the Task and Finish Group. The Housing Directorate have set out below a positive response to many of the Task and Finish Groups Report recommendations and a few areas where there is more diversity of thought currently. The directorate recognises that sections 3 – 17 reflects the evidence considered rather than recommendations and the service have not made comment on this section.

The Housing Directorate's thinking is aligned to many of the key recommendations including:

Using a Whole House approach to consider the measures required or Low Carbon Retrofit and staged delivery of measures

- A whole house approach is essential to successful low carbon retrofit (1.3) and that this may be achieved in stages (2.2). The Directorate would agree and stress that each architype and property type requires a walk route to its 'lowest possible/economically reasonable carbon footprint'.
- To deliver the greatest carbon benefit several stages will be essential for most houses and these stages need to align to the fabric first approach. The service will need to be aligned the stages as best possible to the capital replacement programme and available subsidy (grant).

Government subsidy is essential to achieving low carbon retrofit

- Government subsidy (grant) support will be essential to the installation of retrofit measures (1.5). The Housing Directorate would go further to suggest that the timing and form of subsidy will have a significant influence on the success of achieving any targets set regardless of how we choose to measure carbon savings (improved EPC/SAP ratings, reduced power consumption(kWh/m²/yr), regulated energy (design of the building) or non-regulated energy (design + appliances selected + habits of the occupant, etc).
- The Directorate would agree that with good stock data and an established whole house approach by property architype and form the council should be in a strong position seek to maximise any government grant opportunities which would fund identified measures (2.7.1)

Standardised Guidance

- The report recommends that various guides to retrofit would benefit by being standardised (2.1). The Housing Directorate would agree that a standardised guide would help landlords deliver the good practice/approaches for example the approach. Potentially this will eventually come in the form of building regulations.
- The Directorate is aware of the standards specified in the London Energy Transformation Initiative (LETI) retrofit guide. The Directorate recognise, as does LETI, that their guidance has not been costed and therefore its ambitions may not be the most cost-effective way to

achieve carbon saving or to achieve statutory requirements. The Directorate would question the prescriptive nature of targets, such as those set in the LETI standard for reduced power consumptions, as each landlord will have a range of architypes and property forms which will each have their optimum achievable power consumption measure. Reducing heat and power to its optimum level and then applying renewable grid supplied or on-site energy will produce a zero-carbon home. The key consideration is to create a 'property' target with as low a power consumption as practical to reduce the likelihood that the tenant will face fuel poverty when the property switches to electricity.

- The Directorate suggests that setting a standard measurement for an architype form to prevent fuel poverty is important. Measuring the carbon savings against the property's current energy use is more meaningful than measuring the property against an arbitrary target.
- The use of walk routes by architype and form helps the council maximise the carbon saving and invest in the most appropriate measures for the property.
- The walk route of measures can also ensure decisions are made in relation to investment which do not act against later investment decision, for example understanding if the insulation of the floor and decant of the customer is essential or not to avoid fuel poverty should the property start to use electricity as the source of heat and power is critical and there will be an optimum point in the sequence of measures where this is best done if required.

A whole house approach delivered in stages must begin with fabric

- The directorate enthusiastically support this approach. A whole house approach delivered in stages must begin with fabric to bring about significant power use reductions for homes and for the stock (2.2).
- The Directorate would suggest the stages will in part depend on the distance the architype has to travel to achieve carbon neutrality or the ease and number of measures required and cost constraints.
- The Directorate would also wish to note that the 2030 and 2035 requirements for social landlords to achieve EPC C will focus spend on fabric measures above secondary stage measures such as removing fossil fuel.

Removal of fossil fuels

- The Directorate agree that the removal of fossil fuel is essential to achieve zero carbon (2.2). The timing of the removal of fossil fuels is the final of three essential steps to retrofit:
 1. Gaining customer / tenant support for retrofit. In retrofit the council require access to customers' homes. Access is much easier if customers understand and share the purpose for the works.
 2. Fabric first
 3. Renewable energy via the Grid or through on site/community renewable energy
- The speed at which fossil fuels are replaced will depend on several variables:
 - Achieving EPC C and good insulation standards through a fabric first approach

- The introduction of a new SAP methodology which is likely to weight electric heat over fossil fuel heating (such as gas).
 - The speed by which a decarbonised grid is created
 - The availability of low cost on site renewable technology
 - The availability of subsidy to support introduction of renewable on-site technology
 - Access to homes
- The Directorate recognise that switching to grid fed electricity will exaggerate fuel poverty if progressed too swiftly. This will act against the requirement of the council to achieve EPC C for households in fuel poverty by 2030 and is likely to act against tenants' support for retrofit.

Building customer awareness

- The directorate welcome the importance placed on building up customer awareness and support for retrofit and making full use of tenants as leaders (2.5) (2.9).
- We agree that retrofit projects should be monitored to check performance, tenant's satisfaction and learn lesson (2.9)
- As stated above the Directorate would consider gaining customer support as one of the three key challenges to achieving zero carbon retrofit homes. Customer enthusiasm and support is essential to;
 - allow timely access to carry out works to customers' homes,
 - collecting before and after works energy use data to evidence success
 - monitoring and maximising savings to reduce fuel poverty
- The Directorate is aware that equal to success is the enthusiasm of our workforce and supply chain who interact with customers

Alignment of the retrofit and capital decent homes programme

- The Directorate agree that the retrofit costs and decent homes capital costs should be aligned to ensure homes remain decent and efficient and economic investment is made (2.7.2)

Learning from local and national best practice

- The Directorate/SWT needs to continue to learn from local and national good practice (2.9) (2.10). The directorate support this statement.

Working with other partners

- The Directorate aims to continue to work with other social landlord partners (2.12). The recent consortium Social Housing Decarbonisation Fund submission with seven other regional Registered Providers is evidence of this. The Directorates continues to work increasingly close with Homes in Sedgemoor and through this considers approaches and common themes.

Disposal of underperforming Council Housing stock

- The Directorate agree that the disposal of Council housing stock should only be progressed where there is a clear business case supporting the overall objectives of the HRA (Housing Revenue Account) (2.12).
- The directorate is aware that many landlords use stock disposal as a means of raising the funding to allow more new build homes. This can work as the costs of maintaining an old property can be avoided and a capital receipt received.

Additional thoughts where there is more deviation of the Housing Directorate thinking.

- The directorate and the report have more diverse views on a small number of recommendations:

More intervention by the housing service in relation to tenants' appliances and equipment

- The directorate is cautious of the role of the council, other than advice and encouragement, in specifying the appliances and lighting in a tenant's home. We recognise that energy use varies significantly depending on the choices of appliances or equipment tenant uses and the energy rating of their equipment. Appliances and equipment may vary with tenants as they do across all tenures from kettles and TVs to hot tubs and tanning beds. The Directorate has limited scope under the tenancy agreement to interfere in these choices and some choices may be better remaining with the tenant and bill payer. The Directorate would be enthusiastic to see the improvement of national standards requiring manufacturers to apply low carbon principles (2.6)

Use of a comfort plan to subsidise low carbon investment

- The directorate is unsure of the mechanism that it could adopt to introduce comfort plan principles.
- We consider the comfort plan principles requires a landlord to be confident in the performance of their interventions. SWT does not currently have the expertise and data (pre works and post works) to provide this confidence.
- The directorate recognises that the principles of the comfort plan should continue to be explored as a potential source of investment (2.7.3)

Use of target setting targets through council policy and planning policy

- The Directorate is concerned that over ambitious target setting by the council, including the local planning authority, for the removal of a) fossil fuels and b) establishing household power consumption will act against the principles of whole house, fabric first and the HRAs (Housing Revenue Account) ability to invest in all the homes requiring measures.
- Without identifying new sources of investment targets in relation to fossil fuels need to reflect a staged approach to whole house solutions and understand if the target creates additional carbon savings or just increase investment costs and potentially fuel poverty.

