

SWT Executive

Wednesday, 21st December, 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 - 12)

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 13 - 14)

To receive items and review the Forward Plan.
- 6. Wellington Place Plan - Approval for Public Consultation** (Pages 15 - 26)

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

The purpose of this report is to seek approval for the draft Wellington Place Plan to go out for public consultation for a period of 4 weeks, from 23rd January to 20th February 2023.
- 7. Connecting our Garden Communities - final approval** (Pages 27 - 126)

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

This report now seeks approval of the final version of the Connecting our Garden Communities Plan.
- 8. Corporate Performance Report - Quarter 2 2022/23** (Pages 127 - 148)

This matter is the responsibility of Executive Councillor for Communications and Corporate Resources, Councillor Benet Allen.

This paper provides an update on the council's performance for the first 6 months of the 2022/23 financial year.
- 9. 2022/23 Housing Revenue Account Financial Monitoring as at Quarter 2 (30 September 2022)** (Pages 149 - 172)

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

This report provides an update on the projected outturn financial position of the Council's Housing Revenue Account (HRA) for the financial year 2022/23 (as at 30 September 2022).
- 10. Access to Information - Exclusion of the Press and Public - Agenda Item 11 - Appendix F Only**

During discussion of the following item (Agenda Item 11 – Appendix F 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 11 – Appendix F 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).

11. 2022/23 General Fund Financial Monitoring as at Quarter 2 (30 September 2022)

(Pages 173 - 208)

This matter is the responsibility of Executive Councillor for Communication and Corporate Resources, Councillor Benet Allen.

This report provides an update on the projected outturn financial position of the Council's General Fund (GF) for the financial year 2022/23 (as at 30 September 2022 forecast).



**ANDREW PRITCHARD
CHIEF EXECUTIVE**

Please note that this meeting will be recorded. At the start of the meeting the Chair will confirm if all or part of the meeting is being recorded and webcast. You should be aware that the Council is a Data Controller under the Data Protection Act 2018. Data collected during the recording will be retained in accordance with the Council's policy. Therefore unless you are advised otherwise, by entering the Council Chamber and speaking during Public Participation you are consenting to being recorded and to the possible use of the sound recording for access via the website or for training purposes. If you have any queries regarding this please contact the officer as detailed above.

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 November 2022

- Present: Councillor Federica Smith-Roberts (Chair)
Councillors Derek Perry, Benet Allen, Chris Booth, Dixie Darch, Caroline Ellis, Mike Rigby, Francesca Smith and Sarah Wakefield
- Officers: James Barrah, Alison Blom-Cooper, Chris Brown, Jenny Clifford, Paul Fitzgerald, Chris Hall, Kate Murdoch, Andrew Pritchard, Clare Rendell, Graeme Thompson, Joanne Toogood, Amy Tregellas and Joe Wharton
- Also Present: Councillors Andrew Sully, Simon Coles, John Hassall, Marcus Kravis, Libby Lisgo and Janet Lloyd

(The meeting commenced at 6.15 pm)

138. **Apologies**

An apology was received from Councillor A Sully, who would be joining via Zoom.

139. **Minutes of the previous meeting of the Executive**

(Minutes of the meeting of the Executive held on 21 September 2022 circulated with the agenda)

Resolved that the minutes of the Executive held on 21 September 2022 be confirmed as a correct record.

140. **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 S Coles	All Items	SCC & Taunton Charter Trustee	Personal	Spoke
Cllr D Darch	All Items	SCC	Personal	Spoke and Voted
Cllr C Ellis	All Items	SCC & Taunton Charter Trustee	Personal	Spoke and Voted
Cllr M Kravis	All Items	SCC & Minehead	Personal	Spoke
Cllr L Lisgo	All Items	Taunton Charter Trustee	Personal	Spoke
Cllr J Lloyd	All Items	Wellington &	Personal	Spoke

		Sampford Arundel		
Cllr D Perry	All Items	SCC & Taunton Charter Trustee	Personal	Spoke and Voted
Cllr M Rigby	All Items	SCC & Bishops Lydeard	Personal	Spoke and Voted
Cllr F Smith	All Items	SCC & Taunton Charter Trustee	Personal	Spoke and Voted
Cllr F Smith-Roberts	All Items	SCC & Taunton Charter Trustee	Personal	Spoke and Voted
Cllr A Sully	All Items	SCC	Personal	Spoke
Cllr S Wakefield	All Items	SCC	Personal	Spoke and Voted

141. **Public Participation**

Steve Martyn spoke on Blenheim Gardens Café – Minehead:-

The Jewel in The Crown

- Blenheim Gardens Café falls within the Wellington Square conservation area of Minehead. Covenants protecting the gardens have been in place since 1911. These state that the gardens are a public park for the pleasure of the people of Minehead. No permanent buildings are allowed. The buildings that are there are of timber construction and include a band stand, café, shelter and toilets. Alcohol may not be consumed within the gardens and the gates are locked at dusk.

The Café:

- There had been a café in the gardens for at least 40 years, run by one family. They were the last tenant who gave SWT notice in 2018 following a rent increase. There was great sadness when it closed particularly among young families with children and the elderly who used the café as a quiet and peaceful meeting place in contrast to the busy Avenue. The café has now been empty for 4 years and it's condition has visibly deteriorated. This is under SWT's watch and would never have been allowed to happen in Vivary Park.

SWT's Decision To Tender:

- The people of Minehead were not consulted why not?
- Localism Act should have applied, why not ? Public Services (social value) Act was not applied, why not?

The Tender Process:

- Executive Cllr M. Kravis
- Five Expressions of interest
- 20-year lease
- Applicant to repair building
- Applicant to propose rent

- How were the applicants picked? Were any applicants known to the Executive Councillor?
- Has the Executive Councillor had business dealings with any of the applicants before or after the tender?
- Has the Executive Councillor rented, or occupied premises owned by any of the applicants before or after the tender?
- Did the Executive Cllr declare any prejudicial interests before conducting the tender?
- Did the five applicants receive the same brief on the same date?
- Can we see the brief?

The Lease - decision 30/10/20

- The lease was awarded to the proprietors of Bar21 in the Avenue Minehead. The award was made based on the financial value, quality and deliverability of their submission.
- Bar21 is a busy bar with a large outside area of raised decking. It plays very loud music every day of the week. It's a magnet for groups of young men and a popular venue for stag and hen parties. It's very noisy and not in keeping with the Wellington Square conservation area. Local people complain about the noise which can be heard right across the town, Blenheim Gardens and North Hill, but nothing is done to stop it. When residents met in Blenheim Gardens for the minute of silence on the Sunday before the Queen's funeral, loud music continued from Bar21.
- Bar 21 has a history of planning breaches. There were 6 planning enforcements at the time of the tender including its raised decking.
- Did the Executive Cllr take account of the proprietors planning enforcements when making his decision?
- Did the Executive Cllr consider the way Bar21 is run to be compatible with the operation of a café in a quiet park when making his decision?
- According to the proprietors agent the brief was to extend the cafés area. Was this the case?
- Was a requirement to extend the café in the brief to the other applicants?
- The proprietors bid £5875 pa was 3 times higher than the rent paid by the last tenant, who could not make the café pay.
- Was due diligence carried out by the Executive Cllr to determine a realistic market rent and the applicant's ability to deliver the terms of the lease?
- Did the proprietors bid not raise questions about its financial viability given that the café must adhere to the gardens opening hours and no alcohol rules?
- More than two years have passed since awarding the lease to the proprietors. The café has remained empty and the agreed refurbishment by the proprietors has not been completed.
- Does the Executive Cllr still feel that the proprietors bid represents financial value, quality and deliverability?
- A planning application was made 10/08/22 by Bar21 to turn the café into a 100-seat restaurant open from 7am to 11pm. This application doubled the footprint of the cafe well beyond the area included in the lease. It proposed removing mature trees and laying raised wood decking like Bar21. Over 60 objections were posted on the planning website and a petition against the development with 200 names was presented to MTC. The planning

application was withdrawn. We expect another planning application will soon follow.

- The proprietors track record and activities since being chosen to run the café suggest he is not a suitable candidate.
- So far, the lease has not been signed and cannot be signed until agreed refurbishment has been completed.

What Next?

- We believe the tender process was poorly executed and lacked sound judgment.
- We want the lease stopped.
- Such an important and historic public building demands that the people of Minehead must now be consulted to protect its future.
- We understand there was a consultation document circa 2012 which concluded that Blenheim Gardens should remain unchanged. We would like to see this document.
- A group of Minehead residents have expressed an interest in taking over the café with any profits used to support local causes. This deserves consideration.
- The information contained in this document has been sourced from local newspapers, online media and discussions with local residents and has not been fact checked. SWT Asset Management refused to our FOI request for information concerning the lease.

The Portfolio Holder for Economic Development, Planning and Transportation gave the following response:-

The issues that have been presented to us this evening have already been responded to by the Service, and by the Leader of the Council, and responded to through our complaints procedure at both stage 1 and 2, and through Freedom of Information requests. None of the information this evening is new and has been clearly responded to.

Whilst we welcome public participation in our decisions the responses provided have always been clear and transparent, but I will reiterate the headlines for the benefit of the committee.

- The council made the decision to publicly market the opportunity to run the Blenheim Gardens Café, this was advertised in an open fair and transparent manner all documentation was provided equally and in the same timeframe.
- Information was constant with viewings held for parties that requested them so they could assess the building condition.
- The timeline for responses was extended to accommodate Minehead Town Council's request for more time, all parties were notified of this extension of time which was provided to anyone wishing to bid. We also publicised this extension.
- Potential applicants were not selected to bid, the marketing was public and available to any interested party, there were no exclusions and so to suggest Minehead were not consulted is inaccurate.
- The bid responses were assessed by a panel of officers and the Assets portfolio holder.

- The lease lengths were put forward by the bidders on the basis of the time they felt necessary to recover their refurbishment costs, none of the bids meet the trigger points under the Localism Act so there is no breach in our duties.
- The Council has a duty to achieve best value and has taken a proactive and transparent stance to achieve investment in a property where there was no council budget to make the necessary improvements. It will also achieve an income from this process. The alternative option may have been a permanent closure and demolition.
- To suggest that the council lacked judgement and have executed the process poorly suggests a misunderstanding of the entire process despite the council's clear, consistent and robust responses. For clarity this is a process that have been successful elsewhere in the district, you only have to look at the café in Goodland Gardens to see how private investment can enhance a public space.
- We are aware that a successful bidder made a planning application that was contrary to their bid submission. The application was not supported by the Assets team who act as landlord. Members will be aware that anyone can make a planning application on any land with the planning authority being required to consider the application on its merits. From our role as a landlord, we are clear that should the application have been approved we would not allow this work to be delivered as we remain the landowners and our consent would have been required.
- There have been various suggestive statements made about the Executive Member involved in the tender process. This is not the way to raise concerns over the behaviour of a councillor. If the public speaker wished to raise a concern or make a complaint, there is a process to do so which we would be happy to provide to you
- This scheme has not been without its problems, works were paused while an acceptable solution was being sought to create a refurbishment which would comply with the Minimum Energy Efficiency Standards.
- We have received an acceptable certificate which means they can continue with works.
- Considerable officer time and resources have gone into responding to these matters and I hope this to be the last contact we receive, however those involved in the complaints have the right to contact the local government ombudsman if they remain unhappy and we are ready to defend our position and share all information with the LGO.

142. **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.

143. **New Regulatory Services Enforcement Policy 2022-2023**

During the discussion, the following points were raised:-

- Councillors queried whether the Policy would give any powers to control living conditions or did it give additional powers to what was already in place.
The Regulatory Services Operational Manager advised that the Policy did not give any additional powers. The HHSRS dealt with the conditions of a property. The Policy gave powers to issue financial penalties.
- Councillors agreed that the policy was very clear and transparent.
- Councillors queried whether the Council carried out inspections for private rented accommodation for enforcements issues related to energy standards.
The Regulatory Services Operational Manager advised that they did not actively seek out issues related to energy standards, they generally followed up on complaints only. Councillors were further advised that grants had recently been sought to assist landlords.
- Councillors queried what happened with empty properties if there were issues with conditions or enforcement.
The Regulatory Services Operational Manager advised that there were limitations with what could be done on empty properties as that was covered by regulatory policies. The Council did employ an empty homes officer who did work on getting properties reinhabited.
- Councillors were pleased to see work was being done on empty properties.
- Councillors agreed that it was good to see EPC rules included, however, they wanted to ensure that inspections were carried out.
The Regulatory Services Operational Manager advised that they would rely upon tenants coming forward.
- Councillors queried whether housing associations would fall with the private landlord bracket.
The Regulatory Services Operational Manager advised that they would, but that non-enforcement routes would always be considered as they would want to work amicably with the housing associations.

Resolved that the Executive adopted the following:-

- Somerset West and Taunton's Regulatory Services Enforcement Policy 2022-2023; and
- Somerset West and Taunton's Private Sector Housing Enforcement Policy 2022- 2023.

144. **Low Carbon Retrofit Strategy and Delivery Plan**

During the discussion, the following points were raised:-

- Councillors were pleased to see the Strategy being brought forward and that it included retrofit and work on new properties.
- Councillors were pleased to see that the baseline data had been collated and included in the Strategy.
- Councillors queried how officers would make sure that tenants were not disrupted when the work was carried out.
The Assistant Director for Development and Regeneration agreed that it would be a challenge, but that the work formed part of the capital programme, so the work needed to align properly.

- Councillors were looking forward to the show home being open in the new year, so it could showcase what work could be achieved.
- Councillors wanted to ensure that letters were sent out to the tenants to advise them of what work would be carried out.
- Councillors highlighted that tenant engagement has been at the core of the work carried out on the Strategy.
- Concern was raised on the removal of gas supplies, which were due to be replaced with electric, which would cost more for tenants.
The Assistant Director for Development and Regeneration advised that as part of the work carried out on the bidding for air source pumps, they would include calculations on the difference in energy costs. They hoped not to make tenants worse off due to the proposed work.

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

- Full Council approved the Low Carbon Retrofit Strategy and Delivery Plan. The delivery of the strategy would need to be managed within the annual budget setting process, including the Medium-Term Financial Plan and 30-Year Business Plan, to ensure the overall affordability of the schemes being proposed each year; and
- The Portfolio Holder for Housing and the Director of Homes and Communities progressed the steps identified in the delivery plan and to promote the approach with Somerset County Council colleagues.

145. **Governance for Taunton Garden Town**

During the discussion, the following point was raised:-

- Councillors queried where the new Taunton Town Council fitted into the work.
The Garden Town Implementation Manager advised that they were aware of the establishment of the Town Council and that it had been included in the report within the delivery board and stakeholders' work.

Resolved that the Executive approved the following:-

- 1) The Taunton Garden Town governance proposals.
- 2) That responsibility for the finalisation of initial non-political representation on the proposed Delivery Board and Forums was delegated to the Director of Development and Place in consultation with the Portfolio Holder for Planning and Transportation.
- 3) That delegated authority was granted to the Director of Development and Place in consultation with Legal Services to prepare initial governance documents for approval at the first meeting of the Delivery Board.

146. **Firepool Design Guidance and Masterplan**

During the discussion, the following points were raised:-

- Councillors were pleased to see the report come forward for consultation.
- Councillors hoped that the work would start soon, as it had been in the pipelines for years.
The Principal Planning Policy Officer advised that after the consultation had closed, it would go to Full Council for approval.

- Councillors praised the Project and that it was a good legacy for the Council to leave for the residents and visitors of Taunton.
- Councillors were pleased to see public artwork included alongside the Project.
- Councillors were keen to see the Project signed off prior to vesting day.
- Councillors thanked the officers for all their hard work.

Resolved that the Executive approved the Draft Firepool Masterplan and associated supporting evidence documents for public consultation.

147. **Access to Information - Exclusion of the Press and Public**

Resolved that under Section 100A(4) of the Local Government Act 1972 the public be excluded from the next item of business on the grounds that it involved 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).

148. **Cultural Grant Provision**

Resolved that the Executive approved recommendation 2.1 within the confidential report.

(The Meeting ended at 8.55 pm)

EXECUTIVE

Executive Meeting	Draft Agenda Items	Lead Officer
21 December 2022	GF Financial Performance 2022/23 Q2	Kerry Prisco
venue =	HRA Financial Performance 2022/23 Q2	Kerry Prisco
Exec RD = 9 December	Corporate Performance Report Q2	Malcolm Riches
Informal Exec RD = 8 November	Connecting our Garden Communities	Graeme Thompson
SMT RD = 26 October	Wellington Place Plan – Approval to go out for Public Consultation	Sarah Povall
18 January 2023	NTWP - Purchases	Jane Windebank
venue =		
Exec RD = 6 January		
Informal Exec RD = 6 December		
SMT RD = 23 November		
15 February 2023	Taunton Garden town: Delivering our Vision	Jenny Clifford
venue =	Local Labour Agreements	Hattie Winter
Exec RD = 3 February		
Informal Exec RD = 3 January		
SMT RD = 14 December		
15 March 2023	GF Financial Performance 2022/23 Q3	Kerry Prisco
venue =	HRA Financial Performance 2022/23 Q3	Kerry Prisco
Exec RD = 3 March	Corporate Performance Report Q3	Malcolm Riches
Informal Exec RD = 1 February	Firepool Design Guidance and Masterplan	Graeme Thompson
SMT RD = 18 January	Taunton Heat Network Feasibility Study	Matt Parr/Graeme Thompson

Report Number: SWT 163/22

Somerset West and Taunton Council

Executive – 21 December 2022

Wellington Place Plan – Approval for Public Consultation

This matter is the responsibility of Executive Councillor Mike Rigby

Report Author: Sarah Povall, Principal Planning Policy Officer

1 Executive Summary/Purpose of the Report

- 1.1 The purpose of this report is to seek approval for the draft Wellington Place Plan to go out for public consultation for a period of 4 weeks, from 23rd January to 20th February 2023.
- 1.2 Somerset West and Taunton Council has commissioned consultants Allies and Morrison, Avison Young, and LUC to prepare the Place Plan for Wellington, including: a Vision, Spatial Framework, and Infrastructure and Implementation Plan. The Place Plan will inform decisions about the development, regeneration and conservation of the town and be a long-term strategy for the future of Wellington that will inform the future Somerset wide Local Plan.
- 1.3 The public consultation is a statutory requirement to enable the document to be adopted as planning guidance and to be considered a material consideration in decision-making activities. Following a review of the document, considering any comments and observations made during the consultation process, the intention is to take the Plan to Full Council for adoption as planning guidance.
- 1.4 It is not appropriate to adopt the Place Plan as part of the Local Development Scheme, at this moment in time, as a Local Plan for the new unitary authority is under consideration. However, this work will be fundamental in informing and supporting the development of the new Local Plan, which will then be formally adopted as policy.
- 1.5 Once adopted, the Place Plan will be referred to in determining planning applications and considering regeneration and conservation activities to ensure we are protecting and enhancing the quality of place in Wellington.

2 Recommendations

- (1) To approve the Draft Wellington Place Plan for public consultation for a four-week period and that the Assistant Director Strategic Place and

Planning, in consultation with the Portfolio Holder, be authorised to make minor amendments to the Draft Place Plan prior to the public consultation.

- (2) To note that, following consultation and any subsequent revisions to the documents, it is intended that the final Wellington Place Plan will be considered by the Executive for endorsement as a material planning consideration for the preparation of masterplans, pre-application advice, assessing planning applications and any other development management purposes within the area of the Plan.

3 Risk Assessment (if appropriate)

- 3.1 The main risk is not managing to reach a representative proportion of all groups in Wellington, meaning that these voices are not heard in this consultation exercise. This will be mitigated against through our Consultation Strategy (Appendix A), which considers a breadth of consultation material and forms of engagement to meet a variety of needs; including those who find it difficult to engage.
- 3.2 There is also a significant risk, given the very tight timetable, that the Place Plan might not get adopted by Full Council by vesting day.

4 Background and Full details of the Report

- 4.1 Somerset West and Taunton Council are producing a Place Plan for Wellington comprising a Vision, Spatial Framework and Implementation Plan. Allies and Morrison, Avison Young and Land Use Consultants have been commissioned to support the Council in preparing the document. The Place Plan will aid the council in its decisions around the development, regeneration and conservation of Wellington moving forward. The Place Plan will feed into the future Somerset Wide Local Plan evidence base.
- 4.2 Wellington is a town with a rich history, impressive landscape setting and strong retail, leisure and employment offer. The town has a market town function for the Somerset West and Taunton District alongside its extensive offer of independent shops and restaurants. The town is subject to unique challenges such as demands on infrastructure and heritage-at-risk, but is also subject to nation-wide challenges such as climate change and shifting retail patterns.
- 4.3 With the delivery of the new railway station, anticipated in May 2025, and the associated push on development opportunities, Wellington needs a holistic framework to guide future growth to support housing and employment needs.
- 4.4 The draft Place Plan follows the development of the Baseline Report and Vision Document. The Baseline Report sets out the main characteristics of Wellington, including the main highlights and challenges with reference to the planning, urban design, landscape, economic and social context. This was

used to inform the visioning exercise, which took place in October 2022, which in turn sets the context for the Place Plan itself.

4.5 The Draft Wellington Place Plan does the following:

- i. Sets the scene in establishing baseline information related to the physical, social and economic context of the town and surrounding area
- ii. Sets out **land-use, design and management principles/guidelines** and development priorities for different sections of Wellington and Tonedale
- iii. Identifies areas of search for growth opportunities, identifying potential appropriate uses and clarity about the form and function of these areas in connecting with the town and the vision
- iv. Various elements or functions that could act as catalysts for change
- v. **Image, neighbourhood character and heritage** – showing the integration of contextual features, including topography, water and distinctive landscape and heritage features; and identifies character areas and appropriate development and management strategies within those areas
- vi. Shows the existing network of **open space and public realm**, and opportunities to protect, enhance and expand this. This takes into account active and passive uses for the design and layout considerations
- vii. The location of significant **biodiversity** values and how to protect, enhance and manage these
- viii. Consideration of **integrated water management and utilities**, particularly waterways and catchment areas and **phosphate mitigation solutions**
- ix. Transport – the hierarchy of streets, **pedestrian and cycle paths, and public transport** and freight routes, including rail; with priority given to public transport, walking and cycling
- x. Sets out a sustainable transport strategy for the area, including implementing “first mile last mile” objectives associated with the delivery of a new railway station for Wellington; and promotes active travel links to bring the town together
- xi. Identifies development opportunities, including early-stage projects for immediate delivery, which could unlock the development potential, including future employment site allocations or extensions
- xii. Includes an **Infrastructure and Implementation Plan**, which sets out the key steps necessary to implement the major projects identified, including the requirements for and likelihood of external funding
- xiii. Includes **Monitoring Indicators**, which will enable officers to annually assess progress towards meeting the objectives set out in the Plan.

4.6 The Draft Wellington Place Plan can be found in Appendix B (to follow).

5 Links to Corporate Strategy

5.1 The Draft Wellington Place Plan is an important document which will help

articulate and translate the Council's strategic objectives into planning policy. This decision is linked to delivering the following Corporate Strategy themes:

- *“A low-carbon, clean, green and prosperous district that attracts high quality employment opportunities and encourages healthy lifestyles”*
- *“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”*

6 Finance/Resource Implications

6.1 The estimated cost for delivering the Wellington Place Plan consultation in this paper will be £2,000, to be spent on publicity and consultation during the 2022-2023 financial year. The estimated cost for delivering the full and completed Wellington Place Plan is estimated to be £91,962 – this includes: the SA/SEA Scoping Report; the Baseline Report; Vision Report; Implementation Plan and Monitoring Indicators.

6.2 The costs associated with developing the Wellington Place Plan, including the public consultation exercise, is being met through officer time and existing budgets.

7 Legal Implications

7.1 The Council's Constitution describes how Somerset West and Taunton will discharge its responsibilities, including responsibilities for the preparation and adoption of the planning policy and guidance, which must be considered and endorsed by Full Council, prior to adoption.

8 Climate and Sustainability Implications

8.1 The Draft Wellington Place Plan seeks to bring together the CNCR, Ecological Emergency Action Plan and climate positive planning for Wellington; together with a vision for development, conservation and regeneration of the town.

8.2 The climate emergency, and our response to it, is a strong theme running throughout the document. The Plan aims to mitigate the climate emergency and adapt to its effects. It covers issues including reducing carbon emissions through walking, cycling and public transport, the location of development in sustainable locations, the energy efficiency of buildings, renewable energy, biodiversity enhancements, tree planting and flood risk.

9 Safeguarding and/or Community Safety Implications

9.1 None identified.

10 Equality and Diversity Implications

10.1 None at this stage. In order to comply with the public sector equality duty: an

Impact Assessments (IA) will be prepared as part of the plan making process. Further, details of the process are also available from:
<https://www.somersetwestandtaunton.gov.uk/your-council/equality-and-diversity/>

11 Social Value Implications

11.1 This project is intended to have a high social value, by promoting community engagement to embrace a shared vision for the town; as well as aspirations as the town continues to grow.

12 Partnership Implications

12.1 SWT has been working collaboratively with Wellington Town Council and Somerset County Council in the development of this document.

13 Health and Wellbeing Implications

13.1 None identified.

14 Asset Management Implications

14.1 None identified

15 Scrutiny/Executive Comments / Recommendation(s)

15.1 To follow.

Democratic Path:

- **Scrutiny/Audit and Governance Committee – No**
- **Executive – 21 December 2022**
- **Full Council – No**

Reporting Frequency: Once only

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

Appendix A	Wellington Place Plan – Consultation Strategy
Appendix B	Consultation Draft Wellington Place Plan

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Consultation Strategy for the Wellington Place Plan

Sarah Povall, Strategy Team

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Background

Somerset West and Taunton Council has commissioned consultants Allies and Morrison, Avison Young, and LUC to prepare the Wellington Place Plan, including: a Vision, Spatial Framework, and Infrastructure and Implementation Plan. The Place Plan will inform future decisions about the development, regeneration and conservation of the town; and look at potential options for future growth to support housing and employment needs; retail and commercial function; transport systems; culture and heritage.

Following our visioning exercise with the community in October 2022, a statutory consultation will take place in January and February 2023, taking on the views of key stakeholders and members of the public. These comments will be further considered in reviewing the final draft of the Place Plan. When adopted it will be a long-term strategy that will inform the future Somerset-wide Local Plan as we move to a new unitary authority in April 2023.

Summary

The Consultation Plan sets out how officers will engage with key stakeholders and members of the public on the forthcoming Draft Wellington Place Plan consultation. The Consultation Plan follows aligns with our adopted Statement of Community Involvement (SCI), which sets out how Somerset West and Taunton will involve the community and stakeholders in the preparation, alteration and review of local planning policy and the consideration of planning applications within the Local Planning Authority area. In the preparation of planning policy this includes who we will consult and the method of consultation. These are elaborated on, below.

The Town and Country Planning (Local Planning) (England) Regulations 2012 set out the minimum requirements for public participation in the preparation of a Supplementary Planning Document (SPD). Although the Wellington Place Plan will not be a statutory plan, such as an SPD, in seeking best practice we will still follow the minimum requirements set out. These are to:

- Publicise the consultation on the **Council's website**, with evidence base studies and related information also available to view and download;
- Make hard copies of documents available at **inspection points** at the Council's offices; and

- **Notify** statutory bodies, stakeholders, relevant groups and other individuals or groups on our consultation database – either by email; or letters if they have specifically requested to be contacted by post.

Consultation Strategy

Consultation period: for at least 4 weeks in January/February 2023

1. Purpose

- To consult formally for at least 4 weeks on the Wellington Place Plan document;
- To gain an understanding for the issues facing the local area and potential ways in which these could be addressed through the Place Plan;
- To inform the final document;

2. Target audience

- Statutory consultees (defined in the Regulations)
 - Somerset County Council
 - Historic England
 - Natural England
 - National Highways
 - Sport England
 - NHS
- General public (residents)
- Local businesses
 - Country Land and Business Association - South West
 - Federation of Small Businesses (Somerset, Wiltshire & Dorset)
 - Road Haulage Association
 - Somerset Chamber of Commerce
 - South West Tourism Alliance
 - Taunton Chamber of Commerce
 - West Somerset Business Group
- Wellington Town Council
- Special interest groups and organisations in Wellington
 - Local businesses
 - Local schools including Isambard Kingdom Primary, Rockwell Green Primary, St John's, Beech Grove, Wellesley Park, Court Fields
 - Early Years providers
 - Wellington Churches Together
 - Wellington Carers Support Group
 - Wellington Mills CIC
 - Wellington Arts Association including the Operatic Society, Wellington Acoustic Music Club, Spectrum Arts and Crafts and Wellington Theatre Company

- Wellington Community Hospital
- Wellington Medical Centre
- Luson Surgery
- Wellington Local History and Museum Society
- Wellesley Cinema Wellington
- Local artists
- Wellington & District Sports Federation
- Wellington Wheelers
- Wellington Sports Centre
- Rockwell Green Community Allotment
- Wellington and Rockwell Green cubs/ scouts/ brownies/ guides
- Wellington Community Centre
- Transition Town Wellington
- Friends of Wellington Park
- Wellington Community Food
- Reminiscence Learning (local Alzheimer's Support Group)
- Wellington Counselling
- Wellington One Team
- Facebook groups like Wellington Somerset Community Group
- Community/residents groups, including individuals/groups protected under the Equalities Act
 - Anglo Chinese Society
 - Equality & Human Right Commission
 - Ethnic Minority Achievement and Traveller Education Service
 - Friends, Families and Travellers
 - Somerset Multicultural Association
 - Taunton Deane Polish Association
 - The Diversity Trust
 - Bahai Community
 - Catholic Church, Clifton Diocese
 - Diocese of Bath and Wells
 - Diocese of Bath and Wells – Community
 - Faithnet South West• Humanists
 - Jewish Community of Somerset
 - Somerset Churches Together
 - Somerset Circuit of Jehovah Witnesses• Taunton Deane and South Sedgemoor Methodist Circuit
 - Action on Disability and Development
 - Alzheimer's Society – Somerset
 - Autism Somerset
 - Bridgwater & Taunton Deane Deaf Club
 - Compass Disability Services
 - ESCAPE Support Groups
 - Maggie's Centre (Cancer Care)
 - Mind in Taunton & West Somerset
 - RNID (Action on Hearing Loss)
 - Royal National Institute of Blind People (RNIB)
 - Somerset Sight
 - Taunton and District Mencap Society
- Voluntary bodies

- Age UK Somerset
- Arc Inspire (Taunton Association for the Campaign to Protect Rural England)
- Citizens Advice Bureau (Taunton)
- Community Council for Somerset
- Cycle Somerset
- Ecos Trust
- Engage Taunton Deane
- Forum 21
- Friends of the Earth
- FWAG South West England Office
- Home Builders Federation
- People Plus
- Quantock Eco
- RSPB SWRO
- Somerset Activity & Sports Partnership
- Somerset Association of Local Councils
- Somerset County Federation of Womens' Institutes
- Somerset Churches Together
- Somerset Gay Health
- Somerset Lesbian Network (SLN)
- Somerset Playing Fields Association
- Somerset Wildlife Trust
- Somerset Youth Parliament
- South West Seniors Forum
- SUSTRANS
- Taunton Ramblers
- Taunton Women's Aid
- The Exmoor Society
- Village Agents
- Wivey Action on Climate and Environment
- Women's Equality Network, Somerset (WENS)
- YMCA - Minehead and Taunton
- Consultee database (those who have expressed an interest previously);
- Under-represented groups – in Wellington these have been identified as being residents on low incomes, ethnic minority groups and young people (0-17 years)

3. **Methods**

- **Website** On the Planning Policy home page at: <https://www.somersetwestandtaunton.gov.uk/planning-policy/> . Baseline Report, Vision Summary, related information and questionnaire available to view and download.
- **Inspection Points** Hard copies of documents and questionnaires will be available to view at the Wellington Town Councils Offices and Wellington Library
- **Email** Notifications will be sent from the generic email address strategy@somersetwestandtaunton.gov.uk to all statutory consultees,

stakeholders and relevant groups and other individuals and organisations on our consultation database.

- **Letters** Postal notifications will be sent to statutory bodies, stakeholders, relevant groups and other individuals and organisations on our consultation database where we only have a postal address or they have specifically requested to be contacted by post
- **Information boards** at Wellington Library.
Requirements: boards containing a series of statements/questions, to be up for the full 4 weeks; paper questionnaires but people encouraged to use the online questionnaire.
- **Public exhibitions** Information boards at two free public events (e.g show/market) in Wellington. Staff will be on hand to discuss.
Requirements: at least 3 staff to help transport and move equipment and meet public. Paper questionnaires will be available but people encouraged to use online questionnaire.
- **Town Council Clerk** Email early (forewarning of consultation) so as to meet as many print deadlines as possible
- **Social Media** campaign to include posts at start of consultation and weekly tweets/FB posts highlighting a different topic. Post near the end of consultation as a reminder and posts near the time of events.
Simultaneous with Press Release
Requirements: ongoing liaison with the Comms Team.
- **Press release** Public Notices will be placed in the Somerset County Gazette and the Wellington Weekly News to include details on when and where planning documents can be inspected, how copies can be obtained, the closing date for representations and where to send them. We will also issue a press release to these newspapers.

Somerset West and Taunton Council

Executive Committee – 21st December 2022

Connecting our Garden Communities – final approval

This matter is the responsibility of Executive Councillor Mike Rigby (Economic Development, Planning and Transportation)

Report Author: Graeme Thompson, Principal Planning Policy Officer and Sophie Jones, Planning Policy Officer

1 Executive Summary / Purpose of the Report

- 1.1 Connecting our Garden Communities is a plan for ensuring that modern, futureproofed walking, wheeling and cycling infrastructure accompanies the delivery of key developments across Taunton Garden Town. The plan builds on and complements the existing Taunton Local Walking and Cycling Infrastructure Plan and other related projects being delivered via the Future High Streets Fund.
- 1.2 Public consultation on a draft plan took place between 29th July 2022 to 30th September 2022. Following this, officers have reviewed the 276 responses received alongside comments made in-person during consultation events and amended the plan as considered appropriate. However, amendments have been relatively minor from the consultation draft and the overall plan remains much the same, with changes generally relating to points of detail, some of which have been revised now, others of which are noted for consideration at later stages of route design.
- 1.3 This report now seeks approval of the final version of the Connecting our Garden Communities Plan.

2 Recommendations

That Executive Committee:

- 2.1 Approve the Connecting our Garden Communities Plan for adoption:
 - a) as a material planning consideration in the preparation of masterplans, pre-application advice, assessing planning applications and any other development management purposes across Taunton Garden Town, and
 - b) as corporate policy to inform future policy and project development and funding bids within Taunton Garden Town.
- 2.2 Agree that the Director of Development and Place in consultation with the Economic Development, Planning and Transportation Portfolio Holder be authorised to approve and make minor amendments prior to the final publication of the Connecting our Garden Communities Plan.

3 Risk Assessment

- 3.1 There are risks associated with the Connecting our Garden Communities project. However, many of these risks are more associated with the delivery of the plan and routes themselves, rather in the decision to approve the plan itself.
- 3.2 The main risks associated with approving the plan itself include:

Risk	Explanation and Mitigation
Raising expectations / over promising, under-delivering	The plan includes careful wording to ensure it is clear that it sets out our aspirations, and that each route is subject to detailed design (which may necessitate change) and that it is heavily reliant on developer negotiations and securing external funding in order to deliver. Indicative timescales are identified for when routes should be delivered based on a series of assumptions relating to priority, phasing of development, other plans (e.g. alignment with the Bus Service Improvement Plan) and LCWIP timescales where relevant. It explains that should any of the considerations underpinning these assumptions change then this may change timescales for delivery. It highlights that by identifying the routes, the Council is not bound to deliver any of them and the reliance upon external funding.
Raising anxiety / concern in affected communities / parties	The plan identifies routes only, with some commentary about constraints and opportunities which hints at what the design solution may need to consider. It contains no specific detailed proposals. There will be parts of routes that are more sensitive to change than others and where controversy may arise as detail develops (e.g. removal of on-street parking may turn out to be necessary in places). Whilst this level of detail is not included in the plan, the identification of routes does have potential to 'set hares running' in certain locations. As such, the plan includes a commitment to work with communities to develop more detailed proposals, particularly where more transformational change may be required. An indicative hierarchy of walking, wheeling and cycling interventions has been included which helps to communicate what different kinds of interventions might be more relevant in different parts of the network.
Public confusion with other more advanced active travel schemes in the town centre	The plan shows how routes that are more advanced / already referred to in the public domain (such as those funded by the Future High Streets Fund and the Wellington to Taunton route) link with and relate to the routes being proposed by this project. It makes it clear that this is about longer-term vision and aspiration and preparing the pool of projects to work towards delivery of next.
Public confusion with the Taunton LCWIP	The plan clearly states that it builds on and complements the LCWIP. It will influence future iterations of the LCWIP. Text and maps in the final version of the plan provide increased clarity on this point including information about how the plan will become absorbed into the LCWIP and

	<p>gain greater weight as a supporting document to the emerging new Local Transport Plan. A plan identifying the LCWIP routes overlaid with the Connecting our Garden Communities routes is now included for clarity.</p>
<p>Risk of being seen to overly focus on Taunton</p>	<p>The plan states that it is directly related to the designation of Taunton as a Garden Town, and the capacity and capital funding related to this. It further justifies the focus on Taunton in terms of the scale of opportunity it provides for carbon reduction and health and wellbeing improvements in comparison to other parts of the district. It identifies the aspiration to develop future external linkages to neighbouring settlements. It explains our existing commitments to deliver an LCWIP for Wellington, and within the CNCR Action Plan to further widen work on active travel across the district over time. Furthermore it references that there are wider community aspirations for other routes which are not captured within the plan and that this does not mean these linkages are not important, or that they won't be pursued – we remain open to considering further routes. However, it will be vital that we prioritise route delivery appropriately.</p>
<p>Risk of being seen to overly focus on the Garden Communities over existing communities.</p>	<p>As explained above, this plan is directly related to the designation of Taunton as a Garden Town. This designation is as much the town as a whole as it is about delivering the new communities and knitting them in with the existing. However, the Garden Town capacity funding from which the supporting evidence work has been funded is intended by Homes England for unlocking housing growth and development aspirations in particular, as such this is the primary focus. Furthermore, it is routes to support these new developments which stand greatest chance of being externally funded, and only these routes which we stand a chance of being able to negotiate developer contributions towards. The routes included within the plan do not think of the Garden Community areas in isolation. They bear in mind existing users and communities, which were the key focus of the LCWIP routes, and collectively they will deliver a fairly comprehensive network across the town. Early engagement with ward members and parish councils around the Taunton area was used to identify any local aspirations which the routes could look to respond to in part and where relevant to the Garden Communities. However, there may well be other routes felt to be necessary within and beyond the town, to serve existing communities, but which have no direct relationship with the Garden Communities themselves, in which case these are not picked up.</p>

3.3 The following risks are relevant, but more in relation to final approval of the final plan and delivery of routes.

Risk	Explanation and Mitigation
Public consider their comments have not been listened to	A significant number of comments were made during public consultation. Consultation responses have been taken into account and have been instrumental in influencing route prioritisation in particular. However, many comments related to detailed points about route design, implementation or in some cases suggested alternative routings to specific sections of routes. Rather than seeking to amend the routes as part of the plan, it is proposed to consider these points in more detail as route design evolves. There is a risk that some people may consider this to be ignoring such responses. However, there are some important and valid points which have been made a which would be better considered further as route design evolves beyond what is essentially the overarching vision set out by this plan. The final plan has added a section to the routes in Appendix B (to the plan) noting key comments made in relation to each for consideration at later stages. A Consultation Statement has been produced (see Appendix B to this report) setting out summaries of the comments received and responding to key points raised. This includes a "you said, we did" section.
Not achieving carbon neutrality by 2030 / failure to address climate change	Developing the plan will contribute towards tackling climate change and the transport sector which is the source of most emissions locally. Delivery of new routes against an evidence based plan increases the effectiveness of this action.
Failure to deliver sufficient housing or demonstrate sufficient land supply for housing	The plan identifies infrastructure related to the Garden Community developments around Taunton. All developments generate finite values and therefore have finite viability. Over-burdening costs on new development may risk making development unviable and stymie the delivery of housing. The plan essentially sets out a starting point for developer negotiations at the planning application stage. Planning obligations must be necessary to make a development acceptable in planning terms, relevant to the development and fairly related in scale and kind. Planning must balance a wide range of policy requirements and material considerations in order to consider whether development proposals constitute sustainable development. As such, the plan itself does not result in failure to deliver housing / land supply.
Risk of slowing, stalling or pausing of major capital programmes and project delivery	The Firepool development is a key part of the Council's corporate plan (and local planning policy), capital programme and project delivery. As a Garden Community, the plan covers connections associated with the Firepool development which the emerging Masterplan and future planning applications will need to respond to. The same terms referred to in the risk above apply to Firepool as any other development. The Council is currently consulting on a Draft Masterplan for the Firepool site which highlights the

	<p>viability challenges which development of the site will face. The final Masterplan is expected to be supplemented by further response to the Connecting our Garden Communities Plan and routes.</p>
<p>Risk of stymying wider Council aspirations in relation to Council assets</p>	<p>The Council owns significant land holdings within Taunton as part of its general fund, housing and open spaces functions. The use of any of this land for delivery of walking, wheeling and cycling routes could, in theory stymie wider aspirations that the Council may have for those assets (e.g. disposal, regeneration, tree planting etc.). The starting principle for the design of any of the emerging routes will be to accommodate the route in line with the following hierarchy: 1) Highways land; 2) Other SCC or SWT land; 3) Third party land. Following this hierarchy increases the likelihood and ability to deliver routes, potentially reduces costs, and avoids being overly and unnecessarily constrained solely by existing highway widths. The use of any SWT land will of course need to be subject to appropriate discussion and negotiation with the relevant asset holder within the Council so as to understand long term aspirations for that land and ensure that these would not be compromised. Early engagement has taken place with Housing, Assets and Open Spaces teams to raise awareness of the routes.</p>
<p>Failure to allocate and spend Section 106 funds</p>	<p>The plan provides an evidence based approach against which to secure future planning obligations, making it easier to allocate and spend the funds and increasing the transparency of doing so. It identifies an expectation that applicants utilise a “Vision and Validate” approach to transport assessment and travel planning, which will provide the basis for ensuring any planning obligations meet the NPPF tests.</p>
<p>Failure to act on low physical activity levels</p>	<p>Developing the plan will contribute towards tackling low levels of physical activity. The focus on enabling key journeys to be undertaken by active means increases the effectiveness of this action, and focusing on schools in particular drives potential for greater long-term health gains.</p>
<p>Failure to deliver modal shift – congestion, air quality, road capacity improvements – vicious cycle</p>	<p>Continuation of the business as usual approach to assessing and addressing transport needs of new developments drives demand for roads. It is well established that freeing up road capacity encourages people to drive. This plan contributes pro-actively towards tackling these issues by identifying routes and key connections and setting out an expectation that applicants utilise a “Vision and Validate” approach to transport assessment and travel planning rather than the traditional “Predict and Provide” approach. Delivery of the routes themselves will contribute significantly, though needs to be accompanied by wider action (e.g. around behavioural change) to have most impact. Delivery of some routes will likely require the reduction of road/junction capacity in places and as such there may be some shorter-term</p>

	negative impacts in this regard, to be understood at the detailed design stage for routes. The Plan acknowledges that a level of road congestion may be necessary to facilitate behaviour change, but that moving those who can travel by sustainable modes off of the road, space will be freed up for those who require car travel. The focus on enabling key journeys to be undertaken by active means increases the effectiveness of this action.
Legal issues could arise in detailed design	The plan includes careful wording to ensure that it is clear that the exact routing of routes may change and the detail of provision is not set, to be determined through detailed design. The plan is at a high enough level to avoid triggering any legal issues at this stage. The plan includes text to clarify that routes will wherever possible look to avoid third party land and utilise SCC/SWT land (and in the main highways land).
Potential for equalities impacts on protected groups	An Equalities Impact Assessment (EqIA) has been undertaken which accompanies this report and which should be read for further information (see Appendix C to this report). There are no equalities impacts associated with the production of the plan itself. However, as set out in the EqIA there is potential for delivery and implementation to have negative impacts on protected groups depending on the way the plans are executed and the detailed design of routes. Detailed design is beyond the scope of the plan. The EqIA and plan itself include text to state the relevance and importance of route designs taking an inclusive approach, and the value of following the Government's Local Transport Note (LTN) 1/20 guidance on cycle infrastructure design and Inclusive Mobility guidance as a means to ensuring access for all. Further, detailed EqIA's will need to be undertaken at the project stage as routes progress through the design process. The final plan now makes reference to walking, <i>wheeling</i> and cycling throughout as a more inclusive term.

4 Background and Full details of the Report

4.1 Connecting our Garden Communities is a plan for ensuring that modern, futureproofed walking, wheeling and cycling infrastructure accompanies the delivery of key developments across Taunton Garden Town. The intention is to ensure that the Garden Communities of Comeytrove, Staplegrove, Monkton Heathfield, Firepool, Nexus25, Nerrols and Ford Farm:

- link in to the strategic routes identified in the Taunton Local Cycling and Walking Infrastructure Plan (LCWIP),
- connect to key services and facilities beyond their site boundaries, and
- ensure routes address associated links which may have been missed by the LCWIP, whilst delivering against strategic green infrastructure opportunities.

4.2 The plan includes an evidence-based network plan of walking, wheeling and cycling

routes which builds on the LCWIP and shows the Council's ambition for connecting the garden communities across the town. It identifies a total of 33 "core" routes, which are reasonably specific in terms of their routes. It also identifies 10 more "aspirational", Green Infrastructure-led routes which are less specific, more indicative of the places they might look to connect. It places these routes spatially alongside routes which are already further progressed including those associated with the Future High Streets Fund, East Street, and the Killams route being progressed by SCC.

- 4.3 Further information on the background, intentions and reasons for the plan can be found within the [previous report to Executive Committee from July 2022](#) which sought approval of the draft plan for public consultation.

Public consultation

- 4.4 Public consultation on the draft plan took place with key technical and community stakeholders as well as the general public, for a nine-week period from 29th July 2022 to 30th September 2022. During this time, a total of 276 formal responses were received across the consultation hub, email, social media and in comments on news articles. In addition to this, officers undertook a number of engagement events at which views were gathered including:

- a workshop with Somerset Youth Parliament,
- attending a meeting of Taunton Area Cycling Campaign,
- presenting to the Council's Agents Forum,
- presenting to relevant parish councils, chartered trustees and ward members,
- presenting to Blackbrook Green Forum, and
- attending the Richard Huish College bike day.

- 4.5 A total of 145 people responded using the consultation hub either via the main survey or the heatmap (where respondents could "drop a pin" and answer a short survey about the specific location).

- 4.6 Below is a brief summary of consultation responses received, together with key changes being made between the consultation draft and final draft plan. For a full summary of the comments received and how they have been taken into account in production of the final plan document please see the Consultation Statement at Appendix B to this report.

General

- 67% of people dropping a pin on the heatmap were identifying locations where they felt either unhappy or dissatisfied about walking, wheeling or cycling in Taunton. This, together with the reasons and the design solutions people suggested, support the need for effective improvements to be made within the routes identified.
- Responses to the main survey highlighted the low levels of walking and cycling currently being made by respondents. However, 54% of respondents said that if the routes identified were delivered then they would "definitely" be more likely to make walking and cycling trips, with a further 22% saying they would be "likely to".
- The routes identified were generally well supported, with 51% being "satisfied" with the routes and a further 27% being "happy".

Potential Alternative Routes

- A number of potential alternative routes were raised from the consultation. However, it was not considered necessary to make any changes to the Final Plan network map. Instead, a number of routes may 'be considered as studies progress and route design evolves'; some could be included in future iterations of the Taunton LCWIP; and a number of others were not considered relevant for inclusion.

Additional Design Issues & Constraints

- Several walking, wheeling and cycling infrastructure issues were raised in the consultation responses alongside the need to recognise the constraints, conflicting corridor priorities and opportunities. These have been added to Appendix B where relevant according to each route for consideration at later stages of studies and designs.

Prioritisation of Route Destinations & Delivery

- The consultation identified the key priorities among route destinations and delivery factor. The Plan recognises these factors, and they have, therefore, informed the prioritisation of the routes in the Final Plan and beyond. Chapter 9 and Appendix C introduce a matrix approach which accounts for the key priority factors identified to list the highest priority routes. This is supplemented with indicative delivery timescales based on identified assumptions. Where assumptions underpinning the timescale justifications change, the Plan acknowledges that this may impact these timescales. Delivery to timescales is also acknowledged as being highly dependent upon securing necessary external funding.

Missing Connections

- A number of missing connections were raised through suggestions within the consultation responses. However, the network map of proposed routes already connected to many of the connections suggested and several were not considered relevant to the project. As a result, no changes were made to the Final Plan.

Walking, wheeling & Cycling Infrastructure Design

- The consultation responses identified the importance of establishing an equitable and inclusive walking, wheeling and cycling network, suitable for all users. Currently, the potential for trip-chaining has been captured in Appendix B 'onwards connections'. Lighting has also been added to the hierarchy of interventions set out in Chapter 10 and reference made to the Government's Inclusive Mobility guidance.

Integration with other plans and modes

- The consultation raised the need for additional information regarding secured funding sources. Chapter 10 now includes some additional clarification about funding sources for the LCWIP and the distinction with Connecting our Garden Communities (CoGC). To further align with the LCWIP, Chapter 8 includes a combined map of the LCWIP and CoGC routes and Chapter 6 includes the prioritised destinations in relation to each garden community.
- The need to fit CoGC within the Local Transport Plan and consider active travel as part of sustainable transport as a whole was also raised. Chapter 10 now sets out the increased weight the Local Transport Plan will give CoGC in

decision-making and the ability for the Plan to help mediate conflicting priorities for space. The Plan already included text on the importance of integration with bikes, e-bikes and e-scooters, but further text on the integration with public transport, considering Taunton's ageing demographic, has been added.

Scope of the document

- The document now recognises that assessing highway capacity will be a significant part of future work in Chapter 7 and how it could be secured in Chapter 10. Furthermore, estimations of demand will need to be provided. The Plan is a vision document and as such, some text has been included regarding likely access to the prioritised destinations in Chapter 6, but no further detail is given.
- The need for a new highway link between Bossington Drive and Lyngford Lane/ Cheddon Road was questioned by the developers of the Lyngford Lane site (part of Nerrols Garden Community, a current planning application). While the draft plan set out that Policy SS2 states a requirement for a new highway link in this location, the Council has already published further guidance on this subject in light of the Climate Emergency within Climate Positive Planning which suggests that *"the expectation will be that this connection has filtered permeability for active travel modes, and potentially public transport only"*. Further policy context has been added in Chapter 5 in order to reflect this.
- A number of comments were received about ensuring sustainable modes are genuinely prioritised over the car. The Draft Plan set out 'retaining and creating constraints' in Chapter 10, the approach for prioritising sustainable modes over the car. However, the approach has been strengthened by explicitly stating the role of reduced road space and capacity in behaviour change. Furthermore, the 'vision and validate' approach has been explained further in Chapter 10, setting out the expected approach to addressing transport impacts of new development. This also helps to clarify the concerns raised about a potential reduction in road space.
- Another important clarification raised in the responses was to identify that different types of infrastructure may be required on different parts of the network. While the Draft Plan recognised this in Chapter 2, Chapter 10 now includes an indicative infrastructure hierarchy of different types of cycling infrastructure that may be suitable from busy corridors to residential areas.
- The co-benefits of access to green space and nature have also been emphasised in the Final Plan. While open space is recognised as a key destination to prioritise connections, local policy context has been incorporated from the GI Opportunities Update (2017), which sets out the mental and physical health benefits. In addition, potential opportunities have been added to Appendix B where previously absent.
- Several concerns were raised about the need to consider potential heritage, biodiversity, flood risk and landscape impacts and opportunities, particularly in relation to the canal path. The final plan includes explicit wording to explain the need to consider wider constraints and opportunities associated with routes as they progress through the design stages. In relation to the canal path in particular, the plan recognises the constraints, sensitivities and range of users it needs to accommodate, yet also recognises it is well used for walking, wheeling and cycling already. As such the route is included (with caveats) but necessary alternatives are identified to reduce reliance upon it. Potential impacts and opportunities have been added to Appendix B where previously absent.

Developer contributions and weight of document

- Finally, clarification was needed around the weight of the document and how developments would contribute towards the proposals. The Final Plan now states in Chapter 10 that (in line with national legislation and policy) the Development Plan takes precedence in decision-making, though the Connecting our Garden Communities Plan will be an important material consideration. It introduces a 'roof tax' approach as a starting point for negotiation of developer contributions where the three planning obligation tests are met, and that a 'vision and validate' approach to addressing transport impacts of new development should be taken by applicants.