- The LETI ambitions for energy performance should be used to reflect the 2050 goal of zero carbon. However, should new sources of funding allow a swifter move to zero carbon retrofit it will be embraced.
- The Directorate would suggest that the critical measurement is power usage per property archetype/form measured in Kwh/m²/yr. However, setting random targets such as 90, 50, 40 Kwh/m²/yr is likely to be superficial and could increase the opportunity for poor investment decisions, fuel poverty due to inability to invest in all the stock or a requirement to sell more poor stock to help close the gap with the target. The Directorate proposes that each property archetype/form will have a different optimum standard for heat and power and each target is set to ensure the customer is very unlikely to suffer fuel poverty as heat is switched over time to electricity through the grid or on-site renewables.
- Through using a walk route to zero carbon rather than target setting there will be greater and more immediate opportunity to evidence carbon reduction as it would be measured against current carbon use. Carbon could be measured at every point along the walk route as the property receives each measure. An example of this is the results from a test property which we have analysed and has a power usage of 220 Kwh/m²/yr. The best this property could achieve is 45 Kwh/m²/yr but to achieve this the tenant would need to be decanted to allow the floor to be insulated, air tightness interventions and mechanical ventilation would need to be incorporated. These measures are possible but unaffordable considering the number of units the council must retrofit. However, through fabric measures the property could achieve a power usage of 84 Kwh/m²/yr. This level of power usage would fall short of the LETI standard but would create a huge carbon saving of 136 Kwh/m²/yr or 60%. Achieving 84 Kwh/m²/yr on this property would also achieve 80% of that archetypes/forms potential power reduction.
- It is important to note that as the grid decarbonises the property would become zero carbon as long as it has electric heating and the key variable is the relationship of the tenant to fuel poverty.
- It is important to remember that the government is introducing a new SAP calculation which could alter how we prioritise our investment. We are building this new calculation into our thinking as best we can.

Chris Brown
Assistant Director Development and Regeneration

Council Housing Zero Carbon Retrofit Task and Finish Group

Terms of Reference

Role of the Council Housing Zero Carbon Retrofit Task and Finish Group

A cross party, non-decision-making Task and Finish Group who will investigate funding sources and approaches for a zero-carbon retrofit programme for the council's housing stock.

The Task and Finish Group will prepare a report with recommendations for the Scrutiny Committee, who may then recommend consideration of the report and recommendations by the Executive and, if appropriate, Full Council.

This topic aligns with the Corporate Strategy of SWT, priority theme on Our Environment and Economy Objective 1: *“Work towards making our District carbon neutral by 2030 - deliver projects based on a Carbon Neutrality and Climate Resilience Plan that work toward this goal (for example installing electric vehicle charging points across the District)”*.

The panel will meet on a regular basis and report back to Scrutiny Committee within 4 months if possible

Scope

The Task and Finish Group will consider:

- Funding sources and approaches for a zero-carbon retrofit programme for the council's housing stock, covering insulation and heating systems as well as energy efficiency, generation and storage.
- Current SWT Council plans for retrofit of the Council's housing stock (currently detailed in the CNCR Action Plan)¹
- Guidance and different approaches being taken to retrofit work, including Energiesprong amongst others and examining examples of good practice.
- Whether part of the savings in energy costs from retrofit work should be reinvested and methods for reinvestment.
- Opportunities for additional non-energy savings and an investment programme to support retrofit work.

¹ <https://www.somersetwestandtaunton.gov.uk/media/2429/carbon-neutrality-and-climate-resilience-plan.pdf>
Appendix 1: <https://www.somersetwestandtaunton.gov.uk/media/2431/appendix-1-indicative-action-plan-to-2030.pdf> There is an update in 5.9 at:
<https://democracy.somersetwestandtaunton.gov.uk/documents/s13172/HRA%20Revenue%20and%20Capita%20Budget%20Setting%202021-22%20including%20Dwelling%20Rent%20Setting%202122%20and%2030-Year%20Busi.pdf>

- Relevant case studies, feedback and lessons from other councils, housing associations and any similar social housing providers.
- Implications for the Council and its tenants.
- Benefits from joint working with partners in the region.

Membership

The membership of the group does not need to be politically balanced.

Name	Political Party / Role
Cllr D Mansell	Independent and Green / Chair
Cllr A Wedderkopp	Liberal Democrat / Member
Cllr I Aldridge	Independent and Green / Member
Cllr N Cavill	Conservative / Member
Cllr J Hassall	Liberal Democrat / Member

Method of Working

- The Chair (and Vice-Chair if required) to be elected and appointed at the first meeting of the Task and Finish Group, who shall be Members from the Scrutiny Committee.
- At the first meeting, business will also include:
 - a) To elect the Chair of the Task and Finish Group (if appropriate)
 - b) To appoint the Vice-Chair of the Task and Finish Group
 - c) To receive any apologies for absence
 - d) To review the Terms of Reference for the Task and Finish Group
 - e) To complete the Task and Finish Group scoping document
 - f) To consider any other business set out in the agenda
 - g) To determine the frequency of meetings (considering the workload of officers and Committees – which take precedence)
 - h) To determine the date of next meeting
- Any non-executive Councillor may be appointed to serve on Task and Finish Groups and membership will be open to non-councillors, including representatives of external bodies.
- Support from the Governance team.
- Relevant persons from both inside and outside SWT will be invited to attend and answer questions where it does not cause undue disruption to other priority activities.
- The Task and Finish Group will primarily meet virtually on a regular basis, via Zoom or Teams.
- The Task and Finish Group can make recommendations but is not a decision-making body, collective views will feed into the Group's report, which will be submitted to the Scrutiny Committee.

- Where possible papers will be issued 3 working days ahead of meeting, allowing sufficient time to review and prepare for the meeting.
- Meeting notes and actions will be circulated to the Working Group within 5 working days where possible.
- All papers will be distributed electronically only.
- The quorum will be a minimum of two members, however, dates of meetings will be selected to allow for the attendance of the whole group wherever possible.
- The relevant Portfolio Holder and Director and/or SMT, if appropriate, will be consulted before the Group's report is completed.
- The final Group report and any recommendations shall be decided by a simple majority of Group members present at the meeting, although the Group should aim for consensus wherever possible.

Somerset West and Taunton Council

Executive – 15 June 2022

Wellington Land Acquisition (The Green Spaces)

This matter is the responsibility of Executive Councillor Member Cllr Rigby

Report Authors: Joe Wharton, Assistant Director Major and Special Projects & Dr Joanne O'Hara, Programme Manager – Heritage at Risk

1 Executive Summary / Purpose of the Report

- 1.1 Wellington Land Acquisition: To inform Members of a proposed future land consolidation project for Wellington to protect the open green spaces and enhance community provision, and to seek approval for SWT to purchase land using CIL allocated funds and to provide for disposal on a long-term lease to the Wellington Town Council (WTC) for its future management.

2 Recommendations

- 2.1 To seek approval for the recommendations set out the Confidential Appendix 1.

3 Risk Assessment

- 3.1 The main risk is the acquisition of a large piece of land that comes with responsibilities for maintenance and possible liabilities. Discussions are advanced with Wellington Town Council over Heads of Terms for a long term lease in order to mitigate this risk and ensure they accept the lease on acquisition.

4 Background and Full details of the Report:

- 4.1 This project seeks to purchase an area of agricultural land and green space in Wellington that connects Rockwell Green, Tonedale and Wellington ('the Green Spaces'). This will allow the creation of a coherent plan in line with SWTs Green Infrastructure Strategy to provide enhanced green space for the residents in Wellington. The following appendices accompany this report

- 4.1.1 Appendix 1 Confidential Commercial Information.

- 4.1.2 Appendix 2 shows the red line plan for the land for acquisition.

- 4.1.3 Appendix 3 shows the proposed division of the Green Spaces for community use.

- 4.1.4 Appendix 4 is the District Valuation report (Confidential).

- 4.1.5 Appendix 5 shows the Fox's Field red line (already acquired by SWT).

- 4.2 This project may facilitate future improvement of the pedestrian access between Wellington and Tonedale using green spaces rather than primary roads, enhance the environment for the wellbeing of the community, deliver youth sports pitches for leisure and provide additional allotments. It could also deliver a Community Farm to provide

food production for local people as well as employment and training opportunities for young and disadvantaged groups.

4.3 It is proposed that SWT purchase the Green Spaces and then immediately transfer responsibility via a long-term lease (up to 125 years) to the Wellington Town Council who will in turn work with the groups listed below, to include but not limited to:

4.3.1 Wellington Community Food;

4.3.2 Wellington Mills CIC; and

4.3.3 Transition Town Wellington.

4.4 It is proposed that the lease to WTC should also include the open space adjacent to Tonedale Mill known as Foxes Field. This area was purchased in 2018 by SWT. Approval has previously been sought for a long lease to a community group, and its inclusion in the Town Council lease would give greater cohesion in the delivery of community amenities.

4.5 The Green Spaces have not been actively managed and the pedestrian access is fragmented. The land also neighbours the Wellington Sports Centre, Nature Reserve and Wellington Park and Recreation Ground. Wellington Park (RPG, Grade II*) holds a Green Flag award and is a prized open space for the community. This would further bolster the green space which has been invested in by SWT for the residents of Wellington.

4.6 It is not intended as part of this transaction to acquire The Ponds or the various waterways crossing the Green Spaces – these are in separate ownership (Mancraft Limited and The Crown Estate).

5 Links to the Corporate Strategy:

Environment and Economy:

5.1 *“Shape and protect our built and natural environment, supported by a refreshed Local Plan and develop our heritage, culture and leisure offer including a clear vision and delivery plan for the Taunton Garden Town.”*

The Green Infrastructure Strategy:

5.2 *“Create and enhance green infrastructure across the Borough, particularly at Taunton and Wellington, and maximise its potential to meet a diversity of functions, including wildlife habitat, recreation, flood alleviation and visual amenity, and to identify opportunities for GI within and adjacent to potential development areas to inform the LDF, and to identify approaches to funding and implementation of the green infrastructure proposals.” and*

5.3 *“As shown in Figure 3.4, Wellington has good provision of access to formal parks and gardens. Similarly to Taunton, Wellington has significant areas of deficiency in access to local open space, including in central Wellington and at Rockwell Green and Tonedale. Parts of north, central and south Wellington are currently deficient in play areas, and most of the town is deficient in access to a young person’s space.” and*

5.4 *“With the exception of small areas on the north western and north eastern fringes of Taunton, the town meets the 1km distance standard for provision of allotments. The provision in Wellington is not so good, where most of the central and eastern areas of*

the town are more than 1km from an allotment.”

6 Finance / Resource Implications

- 6.1 The opportunity to create the Green Spaces was brought to this Council's attention by local community groups in Wellington. The purpose of the acquisition is to provide a facility identified as *'land to provide a country park, an expansion of existing allotments, the provision of a community farm and the further development of community sports facilities for the benefit of Wellington, Rockwell Green as well as additional land identified for conservation benefits for the area as a whole'*.
- 6.2 The land will be capitalised as a community asset on the Balance Sheet of Somerset West and Taunton Council, measured at depreciated historic cost (although as the asset is land it would not ordinarily be depreciated). It is proposed that Somerset West and Taunton Council will lease the Green Spaces and Foxes Field to Wellington Town Council on a long lease at a peppercorn rent and, although terms are still to be agreed, it is expected that an annual financial contribution by Wellington Town Council towards maintenance will be agreed on an ongoing basis as part of a 5 year rolling management plan. A termination clause in the lease will be provided should Wellington Town Council not adhere to the terms of the lease. It is also expected that any future surpluses accruing to Wellington Town Council from sub-leases of the Green Spaces would be re-invested into the site.
- 6.3 Considerable future investment by Wellington Town Council will be needed on the site in the coming years to deliver the desired community benefits but the purpose of this report is to secure the land so that the future plans can be delivered in consultation with the local community, which is a vital and necessary stage of the process.
- 6.4 The submission by Somerset West and Taunton Council was unsuccessful in obtaining funds for this project from the Levelling Up Fund in Round 1. This land was originally identified in the Levelling Up Bid in 2021 and part of the recommendations in the paper that was approved by Full Council on 7 September 2021.
- 6.5 It is now proposed to purchase the land for The Green Spaces using Community Infrastructure Levy (CIL) allocated funds. This is utilising funds already held in CIL capital reserves and would not result in additional borrowing costs or an increase in Minimum Revenue Provision (MRP) for capital debt repayment.
- 6.6 The proposal to acquire this land requires updates to the current approved budget within the Capital Programme, in order to put together the total budget in 2022/23 under Community Development:
- 6.7 VAT considerations: as SWT is not expected to incur any development costs and the lease is a peppercorn, it is not expected that the plot will be opted to tax and this will not impact the partial exemption calculation. Professional advice will be sought if required.

Financial Implications for Somerset Council:

- 6.8 The proposals in this report would provide an asset on the Council's Balance Sheet that will transfer to Somerset Council on 1 April 2023 at book value.
- 6.9 The structure of the lease arrangement means there should be limited ongoing implications regarding freehold ownership of the asset. Maintenance costs will be covered by Wellington Town Council. Somerset Council's ongoing interests will be

suitably protected in the lease as described above, and will need continued oversight. As the lease is proposed at peppercorn ongoing income is insignificant.

- 6.10 The proposed increase in budget utilises existing capital reserves, which therefore places a commitment to use these reserves prior to vesting day but does not result in increased financing costs in subsequent years.

7 Legal Implications

- 7.1 The Council may dispose of land held by it in any manner it wishes.
- 7.2 Section 123 LGA 1972 requires that any disposal of land, other than by way of a short tenancy, must not be for a consideration less than the best that can reasonably be obtained.
- 7.3 In disposing of the Green Spaces and Foxes Field to WTC on a long-lease at a peppercorn rent, the Council will need to firstly comply with various statutory obligations, as follows:
- 7.3.1 Before making a final decision on the disposal, the Council must advertise its intention to do so and consider any objections received (S123 LGA 1972);
- 7.3.2 The Council must be satisfied that it is achieving the best consideration reasonable obtainable for the land or (if disposing at an undervalue of less than £2 million) that it considers the disposal will help it to secure the promotion or improvement of the economic, social or environmental well-being of its area (S123 LGA 1972 and Circular 06/03 General Disposal Consent 2003). The justification for proposed disposal to Wellington Town Council at a peppercorn rent is set out in Section 6.2 and 6.3 of this Report.
- 7.4 In effectively providing a public subsidy to Wellington Town Council, the Council must ensure that it complies with the obligations in the UK-EU Trade and Co-operation Agreement and be satisfied that the subsidy does not carry any appreciable risk of triggering a dispute with a trade partner under the terms of the applicable Wellington Town Council rules or the UK's Free Trade Agreements. Officers are satisfied that the proposed disposal at an undervalue complies with these requirements.
- 7.5 At the time of writing this report, Officers are seeking legal clarification as to whether the formal consent of the Executive of Somerset County Council is required for the proposed leasehold disposal to Wellington Town Council pursuant to the Section 24 Direction issued by the Secretary of State on 10th May 2022. It is recommended that Officers be given delegated authority to seek such consent if it is required. The S151 Officer has already informed the LGR Finance Board of the proposals for transparency.

8 Climate and Sustainability Implications

- 8.1 The proposal is significant in protecting the green spaces of Wellington and Tonedale. Having control of this area could significantly enhance the natural environment, and fulfil the aims of the Green Infrastructure Strategy in this area of Wellington.
- 8.2 This could improve the existing infrastructure by enhancing pedestrian and cycling routes. It can also deliver a community forest garden, potential wetland, tree planting or allotments, amongst other possible uses.

9 Safeguarding and/or Community Implications

- 9.1 Securing the Green Spaces puts us one step closer to being able to develop the green site and in particular create safe and green routes between Tonedale, Rockwell Green and Wellington.

10 Equality and Diversity Implications

- 10.1 These proposals seek to enhance the built and natural environment for the benefit of the whole community. In practical terms these projects could physically open additional spaces for members of the community who are currently excluded. The proposal is also seeking the delivery of youth provision by expanding allotments and delivering youth pitches. Volunteering and employment opportunities can also be delivered through the community farm.

11 Social Value Implications

- 11.1 The acquisition of the Green Spaces would have considerable amounts of social value. It will protect a large amount of green space which has a low agricultural value partly due to its fragmented location that will have a very high community value in the future. The potential future uses of the site will be put out for consultation with the community and our partners will seek high levels of community engagement with developing these plans.

- 11.2 Wellington Town Council and Wellington community groups have already commenced substantial community consultation and current ideas include the provision of further allotments, youth sports pitches and a community garden to be created in the Green Spaces are all testament to the social value of this acquisition. Projects being considered and developed include:-

Develop a Community Farm:

- 11.3 Work is already underway on developing plans to develop a Community Farm to provide affordable sustainably produced food. Wellington Community Food Ltd has been established and with financial support from the WTC has developed a 5 year business plan showing that it is a viable proposition – all it needs is land. This will link into the Council's commitment to reducing the towns carbon footprint and help raise awareness of the Climate and Ecological Emergencies and how lifestyle and consumption choices can have a positive impact on the planet

Extend the allotments to provide extra capacity and reduce/eliminate of the waiting list:

- 11.4 The Town Council has a waiting list of people looking to take on an allotment at The Basins. This land it will provide the ability to extend the existing allotment area creating additional plots. As with the Community Farm by making more allotments available this will encourage greater self-sufficiency in food production and support the reduction of the town's carbon footprint.

Improve active travel options around the town i.e. between Rockwell Green/Basins/Tonedale Mill/Westford:

- 11.5 Linking in with the development of the town's Local Cycling and Walking Infrastructure Plan (LCWIP) we will increase active travel options around the town through the creation of multiuser access tracks linking Tonedale to Rockwell Green and Westford).

- 11.6 By having an LCWIP this will enable applications for funding to improve those

links.

Develop additional junior playing pitch capacity:

- 11.7 The Sports Federation is invited to look at using part of the land to develop additional junior playing pitches to cope with increased demand caused by the town's growing population.