4.7 Further minor changes have been made in order to ensure the Plan is as up to date as possible in relation to the planning status of each Garden Community and to reflect the fact that this is the final version of the plan. In summary the changes are as follows:

- Summarising the public consultation process and outputs – more detail available in the accompanying Consultation Statement (see Appendix B to this report).
- Inclusion of prioritised routes including methodology, list of top 10 routes, and table showing the routes in priority order, which Garden Communities they are relevant to and an indicative timescale for delivery justified against LCWIP timescales, current publicly available information on phasing of developments and other plans e.g. BSIP. This responds directly to comments made.
- Inclusion of an indicative hierarchy of walking and cycling interventions for different parts of the network – making it clear that it's not a one size fits all situation.
- Referring to walking, *wheeling* and cycling – more inclusive.
- Setting out a clear expectation that applicants take a "Vision and Validate" approach to transport assessment and travel planning.
- Clarification on the intended status of the Plan for development management purposes as an important and up to date material planning consideration, whilst recognising the primacy of the development plan.
- Clarifying the Plan will be incorporated into the LCWIP and then into the new Local Transport Plan which will increase the weight that can be placed upon it, and inclusion of a plan overlaying LCWIP and CoGCs routes.
- Clarifying that things have moved on since policies were adopted and the Connecting our Garden Town (draft transport strategy for Taunton) was published, and the move away from traditional highways infrastructure aimed at increasing road capacity.
- Inclusion of plans identifying existing cycling infrastructure nearby each Garden Community.
- Updated assessment of planning status of each Garden Community to most up to date.
- Inclusion of priority destinations for each Garden Community informed by consultation responses (mainly these are schools/colleges plus Musgrove).
- Clarifying that some of the more external, aspirational routes will struggle to secure major contribution through S106 and so they are even more likely to be reliant upon alternative funding sources.
- Including reference to other national policy context inc. Manual for Streets, Cycling and Walking Investment Strategy 2, Inclusive Mobility guidance.
- Improved reference to multi-benefits and importance of GI linkages.

- Clarifying that a level of road congestion may be necessary to facilitate behaviour change.
- General updates to reflect this is the final version of the plan.

Next steps and future delivery

- 4.8 This report recommends that the CoGCs Plan is now approved both as a material consideration in the determination of relevant planning applications, and as corporate policy to inform future policy and project development and funding bids.
- 4.9 From the Council's perspective as Local Planning Authority, this means that following approval, the CoGCs Plan will be able to be given reasonable weight in decision making as a material consideration. Planning decisions should be taken in accordance with the development plan unless material considerations indicate otherwise. The Plan includes useful context about each of the Garden Communities to help identify how much of an influence the document is likely to be able to have on future planning applications (considering that each of the Garden Communities is at a slightly different stage in terms of planning status). The Plan does not set policy, this is already set by adopted development plan documents (for development in Taunton these are the Core Strategy, Town Centre Area Action Plan and Site Allocations and Development Management Plan and Neighbourhood Plans). However, planning applicants/developers will need to set out how they are responding to adopted policies relating to active travel and the CoGCs Plan, and then this should be considered in the planning balance.
- 4.10 Where appropriate and where the three planning obligation tests (necessary to make the development acceptable in planning terms; directly related to the development; and fairly and reasonably related in scale and kind to the development) are met, then the LPA will seek contribution towards the delivery of relevant routes via Section 106 Agreement.
- 4.11 The Council's Infrastructure Funding Statement sets out how receipts of the Community Infrastructure Levy (CIL) (charged only in the former Taunton Deane area) will be used to deliver on infrastructure priorities. This identifies that a proportion of CIL receipts should be spent on cycle and pedestrian improvements. The CoGCs plan may influence how these moneys will be allocated and spent.
- 4.12 Officers from the Council's planning, major projects and climate teams are already engaging in project work informed by the CoGCs Plan, and it will continue to inform project work as resources and opportunities allow. This includes preparing funding bids and business cases ready for when opportunities arise.
- 4.13 Going forward, all routes will need to go through concept planning, business case development and detailed design stages ahead of delivery. As routes progress through this design path, it may be that some routes fall away as infeasible once more detailed issues are understood, or need tweaking to overcome such issues. The plan is clear that by identifying the routes, the Council is not bound to deliver any of them, and delivery will be heavily reliant upon successful negotiation with developers, and securing of other external funding. A principal purpose of the plan is to enable negotiation with developers in order to secure developer contributions towards scheme delivery, and to inform business case development and funding bids to secure other external funding sources.
- 4.14 The Government has had a step change in its approach to walking and cycling over the last few years and committed to significant funding being made available towards

delivery of active travel infrastructure. The Department for Transport's new executive agency, Active Travel England has been set up to ensure that this, and wider transport investment, is well spent, and to help raise the standard of cycling and walking infrastructure to align with Local Transport Note (LTN) 1/20 as far as at all possible. Having proposals sufficiently developed and ready to go is essential for making the best of these funding opportunities when they are announced, often with short timescales to submit bids. The CoGCs Plan is directly informing Somerset County Council's bid to Active Travel Fund 4 and spend of existing Garden Town funding. Being ready for further funding opportunities as they arise will be essential to successful delivery.

- 4.15 The overall network of routes has an aspirational element to it. It sets out the extent of routes which are likely needed to meet our Climate Emergency commitments and Garden Town Vision, both of which realistically necessitate transformational change. However, the overall cost associated with delivering all of the "core" routes only is likely in the region of £124-£150 million. As such, delivery of the plan as a whole is heavily reliant upon external funding and developer negotiations.
- 4.16 The final Plan prioritises routes based on a transparent scoring matrix. This will help to focus efforts for funding bids, and associated business case development. The route prioritisation and indicative delivery timescales in the plan will influence this work programme alongside availability of resources, funding and opportunities.
- 4.17 SWT and SCC officers agree that in time, this Plan will be incorporated into the next iteration of the Taunton LCWIP. The project is actively recognised as a key interdependency with delivery of the County Council's Bus Service Improvement Plan. The next Local Transport Plan is required to be completed by April 2024 and must be underpinned by a series of other plans and strategies including the LCWIP and BSIP. Taken together, and incorporating the Connecting our Garden Communities Plan, these will hold significant weight in decision making and help to ensure that a holistic approach is taken in consideration of all sustainable transport modes.

5 Links to Corporate Strategy

- 5.1 Connecting our Garden Communities responds directly to objectives 1, 2 and 5 of the "Our Environment and Economy" theme and objectives 6 and 7 of the "Homes and Communities" theme of the Corporate Strategy. A Consultation Statement is included at Appendix B to this report – this responds directly to objective 5 of the "A Transparent and Customer Focused Council" theme of the Corporate Strategy. By engaging with TACC in the development of the plan, and continuing to do so going forward, we are responding directly to objective 5 of the "Homes and Communities" theme of the Corporate Strategy. If Council assets are required to assist in the delivery of any of the routes, then this would be directly responding to objective 3 of the "An Enterprising Council" theme of the Corporate Strategy.

6 Finance / Resource Implications

- 6.1 The Connecting our Garden Communities plan sets out an aspiration for the delivery of a network of walking, wheeling and cycling routes. There is no explicit request for funding, or expectation that the routes will be funded by the Council.
- 6.2 A principal purpose of the plan is to enable negotiation with developers in order to secure developer contributions towards scheme delivery, and to inform funding bids to secure

other external funding sources. It is likely that the Council will need to contribute some funding towards the delivery of some routes, including through CIL receipts, capital and revenue budgets. However, such requests will be made on a project by project basis further down the line.

6.3 Finance have reviewed this report which is considered a strategic report. Finance comments will be made for the individual projects as they develop and approval is sought for the associated costs and funding. It should be noted that there are currently two capital projects already approved in relation to active travel:

- CIL funded cycle and pedestrian improvements - The Infrastructure Funding Statement allocated CIL money towards cycle and pedestrian improvements, which may well contribute some towards delivery of certain routes emerging from this project. However, this report does not seek allocation of any of this funding at present.
- XX169G – Future High Streets Fund active travel improvements – The routes funded by the FHSF project are related to, but not directly part of this project. The routes within this project will complement and add to those being delivered with the FHSF moneys.

6.4 Firepool is one of the Garden Communities considered by the plan. As the Council is also developer for this site, and the plan identifies key off-site walking, wheeling and cycling links relating to the Firepool development, there may be an indirect financial impact on the Council in this regard, subject to developer negotiations at the planning stage. This process is beginning now, in relation to the emerging Masterplan.

6.5 The above points relate as much to the new unitary council as they do to Somerset West and Taunton Council.

7 Legal Implications

7.1 There are anticipated to be no legal implications of approving the Plan as a material consideration in the determination of relevant planning applications or as corporate policy to inform future policy and project development and funding bids. The Plan and this report both rightly point out the planning decisions should be taken in accordance with the development plan unless material considerations indicate otherwise.

7.2 The Plan includes careful wording to ensure that it is clear that the exact routing of routes may change and the detail of provision is not set, to be determined through detailed design. The plan is at a high enough level to avoid triggering any legal issues at this stage. The plan includes text to clarify that routes will wherever possible look to avoid third party land and utilise SCC/SWT land (and in the main highways land).

8 Climate, Ecology and Sustainability Implications

8.1 Transport is the dominant source of carbon emissions in Somerset, making up 46% of carbon dioxide emissions in 2018, compared with just 28% as the UK average. For Somerset West and Taunton the figure is higher still at 51%. This is indicative of the rural nature and low density population of the area and the lack of realistic alternatives to the personal motorised vehicle in many cases, as well as the fact that the M5 motorway runs through the district. Replacing vehicular journeys with active travel modes (walking, wheeling and cycling) is identified as central to the success of reducing emissions from transport. Taunton represents the greatest opportunity in the district (and county) for

securing higher levels of walking, wheeling and cycling, and new developments are a key catalyst and opportunity for moving forward delivery of the necessary infrastructure. This plan is intended to lead to modal shift of movements from/to the Garden Communities to more sustainable and zero emission, active travel modes. Delivery of the routes will also enable improved modal shift for existing communities.

- 8.2 The delivery of routes will, wherever possible look to retain existing vegetation, particularly where there is an important ecological benefit to doing so. However, there may be places along the routes where a balance needs to be found between delivering high quality, compliant infrastructure and retention of existing vegetation. Climate change poses a significant risk to our ecology, and the delivery of walking, wheeling and cycling routes can help to mitigate this risk. However, the loss of biodiversity is also of significant concern and the right balance needs to be struck. A holistic view will be taken in developing more detailed proposals for route delivery, with a view to creating opportunities to enhance the green infrastructure along the route corridors. Wherever possible, route designs will look to make use of and enhance/improve existing infrastructure, improving the sustainability of proposals in terms of resource use. However, in some cases, new infrastructure will be necessary/more appropriate. Water management will need to be considered in detailed design. However, all of the above relates to project delivery and not the approval of the plan for public consultation.

9 Safeguarding and/or Community Safety Implications

- 9.1 A key objective of the project is to work towards the delivery of modern and futureproofed infrastructure, which would be usable by all. The routes have directly considered the need to accommodate the safe movement of children to schools, and the need to ensure routes are safe, attractive, overlooked and with a reduced fear of crime. Further consideration will be needed as routes progress through concept and detailed design.

10 Equality and Diversity Implications

- 10.1 An Equalities Impact Assessment has been undertaken – this is included at Appendix C. Officers within the Council with an overview of the Equalities function, who have experience of identifying impacts on those with protected characteristics have been consulted for this initial identification of potential impacts. Overall the plan is anticipated to have a positive impact across all protected groups as there are no equalities impacts associated with the production of the plan itself or approving of the draft plan for public consultation. However, as set out in the EqIA there is potential for delivery and implementation to have negative impacts on protected groups depending on the way the plans are executed and the detailed design of routes. Detailed design is beyond the scope of the plan and this consultation. The EqIA and plan itself include text to state the relevance and importance of route designs taking an inclusive approach, and the value of following the Government's Local Transport Note (LTN) 1/20 guidance on cycle infrastructure design and Inclusive Mobility guidance as a means to ensuring access for all. Further, detailed EqIA's will need to be undertaken at the project stage as routes progress through the design process. The final plan now makes reference to walking, *wheeling* and cycling throughout as a more inclusive term.

11 Social Value Implications

- 11.1 The delivery of walking, wheeling and cycling routes can bring added social value to the town through the contribution to placemaking and the power this has to create

environments that people are proud of, want to spend time and invest in. Furthermore, there are significant health benefits of walking, wheeling and cycling that delivery of the right infrastructure in the right places can help to realise.

12 Partnership Implications

- 12.1 Whilst this project has been led by SWT, it relates to transport policy and highways which are functions of Somerset County Council. As such officers from these departments have been closely involved in the plan's development. Continued close partnership working will be necessary in relation to consideration of planning applications, funding bids and transport planning for the town.
- 12.2 The project has benefited greatly from close, transparent and trusted working with TACC. The delivery of any routes included within the plan will require ownership and drive from the community and the continuation of this positive relationship is key to this.

13 Health and Wellbeing Implications

- 13.1 Health and wellbeing are central to this plan. The routes directly consider this in their connection to the places people need to go for essential services and facilities. The prioritisation of routes connecting to schools is key. Enabling children to develop a habit of walking, wheeling and cycling to school can set them up for more active lifestyles for the rest of their lives.
- 13.2 Some of the routes quite deliberately link to or through some of the most deprived wards in the district. This ensures that the routes not only benefit the new Garden Communities, but also enable these existing communities to access the opportunities that these linkages and the Garden Communities themselves provide.

14 Asset Management Implications

- 14.1 This report makes no recommendations or requirements in relation to specific SWT assets. At this stage, the Plan discusses routes in general, rather than the specifics of route design and land holdings required.
- 14.2 The Council owns significant land holdings within Taunton as part of its general fund, housing and open spaces functions. The use of any of this land for delivery of walking, wheeling and cycling routes could, in theory stymie wider aspirations that the Council may have for those assets (e.g. disposal, regeneration, tree planting etc.). The starting principle for the design of any of the emerging routes will be to accommodate the route in line with the following hierarchy: 1) Highways land; 2) Other SCC or SWT land; 3) Third party land. Following this hierarchy increases the likelihood and ability to deliver routes, potentially reduces costs, and avoids being overly and unnecessarily constrained solely by existing highway widths. The use of any SWT land will of course need to be subject to appropriate discussion and negotiation with the relevant asset holder within the Council so as to understand long term aspirations for that land and ensure that these would not be compromised. Early engagement has taken place with Housing, Assets and Open Spaces teams to raise awareness of the routes.

15 Data Protection Implications

- 15.1 A Data Protection Impact Assessment was undertaken in relation to the consultation

exercise. Officers with an overview of data protection were consulted as part of this. This highlighted a number of measures which were taken forward as part of the consultation to ensure compliance with GDPR and reduce risks. The Consultation Statement attached at Appendix B summarises comments received without reference to any personally identifiable information or being able to identify any personal special category data.

16 Consultation Implications

16.1 See above sections 4.4-4.6.

Democratic Path:

- Executive – Yes (21st December 2022)
- Full Council – Yes (7th February 2023)

Reporting Frequency: Once only

List of Appendices

Appendix A	Connecting our Garden Communities (main plan and associated appendices A, B and C) – please click here to view the documents
Appendix B	Consultation Statement
Appendix C	Equalities Impact Assessment
Appendix D	SEA/HRA Screening Report

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Connecting our Garden Communities

Consultation Statement

December 2022

Version	Purpose	Date
1	For consultation	28/07/2022
2	Final Plan	02/12/2022

Connecting our Garden Communities

Consultation Statement

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Introduction

Connecting our Garden Communities is a plan for ensuring modern, futureproofed walking and cycling infrastructure accompanies the delivery of key developments across Taunton Garden Town.

The plan sets out our aspirations for delivery of a network of walking and cycling routes across the town, which are explicitly intended to serve the needs of the Garden Communities, whilst also serving existing communities. It builds on the work already in train in relation to town centre routes including that funded through the Future High Streets Fund, and the network planning undertaken in support of the Taunton Local Cycling and Walking Infrastructure Plan.

The plan is focused around the identification and appraisal of routes, and importantly not their detailed design, which will follow. Exact routings may be subject to change. The detail of the infrastructure provision is not set by this plan, and indeed types of infrastructure may be different for different parts of the network depending upon the opportunities, constraints and types of user the routes need to accommodate. As routes progress through concept and detailed design this may necessitate change, but the plan provides a starting point for these processes.

There will inevitably be parts of routes that are more sensitive to change than others. Successful delivery will be reliant upon community support and buy-in. As such, the Council commits to working with communities to develop more detailed proposals, particularly where more transformational change may be required.

This Consultation Statement explains how Somerset West and Taunton Council have undertaken public consultation to inform the development of the Connecting our Garden Communities Plan (“the Plan”), and how the engagement, feedback and responses received have and will continue to influence its development.

This draft statement covers:

- Which bodies and persons were invited to make comments;
- How those bodies and persons were invited to make comment;
- The material subject to consultation;
- A summary of early engagement and how this has influenced the development of the Plan.

The final statement will also cover:

- A summary of the responses received; and
- A summary of how the responses influenced the development of the Plan.

The Council has an adopted [Statement of Community Involvement](#) (SCI). The SCI outlines that the Council is committed to effective community engagement, and seeks to use a wide range of methods for involving the community in the plan making process. SWT’s Statement of Community Involvement was adopted in November 2019. In relation to plan preparation, it primarily relates to the preparation of Development Plan Documents (DPDs), Strategic Environmental Assessment (SEA) and Sustainability Appraisal (SA), Supplementary Planning Documents (SPDs) and Neighbourhood Plans. As the Plan is not any of these types of

documents and is not formally required by any legislative, regulatory or administrative provisions, there are no mandatory steps, methods or bodies for consultation to comply with. However, consultation has been designed to comply with the SCI in the interests of good practice.

Consultation Summary

In July 2022, the Council published “Connecting our Garden Communities” for public consultation (the “Draft Plan”). Consultation ran from 29th July 2022 to 30th September 2022.

The Plan was subject to early engagement with key community and technical stakeholders, which informed the proposals within the consultation draft.

The Draft Plan itself is a 122 page long PDF document, supported by two technical appendices totalling a further 86 pages. The Plan sets out its purpose, context, methodology, evidence and proposals. An executive summary was set out at the front of the document to summarise the document at a glance. By its nature, the document was fairly technical and text heavy, though officers tried to ensure that it was as accessible as possible through the use of diagrams and use of language, considering its nature and purpose. Furthermore, the Plan is accompanied to public consultation by a short-form, four page summary document, designed to cut to the key points and make the proposals more accessible. Consultation is focused around the use of the Commonplace online engagement platform, which presents the plan in an interactive format.

Purpose of the consultation

Public consultation had the following objectives:

- **Inform** – awareness of the project, it's aims, specific proposals, opportunities and constraints etc. is understood by developers, residents, interest groups, businesses and wider stakeholders.
- **Consult** – views are gathered on the emerging proposals, their impacts and deliverability and the form they should take, and these views are taken into account in the final version of the plan.
- **Respond** – calls for greater action on walking and cycling in Taunton from TACC and others, are responded to.
- **Partnership** – encouraging and enabling an element of active participation and co-design with stakeholders through direct inputs and suggestions on routes, constraints, opportunities, potential solutions and alternatives for consideration. The pool of participants is widened to be more representative.

Who was consulted?

A list of Specific Consultation Bodies, General Consultation Bodies, and other organisations and groups the Council seeks to involve in plan-making is included in the SCI. As a non-statutory plan, there was no statutory list of bodies and

organisations that the Council was required to consult in its preparation. Despite this, all those on this list have been included in this exercise.

In addition, the Council is committed to ensuring that local groups, organisations and individuals are provided with the opportunity to be involved in the preparation of planning policy documents.

The Council has a database of consultees, who have either commented upon, or expressed an interest in being involved with the development of local plans. This database is used to keep individuals, companies and organisations informed on the production of the Local Plan and other planning policy documents. New consultees are added to the consultation database via e-mail or letter to the Planning Policy and Implementation Team requesting inclusion on to the database. The General Data Protection Regulations are followed to ensure that personal data is only required and retained where proportionate and necessary, is only gathered where explicit consent has been provided, is kept securely and is not disclosed to others. All bodies and persons identified within this database were emailed with notification of the consultation.

In addition to the above, a number of specific consultees were identified as relevant to this project, and also invited to comment, including:

- Promoters/developers of the Garden Communities
- Other developers/agents more generally
- Musgrove Park Hospital
- Bridgwater & Taunton College
- Richard Huish College
- Secondary schools (maintained and academies)
- Primary schools (maintained and academies)
- Taunton School
- Queen's College
- King's College
- Kings Hall School
- UK Hydrographic Office
- Somerset County Cricket Club
- Kingston Area Cycle Campaign
- Taunton Bike Club
- Wellington Wheelers
- Taunton Running Club
- Active Travel England
- Young Somerset
- Centre for Ageing Better
- First Bus
- Hatch Green Coaches
- A1 Ace Taxis
- TLC Taxis
- Taunton Taxi Services
- Friends Taxis
- Taunton Transition Town

- Taunton Green Parents
- Extinction Rebellion Taunton
- Climate Action Taunton
- Friends of Longrun Meadow
- Taunton Green Forum
- Somerset Climate Action Network
- Blackbrook Green Forum

How we consulted

Consultation on the Draft Plan ran from 29th July 2022 until 30th September 2022. During this time, a variety of methods were employed. This section of the report details each of these methods. Responses to the consultation were encouraged:

- Online via the Council's [consultation portal](#), which contained a full survey and an opportunity to drop pins and leave comments on an interactive map;
- By email to strategy@somersetwestandtaunton.gov.uk;
- By post to Planning Policy and Implementation team, Somerset West and Taunton Council, Deane House, Belvedere Rd, Taunton, Somerset, TA1 1HE.

To publicise the consultation, the Council:

- Emailed a notification of the consultation to all bodies and persons identified within the consultation database;
- Made the above consultation documents available for inspection at the following locations:
 - Deane House, Belvedere Road, Taunton, TA1 1HE
 - Taunton Library, Priorswood Library
- Published the documents on the Council's website at <https://www.somersetwestandtaunton.gov.uk/consultations/connecting-our-garden-communities/> and on the consultation portal at <https://tauntongardentown.commonplace.is/>. The Council's Consultation webpage at <https://www.somersetwestandtaunton.gov.uk/consultations/> also contained information directing people to the consultation portal.
- Published a press release via the Council's website and social media posts, raising interest, communicating the consultation and encouraging participation.
- Posted a news article within SWT's Climate Newsletter.
- Organised and conducted presentations to various groups with associated opportunities for feedback.

Previous consultation and engagement

Prior to producing the Draft Plan and launching this public consultation, officers undertook early engagement with key technical and community stakeholders. This early engagement assisted in establishing the scope of the plan.

Engagement with Taunton Area Cycling Campaign (TACC)

Taunton Area Cycling Campaign (TACC) were crucial to the auditing process. TACC volunteers undertook a significant number of the audits on the Council's behalf, and

discussion with them about options to consider and specific routings heavily influenced the process.

Initial engagement exercise (December 2021)

The initial engagement exercise focused on introducing the project and why we were undertaking it, and gathering thoughts, aspirations and ideas. An initial email was sent round in December 2021 to the relevant parish councils and ward members covering Taunton and adjoining areas, setting out our aim for delivering further active travel linkages relating to the Garden Communities and seeking their initial inputs to shape the direction of the project.

As part of this we were keen to collate responses to the following questions:

- Are there any particular key services, facilities or destinations beyond the boundaries of the Garden Communities which you think residents / users of the sites will need to access on a regular basis? (e.g. schools, shops, employment areas, recreational facilities).
- Are there any specific barriers to safe walking and cycling between the Garden Communities and these key services and facilities that need to be considered/overcome or which might be difficult to overcome? (e.g. critical road junctions, on-street parking on constrained width highways).
- Are there any particular opportunities worth exploring through this project (e.g. aligning with wider community aspirations around other walking and cycling links, health and wellbeing, landscape or biodiversity projects, climate change mitigation/adaptation, open space, developments, transport improvements, or specific route options)?

Responses have been grouped below against relevant Garden Communities:

Garden Community	Comments
Comeytrove	<ul style="list-style-type: none"> • Essential that Comeytrove Road is converted to 2 cul-de-sacs ASAP and green space takes over the middle section linking up with Comeytrove’s Neighbourhood Park. • Advisable to look at installing a link from the A38 side of the development to link to the Town Centre. • We need to ensure active travel links to SCAT/Castle (and therefore Longrun/French Weir and on). • Ensure that relevant primary schools (Trull, Bishops Henderson, Bishops Hull, Parkfield) are linked in. • Need to link through to open areas around the stream and Comeytrove Lane and around College Way. • Any cycle/ walking connection through the development must include arrangements for how it will connect through to the village of Trull across the Honiton Road. • Traffic on Honiton Road will increase incredibly. Many in the community are very concerned how people/ children can be kept safe walking or cycling from Trull into town or to Castle School.

Staplegrove / Ford Farm	<ul style="list-style-type: none"> • Manor Road/Corkscrew Lane must be made safer for pedestrians, cyclists and all road users. Key route for Staplegrove residents to get to the Taunton Academy and the Wellsprings leisure Centre; it is a narrow lane in places with two s-shaped bends and no pavement for most of the length of it, needs to be vastly improved. • A safe route between Kingston St Mary and Taunton needs to be brought forward from the 10 year to 4 year plan. Key finding from the 2017 Community Survey. • Provision along Bindon Road would be a way to connect Norton Fitzwarren and other western villages.
Monkton Heathfield / Nerrols	<ul style="list-style-type: none"> • Long held ambition to create a link from the canal to the Country Park i.e. up to the crossing to be built at the bottom of Yallands Hill, likely using land east of Aginhills Wood. • Long held objective to create cycle way north of the A3259, from the Crown Medical roundabout, through the Country Park, allocated West of Greenway Development, along Monkton Heathfield Rd to Monkton Heathfield 2
Nexus 25	<ul style="list-style-type: none"> • Linkage to Hawthorn Park, Holway, aligning with planting initiatives should be taken into consideration.

This parish council and ward member engagement was supplemented by a series of meetings with Taunton Area Cycle Campaign (TACC). Through these meetings the project aims were introduced and particular issues and ideas discussed. These ideas helped to shape the route options that were considered and subject to auditing. This engagement also led to a number of TACC volunteers helpfully putting themselves forward to assist in undertaking route audits. Further discussions took place early in the new year with TACC as auditing work progressed and the list of emerging routes began to take shape.