Plant trees to help the town reduce its carbon footprint:

- 11.8 Owning land means more trees can be planted to offset carbon emission and address biodiversity issues helping the town to meet its target of seeking to achieve carbon neutrality by 2030.

Improve habitats and landscape of the area:

- 11.9 Create nature rich habitats on a significant proportion of the land.

Increase Carbon Storage:

- 11.10 There is potential to sequester carbon within the soil and trees contributing to the Councils commitment for the Town to move towards being carbon neutral.

12 Partnership Implications

- 12.1 Somerset West and Taunton Council is seeking to lease directly to Wellington Town Council, but would continue to remain a key stakeholder in the delivery of the site alongside group such as Wellington Community Food, Wellington Sports Federation, Transition Town Wellington and Wellington Mills CIC.

13 Health and Wellbeing Implications

- 13.1 The Green Spaces will allow accessible amenity space for the community to use and enjoy in terms of recreation space, exercise through sports pitches and allotments and in availability of fresh produce.

14 Asset Management Implications

- 14.1 SWT would seek to immediately transfer the land to the Wellington Town Council on terms which are currently being agreed. Somerset West and Taunton Council will pass all maintenance liabilities to Wellington Town Council whilst retaining an overseeing role by way of the proposed 5 year rolling management plan. It is envisaged that they would work with other end users for community activities to be provided throughout the space.
- 14.2 The Section 24 requirement comes into force on 16th June 2022 and the onward disposal of this land would need to follow the process once it has been clarified.

15 Consultation Implications

- 15.1 The sites are important for the community of Tonedale and Wellington more widely. Consultation for the sub-leases of the land would be conducted by Wellington Town Council.

16 Informal Executive Comments

16.1 A discussion was held at informal executive and Members were supportive of the proposals.

17 Scrutiny Comments

17.1 No additional comments or changes were sought on any of the recommendations, although the committee were made aware that the recommendations may change slightly to clarify points of process before Executive, but these do not alter the substantive ask.

Democratic Path:

- **Corporate Scrutiny Committee – Yes 1st June**
- **Executive Committee – Yes 15th June 2022**
- **Full Council – Yes 5th July 2022**

Reporting Frequency: Once only

List of Appendices

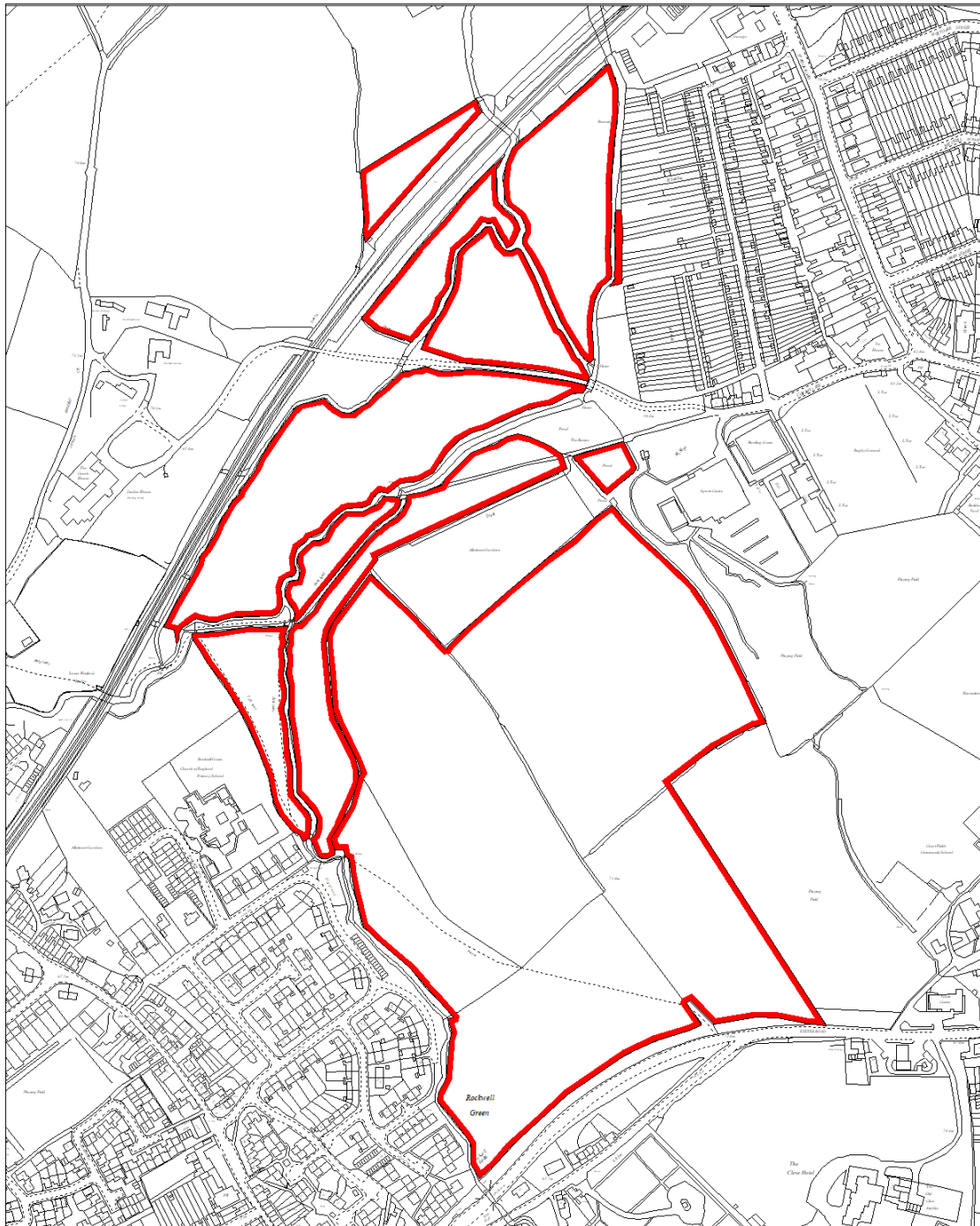
Appendix 1	Report Recommendations (CONFIDENTIAL)
Appendix 2	Plan of Proposed Acquisition
Appendix 3	Proposed Community Uses
Appendix 4	Valuation Report (CONFIDENTIAL)
Appendix 5	Plan of Fox's Field

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By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
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Plan title: Land at the Basins, Wellington

Case type:

Key

Map title: ST1220NE
Scale: n/a

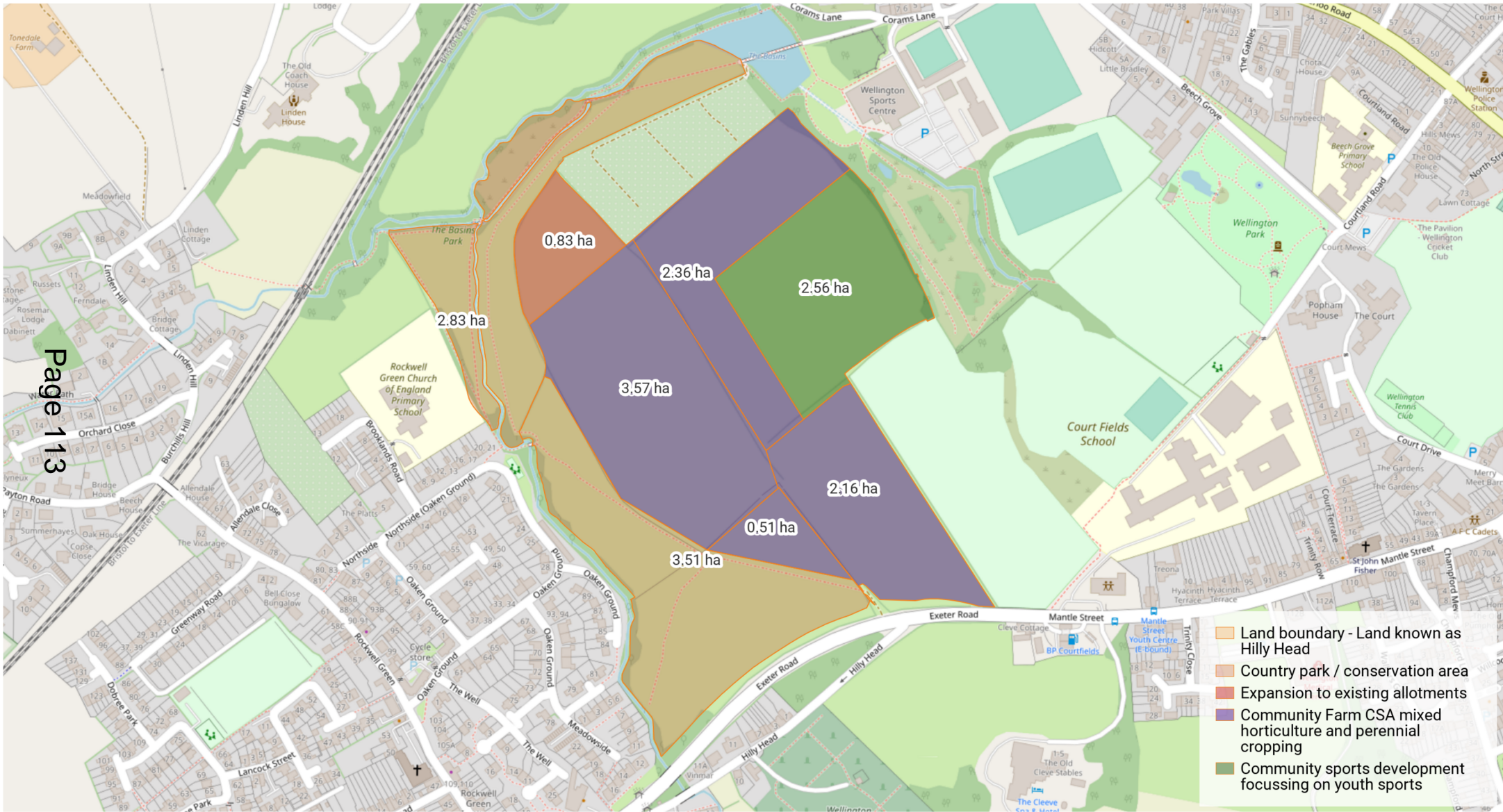
Coordinates: 312849,120619
Area: Perimeter:



Land subject to proposed purchase shown edged in red.

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Designated areas are for illustration only, division of land will be dependant on community vision

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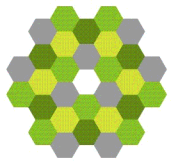
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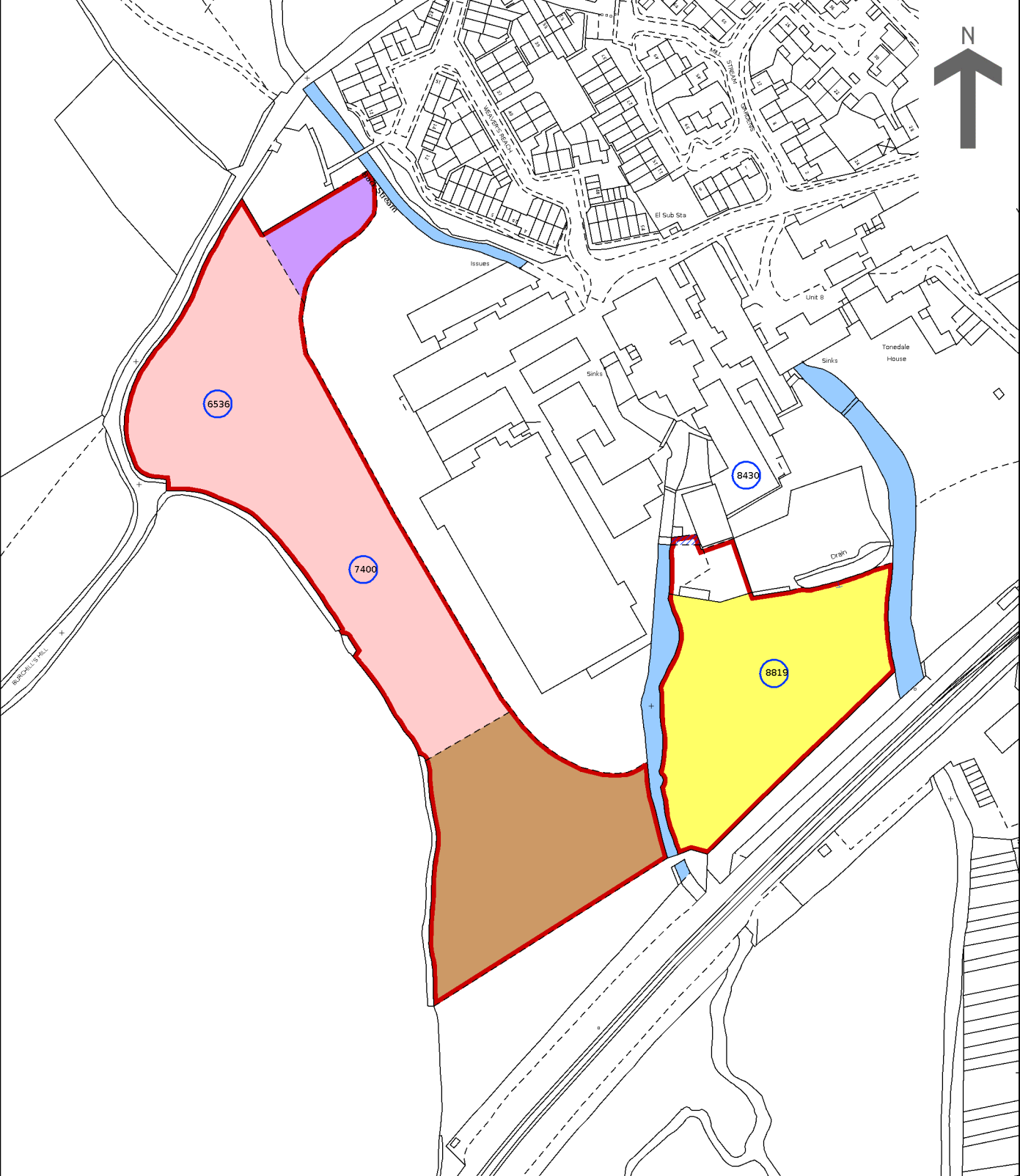
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West and Taunton**



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Report Number: SWT 81/22

Somerset West and Taunton Council

Executive: 15 June 2022

North Taunton Woolaway Project - Vacant Possession of Site

This matter is the responsibility of Executive Councillor Member Francesca Smith

Report Author: Jane Windebank – Development Manager, Development and Regeneration

Chris Brown – Assistant Director, Development and Regeneration

1 Executive Summary / Purpose of the Report

- 1.1. To request permission from the Executive Committee to purchase two privately owned dwellings in the North Taunton Woolaway Project (the Project), if purchased this will avoid CPO activity in relation to these properties.
- 1.2. The Project will deliver two hundred and twenty-seven (227) new Council homes and comprehensively refurbish twenty-seven (27) Council homes in five (5) phases over an eight and a half (8.5) year period, a phasing plan is attached at Appendix 1.
- 1.3. The Project is an essential part of the Council’s commitment to offer a choice of good quality homes for our residents, whatever their age and income, in communities where support is available for those in need. The proposals identified in this Report will assist the progression of the remaining Phases (B–D) in a timely manner and provide certainty and security to the North Taunton Woolaway Project tenants.
- 1.4. Officers are requesting the Executive, under their delegated authority, approve the purchase of two privately owned dwelling by mutual consent to progress with the demolition and development of the Project. A confidential financial summary is included at Appendix 2 for the purchase of these properties.

2 Recommendations

- 2.1 The Executive approves the purchase of the private dwellings as set out in Confidential Appendix 2.

3. Risk Assessment

- 3.1 A risk assessment can be found at Confidential Appendix 3 however the main risks in relation to vacant possession are set out in Table 1 below:

Table 1: Main Scheme Risks

Risk	Score out of 25 based on	Mitigation
------	--------------------------	------------

	probability x impact	
SWT fail to achieve the purchase of the remaining privately owned dwellings in NTWP phases B, C & D	10 (probability 2 x impact 5)	To date 16 of the 22 privately owned properties have been purchased and 2 properties are in final stages of negotiation. SWT provides an enhanced offer to owners to encourage purchase by mutual consent, the Council have introduced an equity share loan removing barriers to owners purchasing an alternative home from the market, the Council apply all statutory compensations as outlined in SWTs Decant Policy and in accordance with current legislation governing the use of Compulsory Purchase Orders under the Town and Country Planning Act 1990 (as amended) and the payment of compensation in accordance with the Land Compensation Act 1973 and the Planning and Compensation Act 1991. SWT resource the NTWP and staff are equipped to negotiate with private owners.
SWT fail to gain vacant possession of NTWP private dwellings in a timely manner.	8 (probability 2 x impact 4)	There remains two private dwellings in Phase Ci, none in Cii/Ciii and 4 in Phase D. SWT encourages negotiation with private owners at any time regardless of phase. The CPO allows a parallel approach to gain vacant possession.