Early engagement workshops (March 2022)

In March 2022, the Council held a series of online engagement workshops with key community stakeholders including Ward Members, Parish Councils and TACC. As part of this, officers presented the context, scope and objectives of the project and sought inputs on a number of issues including key destinations, types of destination, prioritisation, barriers to delivery of appropriate infrastructure and alternative options or missing routes. An online mapping engagement tool was used to capture points raised in real-time during the meetings, enabling clarity on points raised and a more involved engagement from attendees. Key outcomes of the workshops are identified below:

High quality infrastructure essential to a Garden Town and Climate Emergency response

Attendees agreed that high quality walking and cycling infrastructure is essential to meeting both the Garden Town Vision and Climate Emergency commitments. There was general support for the principle of road space re-allocation to more sustainable modes in the right places.

The LCWIP doesn't sufficiently meet the needs of the Garden Communities

Existing routes and LCWIP proposed routes were not considered to sufficiently address the walking and cycling needs of Monkton Heathfield, Staplegrove or Nerrols Garden Communities. The response was more mixed in relation to Comeytrove, Nexus, Firepool and Ford Farm, where LCWIP routes do more obviously serve them, though they weren't seen as meeting all needs.

Connecting to schools a key prioritisation factor

The factors considered to be of most importance for the prioritisation of route delivery were:

1. Connect to schools
2. Connect to other essential services
3. Serve existing as well as future users

Having community support and having potential to be transformational also performed well.

Schools, employment and town centre/station the most important destinations

The most important everyday services for the Garden Communities, generally, to be connected to were seen to be:

1. Schools
2. Employment
3. Town Centre/Station

However, other destinations including convenience store, supermarket, open spaces, leisure centres, GP surgery and other local centres were also referred to.

Attendees identified a number of specific destinations for each of the Garden Communities, many of which aligned with destinations which officers had already identified. However, a number of additional destinations not previously identified were suggested. In addition to this, certain destinations including Musgrove Park Hospital and both Bridgwater & Taunton College and Richard Huish College were seen as being of critical importance and relevant to all of the Garden Communities bar Nexus 25.

Emerging routes supported, but other routes identified

The principles of the emerging routes at that point were broadly supported. However, a number of barriers were identified, particularly around road space and capacity limitations, costs of infrastructure delivery, safety concerns of shared use paths, the importance of routes benefitting existing communities, the capacity of some of the services/facilities being connected to, and the need for appropriate supporting infrastructure such as cycle parking, tools/pumps, traffic light prioritisation etc. The importance of routes serving existing communities, and helping to resolve potential congestion issues or safety concerns for walkers and cyclists arising from new traffic generated by the Garden Communities was also raised.

A number of routes were identified as being felt to be either missing or worth considering as an alternative, including:

- **Silk Mills Road to Wellington Road and Heron Drive** – seen as necessary to connect Ford Farm and Staplegrove to Musgrove Park Hospital and

Bridgwater & Taunton College, and to connect Comeytrowe to Bindon Road Employment Area.

- **Silk Mills Park & Ride to Tangier/French Weir** through Longrun Meadow – seen as a well-used existing route necessary to connect Ford Farm with the town centre and French Weir Health Centre.
- **Creech Castle to Winckworth Way via the River Tone** – seen as a well-used existing route which could help connect Monkton Heathfield to Firepool and the town centre.
- **Creech Castle to Blackbrook via Hankridge Farm retail park** – seen as a well-used existing route in need of significant improvements, necessary for connecting Monkton Heathfield to Hankridge Farm retail park, Blackbrook Business Park and Nexus 25.
- **Crown/Venture Way roundabout to Taunton Station via Priorswood Road** – seen as a direct route from Monkton Heathfield to Crown Industrial Estate, the station and Firepool with better natural surveillance and scope for improvement than the canal.
- **Taunton Station to Taunton Academy via Cheddon Road** – seen as a vital part of the overall network providing a direct route on an alignment people want to use.
- **A more direct link from Monkton Heathfield to Nexus 25** – using existing motorway underbridges e.g. at Hankridge Farm. Seen as avoiding convoluted routes and also helping to link in Creech St Michael and Ruishton.

The importance of Cheddon Road, Station Road, East Reach and Wellington Road as core parts of any future network was reiterated by TACC.

Following the workshops, suggestions were reviewed, and additional audits undertaken in some cases. Responses then directly fed into the proposed routes included in the Draft Plan.

Route scoping workshops (March-April 2022)

In addition to the above initial and early engagement stages which focused on the plan and network as a whole, workshops were held in March and April to scope out specific options and interventions in relation to a number of the emerging routes. Through these workshops, the Council's transport consultants Stantec presented their views on the technical constraints and opportunities and options for interventions along those routes considered. Attendees from both Somerset West and Taunton Council (Planning Policy, Development Management, Major & Special Projects, Placemaking and Green Infrastructure) and Somerset County Council (Transport Policy, Highways and Safety Audit) then provided inputs in response to points raised. These workshops helped to ensure the routes were based on technical stakeholder as well as community stakeholder inputs, and to ensure that proposals broadly had the support of the highways authority.

Draft Plan Consultation

After producing the Draft Plan, officers undertook public consultation with key technical and community stakeholders as well as the general public, for the nine-

week period from 29th July to 30th September using a variety of engagement methods. Through these various engagement methods, the Draft Plan could be further refined. This section of the report details each of these methods:

Emails

Emailed notification of the consultation was sent to all bodies and persons identified within the consultation database on Friday 29th July 2022. A screenshot of the email is shown below:

Dear Sir/Madam,

Somerset West and Taunton is holding a public consultation on its plans for a network of walking and cycling routes which would connect key developments (the Garden Communities) across Taunton Garden Town. The draft "Connecting our Garden Communities" plan and more information can be found on our [website](#) and via our [consultation portal](#) where you can view and comment directly on an interactive map, respond to survey questions and review all of the supporting material.

Consultation on the plan runs from today (29 July) for nine weeks until **30 September 2022**.

The plan builds on and complements the existing Taunton Local Cycling and Walking Infrastructure Plan (LCWIP) and is designed to ensure that futureproofed walking and cycling infrastructure accompanies the delivery of key developments. It aims to ensure that the Garden Communities at Comeytrove, Staplegrove, Monkton Heathfield, Nerrols, Ford Farm, Firepool and Nexus25, link in to the strategic routes identified in the LCWIP; and connect to key services and facilities beyond their site boundaries.

When adopted the plan will be a material consideration in the determination of relevant planning applications and masterplanning activities, ensuring they knit into and integrate with existing communities.

We are seeking views from the public, local communities, technical stakeholders and the development industry on this draft Plan until Friday 30th September 2022. Wide engagement and participation is an important part of developing an effective plan, and community buy-in will be integral to successful scheme delivery. Therefore we want to know what you think.

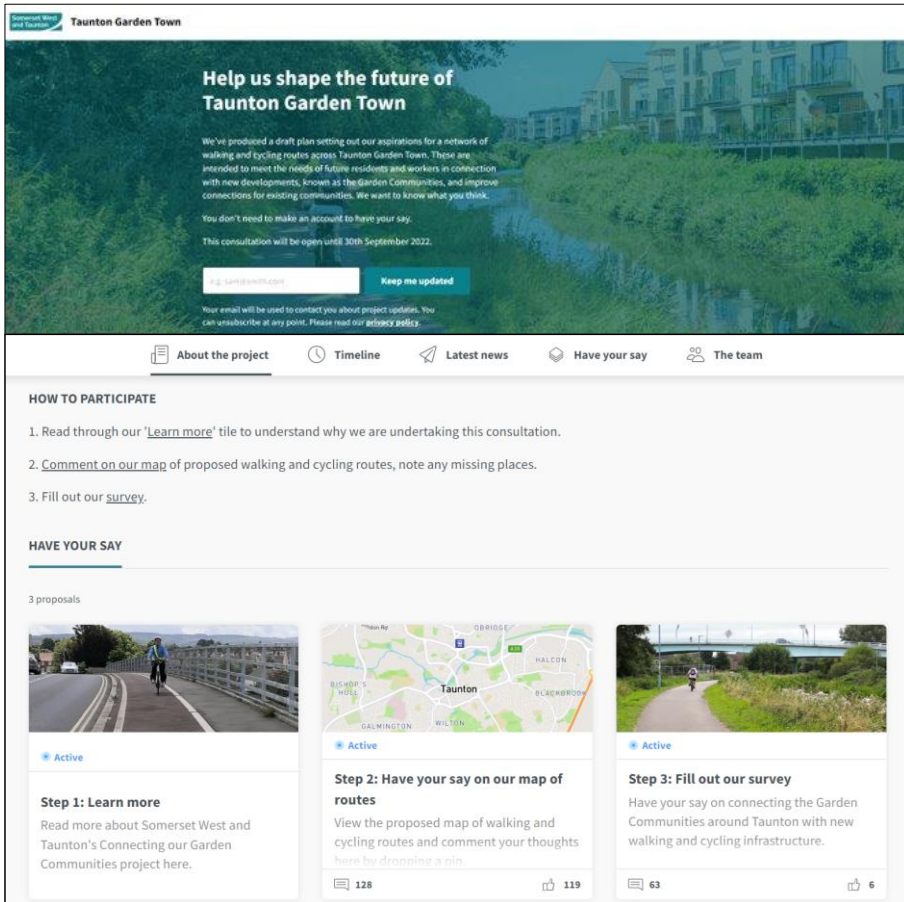
To respond to the consultation, we encourage you to use the [consultation portal](#). Alternatively, you can email responses to Strategy@somersetwestandtaunton.gov.uk or write to us at Planning Policy and Implementation team, Somerset West and Taunton Council, Deane House, Belvedere Rd, Taunton, Somerset, TA1 1HE.

Yours faithfully
Planning Policy and Implementation Team
Somerset West and Taunton Council

A total of 12 responses were received by email. (These were received either as a direct response to the email or through the email provided on Commonplace.)

Commonplace Consultation Platform

Officers met with the Commonplace team at the end of May to begin setting up a Commonplace Consultation Hub, using the license provided by Somerset County Council, and coordinating tasks through the June-July period before the portal was to be launched. A tile was set up on SCC's Somerset Sustainable Transport page, but the page had separate URL at <https://tauntongardentown.commonplace.is/> allowing a distinction between projects and enabling three additional tiles. A screenshot of the home page of the consultation hub with the three tiles is shown below along with the other features provided such as a timeline, latest news and the team:



The three tiles on the page were 'learn more', 'have your say on our map of routes' and 'fill out our survey'. The tiles are discussed in more detail:

1. A 'learn more' tile was also published with more information about the project and links to all Draft Plan and associated appendices, non-technical summary and other supporting documents such as the Equalities Impact Assessment.
2. The map of the walking and cycling routes was also published on the Commonplace hub whereby respondents could 'drop a pin' on a specific place or issue on the map and a short survey of 7 questions would pop up. The survey received 152 responses and 133 likes.
3. An online survey was published on the Commonplace Consultation Hub portal at. The link to the survey was published in the consultation notification emails as well as the press release and on the website. The survey consisted of 11 questions with varying answer styles and received 63 responses and 6 likes. Screenshots of the tile content are shown on the following pages:

< Home Step 1: Learn more

215
Learn more

- Why are we seeking your views? +
- We have engaged before +
- What are we seeking your views on? +
- How do I provide feedback? +
- When do I need to provide feedback by? +

Check out the following documents

	Non technical Summary.pdf	pdf	↓	🔗
	Wals Plan (Strat).pdf	pdf	↓	🔗
	Wals Plan (Strat) Appendix A - Route auditing.pdf	pdf	↓	🔗
	Wals Plan (Strat) Appendix B - Route Summaries.pdf	pdf	↓	🔗
	Consultation Statement.pdf	pdf	↓	🔗
	Draft EIA/RIA Screening.pdf	pdf	↓	🔗
	Equalities Impact Assessment.pdf	pdf	↓	🔗

< Home Step 2: Have your say on our map of routes

215 responses

Have your say

What is the place you have marked on the map?
e.g. End Street or a route along the...

Why are you dropping a pin here?
Select one option

- To comment on a destination
- To comment on part of proposed route
- To comment on a potential alternative route
- Add something else

How do you feel when walking, wheeling and cycling in this location?
😊 😐 😞 😡

Why do you feel this way?
Select one or more options

- Clean air
- Poor air quality
- Bad for cycling
- Cycle friendly
- Feels unsafe
- Feels safe
- Speeding traffic
- Calm traffic
- Supports mobility
- Hinders mobility
- Good for walking
- Bad for walking
- Add something else

Please select any design solutions you think are needed or would be appropriate for the location you have plotted. (Select all that apply)

- Off road or separate cycle lanes away from traffic
- Footpath provision or widening
- Additional lighting
- Reduction of speed limits
- Traffic calming such as removing a lane or narrowing the street
- Additional vegetation or planting
- Cycle parking or increasing amount of existing provision
- Less congestion and air pollution
- Dropped kerbs and tactile paving
- Signage and wayfinding
- Quiet streets and neighbourhoods
- Removal of barriers/ bollards
- New or improved crossing
- Improvements to cycle markings
- Less on street car parking
- Provision of disabled car parking
- Add something else

If you selected a potential alternative route, why is this alternative better?
e.g. shorter and better overlooked

Please add any other comments or suggestions you have in the box below.
e.g. want to see a segregated cycle path on this section of a route because...

< Home Step 3: Fill out our survey 69 responses

1/1

Have your say by filling out our survey below

How often do you make walking trips to the following destinations in Taunton? (Please tick one box for each row)

Turn your device horizontal - for a better experience

	Daily	2-3 times per week	Weekly	2-3 times per month	Monthly	Less often or never
Convenience Store	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GP Surgery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supermarket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open Space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taunton Town Centre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taunton Station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How often do you make cycling trips to the following destinations in Taunton? (Please tick one box for each row)

Turn your device horizontal - for a better experience

	Daily	2-3 times per week	Weekly	2-3 times per month	Monthly	Less often or never
Convenience Store	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GP Surgery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supermarket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open Space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taunton Town Centre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taunton Station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What are the most important connections to prioritise walking and cycling access to?

Sort in order of importance

- Convenience Store
- GP Surgery
- Supermarket
- Schools
- Open Space
- Taunton Town Centre
- Taunton Station
- Employment

Are there any other connections you would like to add to the list above?

Select your favourite example(s) of walking and cycling infrastructure.

Select one or more options



Fully segregated cycleway and separate footpath with situated parking and dedicated signals



Segregated cycle path and footpath with sections of shared use



On-road advisory cycle lanes with pavements for pedestrians



No cycle paths and only pavements for pedestrians



Quiet street treatment with greenery, parking restrictions and lower speeds



Off-street cycle paths that avoid the roads and go through parks or open spaces

What is most important to you when prioritising the delivery of the proposed walking and cycling routes in Taunton?

Sort in order of importance

- Connection to schools
- Connection to other essential services
- Serves existing as well as new users
- Has community support
- Potential to be transformational
- Value for money
- Broad feasibility
- Performance against policy objectives (such as climate, planning and transport)
- Potential to attract funding
- Political acceptability
- Cost of route delivery
- Timing of delivery coordinated with development

Are there any missing key destinations that you feel the routes don't connect to?

Select one option

- Yes
- No
- Not sure

[Add something else](#)

If you answered yes to the question above, what destination(s)?

e.g. Bishop's Hill

Do you support the routes we have identified in the map?

☹️ ☹️ ☹️ 😊 😊

Unsupportive Very Supportive

If the routes were delivered, would you be more likely to make walking and cycling trips?

1 2 3 4 5

Definitely not Definitely

Please leave any further comments you have below.

I think this consultation is important for future residents of Staplegreen Garden Community because...

The website had 1828 visitors overall with a mix of email traffic, direct traffic, organic traffic and referral traffic, 145 respondents, 445 contributions made and 137 news subscribers as of 09:00 on Monday 3rd October 2022.

SWT Website

A new webpage was set up on the Council's website at <https://www.somersetwestandtaunton.gov.uk/consultations/connecting-our-garden-communities/>. The website sits within the Planning Policy webpages of the Council's website and was easily linked to from the [Planning Policy homepage](#) and the [Taunton Garden Town homepage](#). The link to the webpage was published in the consultation notification emails as well as the press release. The website explained that the Council was seeking views from the public, local communities, technical stakeholders and the development industry on a draft plan. It then set out the details of the consultation, how to engage, and the broad purpose of the Draft Plan.

Social Media

A social media campaign was launched on the first day of the consultation posting the URL to the Commonplace Consultation Hub and an image of the Draft Plan.

Facebook [@SWTCouncil](#) – page followed by 8,176 people. The post was published at (insert time and how many people it went out to) on Friday 29th July 2022. The post received 16 likes, 19 shares and 1 comment which received 2 likes.

Twitter [@SWTCouncil](#) – page followed by 3,124 people. The post was published at 12:35 on Friday 29th July 2022. The post received 7 retweets and 12 likes.

On Cycle to Work Day on Thursday 4th August 2022 the social media posts for Cycle to Work Day were reposted with a new caption reminding followers to have their say on the proposals for the network of cycling routes across Taunton.

Facebook [@SWTCouncil](#) – the Cycle to Work Day post was ‘reposted’ at 17:13. The post received 7 likes and 1 share.

Twitter [@SWTCouncil](#) – the Cycle to Work Day post was ‘reposted’ at 17:13 with the new caption. The post received 1 retweet.

A further social media campaign was launched at around the four weeks to go mark whereby another round of the original social media posts were published.

Facebook [@SWTCouncil](#) – repost was published at 10:00 on Monday 5th September 2022. The post received 3 likes.

Twitter [@SWTCouncil](#) – repost was published at 10:00 on Monday 5th September 2022. The post received 10 retweets and 6 likes.

LinkedIn [@SWTCouncil](#) – page followed by 1,728 people. The repost was published on Monday 5th September 2022. The post received 10 likes.

Officer Social Media Posts

A social media post was shared by an officer using their LinkedIn platform.

LinkedIn [@SWTCouncil](#) – posted on 29th July 2022 by an officer with 397 connections. The post received 35 likes and 4 shares.

Press Release

A press release was published on our website at <https://www.somersetwestandtaunton.gov.uk/news/connecting-our-garden-communities-consultation/> on 29th July 2022 and sent to all regional media.

Climate Newsletter

An officer prepared an article to go into the Somerset West and Taunton Climate Newsletter. This was released on Monday 1st August 2022 at 13:00.

Connecting our garden communities with walking and cycling routes

The Council is holding a public consultation on its plans for a network of walking and cycling routes which would connect key developments (the Garden Communities) across Taunton Garden Town.

The draft "Connecting our Garden Communities" plan builds on and complements the existing Taunton Local Cycling and Walking Infrastructure Plan (LCWIP) and is designed to ensure that futureproofed walking and cycling infrastructure accompanies the delivery of key developments.

It aims to ensure that the Garden Communities at Comeytrove, Staplegrove, Monkton Heathfield, Nerrols, Ford Farm, Firepool and Nexus25, link in to the strategic routes identified in the LCWIP; and connect to key services and facilities beyond their site boundaries.

When adopted the plan will be a material consideration in the determination of relevant planning applications and masterplanning activities, ensuring they knit into existing communities.

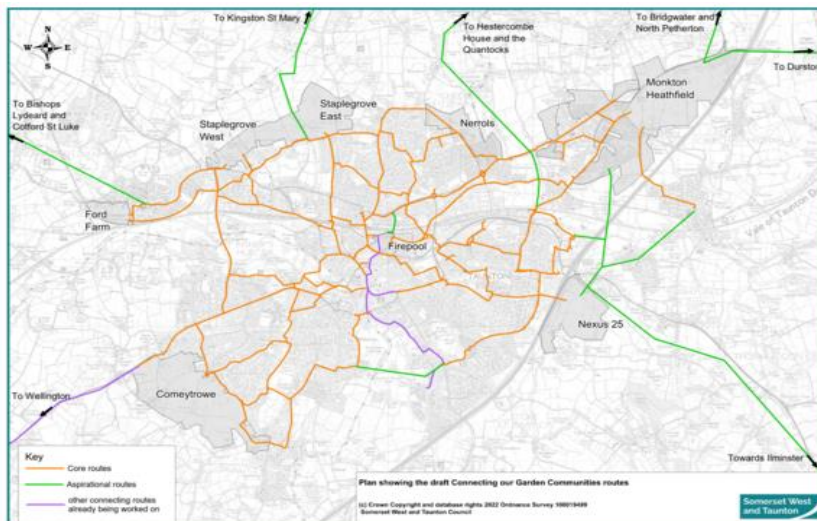
Wide engagement and participation is an important part of developing an effective plan, and community buy-in will be integral to successful scheme delivery. Therefore we want to know what you think.

To respond to the consultation, and view the draft plan and consultation documents, we encourage you to use the [consultation portal](#). Here you can view and comment directly on an interactive map, respond to survey questions and review all of the supporting material.

More information and alternative ways to comment can be found on our [website](#).

Consultation is open until **30 September 2022**.

We want to hear from you!



Articles in Newspapers Somerset Gazette and BBC News

The Somerset County Gazette posted the project in a news article on 3rd August with the title “*More than 30 new cycle links could connect Taunton at a cost of up to £150M*”. The article received 6 comments. View the article [here](#).

BBC news also posted an article about the project in a news article on 4th August with the title “*Somerset Council will need £150m for new cycle routes*”. No comments were received. View the article [here](#).

Taunton Area Cycling Campaign (TACC) Stall & Social Media

TACC hosted a cycling campaign stall on Friday 12th August 2022 in Taunton Town Centre outside Monsoon from 10:00 to 14:00. The stall displayed the network map of the proposed walking and cycling routes for Connecting our Garden Communities Draft Plan. An officer also printed one hundred ‘consultation cards’ for TACC to hand out from the stall with information about how to comment using Commonplace. As a result, two thirds were given out.

The link to Commonplace was also posted on Facebook [@Taunton Area Cycling Campaign](#) on Thursday 11th August 2022. The post received 7 likes and 5 shares. This was shared again on 22nd August reminding members of the consultation deadline, although the post received no likes or shares.

Somerset Youth Parliament

Officers arranged to attend a face-to-face meeting with Somerset Youth Parliament as part of their regular meetings at St Mary Magdalene Church in Taunton on Saturday 3rd September 2022 from 15:00-16:00. There were 10 attendees including two youth workers and plus two officers. An officer met with the organiser from Somerset County Council prior to the meeting to prepare materials and the link to the Commonplace Consultation Hub was sent out beforehand. During the meeting officers introduced themselves and what the project was about using an A1 map of the walking and cycling routes from the Draft Plan for context. Then, a discussion ensued around the barriers to cycling and what was needed to improve it. A number of activities were then set out for the attendees where they were each given three sticky dots to place in their top three priorities in answer to the questions:

- What are the most important connections to prioritise walking and cycling access to?
- What is most important to you when prioritising the delivery of the proposed walking and cycling routes in Taunton?

The final activity got the attendees into pairs to respond to the question “What would your dream street look like?”. A number of images of different types of streets in Taunton, such as residential streets with private parking either side or high streets, were handed out for them to draw on their ideas. Print-outs of types of cycle infrastructure were handed out to offer ideas and then each image was presented by each group on what they had come up with. Notes were taken throughout.

Meeting with Parish Councils/ Chartered Trustees/ Ward Members

An officer organised a meeting with relevant Parish Councils around Taunton as well as the Charter Trustees and other relevant Ward Members on Monday 5th September 2022 from 17:30-18:30. The date was discussed with Governance to ensure there was no clash with other governance commitments and other parish council meetings. The email was sent out to 45 potential attendees with a screenshot shown below:

Dear all,

Further to our previous informal engagement sessions back in March, hopefully you will have seen that we have now launched public consultation on the draft Connecting our Garden Communities plan – more info [here](#).

As part of this, we are organising an **online consultation session on Monday 5th September 2022 at 5.30pm** for relevant parish councils around Taunton, as well as the Charter Trustees and other relevant district ward members. This session will be to present the draft plan proposals and provide more information on how to respond to the consultation, as well as give an opportunity for Q&A. The idea is that this should supplement your own review of the consultation documents, catching you after the holidays, but before your September cycle of parish council meetings, so that you are armed with the information you need to be able to respond to the consultation before the closing date of 30th September 2022.

Details of the online consultation session are provided below. You will also receive a calendar invite with the same details in a moment. Noting the difficulties some experienced with using Teams in the March engagement session, this time we are hosting the session using Zoom.

Meeting date: 5th September 2022
Meeting time: 5:30pm – 6:30pm

Two officers hosted the meeting and conducted a presentation to attendees to discuss how comments received in the early engagement had been considered within the Draft Plan. Further information was also provided about how to respond to public consultation using Commonplace and the other ways in which responses could be made. Zoom was used during this meeting to overcome the difficulties with Teams experienced during early engagement. There were fifteen attendees of the meeting. No further correspondence was received.

Blackbrook Green Forum

An officer attended a meeting of Blackbrook Green Forum (a locally self-organised group of representatives from businesses based on Blackbrook Business Park which meet regularly to receive presentations and discuss local sustainability issues) on Thursday 8th September 2022. The meeting was attended by approximately 17 people from a range of local businesses. The officer gave a 20 minute presentation setting out the policy context and key objectives, early engagement results, how the routes were developed, key points for consideration such as funding availability and key factors needed for route delivery as well as details on how to respond to the consultation. This was followed by 40 minutes of Q&A and general discussion about pertinent active travel / transport issues.

No further correspondence was received, though many attendees indicated their intention to respond directly via Commonplace.

Agents Forum

An officer organised a forum with Planning Agents and developers on Monday 12th September 2022 from 15:30-17:30. The email was sent out to 77 potential

attendees. Only 5 planning agents and developers attended the meeting. A screenshot of the email is shown below:

Hi all,

Somerset West and Taunton Officers will be holding an Agents Forum on Monday 12th September from 15:30-17:30 on specifically **Taunton Garden Town** related matters.

The initial agenda with approximate timings is set out below:

1. Welcome and introductions from SWT Officer team. 15:30-15:40
2. Connecting Our Garden Communities consultation. (Plans for a network of walking and cycling routes to connect key developments across the Garden Town) 15:40-16:40
3. Infrastructure Delivery Plan (Garden Town) 16:40-17:00
4. Stewardship (Garden Town) 17:00-17:15
5. Update on other Garden Town work 17:15-17:30

The Forum will give you the opportunity to hear the latest updates on the work being progressed. Further information may be issued closer to the time.

Please could you confirm your attendance in advance of the meeting.

If you have any queries I will be on leave from 19th August to 30th August but please email Jenny Clifford at J.Clifford@somersetwestandtaunton.gov.uk.

The forum was conducted by three officers with a Taunton Garden Town themed agenda. The first hour was allocated to the Connecting our Garden Communities project. The presentation set out the policy context and key objectives, early engagement results, how the routes were developed, key points for consideration such as funding availability and key factors needed for route delivery. Information on how to respond to the consultation, including Commonplace, was then presented, as well as the next steps for the project. No further correspondence received.