4. Background and Full details of the Report

- 4.1 In February 2019 the Shadow Full Council approved the redevelopment of the North Taunton Woolaway Project area and approved the principle of using Compulsory Purchase Powers set out in Section 17 of the Housing Act 1985, should vacant possession not progress to acquire the properties under the regeneration initiative detailed in the Report.
- 4.2 In December 2021 the Full Council approved the use of Compulsory Purchase Powers set out in Section 17 of the Housing Act 1985 to be used in parallel with continued negotiations with private owners to try and agree a purchase by mutual consent.
- 4.3 The existing site comprises of 212 Woolaway homes of which the Council retain ownership of 162 and 45 have been purchased through the Right to Buy and are now in private ownership.
- 4.4 In total the Council have decanted one hundred and four (106) out of the one hundred and sixty- seven (167) tenants and purchased sixteen (16) of the twenty-two (22) private homes within the Project area. A breakdown of the properties is set out below in Table 2:

Table 2: Tenure of North Taunton Woolaway Project Area

Phase	No. of Existing homes	No. of Tenants	No. of Private Home	No of Private homes left to purchase
Phase A	26	23	3	0
Phase B	22	21	1	0
Phase Ci	16	12	4	2
Phase Cii	18	17	1	0
Phase Ciii	22	20	2	0
Phase D	58	47	11	4
TOTAL	162	140	22	6
REFURBISHMENT ONLY				
Phase E –	50	27	23	0 – none to purchase
TOTAL	212	167	45	6

- 4.5 Detailed planning permission for Phase A has been granted and construction is underway with practical completion estimated as June 2023. The Council’s Planning Committee has resolved to grant outline planning permission for Phases B–E (in March 2019 and again in November 2019). Phase A will deliver 47 new social rented homes and a community facility. The outline planning permission for Phases B–E will deliver up to 180 new build Council homes and refurbish 27 existing Woolaway Council homes. The indicative scheme will provide a net increase of 65 affordable Council homes.
- 4.6 The Outline Planning Permission for the redevelopment of Phase B – E is being held pending phosphates mitigation. In the meantime, a full detailed planning application has been submitted for Phase B – D to ensure the development is not affected by the current phosphate mitigation delays as there is no increase in housing numbers, we are currently awaiting the planning decision. Planning permission has been granted for the refurbishment of SWT properties in Phase E.
- 4.7 The purchase of a private dwellings within Phase C(i) and D have been agreed and details contained in confidential Appendix 2. The detail is confidential under paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972, namely information relating to the financial or business affairs of any particular person (including the authority holding that information). The purchase of this property is strategic to the regeneration scheme. The other alternative would be purchase using a Compulsory Purchase Order but this would have an adverse effect on the Project due to the timescales involved. Further, the owner is willing to sell which would mean the use of CPO powers would not be a last resort (one of the requirements of guidance on the use of CPO powers). The budget for purchasing private properties within phases B-D was agreed by Council 3rd December 2019 and 3rd December 2020.
- 4.8 **NTWP Update**

- 4.9 ENGIE (now EQUANS) are the appointed Contractor for the development of Phase A. From the 4th April 2022 ENGIE will be known as Equans. ENGIE created Equans as its new brand for service-led activity and brings together ENGIE's UK and Ireland. The same staff will continue to deliver the Project.
- 4.10 The programme for Phase A has been extended by 2 weeks due to delays by Highways in obtaining road closures but is still forecast to complete in June 2023. All the foundations have been poured for this Phase. The schemes first roof trusses have been stood and floor joists installed.
- 4.11 On 6th April 2022, Equans had their second visit from the Considerate Contractors Scheme and scored 45 out of 45 (Excellent Rating) stating it is a fully compliant site. The Considerate Contractors Scheme (CCS) is a not for profit, independent organisation founded to raise standards in the construction industry. Organisations registered with the CCS make a commitment to conform to the Code of Considerate Practice. Through consideration to community engagement, the environment and workforce wellbeing they strive to improve the impact of the construction industry and leave a positive legacy through the implementation of best practice.

5. Links to Corporate Strategy

- 5.1 The scheme compliments the Council's Corporate Strategy 2020 - 2024 - Homes and Communities – to offer a choice of good quality homes for our residents, whatever their age and income, in communities where support is available for those in need.
- 5.2 The Project significantly increases the number of affordable and social homes in Taunton and will be built by the Council including a range of housing types to cater for single person, family, vulnerable and elderly households.
- 5.3 The Council's Housing Revenue Account Business Plan sets out the financial model for the Housing Service over a 30 year period. The Council has agreed a number of priorities in its updated Housing Revenue Account (HRA) Business Plan 2020-2050, which are included in the vision statement "*Great Homes for Local Communities*" that accompanies the business plan ('the **Action Plan**'). Its overarching mission statement is: "*Our homes will be safe and secure and we will build many more in which our tenants will thrive. To do this we will develop a great team to provide excellent and modern services...*" The Project compliments these strategy objectives;
- 5.4 **Deliver more new homes** – including a commitment that the Council will deliver 1000 new homes over the next 30 years; build new homes that help combat climate change; and implement exemplar regeneration in North Taunton (including the Scheme). The Action Plan also explains that when having their community regenerated, customers will have the opportunity to relocate or move back into new homes that will be more comfortable and cheaper to run.
- 5.5 **Provide great customer service** – the Council is committed to ensuring that the voices of their customers are heard and they influence the services offered, and also to improving how customers are kept up to date on what is happening.
- 5.6 **Improve our existing homes and neighbourhoods** – the Council will continue to invest in the safety of its homes, investigate ways to increase investment in the energy

efficiency of its stock, and look after the Council's estates. This will mean customers can expect: to live in good quality homes where they feel safe, warm, and secure and where they can thrive; that their communities can be attractive places to live, work and stay; and to live in homes that are cheaper to run and that reduce environmental impacts.

5.7 Engaging and listening to our residents has been the primary driver and embedded in the Project principles established at the initiation of this project. The key Project principles are:-

5.7.1 Existing SWT residents within the scheme will be given the opportunity to remain on a social rent level.

5.7.2 Existing SWT residents within the scheme will be supported to downsize through the scheme design but retain the right to return to an equivalent size property within the new scheme.

5.7.3 The Project is underpinned by the SWT development aspirations and provide new, high quality and energy efficient homes.

5.7.4 The new development compliments The Vision for Taunton as a Garden Town, specifically the themes:

5.7.5 Growing our town greener – quality of the environment. The scheme incorporates green spaces and play spaces and provides more street trees.

5.7.6 Growing Quality Places – quality of our places and neighbourhoods. The design of the scheme focuses on places and spaces with high quality homes, green streets and public spaces. The homes will be energy efficient and aim to incorporate sustainable technologies.

6. **Unitary Authority Considerations**

6.1 The Report has reflected on the potential consequences of the impact of unitary authority status when considering its recommendations. The following statements provide comfort that the recommendations of the Report are appropriate:

- The increased supply of affordable housing is a district priority and a Somerset wide priority. This is evidenced in the Somerset wide Housing Strategy and through the demand recorded through the Somerset wide Homefinder Somerset lettings system.
- The HRA Business Plan is a thirty (30) year Business Plan approved in February and set out an ambition to build homes to increase the supply of affordable homes in the district and in the county. The HRA Business Plan is ring fenced and therefore applies HRA rules and the Council's HRA Business Plan discipline.
- The four District authorities have different structures to manage their housing responsibilities including stock transfer organisations, ALMO and SWT has retained its stock. It is difficult at this moment to make assumptions of how a unitary authority(s) would manage its housing duties or the emphasis it would

place on new development. We therefore consider the Business Plan is a relevant guide to support the Council's decision making.

- All authorities within the unitary proposal are subject to the government climate change policies and targets including net carbon zero by 2050.

7. Finance / Resource Implications

- 7.1 Please see Confidential Appendix 2 regarding the purchase of the two private properties. The financial implications set out in Appendix 2 will be met from the current approved budgets.
- 7.2 The cost of staff time will be met from existing resources or charged to the capital scheme as appropriate.

8. Legal implications

- 8.1 Statutory Home Loss and Disturbance Payments will be made in line with legislative guidance and the North Taunton Woolway Decant Policy. As properties are anticipated to be purchased under, or 'under the threat of' the exercise of CPO powers there is scope for utilisation of the HMG guidance on compensation payments.
- 8.2 Whilst the Council intends to work closely with each household and seek agreement to achieve vacant possession in the event an acceptable agreement cannot be sought the contingency of the CPO is available and is currently proceeding in parallel with the negotiations.
- 8.3 If vacant possession cannot be provided to a contractor by the long stop date in the build contract, the Council will be at risk of litigation for specific performance under the contract and this will potentially have associated financial implications.
- 8.4 Section 11 (6) of the Local Government Act 2003 relates to the Council's ability to retain and use Right to Buy receipts to fund affordable housing.