TACC Full Meeting

An officer attended a TACC 'full meeting' on Monday 12th September, which ran from 19:00-20:00, with a small number of TACC supporters in attendance. The officer conducted a short, 15 minute presentation to brief the project and listen to feedback.

Meeting with Somerset County Council (SCC)

Officers held a meeting with Somerset County Council highways and transport policy officers on Thursday 22nd September from 14:00-15:00. The aim was to discuss and clarify the comments received from SCC in response to the Draft Connecting our Garden Communities Plan, listed in the 'Summary of Responses Received' section.

Richard Huish College

Officers organised to attend the Richard Huish Bike Day on Wednesday 28th September 2022 from 08:00-13:30. A gazebo was set up next to the reception entrance with a table laying out the consultation materials. A number of other stalls were also in attendance including SCC, the Police and On Your Bike. Two officers attended on behalf of SWT Connecting our Garden Communities project to speak to students, teachers and other members of the public.

A series of materials were organised for the consultation, following a similar approach to the Somerset Youth Parliament event. The A1 map was set out on the

table for context, images of streets around Taunton to get ideas for potential interventions, A3 sheets with the questions below and answer options were also printed out with sticky dots available for respondents:

- What are the most important connections to prioritise walking and cycling access to?
- What is most important to you when prioritising the delivery of the proposed walking and cycling routes in Taunton?

Overall, six comments from students and teachers were received. However, officers found on the day that people only wanted to stop briefly so the preferred method of engaging was to introduce the project, listen to comments made (which were noted down) and then to hand out consultation cards with the Commonplace link. A QR code was also printed out for easy access to Commonplace.

Level of response

Overall, there were 276 responses to the consultation. As set out in the table below, of the 276 responses, 20 were submitted by email, 0 by post, 249 using the two available tiles on Commonplace, 1 by social media and the remaining 6 by commenting on the various news articles that had been published. While this summarises the formal responses, it is important to note the many other responses and comments received through the consultation events and workshops hosted by SWT officers, summarised in the following section.

Method	Number of respondents
Email	20
Post	0
Consultation Map & Short Survey	167
Consultation Main Survey	82
Social Media	1
News Articles	6

Summary of Responses Received

This section summarises the responses received through the Council's consultation portal, by email/post, via social media and within the consultation events.

Commonplace Survey

A total of 145 respondents answered the survey with 167 comments left on the map and associated survey and 82 responses received through the main survey. The remainder of the 445 contributions are from those who have liked existing comments and responses. Responses were received from eleven organisations including community groups and non-governmental organisations. The remaining 134 responses were from individuals. There were also a number of comments left by individuals answering 'on behalf of all cyclists in the wider Taunton area' or 'on behalf of all cyclists'. The table below sets out the organisations who responded via the consultation hub:

Organisation
Lisieux Way Community Garden
The Friends of Comeytrove Park
Taunton Fitness Club (Cycling & Walking groups)
Friends of Longrun Meadow
David Orr Consulting
Railfuture
Somerset Youth Parliament
Taunton Unitarian Chapel
Victoria Park Action Group
The Canal & River Trust

There were no comments made about the Draft Plan itself within the survey responses. The Draft Plan and associated documents were available to view.

The online survey consisted of two main sections:

1. Map and associated survey (167 comments)
2. Main survey (82 comments)

Not all respondents filled out the demographics and some respondents answered more than once so the number of respondents associated with these comments could not be determined accurately.

Demographics of respondents

Out of the 145 respondents, 108 filled out their name and postcode. The following demographic questions had a varying level of response:

- 'If answering as an individual, tick all of the following that apply' was answered by 100 respondents, 65 for 'I live in Taunton', 26 for 'I live nearby Taunton', 26 for 'I work in Taunton', 25 for 'I visit Taunton' and 1 for 'I study in Taunton'.
- 'What is your employment status?' was answered by 102 respondents, for which 43% work full time, 33% were retired, 11% work part time, 5% self-

employed, 4% 'other', 2% students, 1% undertaking apprenticeship or training, and 1% were on a zero-hour contract.

- 'Are you acting on behalf of an agent or on behalf of an organisation?' was answered by 54 respondents, 51 answered 'no' (94%), 2 answered 'yes' (4%) and 1 answered on behalf of an individual and organisation (1%). Many people chose not to answer this question considering the eleven organisations listed in the table above.
- 'What is your gender' was answered by 98 respondents, 60% were male, 37% were female, 2% answered 'prefer not to say' and 1% 'other'.
- 'What is your age group' was answered by 103 respondents, 23% were between 65-74, 19% were 35-44, 18% were 55-64, 13% were 45-54, 10% were 25-34, 7% were 75-84, 3% were 16-24, 1% were 13-15 and 1% answered 'prefer not to say'. Out of these respondents, 50% were between the ages of 35-64 and 83% were between 25-74.

Map-based Survey

1. What is the place you have marked on the map?

Respondents were first asked to write the location in which they had dropped a pin on the map. The pin was associated with a set of coordinates to allow a location to be identified if the respondent did not fill out the location question. The locations were then assigned to a route number by an officer to identify comments more effectively. Out of the 43 routes in the proposed walking and cycling network map, 35 were commented on, and all four of the related routes: Wellington Link, East Street, Station to Vivary and Killams Link. The 35 routes and 4 related routes received a total of 136 comments out of the 167 comments. The routes that did not receive any comments from respondents are listed below:

- 12 – Monkton Heathfield - Creech St Michael;
- 13 – Monkton Heathfield - Yallands Hill via Bawler Road;
- 15 – Cheddon Road;
- 16 – Firepool – Priorswood Road – Lyngford Park – Cheddon Road;
- 25 – Staplegrove Road – Bridgwater & Taunton College – Longrun Meadow;
- 27 – Heron Drive;
- 39 – GI-led Durston Link;
- 41 – GI-led railway bridge Link.

Multiple comments were received on all routes except those listed below, all of which received one comment:

- 5a – Henley Road – Longrun Meadow – Tangier;
- 23 – Clifford Avenue – Lyngford Road via Cheddon Road;
- 30 – Priorswood Road;
- 31 – Bossington Drive – Eastwick Road;
- 34 – GI-led Hestercombe Link;
- Other related routes: Wellington Link and East Street.

Commented [TG1]: Maybe once Bex has finished assigning comments to specific routes we could add a couple of lines on comments received into appendix B - route summaries, to be considered as route design evolves?

Will the work that Bex is doing on assigning comments to specific routes be added here or as an appendix?

A further 31 comments were then left that did not have a location relating to the network map and were either relating to a potential alternative route, additional destination, or commenting on the walking and cycling infrastructure issues or positives on sections of routes that were not on the proposed network map. The comments that included proposed alternative and additional routes include:

- Mountfields Park instead of South Road (Killams Link);
- Extending River Tone path (Route 29 and 35) from Hankridge Retail Park into Ruishton, which acts as an alternative to J25/A358/M5 crossing;
- Extending proposed Route 4 along Staplegrove Road to connect to Manor Road junction (Route 1) to use while Staplegrove core road is being built;
- Longrun Meadow;
- Tangier Way/Wood Street (A3807) for connections from the Galmington area to North Town (connecting Route 1 and 5);
- Chip Lane instead of turning onto The Avenue (Route 1);
- Connecting Wessex Road to Pikes Crescent rather than Trull Road (Route 9);
- Adding routes connecting South Taunton including Haydon Lane to Nexus, and Dowsland Way, Stoke Road and Chestnut Road route and junctions;
- Park Street/Cann Street and Corporation Street alternative to Route 5;
- Upper High Street alternative to Route 9;
- Connecting Wood Street to Station Road via existing junction from Portland Street and French Weir Park;
- Manor Road to Staplegrove Village Hall via field PRoW path;
- Lisieux Way to Blackbrook Stream via Lisieux Way Community Garden;
- Barrington Close alternative to Route 8 through Comeytrowe Park.

Commented [TG2]: This is the Killams route not Station to Vivary.

2. Why are you dropping a pin here?

Respondents were then asked why they had dropped a pin. Out of 153 responses to the question, 56% dropped a pin 'to comment on part of a proposed route', 22% 'to comment on a potential alternative route', 16% 'to comment on a destination' and 7% to 'add something else. Not all comments left on the map and associated survey had answered this question, therefore, by assigning the route number to the location given allowed the additional 14 comments to be included as well as the 11 'add something else' comments. In addition, the comments that did have an answer to the question could be double-checked as to whether the category chosen by the respondent applied to the location and comment made. This made the data easier to analyse for SWT officers by allowing comments for potential changes to the project to be identified. Overall, 136 comment related to part of a proposed route or destination on a proposed route and 31 were for 'alternative routes'.

3. How do you feel when walking, wheeling or cycling in this location?

Commented [TG3]: Were there any areas /routes where the negative and positive sentiments were grouped that are worth pulling out here?

Out of the 167 comments left on the map, 40% were 'unhappy', 27% were 'dissatisfied', 22% were 'neutral', 5% were satisfied and 6% were 'happy'. In total, 67% were either 'unhappy' or 'dissatisfied' with a destination or route in Taunton.

The data was then analysed to extract any destinations or routes where there were multiple negative and positive sentiments. There were several negative sentiments for the existing walking and cycling provision on Staplegrove Road and Bindon Road on Route 1/1a, the path along Taunton School Playing Fields on Route 3, Castle Street (Route 5), Wellington Road (Route 7), Bridgwater & Taunton Canal path (Route 14), Blackbrook Way (Route 18), over the M5 from Blackbrook (Route 19), East Reach/Lisieux Way crossing (Route 20), Bishops Lydeard link (Route 32), Ruishton Lane on Route 36 and the link across the green wedge (Route 37). There were positive sentiments for Comeytrowe Park (Route 8) as the infrastructure currently stands and for existing walking and cycling provision through Childrens Wood and Blackbrook (Route 19) with only minor changes needed.

4. *Why do you feel this way?*

Commented [TG4]: As above.

For the 167 comments, there were 159 responses to the multiple choice question, with 8 comments leaving it blank. There were, however, 379 selections as a result for the issues and positives about walking and cycling in and around Taunton. From this, 26% selected 'bad for cycling', 20% 'feels unsafe', 13% 'speeding traffic', 10% 'bad for walking', 9% 'hinders mobility', 6% 'add something else', 3% 'clean air', 3% 'cycle friendly', 3% 'feels safe', 3% 'good for walking', 2% 'poor air quality', 1% 'calm traffic' and 1% 'supports mobility'.

Other responses that were to 'add something else' included volume of traffic, narrow road, speeding traffic and speed limit too high, lack of connection of River Tone and Bridgwater & Taunton Canal, indirect route, width of walking and cycling paths, proximity to traffic, lack of segregation between walkers and cyclists and from the road, poor quality route, poor surfacing, vehicles blocking walking and cycling path, severance from M5, cycling prohibited and lack of linkage to other cycle paths.

The reasons for 'why do you feel this way' were also pulled out for the destinations and routes mentioned under the previous question. The negative sentiment related routes and destinations are listed below:

- Staplegrove Road/Bindon Road - 'bad for walking', 'hinders mobility', 'speeding traffic', 'feels unsafe', 'bad for cycling', unsafe movements associated with Taunton School and the railway bridge, and lack of priority across the bridge and roundabout.
- Taunton School fields path - 'bad for walking', 'hinders mobility', 'bad for cycling', poor maintenance on paths, poor visibility and dangerous to use.
- Castle Street - 'feels unsafe' and 'bad for cycling', cycle path too close to traffic on busy road, particularly for children, and lack of segregation.
- Wellington Road - 'speeding traffic', 'feels unsafe', 'bad for cycling', 'poor air quality', issue with roundabouts and high speed limits.

- Taunton & Bridgwater Canal - 'bad for walking', 'feels unsafe' and 'bad for cycling', path is narrow without segregation, and needs better maintenance.
- Blackbrook Way - 'bad for walking', 'speeding traffic', 'feels unsafe', 'bad for cycling', cycle path too narrow and close to traffic, lack of signage and clear markings, and overgrown vegetation.
- M5 crossing - needed to overcome severance although some views that infrastructure within the town should be a priority.
- East Reach/Lisieux Way junction - 'hinders mobility', 'speeding traffic', 'feels unsafe' and 'bad for cycling', general consensus is that the junction is terrible with long wait times.
- Bishops Lydeard link - 'speeding traffic', 'feels unsafe', 'bad for cycling', need for segregated cycle provision away from traffic.
- Ruishton Lane - 'bad for walking', 'hinders mobility', 'feels unsafe' and 'bad for cycling', high volume of traffic, lack of footpaths and narrow road.
- Green wedge link - lack of existing provision 'hinders mobility' and is 'bad for cycling', route would link up two physically close areas.

The positive sentiment related routes and destinations are listed below:

- Comeytrowe Park - 'good for walking' and 'feels safe', concerns for conflict between cycling and play area and other park users.
- Blackbrook/Childrens Wood - 'good for walking', 'supports mobility', 'cycle friendly', 'clean air', smooth/comfortable path which allows for a quick journey.

5. Please select any design solutions you think are needed or would be appropriate for the location you have plotted.

Out of the 167 comments, there were 151 responses to the multiple choice question resulting in 329 selections of design solutions. From this, 22% thought 'off road or separate cycle lanes away from traffic' would be needed, 21% selected 'footpath provision or widening', 10% 'added something else', 8% selected a 'new or improved crossing', 7% for a 'reduction of speed limits', 6% for 'additional lighting', 6% for 'traffic calming such as removing a lane or narrowing the street', 4% 'removal of barriers or bollards', 4% 'improvements to cycle markings', 3% 'signage and wayfinding', 3% 'cycle parking or increasing the amount of existing provision', 2% 'less congestion and air pollution', 2% 'less on street car parking', 2% 'quiet streets and neighbourhoods', 1% 'additional vegetation or planting' and 1% 'dropped kerbs and tactile paving'. There were no responses for provision of disabled car parking.

Other responses that were to 'add something else' with regards to design solutions included use of the existing A358 for a cycle way once the dualling scheme is complete, painted cycle lanes, make a walking and cycling only route, better maintenance, improved surfacing, cycling underpass/overpass, more direct or segregated route, provision and widening of a cycle path, allowing cycling along an existing route or path, redesign of roundabout to allow greater priority such as the Dutch-style design, traffic calming and bus priority, priority crossings and signals, removal of railings, public realm improvements and better visibility and CCTV.

Commented [TG5]: What else did people suggest?

6. If you selected a potential alternative route, why is the alternative better?

Out of 31 alternative route comments, eleven included a response to the question. However, considering some comments included an answer to this question despite dropping a pin on a proposed route or destination, all comments that did provide an answer were analysed. In total this included 41 responses. Furthermore, not all the alternative locations listed under Question 1 had an associated reason as to why it was better and some comments from the Question 7 have been included as the answer provided further reasoning and detail. The reasons are provided below:

- Tangier Way/Wood Street (A3807) – Several comments suggested this route was needed as it provided a convenient route to north Taunton from French Weir; segregated cycle lanes along the road would provide an alternative route to North Town from Galmington; and from south-west Taunton to Firepool/Taunton Station this way is better than going via Corporation Street, The Parade and North Street;
- Goodland Gardens – The route is well-used by pedestrians and cyclists to access Taunton Brewhouse, Somerset Cricket Ground and shops in the northern part of the retail area;
- Chip Lane – The route is completely free of motor traffic and there is no need to turn right from Staplegrove Road into The Avenue; while the route is narrow in places and not suitable for shared use, there should be a strategy to seek widening of the path in conjunction with future redevelopment adjacent to it;
- River Tone path – The path is safer and away from J25/A358 traffic and any pavement or cycle path crossing the J25/A358 is likely to be problematic. The use of the River Tone path was mentioned a number of times in responses particularly connecting Hankridge to Ruishton and Creech St Michael;
- Staplegrove Road – Likely that the core road through Staplegrove Garden Community will come later and, therefore, a connection along this part of the road (Silk Mills to Manor Road) should be provided. This will allow those to cycle safely to Taunton Academy without a long diversion;
- Wessex Road/Pikes Crescent – Providing a link may result in less need to use Trull Road, which is fairly heavily trafficked;
- Stoke Road/Chestnut Drive/Dowslan Way – These roads and routes were mentioned several times among respondents. Coming into Taunton from the south, this is an important junction; currently there is a lack cycling provision and there are many families with children who may want to cycle;
- Corporation Street – This route from Galmington was mentioned a number of times to be the natural and established eastern approach to the retail core; and by using Tower Street (Route 5) the long established commercial and leisure facilities are bypassed;
- Park Street/Cann Street – Alternatives are too far out of the way (Castle Street) if Trull Road or Wilton is being accessed and current cycle experience is terrifying with fast cars on one way loop and the need to do a hill start;
- Upper High Street – There were many comments suggesting it is not feasible to go through Vivary Park in the winter or in the dark; and East Street to the Hospital needs access without going through town or around to Castle Street;

- Parkfield Road – Many cyclists already use this route, and it should be made a cycle route and designated as walking and cycling only;
- Longrun Meadow – Would provide a quicker route for Bishops Hull and from Silk Mills Park and Ride to the town centre avoiding the college campus;
- A358 – The cycle route should utilise the old A358 when the bypass is completed as it would provide a safer, quieter and less trafficked road;
- Norton Fitzwarren (B3227) – Improving connections on Great Western Way would present better value for money than a new route through the village with limited space and where traffic is an issue. However, this presented mixed comments with others wanting to see a segregated path on Route 4;
- South Road/Mountfields Park – Most people use the footpath cut-through which is Mountfields Park to Calway Road and this should be made the cycle route. This section of South Road is the narrowest and there is no safe route to the next section behind Richard Huish;
- Sherford Lane – Upgrade the current footpath at the end of Sherford Road, south of the golf course to the back of Vivary Park.
- Wood Street - Any update of Staplegrove Road/Station Road junction needs to consider cycle movements north from Wood Street. The route through French Weir and along Portland Street is the most direct route from south-west Taunton to Firepool and the railway street.

7. Please add any other comments or suggestions you have in the box below.

Out of the 167 responses to the survey, 127 comments were left. Some of the points raised within multiple comments have been listed below:

- The speed limit on Galmington Road/ College Way should be made 20mph.
- Concerns about a cycle route through Comeytrowe Park with suggestions it should be diverted through Barrington Close.
- Connections to outlying villages with housing developments need to be prioritised, particularly including Norton Fitzwarren to Bishop's Lydeard via Cotford St Luke and Taunton to Kingston St Mary.
- Concerns with speed limit and traffic volume on roads around Ruishton and comments on improving the path to Hankridge with better surfacing and lighting. Better connection was also needed to CSM and Gateway P&R.
- Concerns about increasing cycling along the canal due to existing narrow width and potential disruption to wildlife.
- Canal does offer potential to connect to CSM.
- Poor width of paths on Blackbrook Way and concerns about Blackbrook Way/Lisieux Way roundabout due to poor visibility and speed of traffic.
- Need for priority contraflow cycle path along Lisieux Way.
- A number of roundabouts need to be redesigned with greater cycle priority including Staplegrove Road/Trenchard Way, Wellington Road/Silk Mills Road and several along Priorswood Road include the junction with Eastwick Road.
- Existing cycle lanes need to be better maintained e.g., Route 3.

- Issue with cars turning into Taunton School on Staplegrove Road or mounting the pavement to drop off. Further issues with the existing cycle path finishing on a hill with a blind summit before the railway bridge encouraging dangerous overtakes. A dedicated route is needed here linking to Bindon Road.
- Preference for an alternative link to J25 to avoid the current provisions.
- Large support for Route 37 although some suggestions for CCTV.
- Large support for Wellington Link with speed reductions and segregation.
- Comments in support for Tower Street and North Street closures for only cycling and bus use or introducing a shared space design.
- Issues with currently feeling unsafe cycling along Castle Street.
- Area of conflict along Route 5 (Hoveland Crescent/Musgrove Park Hospital) with staff standing on the cycle path and poor visibility with Parkfield Drive.
- Existing bridge across the top of French Weir is a major barrier on the cycle network because it is narrow, shared with pedestrians and cycling is not permitted. Rebuilding with greater dimensions needs to be considered.
- Route 17 needs to consider northern movements to Cheddon Road and a new crossing from Railway Street to the station is needed.
- Improving priority and safety at the Toneway/Bridgwater Road junction.
- Several comments reaffirming difficulty of East Reach/Lisieux Way junction.
- Concerns around removing parking for the school on Church Road, Trull.
- Hammet Street concerns as private vehicles use it as a shortcut from East Reach to access the western side of town despite the street being one of the most important and widely recognised places in Taunton.
- Finally, improvements should be made to the junction between Parkfield Road and Wellington Road to remove the guard railings.

Commented [TG6]: In Trull?

Main Survey

1. How often do you make walking trips to the following destinations?

The responses to the survey of all ages between 13-84 were first analysed. The overall trends that emerged from responses to this question are summarised below:

- The destinations of GP Surgery, employment and schools had the largest proportion (over 80%) of people 'less often or never' walking to access them.
- GP was only accessed 'less often or never', 'monthly' or '2-3 times a month'.
- Schools had a higher daily 'on foot' access rate than employment at 12% compared to 6% for employment. However, employment was accessed on foot between monthly and 2-3 times per week more greatly than schools. This may be due to the rise of home working and hybrid-working.
- Taunton Station was also accessed less often, having the lowest rates of daily trips, alongside supermarkets, and over 70% accessing it 'less often or never'.
- Open space was the most frequently accessed by foot with 23% accessing it daily and 23% 'less often or never', much lower than other destinations.

- Convenience stores were also accessed more frequently than other services, and while the daily rate was higher than supermarkets, they were accessed more frequently on a weekly or 2-3 times per week basis than supermarkets.
- The town centre was also frequently accessed on a high monthly to weekly basis and only 34% less often or never walking into the town centre.

It is important to note that the data trends may have been impacted by the large proportion of retired respondents and those over the age of 64. Considering the large number of respondents accessing schools and employment on a 'less often or never' basis, the data was extracted for those between 25-44 who were employed and may be more likely to have children of school age. The findings are listed below:

- Schools still had a large proportion of those 'less often or never' accessing by foot at 72% though the weekly and monthly rates increased.
- Employment was more frequently accessed on foot with 50% 'less often or never' making trips on foot and the monthly to daily frequencies were higher.
- Despite this, there is a large proportion of the sample that are not accessing schools on foot in relation to the daily basis they would be attended.

2. How often do you make cycling trips to the following destinations?

The responses to the survey of all ages between 13-84 were first analysed. The overall trends that emerged from responses to this question are summarised below:

- Schools had the highest proportion of respondents 'less often or never' cycling at 87%. Employment also had a high proportion never cycling at 66% although less than the walking rates and this also applies to GP surgeries and Taunton Station, which are seeing more people cycling to reach them.
- Open space and Taunton town centre had frequent rates of cycling to access them, although rates for 'less often or never' were higher, particularly for open space, which is likely to be accessed more so on foot.
- Taunton Station was accessed more frequently by bike among respondents.
- Convenience store and supermarkets were accessed less frequently by bike among respondents, although still saw lower rates of 'less often or never' cycling to reach them than other destinations such as schools.

As similar to the walking question, the data is likely to have been skewed by responses from those who are retired and will, therefore, not need to access schools or employment. The data was then extracted for those between the ages of 25-44, a sample size of 14 with a mix of male and female respondents, for schools and employment, with the findings listed below:

- Schools still showed a large proportion of those 'less often or never' cycling to access them at 69%, although less than walking though 31% do weekly or daily. This identifies a large potential for change among respondents.
- For employment, 57% 'less often or never' cycled to work and the remaining 43% did between 2-3 times a month and 2-3 times a week.

- While there are positive levels of cycling to schools and employment there is still a large potential to encourage those 'less often or never' to cycle.

It is also important to note that respondents who are answering the survey and these questions in particular may be those with more of a cycling interest than walking.

3. What are the most important connections to prioritise walking and cycling access to?

Out of 70 responses, the most important connection to prioritise walking and cycling access to is employment, followed by schools, Taunton town centre and open space, although this was also middling for a large proportion of respondents). Other middling prioritised connections included supermarkets, convenience stores and Taunton Station, although this was a large 7th priority for many people, out of the eight connections. GP surgery was a common low priority for many respondents as was schools and employment. This mix of priority for schools and employment may be due to the high proportion of retired respondents in the sample.

Considering this, the data for the age groups of 25-44 were further extracted for schools and employment only, which resulted in a sample size of 13. This time schools were noticeably the most important, however, employment responses still varied with some selecting higher up their priorities and others lower. This may again be due to the movement towards working from home or hybrid working.

4. Are there any other connections you would like to add to the list above?

Out of the 82 survey responses, 17 comments were left adding other connections to the ones officers had identified. Among these leisure centres and fitness centres were common as was Musgrove Park Hospital and out of town shopping centres and venues. Other venues and cultural centres mentioned included Taunton Brewhouse, Museum of Somerset and the Odeon.

5. Select your favourite example(s) of walking and cycling infrastructure?

Based on 62 responses to the multiple choice question and 152 resultant selections of infrastructure types, the favourite example of walking and cycling infrastructure was 'off street cycle paths that avoid the roads and go through parks or open spaces' with 34% of selections. The 2nd favourite was 'fully segregated cycleways and separate footpaths with disabled parking and dedicated signals' with 27%, followed by 'segregated cycle path and footpath with sections of shared routes' at 20%, 'quiet street treatment with greening, parking restrictions and lower speeds' with 11%, 'on-road advisory cycle lanes with pavements for pedestrians' at 6% and 'no cycle paths and only pavements for pedestrians' with 2% of selections.

However, considering the demographics of the survey respondents, while this may be favourable for older age groups and male respondents, younger populations and female-identifying active travel users may prefer overlooked routes. A sample of

those who selected 'female' as their gender was then extracted. However, this only included two responses. Both selected the 'fully segregated cycleways and separate footpath with disabled parking and dedicated signals' option.

There were also a number of comments left in survey regarding good examples of walking and cycling infrastructure to consider in designs. These are listed below:

- Canal Road, north of the canal to Obridge, *"this route is great as it is away from roads and traffic"*;
- Exeter bridge example, *"access without need to go via M5 roundabout is a must. Other sites (such as Exeter) built impressive cycle bridges"*;
- Blackbrook and Longrun Meadow with only minor changes needed;
- Manchester CYCLOPs junction and signals for increased cycle priority.

6. What is the most important to you when prioritising the delivery of the proposed walking and cycling routes in Taunton?

Out of 61 responses, the most important when prioritising the delivery of routes was the 'potential to be transformational', followed by 'connection to schools' and 'serves existing as well as new users', which were all consistently high factors. 'Connection to other essential services' was also consistently high and 'has community support' followed closely behind, although it was more middling. Other middling factors included 'value for money', 'broad feasibility' and 'performance against policy objectives'. Lower priorities for respondents were 'potential to attract funding', 'cost of route delivery' followed by 'political acceptability' and the lowest priority 'timing of delivery coordinated with development'. 'Broad feasibility', 'potential to attract funding', 'cost of route delivery', 'political acceptability' were not selected by anyone as their top priority. 'Political acceptability' was only selected as 8th-12th priorities.

7. Are there any missing key destinations that you feel the routes don't connect to?

Out of 59 responses, 20 thought there were missing destinations, 20 weren't sure if there were missing destinations, 17 thought there were not missing destinations and a further 2 selected 'add something else'. More people thought there were missing destinations than did not think there were missing destinations. The 'add something else' comments mentioned the lack of cycle paths into town from outlying villages.

8. If you answered yes to the question above, what destination(s)?

Out of the 82 survey responses, 24 comments were left. A number of missing destinations were listed including Musgrove Park Hospital, Bishops Lydeard, Cotford St Luke, Trull/Sherford, Taunton Racecourse; Oake, Milverton, Wiveliscombe and Bampton via the old railway line, Staplegrove Road along the entire length, Taunton Library, Longrun Meadow, Wellsprings Leisure Centre, Taunton Pool, Bathpool to Hankridge, Park Street, Bishops Hull, Priory Bridge Road and south Taunton.

9. Do you support the routes we have identified in the map?

On a scale from happy to unhappy, the largest majority of respondents at 51% were 'satisfied' with the routes identified in the map, 27% were 'happy', 16% were 'neutral', 5% were 'unhappy' and 1% 'dissatisfied'.

10. If the routes were delivered, would you be more likely to make walking and cycling trips?

Out of 63 responses, 54% said they would definitely make more walking and cycling trips if the routes were delivered, 22% would be likely to make more walking and cycling trips, 14% were neutral, and 10% said they were either unlikely or definitely not going to make more walking and cycling trips.

11. Please leave any further comments in the box below.

Out of the 82 survey responses, 34 included further comments. To identify the key trends, each comment was assigned to a scale of support from 'in support of the project', 'supportive but proposed further changes', 'neutral or did not mention any support for the project' and 'unsupportive'. The improvements are listed below:

- Prioritise areas where people commute by bike already such as Wellington, Bishops Lydeard, Kingston St Mary and Ilminster;
- Integrate e-mobility services such as Zipp Scooters into this expansion and ensure there are pick-up and drop-off zones in key locations such as schools and supermarkets. Usage restrictions should also be removed;
- Existing and new routes need better maintenance such as vegetation management with upkeep similar to that done with roads;
- Routes need to be of a good quality i.e., wide enough and to Dutch standards with segregation and priority;
- Routes should be away from roads, go through back paths and open spaces and be well marked with signage (Blackbrook Way and Hoveland Crescent/Parkfield Drive mentioned as a must on several occasions);
- Routes should be up and running from the completion of a new development and there should be incentives to promote cycling over the car;
- More secure cycle parking in and around the town and station;
- Deprived communities should be connecting such as Halcon;
- Junctions should be designed to make right turns easier for cyclists or permit cycle crossings e.g., Toucan crossings and CYCLOPs junctions.

Some concerns of the project raised in the comments are listed below:

- Damage to the canal path if cycle paths were implemented;
- Decrease in road space will impact those who need to use a car.

Emailed comments

Twenty emailed comments were received from developers, non-governmental organisations, Somerset County Council, parish councils, community groups and the public. These are broadly summarised in the table below:

Respondent	Summary of comments
Somerset County Council (Traffic and Transport Development Management)	<ul style="list-style-type: none"> • Explain the funding mechanisms for the LCWIP projects, clarify funding will not be used to support CoGC proposals and impact of Unitary. • Show alignment between LCWIP and CoGC network plan. • Estimate of the future demand for walking and cycling in relation to the Garden Communities in Section 6 to demonstrate the importance of the route, prioritise delivery and to present a 'vision and validate' approach. • Priority order based on demand/type of user/destination e.g., delivering routes to schools rather than less popular destinations, while referenced in Section 7 and 9, should be brought in earlier with more weight applied. • Figure 71 should also show the LCWIP network. • Fit CoGC within Local Transport Plan. Report is in development, include reference to this and active travel ambitions in Taunton. • Identify the need for impact on highway capacity and traffic modelling as a significant aspect of future work and confirm how this could be secured. • For Appendix B, consider conflicting priorities for space such as BSIP priority measures on corridor routes, EV Charging Strategy impact on residential areas and parking and servicing requirements. • Align CoGC routes with signal improvement schemes in Taunton. • Gender is a policy priority. Need to create an equitable transport system for all users. Consider perceptions of safety, lighting and trip chaining etc. • Interventions need to be appropriate/proportionate. Define a hierarchy of interventions to help target funding.
Gladman Developments Limited	<ul style="list-style-type: none"> • Supportive of the aspirations of the consultation and the aims of promoting active and sustainable travel. • Particular relation to the CoGC proposals through the live application (08/19/0035) at the adopted TAU3 Pyrland Farm Allocation. • Proposals on the site have ensured sustainable travel including improved connectivity to the existing PRoW No. T5/9; public access to land previously not available; and a proposed footway along Lyngford Lane. • Will discuss additional concerns that arise for Route 11 that have not been mitigated as long as they are proportionate and relevant.
Barratt Homes & David Wilson Homes (BDW)	<ul style="list-style-type: none"> • Relation to CoGC proposals through the land at Lyngford Lane, allocated in the Development Plan, subject to the planning application (38/19/0129). • Response gave background to policy allocation for a vehicular link between Bossington Drive and Cheddon Road and the original intention for a northern link road. However, this would be impossible to achieve in the modern context considering the likelihood of requiring a CPO, and the costs associated, as well as the movement to minimise new road building, which "would seem at odds with the CoGC proposals". • Pedestrian/cycle link will be provided between the Nerrols development and Cheddon Road considering a vehicular link would provide a rat-run for local traffic, encourage local car trips, compromise the design of the Lyngford site and create a physical barrier between the east and west fields, and is outdated and undeliverable. • The other specific comments provided by BDW include: <ul style="list-style-type: none"> ➢ Route 11 shows a link between Nerrols and Cheddon Road. The Plan should be state this is a pedestrian/cycle link, not a vehicular link. ➢ Route 11 can only be achieved if the Crown Estate are willing to facilitate a link across Crown land.

	<ul style="list-style-type: none"> ➤ The CoGC must make it clear that either, (a) the Crown support and are 'bought in' to assist delivery of route 11 pedestrian/cycle link or, (b) should set out how the route can be achieved. ➤ Without Crown involvement/approval, it would seem the only way a pedestrian/cycle link could be delivered is via a CPO. Whilst CPO of Crown Land is possible, it is complicated, unwieldy and costly. ➤ If the Crown will support the delivery of route 11 as a pedestrian/cycle link between Nerrols and Cheddon Road, BDW can recognise route 11 in the emerging revised application. ➤ In absence of Crown involvement, if required to, BDW will show the potential for such a link, up to the boundary of land within BDW control, within the redline of application 38/19/0129. ➤ If the Crown are not involved, BDW believe that a pedestrian/cycle connection from Bossington Drive to Cheddon Road/Lyngford Lane is still capable of being delivered. ➤ BDW have previously engaged with SWT and reached in principle agreement that links can be achieved via Leigh Road and land adjacent to 43/45 Bossington Drive. Both of these routes are achievable using SWT land. ➤ Furthermore, it will be possible to connect from the Lyngford site south, via existing T5/15 to Bossington Drive. ➤ These routes would provide direct and convenient access from Cheddon Road to Bossington Drive, achieving the aspiration of the CoGC and Route 11 in particular. ➤ BDW consider that the CoGC should set out potential alternatives to route 11 on plans in the document. ➤ BDW are able to provide plans to show these alternatives, and which will also be a part of application 38/19/0129. ● If financial contributions from CoGC proposals can be appropriately related to the current application, BDW are in principle willing to consider a contribution towards the delivery of walking and cycling routes.
<p>Persimmon Homes & Redrow Homes (via Vectos)</p>	<ul style="list-style-type: none"> ● Promoting the strategic development site at Monkton Heathfield Phase 2. ● Representation reflects emerging and recent transport policy such as the movement away from 'predict and provide' to 'vision and validate'. ● The specific comments provided are listed below: <ul style="list-style-type: none"> ➤ CoGC should refer to the rapidly changing approach to travel, mobility and attitudes, alongside material changes to the aspirations of the authority to meet climate emergency and net zero carbon goals. While routing is important, the future of mobility is a key consideration. ➤ TGT Vision fails on core fundamentals. It promotes the protection of road capacity whilst seeking to promote public transport and active travel. This is out of date with current best practice and emerging policy. CoGC should seek to clarify SWT's position otherwise the protection of road space has the potential to compromise the success. ➤ Significant investment in sustainable transport modes results in little change unless matched with restrictions in capacity and road space. ➤ CoGC should genuinely prioritise sustainable modes over the car, accepting congestion is necessary to change travel habits. ➤ Those that can travel by alternative modes will be forced to do so, whilst those that cannot, will need to accept a level of congestion and delay. Many people who still depend on the car are travelling less now and are able to access the network outside of traditional 'peak hours'. ➤ Important to ensure suitable alternatives are targeted where they can best alleviate bottlenecks within the network;

	<ul style="list-style-type: none"> ➤ CoGC must make important reference to the fact that infrastructure needed may be different for different parts of the network depending on the opportunities, constraints and types of user. ➤ A bold approach to capturing existing road space and using it for more sustainable travel modes, while accepting this may cause some operational inconvenience to the car driver, should be considered; ➤ Implementation of a comprehensive strategy should not rely on S106 contributions alone, but form part of the IDP allowing CIL contributions to be collected across Taunton. CIL contributions will address issues of securing contributions to mitigate cumulative development impacts. ➤ The plan should explain what weight and relevance it will be given for decision making purposes and highlight that the starting point for determining planning applications will be policies contained within the adopted Development Plan. Where conflict arises between the CoGC Plan and Development Plan, the latter will be given priority. • With specific reference to Monkton Heathfield 2, the downgrading of the existing A38 should not be funded directly by the development but instead completed by the local planning and highway authorities via appropriate CIL contributions, where benefits are considered to the wider community of Monkton Heathfield or those traveling into Taunton along the A38.
National Highways	<ul style="list-style-type: none"> • CoGC viewed as a positive document seeking to facilitate an increase in walking and cycling for Taunton Garden Town. • National Highways wherever possible support plans to replace vehicular journeys with active travel modes. • CoGC is helpful in advancing discussion of infrastructure that might enable this shift at Taunton. Stress that license with DfT requires focus on the safe and effective operation of the SRN and this cannot be compromised for sustainable travel initiatives. • Some proposals included in the report affect/interact with our network, so as strategic highway authority, would welcome involvement in future. • While we recognise limitations in user experience using J25 facilities, they provide an option while the Nexus 25 site becomes operational. Support the principle of providing a segregated M5 crossing point. Detail of such proposals need to be reviewed as scheme/options progress. Alternative crossing options to a bridge appear to merit ongoing consideration. • Plan recognises National Highway's project to improve the A358. One aim of National Highways is to enhance access for walkers, cyclists and horse-riders including disabled users who use the route. • Latest design proposals for A358 Dualling scheme seek to provide an offline cycle route serving cyclists in the local communities. It connects to the local road network and existing Sustrans national cycle network and provides new off-road routes from Henlade to Southfields roundabout. • As identified in the LCWIP/CoGC, there also appears an identified need to enable movement across the M5 north of Junction 25, between Monkton Heathfield and Creech St Michael, with potential movements to Ruishton and Nexus 25. These appear in part facilitated by existing structures over the M5, with also identification of aspirational routes that would require new infrastructure. CoGC states that further work is required to establish specific routes and we welcome discussion as this workstream develops. • National Highways endorse CoGC approach to require developments at Taunton to make financial contribution towards the delivery of offsite walking and cycling routes. The identification of key destinations for the different sites is helpful in identifying appropriate infrastructure for sites to

	<p>contribute to. Ongoing consideration of Nexus 25's responsibility in enabling a new M5 sustainable transport crossing is also supported.</p>
Network Rail	<ul style="list-style-type: none"> As Network Rail is a publicly funded organisation with a regulated remit it would not be reasonable to require Network Rail to fund rail improvements necessitated by commercial development. It is therefore appropriate to require developer contributions to fund such improvements. Three level crossings within the plan area that could be affected by the aspirational routes which are in within close proximity are: <ul style="list-style-type: none"> Taunton 5 & 13 Public Footpath (MLN1) Broomhay UWCT (MLN1) Hyde UWCT (MLN1) Network Rail has a strong policy to guide and improve its management of level crossings, which aims to; reduce risk at level crossings, reduce the number and types of level crossings, ensure level crossings are fit for purpose, ensure Network Rail works with users/ stakeholders and supports enforcement initiatives. Network Rail and Office of Rail Regulation's (ORR) policy to reduce risk at level crossings not to increase risk as could be the case with an increase in usage at the level crossings in question. Risk control should, where practicable, be achieved through the elimination of level crossings in favour of bridges or diversions.
Somerset Wildlife Trust	<ul style="list-style-type: none"> Welcome the initiative to develop Connected Garden Communities in Taunton. The co-benefits achieved by this approach for health and wellbeing as well as ease of transport are well known. In the years since Taunton received Garden Town status there have been many changes that have made an initiative such as this even more important including the Covid-19 pandemic and the large increase in population from significant housing developments. It is timely to look at how active travel in the town can be supported to address concerns including air pollution, traffic congestion and water management. CoGC is in line with our own vision for a Nature Recovery Network in the area, where opportunities for active travel are encouraged, car usage and atmospheric pollution are reduced, health and wellbeing is supported, and people are able to access and connect with nature as they go. Work delivered in Taunton such as Routes to the River Tone and Green Spaces, Healthy Places, has demonstrated the importance of access to green and blue spaces and the value local communities place on this. It also demonstrated how areas support wildlife, and the existing networks of waterways, parks and the paths that connect them enable not just people but wildlife to move more freely around the town. Well located and designed footpaths and cycle ways can enhance these wildlife corridors, bringing benefits that can contribute to the Nature Recovery Network and SWT Council's plans to tackle the climate and ecological emergency. Interested to see more detailed design plans as the initiative develops to ensure that maximum benefit can be achieved from route development. Encourage the designs to consider enhancing habitats along routes, incorporating Sustainable Drainage Solutions (SuDS) that support wildlife and mitigate flood risk, and ensure that lighting is ecologically sensitive to support the many bats that live in Taunton. Note that prioritisation is to be based on connection to schools, connection to other essential services and servicing future as well as existing users. While these are important considerations, co-benefits including access to green spaces and nature networks will be valuable.
Wessex Water	<ul style="list-style-type: none"> No specific comments.
Environment Agency	<ul style="list-style-type: none"> Supports the Draft Plan but wishes to make the following comments: Stated a number of factors to consider such as creating space for wildlife and access for maintenance alongside watercourse paths. For main

	<p>rivers, cycle paths should be permeable, gravel or rolled shale to allow machinery to undertake annual maintenance.</p> <ul style="list-style-type: none"> • Must be no interruption to surface water drainage system of surrounding land because of cycleways. • Consider opportunities to link up floodplains when proposed route cross floodplains to create a more significant environmental feature. When cycle paths are on Flood Zones 2 and 3, ground levels must remain unchanged. • Lighting also needs to be suitably designed with wildlife in mind.
Historic England	<ul style="list-style-type: none"> • The Plan could encourage the following in section 10 'Delivery'. <ul style="list-style-type: none"> ➢ Avoid the loss of, or harm to, the significance of designated and non-designated heritage assets including their settings, as well as consider the potential for impacts on yet unknown archaeological remains or deposits (bearing in mind the historic environment is an irreplaceable resource as explained in the National Planning Policy Framework 2021 chapter 16); ➢ Minimise and mitigate any negative impacts on the historic environment, e.g., sympathetic choice of materials or siting of cycle stands/seating/lighting/planting; and ➢ Maximise opportunities for enhancing public understanding, appreciation, access and enjoyment of the historic environment along or near to the routes. Examples may include wayfinding and signposting nearby heritage assets, installing interpretation, making the most of any views of heritage assets along the routes. • In respect of the SEA Screening Report, we note that recommendation that full SEA is not required. From a cultural heritage/historic environment perspective, we are satisfied with that conclusion alongside the recommendation that environmental assessment is undertaken to help design and develop the infrastructure necessary to deliver the routes. • Historic England's advice within the following may assist with this: <ul style="list-style-type: none"> ➢ GPA2: Managing Significance in Decision-Taking in the Historic Environment (2015); ➢ GPA3: The Setting of Heritage Assets (2017); ➢ HEAN 12: Statements of Heritage Significance (2019); ➢ Streets for All (2018) ➢ South West version.
Musgrove Park Hospital	<ul style="list-style-type: none"> • The Plan should allow reasoning behind the position of new cycle facilities in the future and will hopefully make cycling to Musgrove Park Hospital a more attractive option for more people.
Bridgwater & Taunton College	<ul style="list-style-type: none"> • Very interested in the CoGC project overall. • The College own Longrun Lane with shared maintenance with Castle School (Route 5a). The section connecting to Longrun Meadow is an active artificial badger sett so there are limitations.
Comeytrove Parish Council	<ul style="list-style-type: none"> • SWT has inherited huge, planned housing development growth from its previous administration; a planned growth that was always quite naturally going to invite a significant influx of additional retired population from larger areas looking to relocate to the southwest - and in particular Taunton Deane. Consequently, Taunton and its surrounding areas now has an aged demographic that is far more pronounced than other comparable towns. Cycling and walking is not the sole answer to the needs of its present and growing population. Taunton Deane planners of the time should have planned sufficiently for the consequences of this demographic shift upon its infrastructure and this consultation exercise must now include an effective public transport network that will connect with the outlying 'garden' communities the previous administration signed up to - with all the obvious and conscious consequences, and which should have been worked into its plans for growth. • Please include public transport plans and commitment into this connectivity consultation exercise alongside the cycling and walking

	<p>which, although a cheap authority solution, is not an option for many people living in SWTs outlying Taunton areas.</p> <ul style="list-style-type: none"> • Welcomes any additional footpaths and cycleways, but it must not be at the expense or compromise the necessary infrastructure requirements for any new housing development or growth area.
Bishops Hull Parish Council	<ul style="list-style-type: none"> • Bishops Hull Parish Council supports the Connecting our Garden Communities Plan but would like to add that it is essential that any implemented cycle or walking paths are completed from start to finish rather than a piecemeal approach. We would also suggest that relates infrastructure is put in place such as shelters and locations to lock bikes to ensure that the cycle and walking paths are welcoming to all users. It is also essential to connect the Orchard Grove development with the wider community via a safe route, and that a reduced speed limit on the A38 is imposed approaching the Orchard Grove site and a safe crossing is installed allowing pedestrian and cycle access.
Victoria Park Action Group	<ul style="list-style-type: none"> • Victoria Park Action Group comments are summarised below: <ul style="list-style-type: none"> ➤ Proposed route – Alfred Street is better than Victoria Gate link, offer support for cycling, important link to Blackbrook/Holway beyond East Reach, street good for cycling, could be 20mph. ➤ Proposed route – support Cranmer Road cycle route due to presence of school, need safer junction in wide bend at Victoria Park end, 20mph should be extended to adjoining similar streets. ➤ Proposed route – potential whether Winchester Street route should be moved to parallel St Augustine Street. Nervous cyclists would benefit from light controlled crossing on Priory Ave/ St Augustine St. St Augustine Street/ Winchester Street both rat runs, closure to all but active travel would create quiet streets and two T-junctions on Priory Ave with controlled pedestrian crossings at St Augustine Street. This would meet reasons listed in policy M6 Traffic Calming, similar to streets around Eastbourne Terrace were improved. Major safety improvement for pedestrians on along the south side of Priory Bridge Road, will help establish coach drop off zones and new junctions to suit commercial interests on Priory Bridge Road. ➤ Other – light controlled crossing required on Priory Bridge Road dual carriageway from Victoria Park to Wickes Retail Park due to threatening crossing points on Shell Garage roundabout. Members cross here on foot, bike, mobility scooter, distance between roundabouts would allow, destination is important to town centre and beyond. If in interests of retail park, could they fund? ➤ Other – propose pathway parallel to Chritchard Way dual carriageway on east edge of park, which helps complete a non-trafficked link to Retail Park crossing place above and forms a cycle crossroad at end of St Alfred Street. Route part maintained by Group, potential to widen, from 1.65m, depends on maintaining/adapting planting barrier on west side, obstructions of barrier on PBR and bollard in subway.
Mr David and Mr Brian Coate (via Vectos)	<ul style="list-style-type: none"> • Two routes transect the land holding Route 35/36. The Coates support these proposals, recognising the benefit to their business, and as vested members of the Ruishton community would be pleased to provide improved connections to/through their site for the residents of Ruishton. • Route 35: The Coates Lane is important to delivering these routes. The landowner is committed to working with SWT to realise the vision of this route, and will incorporate high-quality links through the land, providing routes do not compromise the current commercial operations of the site. • Route 36: Somerset County Council (SCC) have proposed a Small Improvement Scheme (SIS) along Ruishton Lane, which compliments the aspirational link. The SIS would provide thermal activated pedestrian warning signs to reinforce pedestrian safety along Ruishton Lane by indicating to drivers that pedestrians are walking within the highway.

	<ul style="list-style-type: none"> ➤ The Coate Land could enhance the proposed SIS along Ruishton Lane, and extend the link towards Nexus 25, forming a significant part of the aspirational Route 36. The land has the ability to provide a connection from the SIS along Ruishton Lane towards Route 35 and onwards to Taunton and Monkton Heathfield. Routing west along Ruishton Lane, the land holding has the ability to provide off road pedestrian and cycle provision for Route 36, which is of high quality and compliant with LTN 1/20 guidance. ➤ The landowner is committed to helping where practicable to facilitate Route 35, provided it does not negatively impact the existing commercial operation. The Coate Land also has the ability to enhance the SCC Highways proposals along Ruishton Lane, which also seeks to deliver the aspirations of Route 35. • The routes within SWT's 'Connecting our Garden Communities' offer the potential to enact positive change that will improve health and wellbeing of existing and new communities and contribute towards a Net Zero future. • Routes 35/36 would provide attractive alternative pedestrian and cycle connections to the Coate Land from key local settlements including Monkton Heathfield, Creech St Michael and Nexus 25. • The constraints to both aspirational routes include overcoming third party ownership and funding sources. The land holding within the control of the Coates has the ability to deliver part of these routes, and therefore the Coates would be pleased to assist with delivery in their land, subject to further details and understanding the impact on commercial operation.
<p>Member of the public: Ruishton resident</p>	<ul style="list-style-type: none"> • As a resident of Ruishton I am interested to see [Route 35]. The Ruishton and Thornfalcon draft Neighbourhood Plan has a number of proposals for foot and cycle paths in the parish. I don't see these proposed routes reflected in these proposals. The specific route referred to above is mainly outside Ruishton Parish and consequently barely features in the Neighbourhood Plan, but it is an aspiration for the Parish to see the current footpath, running alongside the river, up-graded to a cycle path. This would enable parishioners to walk and cycle to Hankridge and beyond into town without having to cross the hazardous J25 roundabout. This is particularly dangerous for people with pushchairs, mobility scooters and electric scooters, all of whom I have seen attempting to cross this junction. It would also provide a safe route for schoolchildren.
<p>Member of the public: Staplegrove resident</p>	<ul style="list-style-type: none"> • As a resident of Manor Road, Staplegrove I look forward to the completion of the spine road through the proposed Staplegrove West and East developments. Those developments will create many more traffic movements as well as taking traffic away from Manor Road; but how will they get to and from Cheddon Road and Lyngford and beyond? Mainly along Hope Corner Lane. However, it is not fit for 2 way traffic. Please plan for the spine road to continue on to Cheddon Road around the back of the Pyrland Fields development, it is only a few hundred yards. Then not only will Manor Road and Corkscrew Lane be safer for cyclists and walkers, Hope Corner Lane also will be safer for cyclists. Much of the town centre congestion results from traffic having to go through the centre in order to reach the other side, e.g., Musgrove Park Hospital and Richard Huish College. That congestion makes cycling in particular, and walking, hazardous. There will be more congestion as a result of all the planned developments. Please plan for a road to connect South Road/Shoreditch Road with Trull Road/ Honiton Road as a matter of urgency. The more traffic that can get around the outside of the town centre, the safer will it be for cyclists and walkers to get to and from the centre. It will also result in lower levels of pollution, especially in the centre. I was told some years ago that Taunton has more retirees as a percentage of its overall population than anywhere in England except Bournemouth. I do not know if that is correct, but I do know that it is a high percentage, many of whom are not able to walk, cycle, or use the bus. Of necessity they can travel

	only by car, and please remember that we are all transitioning to hybrid/ electric cars, so motorists should not be treated as the enemy.
Member of the public: Milverton query	<ul style="list-style-type: none"> At what point will there be a corresponding plan for cycle paths from Wivey-Milverton, Milverton-Wellington. For example?

Events and forums comments

The comments and questions received from the consultation events are broadly summarised in the table below.