9. Climate and Sustainability Implications

- 9.1 New build homes will be constructed to a minimum of Part L of the Building Regulations which will substantially improve the thermal performance of the dwellings compared to the existing dwellings. In addition, the contracted specification for phase A has increased insulation, air tightness and reduced cold bridging. The units will also have Air Source Heat Pumps, PV, Batteries, and water reduction measures. The properties will have no gas and are zero carbon 2050 ready. The carbon and fuel efficiency is 12 times better than the Woolway homes being demolished. On the first let carbon saving and tenant fuel costs are anticipated to be 70%-80% less than current Woolway homes.
- 9.2 The new development has been designed to take advantage of biodiversity opportunities in the neighbourhood such as planting trees and creating a new public open space.
- 9.3 The Project has enabled the Council to embrace and design a new garden community

to incorporate the Garden Town Principles and safeguard the natural environment, providing areas of planting and open space whilst ensuring residents have access to suitable homes and facilities.

- 9.4 Phosphates and housing development within the hydrological catchment of the Somerset Levels and Moors Ramsar Site - This scheme falls within the water catchment area of the Somerset Levels and Moors Ramsar Site. The new planning application for Phases B, C and demolition of Phase D assumes a mitigation strategy is not required. However, a mitigation strategy is required to build homes in phase D and the HRA and Council are exploring options for mitigation. Phase D planning permission is not required until 2025 which allows significant time for a phosphate mitigation strategy to be agreed.

10. Safeguarding and/or Community Safety Implications

- 10.1 Through the design of the Project, tenants and residents will feel safe in the public realm and feelings of safety and security in the home due to the adoption of crime prevention measures in the new development.
- 10.2 Consultation with Police and other statutory authorities has already been undertaken as part of the planning application process. No implications arose thanks to the meticulous design and resident consultation that was undertaken to achieve planning permission.

11 Equality and Diversity Implications

- 11.1 An Equality Impact Assessment was first undertaken in relation to the regeneration of the Project in February 2019. That assessment concluded that there would either be a positive or neutral effect on any protected groups.
- 11.2 An Equality Impact Assessment ("EIA") was undertaken in October 2021 to assess the impact on any protected groups of the making of a Compulsory Purchase Order and implementation of the Development, in line with the Equality Act 2010 (Appendix 4). The assessment concludes that there would either be a positive or neutral effect on any protected groups.
- 11.3 The public sector equalities duty is a continuing duty and the impacts on any protected groups will be kept under review should any new information come to light or circumstances change.

12 Social Value Implications

- 12.1 The resident consultation phase of the Project has delivered social value through providing the opportunity for residents to be actively involved in the scheme design process and provide valued and informed contributions.
- 12.2 Social Value formed part of the selection criteria for the procurement of Phase A main contractor and for future phases.

13 Partnership Implications

- 13.1 Any Project opportunities for partnership working with different organisations and agencies that enhance the benefits of the scheme will be explored as they arise. For example, NHS Talking Therapies and MIND have worked in partnership with us to provide a local presence for resident mental health and well-being. This has improved our tenant access to services, enabling them to receive support that they might not have otherwise accessed if not for the regeneration of the scheme.

14 Health and Wellbeing Implications

- 14.1 The Project as a whole has been designed to Nationally Described Space Standards to ensure properties are future-proofed and residents can benefit from some of the principles of lifetime homes and will contribute to the improve health and wellbeing of the residents.
- 14.2 Phase A includes a new community building to provide a focal point for local people to meet and enhance community spirit and interactions.
- 14.3 The new detailed Planning Application for Phases B–D illustrates the provision of public open space for community use which has been informed by public consultation.

15 Asset Management Implications

- 15.1 The Housing (HRA) Asset Management Strategy 2016 reflects the challenges the Council faces and improving its focus on value for money for the Council and for our residents:
- 15.1.1 To promote sustainable local communities through coordinated capital investment and housing management.
- 15.1.2 To work closely with residents to ensure that their homes meet their needs and aspirations.
- 15.1.3 To invest in stock, to achieve good quality and environmental standards and to ensure that all statutory obligations are met.
- 15.1.4 To ensure that stock secures and strengthens the financial viability of the business plan and safeguards its long term future and the income stream it generates.
- 15.1.5 Deliver Value for Money through targeting investment where it will have the best financial and social return.
- 15.1.6 To carry out options appraisals on stock that does not meet the above criteria, exploring the widest range of alternative options to improve outcomes for residents and for our Business Plan.
- 15.1.7 To deliver investment programmes in an effective way, achieving agreed quality and value for money.
- 15.2 Through the evaluation, the asset management model identified 4% of the total stock with an average Net Present Value which is negative. These were exclusively for the

Council's Woolaway constructed properties, reflecting the anticipated need for major works to these properties in the medium term.

- 15.3 The HRA Asset Strategy 2016 recognised the Woolaway house type as the Council's lowest performing stock with a limited life expectancy and high future maintenance costs. Unless action is taken to address the structural defects, the properties will continue to deteriorate, increasing the problems of a poorly performing dwelling.
- 15.4 Providing new energy efficient, affordable homes with a range of property sizes will improve the living standards for residents to create a sustainable community of high quality homes. In addition, increasing the scheme density will generate greater income and make best use of the Council's assets.

15 Data Protection Implications

- 15.1 All personal data is held in accordance with GDPR and Data Protection Act requirements.

16 Consultation Implications

- 16.1 Community Engagement and supporting the residents affected by the scheme, have been at the forefront of the Project's ethos to regenerate the area.
- 16.2 Home owners have been consulted regarding the new detailed planning application for Phases B – D. Negotiations will continue with the remaining home owners to agree terms throughout the CPO process.

17 Scrutiny Comments / Recommendation(s)

- 17.1 Nothing to report.

Democratic Path:

- **Scrutiny / Corporate Governance or Audit Committees – Yes / No** (delete as appropriate)
- **Cabinet/Executive – Yes / No** (delete as appropriate)
- **Full Council – Yes / No** (delete as appropriate)

Reporting Frequency: Once only

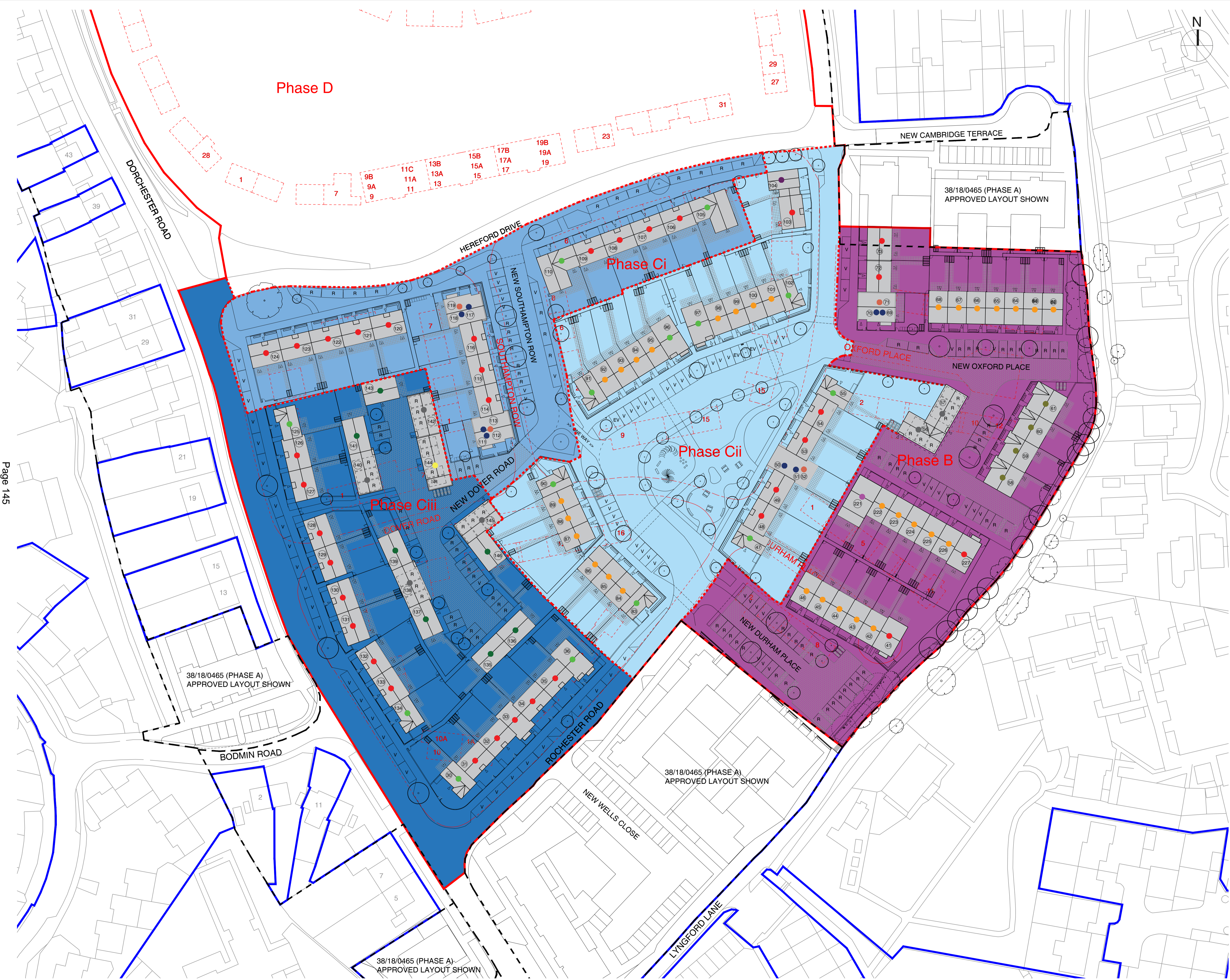
List of Appendices (delete if not applicable)