Event	Summary of comments
Parish Council and Ward Member(s)	<ul style="list-style-type: none"> How can you ask developers who have already secured planning permission on their site for S106 agreements? How can people cycle during wet weather conditions? Will you provide shelters for rainy conditions along the routes? What do you perceive to be a realistic distance for people to walk and cycle? "Taunton is becoming a place where people in England retire, and the developments are getting further and further away from the town centre. How would people get from Comeytrowe to Hankridge for example? They may want to walk there and get the bus back and that needs to be provided for." "Walking and cycling infrastructure cannot be a substitute for good car infrastructure as this will be required." Can we influence schools and the hospitals to accommodate racks and electric charging for bikes? Will National Highways want to have a part of CoGC? There is an issue with volume on the A38 and trying to narrow the road with bus lanes and walking and cycling infrastructure may pose more of an issue and create more traffic. There were many comments about Ruishton suggesting it was excluded from the map and that there are no safe routes to Ruishton at present. For example, "How can schools be prioritised when Ruishton is not connected?".
Somerset Youth Parliament	<ul style="list-style-type: none"> Reasons for not cycling at present included safety issues such as personal safety or safety from cars from lack of infrastructure or confusing infrastructure. Cycle paths need lighting and vegetation needs to be cut back and managed. Often cycle paths go through areas that are not well overlooked or through areas that feel unsafe. Not keen on cycle paths along water bodies as they were scared they'll fall in, and areas often feel vulnerable with no overlooking. Suggested there needs to be greater work into mapping to encourage more cycling. Cycle paths need to show up on Google Maps when you search for a route; a cycle network map would be useful in the town centre or in areas around the town along the network, which clearly identify the cycle routes; digital marketing of the cycle map needs to happen; satnavs could be on electric bikes or hire bikes to guide directions as people tend not to pay attention to signs and are lacking in coherence. Cycle parking is also a critical element of making the network successful as people worry they will get their bikes stolen. Routes also need to come forward before people move in and become set in their ways and behaviours. The outcomes of the 'sticky dot' prioritising activities are set out below: <ul style="list-style-type: none"> In response to, "what are the most important destinations to prioritise walking and cycling access to?", schools were the top priority, followed by town centres, then the rail station and employment. There were also votes for open space, supermarkets and 'other' (community centres). In response to, "what is the most important to you when prioritising the delivery of proposed walking and cycling routes?", 'connection to schools' was the top priority, followed by 'potential to be transformational' and 'performance against policy objectives' as joint second priorities. 'Connection to other essential services' also had a few selections and

	<p>there was one vote each for 'timing of delivery coordinated with development', 'potential to attract funding' and 'value for money'.</p> <ul style="list-style-type: none"> Some other comments received back as a result of the "what is your dream street?" exercise are listed below: <ul style="list-style-type: none"> ➤ Station Road feels really unsafe and doesn't feel appropriate for walking to the station often due to the drinking establishments and the dark tunnels. ➤ An idea for Cranmer Road is to cut back the vegetation along the school fence. Parents want to see their children go through the school gates and cutting vegetation down or moving the entrance could shift behaviour.
Agents Forum	<ul style="list-style-type: none"> Is the document a material consideration? Have you got any critically prioritised areas or infrastructure? How do you ensure development can come forward if it does not provide walking and cycling infrastructure?
Blackbrook Green Forum	<ul style="list-style-type: none"> Generally a good level of support for the initiatives and the routes identified. Specifically good support for routes 18 and 19. Route 18 (along Blackbrook Way) was seen as being far too narrow and didn't feel safe at present due to widths, overgrown vegetation, traffic speeds and poor junction at Leisure Centre access. Route 19 was identified as really well used at present but in need of maintenance and widening. The potential linkage of route 19 across the M5 into Nexus would be seen as a real asset (considering some of the ancillary uses planned there) and opportunity for linked business trips. Vehicles using the cycle path on Blackbrook Way as a drop-off point for nursery on the business park identified as an issue and questioned whether additional walking and cycling accesses could be opened up along here. Questions were raised about whether vehicular access could be opened up from Blackbrook Way, though it was recognised that this was probably against the spirit of the consultation. There was support for the idea of mobility hubs in appropriate places across the town, that could intercept drivers to the business park and provide real opportunities to switch to more active and sustainable modes. The majority of attendees suggested that they would be more inclined to walk and cycle more if the routes proposed were delivered and made to feel safe and attractive, particularly when linked with the idea of mobility hubs containing bike/e-bike/e-scooter hire. Recognised that many people working on the business park live a good distance beyond Taunton and so active travel proposals for some would only ever be able to play a small part in their journey.
Richard Huish College (bike day)	<ul style="list-style-type: none"> Two comments of strong support for Route 37 (Vivary link) due to the large amount of travel via Vivary Park at present. Concern for cycling on the roads as many drivers do not give priority to cyclists. Support for Cotford St Luke – Bishops Lydeard Link (Route 32) suggesting at present the roads are very dangerous and a link here would be 'life-saving'. Current cycle routes in Monkton Heathfield are awkward and the roads are busy. While they are 20mph, cycling through the area is not pleasant. Another comment suggesting the project was a "good idea".

Social media comments

One individual commented on the Facebook post that went out at the end of July. The comment related to agreeing with implementing cycleways, however, safe and secure cycle storage was also needed. This was 'liked' by a further two individuals.

You said, we did

The comments received through the consultation have directly informed development of the final version of the Draft Plan. We have considered all comments

received and applied professional judgement as to whether or not they merit changes. In some cases, this has resulted in specific changes, in others it has resulted in a shift of emphasis. However, not every comment was deemed to require a change to be made.

The table below details some of the main issues raised in consultation representations and the officer response. In some cases, the response has been to make changes to the document, in others the response provides written justification, but no change is deemed to be necessary.

Issue raised	Officer response
<i>Potential alternative routes</i>	
Tangier Way/Wood Street (A3807)	The proposed CoGC route is between Staplegrove in south-west Taunton and Firepool, the College/Castle School/Musgrove. Crossing Longrun Meadow makes sense as part of this as does using the Station to Vivary Link. Further consideration will be given to existing provision along Tangier and Wood Street within junction design as studies progress and route design evolves in relation to routes connecting to Firepool.
Goodland Gardens	While SWT officers recognise this is a well-used path, by directing the route through Goodlands Gardens, the services along Tower Street/Castle Green and North Street are bypassed. The route also provides little overlooking.
Chip Lane (section running parallel to The Avenue)	There is little scope for widening along Chip Lane and there is a lack of overlooking making it unsuitable for all users and unlikely to be used by all during winter and outside of daylight hours. Using The Avenue allows for overlooking of the cycle route and equitable access.
River Tone path (from Hankridge to Creech St Michael via Ruishton)	The River Tone path is currently in the network map via Route 39 and there are aspirational routes (Route 35 and Route 36) that aim to connect Ruishton and Creech St Michael. While the exact path for connecting these settlements has not been precisely identified, we recognise the potential for using the River Tone path. We must still consider the impacts of lighting on surrounding wildlife, interaction with floodplain and the lack of overlooking that would be inevitable.
Silk Mills roundabout to Manor Road (Staplegrove Road)	While this section of road would be a beneficial additional to the network before the Staplegrove development spine road, there is little scope for adding a cycle path through here due to width constraints, gradient increases either side and well established vegetation, as well as the high volume of mixed traffic. Instead, the key link follows Great Western Way via Showell Park (Route 22), which is easier to segregate users from traffic and offers a more pleasant environment. This then connects to The Taunton Academy using Routes 21 and 2.
Wessex Road to Pikes Crescent link	While this is a well-used footpath along the Sherford Stream there is little potential to widen as it is not overlooked, there is likely to be impacts on wildlife and flooding and it is reliant on third party land.
Stoke Road, Chestnut Drive and Dowsland Way	While the need for a connection to south Taunton is recognised, the scope of this project is primarily to connect the planned garden communities around the town. This will be noted however and considered within future iterations of the Taunton LCWIP.
Corporation Street (inc. Park Street and Cann Street route)	A number of comments suggested this was the more natural and well-established route into town from south-west Taunton and something needed to be done along Park Street and Cann Street. Further consideration will be given to detailed routing as studies progress and route design evolves in relation to routes connecting to and through the town centre.

Commented [TG7]: Make reference to key link being from Great Western Way via Showell Park, far easier to segregate users from traffic and more pleasant environment.

Upper High Street alternative to Vivary Park and for access to MPH	The route (Route 9) proposal follows the boundary of Vivary Park but would not be subject to opening times like that of a route through Vivary Park. Further consideration will be given to detailed routing as studies progress and route design evolves in relation to routes connecting to and through the town centre.
Parkfield Road	Whilst used by existing communities, Parkfield Road does not feel directly relevant to connecting the Garden Communities. Where route 5 passes close by the junction of Parkfield Drive and Parkfield Road it may be appropriate to consider wider connectivity and safety as part of detailed design as this evolves.
Longrun Meadow	Longrun Meadow is a well-used and favoured route by many people in Taunton. However, it has not been included in this network as it already features in the LCWIP. Furthermore, the aim of creating a route from Staplegrove/ Ford Farm developments to Bridgwater & Taunton College and The Castle School means likely young people are the primary types of user and, therefore, routes may need to provide natural surveillance and lighting.
The 'old' A358	Route 40 is currently the aspirational route connecting Taunton to the Southfields Roundabout. The exact route is underdetermined at present and, therefore, there may be potential for it to follow the old A358 once the dual road is complete.
Great Western Way and B3227	We received mixed comments regarding Route 4 along the B3227 through Norton Fitzwarren village with some suggesting the focus should be on Great Western Way (Route 22) once complete and others wanting to see a segregated cycle path along the B3227, where space permits. In response, we have proposed two routes through Norton Fitzwarren, both of which are in the adopted LCWIP. The reason being is that Great Western Way will divert traffic away from travelling through the village, decreasing the road traffic dominance through the centre of the village and potentially freeing up road space. Therefore, there is greater potential for safe and convenient active travel through the centre of the village. Detailed design stages will consider an appropriate response for this location. However, this may not necessarily be a segregated cycle path, particularly due to space constraints in the village itself, instead it may be a speed limit reduction and traffic calming to make it safer to walk and cycle, should some users need to use the B3227 to access services.
Mountfields Park	Currently the Killams Link follows South Road, shown in the adopted LCWIP, rather than using Mountfields Park. While this is well used, there is constrained width and a lack of overlooking, which may be an issue during the winter or outside of daylight hours. Furthermore, connecting South Road links up to many other potential routes. Further consideration will be given to detailed routing as studies progress and route design evolves.
Priory Bridge Road	Priory Bridge Road is already featured in the CoGC network map, particularly for connecting Firepool via Route 24. The full length of Priory Bridge Road was not deemed needed to connect the likely destinations for future Firepool residents. However, accessibility by active modes along and across the length of Priory Bridge Road and the A3038 Priory Avenue is something for consideration in future iterations of the overall Taunton LCWIP.
St Augustine Street	The main aim of route 24, which follows Winchester Street and Cranmer Road, is to connect Firepool to St James School and a route via St Augustine Street would not be very direct for this. However, further consideration will be given to detailed routing as studies progress and route design evolves.
<i>Additional design issues and suggestions relating to the proposed routes</i>	

<p>Routes 1, 5, 8, 17, 18 and 24 issues raised regarding additional considerations to vehicular movements, cycle movements, speeds and priority.</p>	<p>The following issues will be considered as studies progress and route design evolves, and have been added to Appendix B 'Route Summaries' for consideration at these later stages:</p> <ul style="list-style-type: none"> ➤ Taunton School vehicular movements with drop-off and pick-up and vehicle speeds in this area; ➤ Cycle and walking movements across the railway bridge on Staplegrove Road, links with Bindon Road and the need for safer provision through this area; ➤ Look into the potential for greater cycle priority at Staplegrove Road/Trenchard Way roundabout; ➤ Reducing vehicle speeds along Galmington Road; ➤ Address area of conflict between Hoveland Crescent and Musgrove Park Hospital; ➤ Improve active travel visibility between Hoveland Crescent and Parkfield Drive; ➤ Reduce speed limit on College Way; ➤ Consider alternative route to Comeytrove Park such as through Barrington Close; ➤ Consider movements from Station to Cheddon Road in designs; ➤ Greater signage and markings along Blackbrook Way; ➤ Additional walking and cycling access into Blackbrook business park to allow access to the nursery; ➤ Alfred Street needs a 20mph speed limit and 20mph on Cranmer Road should be extended to the adjoining streets; ➤ A safer junction is needed in the wide road bend on Cranmer Street on the southern end; ➤ Consider location of access into St James Primary School and the management of vegetation to influence drop-off behaviour; ➤ Control rat runs along St Augustine Street and Winchester Street by closing to private vehicles, creating quiet streets.
<p><i>Prioritisation of route destination and route delivery</i></p>	
<p>Most important route connections</p>	<p>You told us, within the consultation hub and the engagement events, that the most important connections to prioritise walking and cycling access to is schools, employment, Taunton town centre/station and open space. This was followed by supermarkets, convenience stores, and GP surgeries. These results have therefore informed the prioritisation of routes in the Final CoGC Plan and beyond. We will also note the varying responses for employment and consider the changes to working patterns with more people working from home or in a hybrid pattern while considering locations where this is unlikely.</p>
<p>Most important priorities for route delivery</p>	<p>You told us that the most important factors when prioritising the delivery of walking and cycling routes was 'the potential to be transformational', 'connection to schools' and 'serves existing as well as new users'. Other high factors were 'connection to other essential services' and 'has community support'. This was followed by 'value for money', 'broad feasibility', 'performance against policy objectives', 'potential to attract funding', 'cost of route delivery', 'political acceptability' and 'timing of delivery coordinated with development'. These results have therefore informed the prioritisation of routes in the Final Plan and beyond. We also note the importance of coordinating route delivery with development, despite the response on Commonplace, to influence a behaviour change at the start.</p>
<p><i>Missing connections and destinations</i></p>	

<p>A number of missing connections and destinations were raised in the comments.</p>	<p>The network of proposed routes currently connects Blackbrook Leisure Centre via Route 18, Wellsprings Leisure Centre via Route via Route 2/11 and Hankridge Retail Park via Route 29 for leisure and fitness centres and Taunton Town Centre for other fitness classes via Station-Vivary. Musgrove Park Hospital and Museum of Somerset are also connected on the map via Route 5/5a, which has been identified as a major employment site. Cultural centres mentioned such as Taunton Brewhouse have also been connected using the Station-Vivary Link. Bishops Lydeard and Cotford St Luke are also connected via Route 32 and Trull and Sherford via Route 9 and 28. Taunton Library also connected off East Street. Bathpool to Hankridge is connected via Route 10 and 29. The Odeon cinema is also connected via Route 29. Priory Bridge Road is also included on the map for some part, associated with Firepool, on Route 24. Bishops Hull is also connected via Silk Mills on Route 26 and either Route 27 or Route 7 along Wellington Road. Halcon has been linked via Route 10.</p> <p>Destinations that have been mentioned that are not in the proposed network include Taunton Racecourse, Oake/Milverton/Wiveliscombe and Bampton, Staplegrove Road (between Silk Mills and Manor Road) and south Taunton. The response to these routes is as follows:</p> <ul style="list-style-type: none"> ➤ Taunton Racecourse not identified as a significant or essential destination for the Garden Communities. This destination alongside links to south Taunton may be considered in future iterations of the main Taunton LCWIP document; ➤ Links to Wiveliscombe and Milverton are not of relevance to the Garden Communities so not included here. However, there is an aspiration to link these towns within the Carbon Neutrality and Climate Resilience Action Plan. See action 222 in Appendix 1 - Indicative action plan 2030 (somersetwestandtaunton.gov.uk) ➤ An alternative route is proposed for the link between Silk Mills roundabout and Manor Road, which is Route 22.
<p><i>Design of walking and cycling infrastructure</i></p>	
<p>Favourite examples of walking and cycling infrastructure</p>	<p>You told us that your favourite example of walking and cycling infrastructure was 'off street cycle paths that avoid the roads and go through parks or open spaces', followed by 'fully segregated cycleways and separate footpaths with disabled parking and dedicated signals' and thirdly, 'segregated cycle paths and footpaths with sections of shared routes'. There was in general a preference for greater walking and cycling priority over that of the car. In response, while paths through open spaces are good examples of walking and cycling infrastructure, there were many concerns raised among young people in our responses that one major barrier to cycling was the lack of natural surveillance and feelings of safety. We need to ensure we are creating an equitable transport system, with all users in mind and avoid an unconscious bias. Perceptions of safety have been factored in when selecting routes, especially if they are off road or through rural areas, by providing alternatives where possible (for example route 10 as an alternative to route 14) and considered the need for lighting in the hierarchy of interventions set out in Chapter 10. The potential for trip-chaining has been identified in Appendix B 'onwards connections'. Furthermore, the Plan states LTN1/20 will enable the delivery of inclusive infrastructure.</p>
<p><i>Integration with other plans and transport modes</i></p>	
<p>The Plan must note secured funding and funding mechanisms for the LCWIP routes, the progress to date, clarify</p>	<p>The Plan has now included information about funding. This includes that funding will come from a variety of sources. Some sources are known for example, Future High Streets Fund for Station to Vivary Link and S106 and ATF3 for Killams Link. The Plan, alongside the LCWIP will, however, inform bids to the Government and other</p>

the distinction with CoGC and the Unitary impact.	competitive funds including in relation to the forthcoming ATF4. All potential funding options will be considered as opportunities allow.
The Plan must align with the LCWIP network plan.	The Plan has now included a combined map of the proposed CoGC network map of walking and cycling routes and the adopted LCWIP routes (Chapter 8) and had already set out the difference between the projects in Chapter 4.
The Plan needs to be consistent with the LCWIP guidance such as considering prioritisation earlier in the Plan.	In terms of consideration for route prioritisation, CoGC Plan has followed the LCWIP structure in that it is considered towards the end of the document. However, Chapter 6 now includes an element of prioritisation by identifying the highest priority destinations and connections for each garden community.
How can CoGC fit within the Local Transport Plan?	The CoGC Plan in Chapter 10 'Delivery' sets out how the Local Transport Plan will bring together sustainable transport as a whole and how the CoGC Plan will be incorporated alongside the LCWIP.
Consider conflicting priorities for corridor space such as the BSIP priority measures and EV Charging Strategy	The Final CoGC Plan explains at a high level that there are conflicting priorities for corridor space and that appropriate consideration will need to be given to these through the design process. These may include the Bus Service Improvement Plan corridor routes and other sustainable travel projects around Taunton. The Local Transport Plan, set out in Chapter 10, will set out a comprehensive plan to bring these priorities together recognising one mode cannot be viewed in isolation. Where conflict may arise, this has been raised in Appendix B where comments were previously absent.
Include public transport plans alongside walking and cycling plans.	The CoGC Plan recognises the aging demographic within Taunton in Chapter 10. The Local Transport Plan will bring together plans for other projects such as the Bus Service Improvement Plan, which will offer other sustainable transport options.
The active travel expansion needs to ensure the inclusion of mobility hubs including hire for bikes, e-bikes and e-scooters.	The Local Transport Plan to be prepared by the new unitary Council, set out in Chapter 10, will bring together a plan for multiple sustainable transport modes considering the recognition that active travel cannot be viewed in isolation to sustainable transport. The Council is also working to provide safe and secure cycle parking, which may work in conjunction with the key destinations identified in the CoGC Plan. Furthermore, Somerset West and Taunton and Somerset County Council are working together to review opportunities for mobility hubs around Taunton. This may potentially include different transport modes such as bike/e-bike and e-scooter hire facilities. This will enable people to make multi-modal journeys should it not be possible for them to make a trip solely by walking and cycling. See Chapter 10 in CoGC Plan for further details.
Scope of the document	
Consider impact on highway capacity.	Chapter 7 now refers to the need for considerations on highway capacity as an aspect of future work. Chapter 10 sets out the role of developers in this future work and how it could be secured.
Consider other constraints and opportunities.	Appendix B 'Route Summaries' sets out the constraints and opportunities associated with each route. Further points raised in the consultation have been incorporated into these summaries. In addition, further constraints and opportunities may arise as route design evolves and these will need to be responded to.
Align signal improvement schemes with project.	There may be opportunities for alignment with signal improvement schemes which need to be understood. Relevant engagement will take place where appropriate. These opportunities have been stated in Appendix B where comments were previously absent.
Route 11 clarification and alternatives.	Climate Positive Planning states " <i>The policy [SS2 of the Core Strategy] includes a requirement to deliver a new highway link between Bossington Drive and Lyngford Lane/Cheddon Road. In line with the Climate Emergency, the expectation will be that this connection has filtered permeability for active travel modes, and potentially public transport only</i> ". The Plan now includes reference to this policy in Chapter 5. The exact routing of this connection is not

	dealt with in detail by the Plan as this is to be determined in relation to the live planning application. However, the exact routing should ensure that it meets with the objectives of the route, LTN1/20 and be coherent, direct, safe, comfortable and attractive.
Provide an estimate or range of the future demand for walking and cycling in relation to the Garden Communities in Chapter 6.	The Plan is currently about setting out a vision for walking and cycling connections to the planned Garden Communities around Taunton. Therefore, detailed flow modelling will be considered as designs evolve. However, Chapter 6 now includes text regarding likely demand for access to the prioritised destinations, for each garden community, based on the consultation responses stating schools and employment as the top two priority destinations. Chapter 9 also considers the prioritisation of routes to establish a priority order through a 'matrix' style scoring system based on the consultation responses.
CoGC should genuinely prioritise sustainable modes over the car.	Chapter 10 of the CoGC Plan sets out 'retaining and creating constraints' which sets out the approach for prioritising sustainable transport modes over the private car. Constraints to the convenience and speed of travelling by car are crucial towards pushing people to seek alternative, faster and more sustainable modal choices. This includes restricting capacity and road space alongside investment in sustainable transport modes. Chapter 10 also sets out the 'vision and validate' approach in which this project follows and expects from applicants whereby a vision is set out in terms of future demand and designing it to make it happen. This section alongside the policy context, refers to the changing approach to travel, mobility and attitudes alongside material changes to the aspirations SWT to meet the climate emergency and net zero carbon goals.
Infrastructure needed may be different for different parts of network and needs to be appropriate and proportionate	The Plan currently states in Chapter 2 that the types of infrastructure may be different for different parts of the network. The infrastructure also depends on the opportunities, constraints, and types of users the route needs to accommodate. Chapter 10 now includes a hierarchy of different types of cycling infrastructure, which establishes a scale of appropriate infrastructure types.
Consider co-benefits such as access to green spaces and nature.	The Plan recognises open space as a key destination to connect walking and cycling infrastructure and the consultation identified that access to open space is a priority to people. The Plan has now also included local policy context from the GI Opportunities Update (2017) , which states the wider co-benefits to mental and physical health and connection with nature by facilitating better access to green space and the natural environment. Such opportunities are noted in Appendix B where relevant and previously absent.
The Plan needs to encourage a number of design considerations.	Detailed design will need to consider the local context such as potential heritage, biodiversity, flood risk and landscape constraints and opportunities and respond accordingly. This has been identified for each route where relevant in Appendix B.
<i>Developer contributions and weight of document</i>	
CoGC Plan should not rely on S106 contributions alone.	Due to the comprehensive nature of the strategy it will not, and cannot, rely on S106 contributions alone. Viability of development proposals is an important consideration, and this has been further set out in Chapter 10 of CoGC Plan. The delivery of these routes will be reliant on securing funding from multiple sources such as CIL, S106 and other external funding.
Document needs to explain the weight and relevance it will be given in decision-making.	Chapter 10 sets out what weight and relevance the Plan will be given for decision-making purposes in relation to the Development Plan. It also sets out how the Plan should be used by applicants.
<i>Further concerns of the project</i>	
The decrease in road space (as a result of cycling infrastructure) will	We received a number of comments stating concerns for the removal of road space for walking and cycling infrastructure in Taunton with the proposed garden communities likely to bring increased car use. However, the Plan follows a 'vision and validate' approach whereby

Commented [JS8]: Further text within policy context for Taunton Garden town vision setting out how the policy for protecting road space has moved on.

impact those who need to use a car.	providing greater active travel infrastructure as well as other sustainable transport initiatives at the expense of road space will encourage people out of their cars for journeys they can make on foot or by bike due to increased congestion. This will free up road space for those who really need to make journeys by car. This approach has been set out within the CoGC Plan in Chapter 10.
The canal path will be damaged if cycle paths are implemented.	Several concerns were raised about the need to consider potential heritage, biodiversity, flood risk and landscape impacts and opportunities, particularly in relation to the canal path. The Plan recognises the constraints of the canal path and conflicting user interests, and that developments must therefore avoid over-reliance upon it. However, it is an NCN route and is well-used. As such the route is included (with caveats) but necessary alternatives are identified to reduce such reliance. Furthermore, a sustainable and appropriate balance needs to be found between the constraints and opportunities, such as the connection to green spaces and access to heritage. Appropriate mitigations for associated impacts, such as environmental and biodiversity impacts, will be put in place for paths along watercourses. These include permeable surfaces, appropriate and considerate lighting and sensitive designs and materials. The final plan includes explicit wording to explain the need to consider wider constraints and opportunities associated with routes as they progress through the design stages and potential impacts and opportunities have been added to Appendix B where previously absent.

Importantly, we understand the need to integrate the active travel namely walking and cycling plans with other modes of sustainable transport and other cycling facilities, which has been voiced in a number of comments. Somerset County Council is developing a Local Transport Plan, which will include reference to all sustainable transport Strategies, offering a holistic approach.

In addition to the changes referred to above, made directly in response to comments received during the consultation, the following changes were also made:

- Updates to all text from referring to pre-draft plan consultation to post-draft plan consultation, ensuring consistency with the Final Plan.
- Inclusion of Manual for Streets within the policy context and updating 'The Second Cycling and Walking Investment Strategy' policy in Chapter 2.
- Recognition for increasing use of e-bikes and distances travelled in Chapter 4.
- Inclusion a summary of the key stakeholders and draft plan consultation in Chapter 4, setting out the various workshops and meetings conducted.
- Inclusion of plans identifying existing cycle infrastructure nearby each Garden Community in Chapter 5.
- Updated Monkton Heathfield 2 in relation to the deferred application decision.
- Updated details with regards to planning decisions and the Draft Masterplan for Firepool.
- Inclusion of the key outcomes of the draft plan consultation in Chapter 7, which summaries the 'you said, we did' comments raised.
- Finalised matrix approach to prioritisation included in Chapter 9, based on the draft plan consultation responses.

Commented [JS9]: Add in any additional changes to the Final Plan.

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	0.2	Date Completed	20/06/2022, updated 08/07/2022 and 09/12/2022

Description of what is being impact assessed

Connecting our Garden Communities

Connecting our Garden Communities is a plan for ensuring that modern, futureproofed walking, wheeling and cycling infrastructure accompanies the delivery of key developments across Taunton Garden Town. The plan focuses on the evidence and justification for a network of connecting routes across the town. The plan includes comments in the route summaries about considerations to be taken into account in route design. However, it does not go as far as determining exactly what level of infrastructure will be delivered along every section of each route. Further work is required to take each route and specific interventions within them forward through concept and detailed design stages and further EqlAs will need to be undertaken as schemes progress through the design process at a project level. The plan references the Public Realm Design Guide SPD and the Government’s Local Transport Note (LTN) 1/20 guidance on cycle infrastructure design, for which inclusive cycling is the underlying theme so that people of all ages and abilities are considered. It also references the Government’s Inclusive Mobility guidance and in its final version refers to walking, *wheeling* and cycling in recognition of wider inclusive mobility. It recognises that mobility needs to respect equalities and inclusive mobility, and that following LTN1/20 and Inclusive Mobility guidance can assist in this respect. The scope was decided to include both walking and cycling, with the initial objective being to accommodate full LTN1/20 compliant segregated walking and cycling routes. The expectation in this was that this would provide routes suitable for all users of all abilities. The final plan now explicitly refers to wheeling as well in order to recognise the importance of wider inclusive mobility. As routes progress through the design path, it may be that full compliance with LTN1/20 will not be possible in every location, and as such further work to assure an inclusive approach may be required at that point – but this is beyond the scope of this plan. More detailed EqlAs will need to be undertaken as schemes progress through the design process at a project level.