Appendix 1	Phasing Plan for NTWP
Appendix 2	CONFIDENTIAL Purchase of private residential property
Appendix 3	CONFIDENTIAL Risk Assessment
Appendix 4	Equality Impact Assessment October 2021

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Rev.	Date	Notes	Init.
1	30.06.21	For Planning	RB

CDM Regulations
xxx



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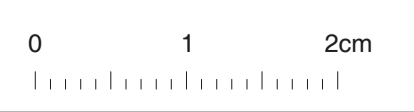
FOR PLANNING

Job Number	Originator	Zone	Level
20060	NP	02	XX
Type	Role	Drawing Number	Revision
DR	A	1205	1

Project
North Taunton Woolaway Project

Title
Phases BCD
Proposed Sub-phasing 1 to 500

Drawn by	Project Manager	Scale
RB	PM	1:500 @ A1



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

Document is Restricted

Somerset Equality Impact Assessment

Before completing this EIA please ensure you have read the EIA guidance notes – available from your Equality Officer

Organisation prepared for	Somerset West and Taunton Council		
Version	1	Date Completed	19 October 2021

Description of what is being impact assessed

North Taunton Woolaway Project (NTWP) - Compulsory Purchase Order and implementation of the Development in line with the Equality Act 2010

The NTWP will make a significant contribution toward delivering quality housing to meet the needs of SWT residents. The Project will provide a significant contribution towards:

- Resolving severe structural matters in relation to 162 defective Woolaway Homes through demolition and replacement with up to 230 new low carbon homes and 27 defective Woolaway properties with better insulated and structurally sound refurbished homes.
- Affordable Housing supply; with 227 – 230 new homes for rent
- Healthier homes and community; well-designed green space and road layout and efficient to heat homes
- Low carbon homes; a significant step toward zero carbon with a fabric first approach and a fund for renewable heat and power
- Accessible housing; a major contribution towards meeting the councils demand for wheelchair accessible homes
- Garden Town; the scheme adopts many principles of the Garden town design guide
- Larger accommodation; national space standards have been maintained throughout the scheme including the design of larger family accommodation (4 / 5 bed).
- The community building and open space will be accessible for all groups in the community reflecting the diversity of the local population, helping to bring people together and foster good relations between different groups.

Evidence

What data/information have you used to assess how this policy/service might impact on protected groups? Sources such as the [Office of National Statistics](#), [Somerset Intelligence Partnership](#), [Somerset's Joint Strategic Needs Analysis \(JSNA\)](#), Staff and/ or [area profiles](#),, should be detailed here

Through the extensive resident consultation undertaken, a detailed understanding and demographic profile of the existing community and its potential future needs has been created.

The consultation in 2018 included four public consultation events in a venue selected for its close proximity and accessibility to the affected residents, the opportunity for home visits from the project team alongside the project team being based in an office hub to provide a 'drop in' facility for the residents.

The scheme proposals have evolved in consultation with a project Design Group. The Design Group consisted of residents, both SWT tenants and homeowners, with a range of housing and lifestyle requirements.

In addition to information gathered through the resident consultation, the community profile has been further populated through information held by the Somerset Intelligence Partnership, specifically the area Indices of Multiple Deprivation results.

Housing needs have been further informed by data held within the Choice Based Lettings System 'Homefinder Somerset'.

All affected home owners have been contacted during the consultation phase and kept up to date with the project progress and phasing plans via newsletters, letters and meetings. Negotiations are preferred option and will continue throughout the CPO process.

Who have you consulted with to assess possible impact on protected groups? If you have not consulted other people, please explain why?

The demographic profiles includes every single household within the projects redline area. The information gathered, particularly through 1-2-1 home visits included completing questionnaires to help identify vulnerable and protected groups.

The project team have worked across a range of agencies and partners within the Priorswood 'One Team' area.

To assist with Skills and Learning, Somerset Academy and Skills and Learning Council have been invited to discussions. The local primary school and doctors surgery have been provided with progress updates.

SWT Tenants Forum and Tenant Services Management Board have received regular feedback on the project and provided views and considerations.

SWT Ward Councillors have been briefed on the report requesting approval to progress the Compulsory Purchase Order.

Analysis of impact on protected groups

The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. Consider how this policy/service will achieve these aims. In the table below, using the evidence outlined above and your own understanding, detail what considerations and potential impacts against each of the three aims of the Public Sector Equality Duty. Based on this information, make an assessment of the likely outcome, before you have implemented any mitigation.

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
Age	<ul style="list-style-type: none"> The increased choice of affordable housing type, size and tenure provides housing options for all age groups. For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group 	□	□	☒

Disability	<ul style="list-style-type: none"> • Specific provision for a range of adapted properties has been made within the scheme proposal to provide a housing choice for those with a disability • For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. • For owner occupiers with disabled adaptations or aids, these will be replicated at their new homes and costs covered by the Disbursement Compensation as set out in the Compulsory Purchase and Compensation Guide (Compulsory Purchase and Compensation, Compensation Guide to Residential Owners and Occupiers: Communities and Local Government, April 2010) 	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gender reassignment	<ul style="list-style-type: none"> • The increased choice of affordable housing type, size and tenure provides housing options that will not negatively impact on this protected group. • For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. • For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group 	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Marriage and civil partnership	<ul style="list-style-type: none"> • The increased choice of affordable housing type, size and tenure provides housing options that will not negatively impact on this protected group. • For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. • For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group. 	□	□	☒
Pregnancy and maternity	<ul style="list-style-type: none"> • The increased choice of affordable housing type, size and tenure provides housing options that will not negatively impact on this protected group. • For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. • For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group 	□	□	☒
Race and ethnicity	<ul style="list-style-type: none"> • The increased choice of affordable housing type, size and tenure provides housing options that will not negatively impact on this protected group. • For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has 	□	□	☒

	<p>equality and diversity policies in place to ensure protected groups are not disadvantaged.</p> <ul style="list-style-type: none"> For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group 			
<p>Religion or belief</p>	<ul style="list-style-type: none"> The increased choice of affordable housing type, size and tenure provides housing options that will not negatively impact on this protected group. For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group 	<p>□</p>	<p>□</p>	<p>☒</p>
<p>Sex</p>	<ul style="list-style-type: none"> The increased choice of affordable housing type, size and tenure provides housing options that will not negatively impact on this protected group. For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group 	<p>□</p>	<p>□</p>	<p>☒</p>

<p>Sexual orientation</p>	<ul style="list-style-type: none"> • The increased choice of affordable housing type, size and tenure provides housing options that will not negatively impact on this protected group. • For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. • For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group 	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<p>Other, e.g. carers, veterans, homeless, low income, rurality/isolation, etc.</p>	<ul style="list-style-type: none"> • The increased choice of affordable housing type, size and tenure provides housing options that will not negatively impact on this protected group. • For rented properties Lettings will be taken from the choice based lettings system 'Homefinder Somerset' which has equality and diversity policies in place to ensure protected groups are not disadvantaged. • For private owners there is choice of housing type, size, tenure and location that will not negatively impact on this protected group 	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Negative outcomes action plan				
Where you have ascertained that there will potentially be negative outcomes, you are required to mitigate the impact of these. Please detail below the actions that you intend to take.				
Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
No adverse equality impact identified. These have been mitigated through an extensive resident consultation process and the resultant scheme design. Any negative outcomes which may emerge during the implementation of the development will be addressed through strong project management and identifiable workstreams.	Select date			<input type="checkbox"/>
	Select date			<input type="checkbox"/>
If negative impacts remain, please provide an explanation below.				
Completed by:	Jane Windebank, Development Manager			
Date	19 October 2021			
Signed off by:				
Date				
Equality Lead/Manager sign off date:				

To be reviewed by: (officer name)	
Review date:	

DRAFT