This EqlA identifies in general terms the likely impact of the general focus on provision of walking, wheeling and cycling routes on different groups of people taken in the round, rather than on a detailed basis. The plan relates to major developments at the Garden Communities around Taunton, which will be subject to future planning applications for which it is intended that this document will

become a material consideration. Where the Council determines planning applications, it exercises a statutory function, and as such the Public Sector Equality Duty is relevant. If necessary, depending upon the detail and context of proposed development, (specifically where an individual or group would see or experience a direct physical change as a result), specific EqIAs may be necessary to understand the impacts of that specific development.

It also needs to be recognised that not all people sharing a protected characteristic within SWT will necessarily experience the same impact (be it positive or negative) from a particular policy, decision or focus.

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

The Council's proposed final Connecting our Garden Communities plan has been reviewed.

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

Officers within the Council with an overview of the Equalities function, who have experience of identifying impacts on those with protected characteristics have been consulted for this initial identification of potential impacts.

The Plan was subject to public consultation, including with relevant community and interest groups and individuals associated with protected characteristics. Consultation complied with the Council's adopted Statement of Community Involvement and invited a wide range of individuals and organisations to respond including disability, diversity and multicultural groups listed within the planning policy consultation database. Responses to the consultation have informed the final plan proposed for approval.

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	<p>Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population across all ages.</p> <p><u>Older people</u> Older people are statistically more likely to be affected by reduced physical mobility. Therefore, a plan/strategy focusing on improving walking and cycling links may not affect older people as positively as it may younger people. In addition to this, older people with reduced mobility are more likely to therefore rely upon travel by vehicular transport, as such, a plan focusing on improving walking and cycling links, which may in places necessitate a detriment to vehicular traffic access, flows and capacity could have potential to adversely impact older people. However, the provision of such infrastructure designed in compliance with LTN1/20 has the potential ability to improve safety for all, and the added prospect of improving health and wellbeing of the elderly in the long term. The Plan now explicitly refers to walking, <i>wheeling</i> and cycling in recognition of the need for wider inclusivity.</p> <p><u>Younger people</u> Younger people are statistically less likely to be affected by reduced physical mobility. Younger people under the legal age limit are unable to drive, and as such are more likely to need to walk and cycle. Therefore, a plan/strategy focusing on improving walking and cycling</p>			<p>X</p> <p>X</p> <p>X</p>

	<p>links may affect younger people more positively than it may older people. Additionally, the provision of such infrastructure designed in compliance with LTN1/20 has the potential ability to improve safety for all, and the added prospect of improving health and wellbeing of the population in general over the long term, particularly if journeys to school are prioritised as suggested – instilling an active lifestyle from a young age. E-scooters tend to be popular within younger age groups. At this stage, the Taunton trial e-scooters are able to be used on roads and on cycleways, however, personal e-scooters are illegal to be used on cycleways and only legal to be used on roads if registered, taxed and insured. If e-scooters (trial or private following legislative review) were to be restricted from using cycleways then this could disproportionately negatively affect younger people. The plan makes no reference to the suitability or treating of e-scooters in relation to the routes as this is beyond the scope of the document.</p>			
<p>Disability</p>	<p>Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. Designed in the right way, in accordance with LTN1/20, such infrastructure should enable safe, convenient access for all irrespective of disability or not. The Plan now explicitly refers to walking, <i>wheeling</i> and cycling in recognition of the need for wider inclusivity.</p> <p><u>Reduced physical mobility</u> A plan/strategy focusing on improving walking and cycling links may not affect people with reduced physical mobility as positively as it may others. In addition to this, people with reduced mobility are more likely to therefore rely upon travel by vehicular transport, as such, a plan focusing on improving walking and cycling links, which may in places necessitate a detriment to vehicular traffic access, flows and capacity could have potential to adversely impact older people. However, the provision of such infrastructure designed in compliance with LTN1/20</p>			<p>X</p> <p>X</p>

Gender reassignment	Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. There may be a higher perceived risk / fear of assault in public spaces for people in this group. The final design of particular schemes must consider appropriate levels of lighting and visibility in order for the routes to be welcoming, and to feel safe for people using them, particularly people sharing this particular characteristic. No additional impacts have been identified that would disproportionately affect this group.			X
Marriage and civil partnership	Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. No additional impacts have been identified that would disproportionately affect this group.			X
Pregnancy and maternity	Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. Air pollutants can cause respiratory illness in pregnant women and also lead to low birth weight or pre-term birth. The aim of this plan is to improve the ability for people to walk and cycle through provision of associated infrastructure, and as such increase modal shift away from motorised vehicles. This approach serves to mitigate and avoid air pollution impacts, particularly associate with travel from the new Garden Community developments. As such, over time and in combination with other policies and proposals it should help improve air quality across Taunton and should therefore, have a particularly positive impact for this group. LTN1/20 standards have been designed with all users including people pushing buggies/double buggies and using bikes with child trailers/cargo-bike type models in mind. This reinforces the importance of working to accommodate full LTN1/20 standards wherever possible. No additional impacts have been identified that would disproportionately affect this group.			X

Race and ethnicity	Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. There may be a higher perceived risk / fear of assault in public spaces for people in this group. The final design of particular schemes must consider appropriate levels of lighting and visibility in order for the routes to be welcoming, and to feel safe for people using them, particularly people sharing this particular characteristic. No additional impacts have been identified that would disproportionately affect this group.			X
Religion or belief	Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. No additional impacts have been identified that would disproportionately affect this group.			X
Sex	Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. Studies have shown that men and women tend to have different travel patterns and choices of transport mode, influenced by the types of trip being undertaken as well as actual and perceived barriers to movement. Personal safety, convenience and appearance/perception are key factors in this regard. The provision of such infrastructure designed in compliance with LTN1/20 has the potential ability to improve safety for all. Route audits have actively considered these issues, and the choice of routes has been influenced by the potential to improve outcomes in this regard. Detailed design will further need to consider these points. There may be a higher perceived risk / fear of assault in public spaces for people in this group. The final design of particular schemes must consider appropriate levels of lighting and visibility in order for the routes to be welcoming, and to feel safe for people using them, particularly people sharing this particular characteristic. No additional impacts have been identified that would disproportionately affect this group.			X

Sexual orientation	<p>Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. There may be a higher perceived risk / fear of assault in public spaces for people in this group. The final design of particular schemes must consider appropriate levels of lighting and visibility in order for the routes to be welcoming, and to feel safe for people using them, particularly people sharing this particular characteristic. No additional impacts have been identified that would disproportionately affect this group.</p>			<p>X</p>
Other, e.g. carers, veterans, homeless, low income, rurality/isolation, etc.	<p><u>Low Income</u> Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. It is also the cheapest form of transport. No additional impacts have been identified that would disproportionately affect this group.</p> <p><u>Rural Isolation</u> Walking and cycling are active modes of travel which are the most accessible means of travel for the vast majority of the population. The plan identifies a number of aspirational links between rural areas and services and facilities within the Garden Communities and wider Garden Town, as such it has the potential to positively impact upon this group in the rural areas immediately surrounding Taunton. However, most affected by rural isolation are significantly beyond the boundaries of this plan – for people in these areas the plan would provide very little positive or negative impact. Although, connection with the Park & Ride sites may suggest some minor positive impact. The document refers to the reasoning behind its geographical scope. No additional impacts have been identified that would disproportionately affect this group.</p>			<p>X</p> <p>X</p>

**Somerset West
and Taunton**

Connecting our Garden Communities

***Strategic Environmental Assessment and
Habitat Regulations Assessment***

Screening Report

December 2022

Version	Purpose	Date
1	For internal consultation	11/07/2022
2	For consultation with consultation bodies	26/07/2022
3	Final report to support final plan	09/12/2022

Connecting our Garden Communities

SEA/HRA Screening Report

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1. Introduction and Summary

- 1.1 Connecting our Garden Communities is a plan for ensuring modern, futureproofed walking, wheeling and cycling infrastructure accompanies the delivery of key developments across Taunton Garden Town. The plan sets out the Council's aspirations for delivery of a network of walking, wheeling and cycling routes across the town, which are explicitly intended to serve the needs of the Garden Communities, whilst also serving existing communities. It builds on the work already in train in relation to town centre routes including that funded through the Future High Streets Fund, and the network planning undertaken in support of the Taunton Local Cycling and Walking Infrastructure Plan (LCWIP).
- 1.2 The plan is focused around the identification and appraisal of routes, and importantly not their detailed design, which will follow. Exact routings may be subject to change. The detail of the infrastructure provision is not set by this plan, and indeed types of infrastructure may be different for different parts of the network depending upon the opportunities, constraints and types of user the routes need to accommodate. As routes progress through concept and detailed design this may necessitate change, but the plan provides a starting point for these processes.
- 1.3 The scope of the plan is limited to Taunton Garden Town and the connections most relevant to connecting the Garden Communities with modern, futureproofed walking, wheeling and cycling infrastructure. However, it is important to recognise that the Garden Town does not sit in isolation. Whilst most of the external day to day services and facilities that people living on the Garden Communities may need to access are likely to be located within Taunton, the Garden Communities may themselves provide key services to surrounding areas, and often provide important opportunities for improving links between the town and other communities in the rural hinterland. The "Garden Communities" considered by the plan are the Comeytrove, Ford Farm, Monkton Heathfield, Nerrols and Staplegrove urban extensions, plus the major town centre regeneration site of Firepool, and the Nexus25 strategic employment site (as shown in figure 1, below).

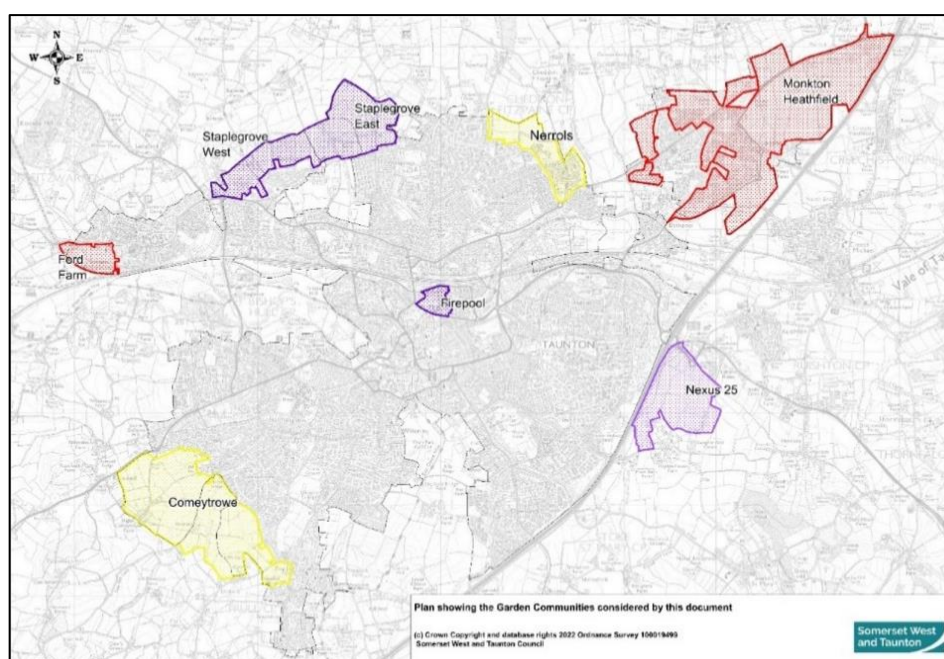


Figure 1 The Garden Communities considered by "Connecting our Garden Communities".

- 1.4 The plan broadly follows the Government’s LCWIP Technical Guidance for Local Authorities, and proposes a network of routes connecting across the town, as identified in the Network Plan (see figure 2, below).

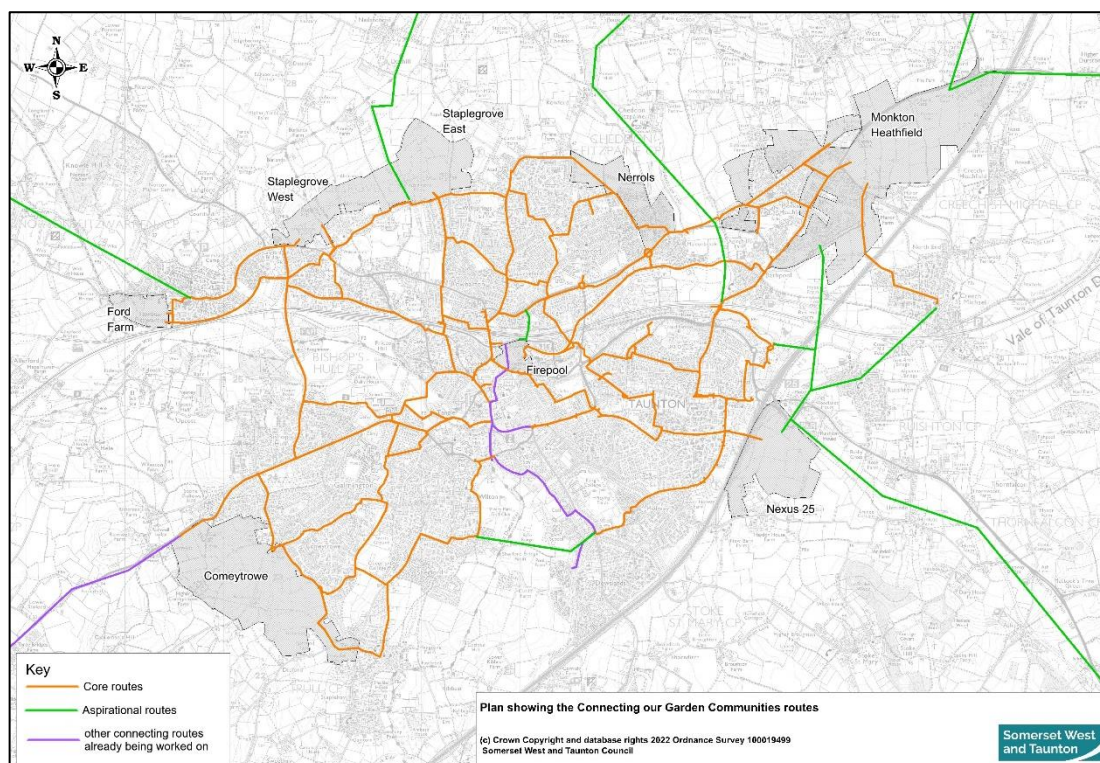


Figure 2 Connecting our Garden Communities Network Plan

- 1.5 The plan responds to national and local planning and other policies and contexts. In particular, the plan explains and justifies how the provision of walking, wheeling and cycling connections and infrastructure relate to specific adopted planning policies and approved developments where appropriate.
- 1.6 The plan prioritises routes using a matrix approach, scoring against a set of criteria, and balanced with scheme costs and opportunities for securing funding/delivery.
- 1.7 The plan sets out an approach for delivery, embedding the plan, taking on board wider considerations, next steps on route design, securing funding and arrangements for review.
- 1.8 The plan will be adopted as a material consideration in the determination of planning applications. This will primarily apply to planning applications relating to the Garden Communities. However, there may be other relevant planning applications along the routes or nearby which will also need to respond.
- 1.9 The purpose of this Report is to determine whether Connecting our Garden Communities should be subject to:
- a Strategic Environmental Assessment (SEA) in accordance with European Directive 2001/42/EC (SEA Directive) and associated Environmental Assessment of Plans and Programmes Regulations 2004 (SEA Regulations); or

- a Habitat Regulations Assessment (HRA) in accordance with Article 6(3) of the EU Habitats Directive and with Regulation 63 of the Conservation of Habitats and Species Regulations 2017.
- 1.10 Under the above pieces of legislation, an SEA is required for all plans which are likely to have significant environmental effects; and an HRA is required when it is likely that the implementation of the plan is likely to have a significant effect upon protected European Sites.
- 1.11 A draft SEA/HRA Screening Report was produced and subject to consultation with the three statutory bodies designated in regulations (Historic England, Environment Agency and Natural England) alongside consultation on the draft Connecting our Garden Communities Plan between 27 July 2022 and 30 September 2022. The comments received as part of this consultation have informed the conclusions of this final report.
- 1.12 **The conclusion of the assessment is that full SEA and HRA are not required to be conducted.**

2. SEA Screening

- 2.1 The basis for Strategic Environmental Assessments legislation is European Directive 2001/42/EC (SEA Directive), transposed into English law by the Environmental Assessment of Plans and Programmes Regulations 2004 (SEA Regulations). Detailed guidance on these regulations can be found in the Government publication ‘A Practical Guide to the Strategic Environmental Assessment Directive’ (ODPM 2005).
- 2.2 The objective of SEA is *“to provide for a high level of protection of the environment and contribute to the integration of environmental considerations into the preparation and adoption of development plans.... with a view to promoting sustainable development”* EU Directive 2001/42/EC (Article 1).
- 2.3 Under Article 2(a) of the SEA Directive, a plan or programme requires an SEA to be conducted where they are:
- *“subject to preparation and/or adoption by an authority at national, regional or local level or which are prepared by an authority for adoption, through a legislative procedure by Parliament or Government, and*
 - *required by legislative, regulatory or administrative provisions.”*
- According to the ODPM guidance, “administrative provisions” are *“likely to be that they are publicly available, prepared in a formal way, probably involving consultation with interested parties. The administrative provision must have sufficient formality such that it counts as a “provision” and it must also use language that plainly requires rather than just encourages a plan or programme to be prepared”*.
- 2.4 The national Planning Practice Guidance states that *“In exceptional circumstances a Strategic Environmental Assessment may be required when producing a Supplementary Planning Document”* (Paragraph: 008 Reference ID: 61-008-20190315). The Connecting our Garden Communities plan is not intended to be adopted as SPD. However, other plans and projects may still require SEA, the Council is legally obliged to advise on whether it is their opinion that an SEA is required or not.
- 2.5 In order to determine whether or not an SEA is required, a “screening” exercise has been undertaken by the Council. The screening evaluates the contents of Connecting our Garden Communities against the criteria set out in the SEA Directive. These criteria are presented over the page in Figure 3.
- 2.6 Should the screening conclude that the Connecting our Garden Communities plan is applicable and will have a “significant impact on the environment”, then a full SEA will be required. Should the conclusion be that an SEA is not required, then any future significant variations or additions to the plan will need to be subject to further screening.

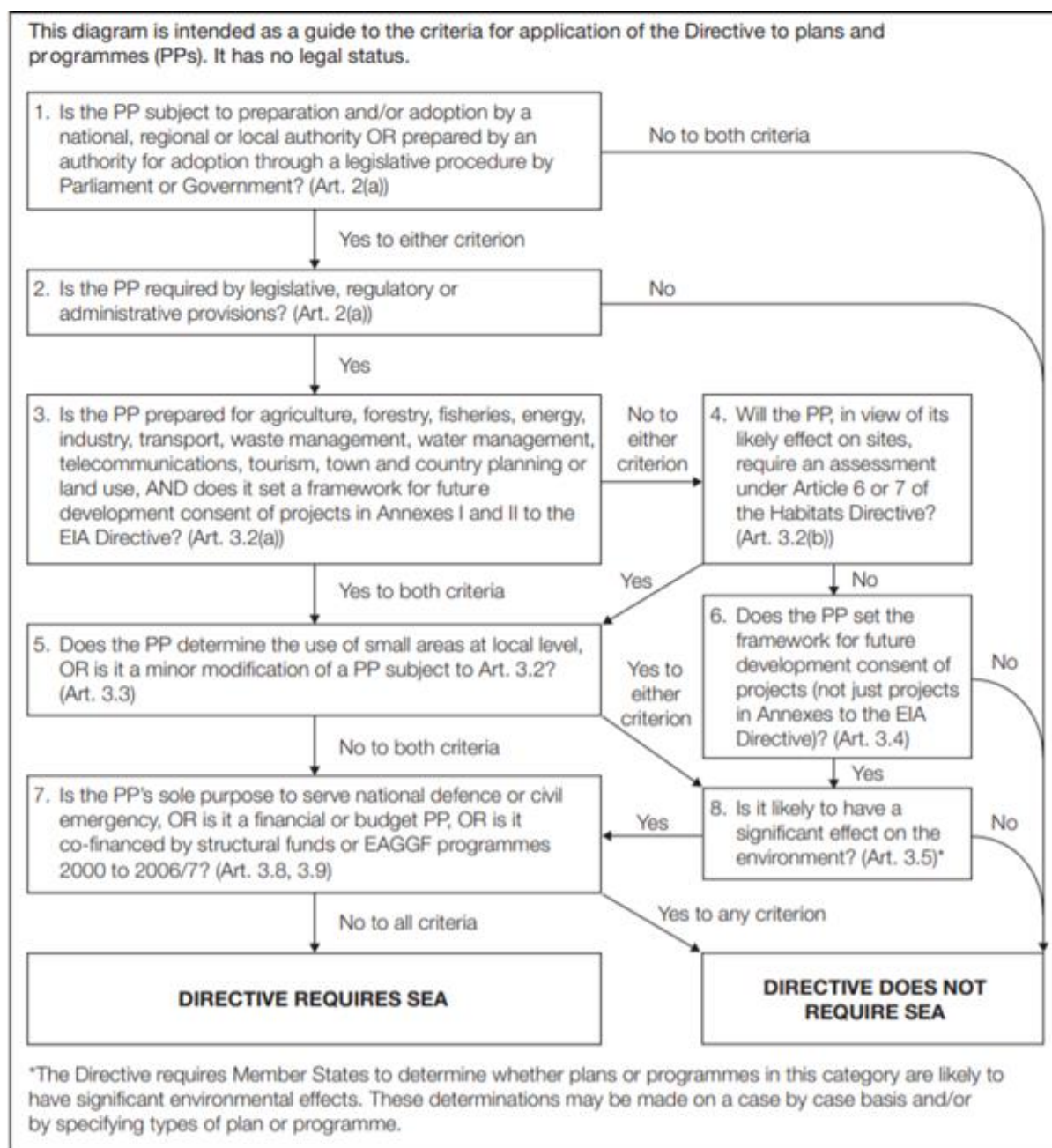


Figure 3 Application of the SEA Directive to plans and programmes

Connecting our Garden Communities

2.7 The Connecting our Garden Communities plan has been produced as a means of responding to the following objectives:

- Develop a network plan identifying key active travel routes linking the Garden Communities into the LCWIP strategic routes and key destinations in order to enable significant modal shift.
- Ensure infrastructure proposed will provide modern and futureproofed cycle and pedestrian routes.
- Ensure routes are informed by key community and technical stakeholder engagement to maximise support and chances of delivery.
- Provide an evidence base to support developer negotiations, funding bids and further work.

- 2.8 The Plan follows the methodology set out in the Government’s LCWIP Guidance to determine its scope, gather information, audit options, network plan, prioritise and integrate the plan with others to secure successful implementation.
- 2.9 The Plan sets out the local and national policy context within which it is being developed. Of particular importance, the plan is pursuant to a number of existing policies and strategies including:
- Taunton Town Centre Area Action Plan (2008)
 - Taunton Deane Green Infrastructure Strategy (2009)
 - Taunton Deane Core Strategy (2012)
 - Taunton Deane Site Allocations and Development Management Plan (2016)
 - Taunton Deane Green Infrastructure Opportunities Update (2017)
 - Taunton Garden Town Vision (2018)
 - Somerset Climate Emergency Strategy (2020)
 - Somerset West and Taunton Carbon Neutrality and Climate Resilience (CNCR) Action Plan (2020)
 - Taunton Garden Town Public Realm Design Guide SPD (2021)
 - Somerset West and Taunton Districtwide Design Guide SPD (2021) and
 - Taunton Local Cycling and Walking Infrastructure Plan (LCWIP) (2021).

The above adopted or approved plans and strategies, and the policies, actions and aspirations within them set the overarching strategy which this Plan responds to, and through which it may be possible to implement it. Connecting our Garden Communities does not seek to alter existing or set new policy, and it does not allocate land in any way. It responds to existing policy and provides aspiration for how policy implementation may be achieved.

- 2.10 The plan sets out the Council’s aspirations for a connected network of walking, wheeling and cycling routes which not only meet the needs of the people living on, working in and visiting these new developments, but also existing communities both within and adjoining Taunton. It focuses on identification of the routes themselves. The routes are not allocated and may change as more detailed work is undertaken. The plan includes comments in the route summaries about considerations to be taken into account in route design as well as an indicative hierarchy of walking, wheeling and cycling infrastructure interventions for different parts of the network . However, it does not go as far as determining exactly what level of infrastructure will be delivered along every section of each route. Further work is required to take each route and specific interventions within them forward through concept and detailed design stages. If the proposals change significantly, there may be a need to re-visit this Screening.
- 2.11 The Plan broadly covers the urban area of Taunton and its immediate rural hinterland explained in the scoping section.
- 2.12 The intention is that the Plan will be adopted as a Council document and become a material consideration in the determination of relevant planning applications. This means that it will carry weight in the decision-making process, although it will not in itself be part of the adopted development plan. It includes no policies and does not allocate any land for development. Planning applications should be determined in accordance with the development plan unless material considerations indicate otherwise. Provided regard is had to all material considerations, it is for the decision

maker to decide what weight is to be given to the material considerations in each case. The plan clarifies that adopted development plan policy is the starting point for decision-making, though this Plan will be an important and up to date material consideration for relevant applications to respond to.

The SEA Screening Assessment

2.13 Table 1, below contains the criteria from Figure 1, above. It identifies whether the Council considers the answer to each criterion to be Yes or No, and gives the reason for this conclusion.

Table 1 – SEA Screening assessment following the process identified in Figure 1

Stage	Y/N	Reason
1. Is the Plan or Programme (PP) subject to preparation and/or adoption by a national, regional or local authority OR prepared by an authority for adoption through a legislative procedure by Parliament or Government? (Art. 2(a))	Y	The Plan has been prepared and is intended to be adopted/approved by Somerset West and Taunton Council as a material consideration. There is no legislative procedure covering the adoption/approval of material considerations.
2. Is the PP required by legislative, regulatory or administrative provisions? (Art. 2(a))	Y	The Plan is not formally <i>required</i> by any legislative, regulatory or administrative provisions. Existing adopted planning policies refer to delivery of walking and cycling improvements and a cycle network. However, these policies do not require the development of a plan such as Connecting our Garden Communities. Due to changed circumstances (including adoption of the Garden Town Vision, declaration of a Climate Emergency, and approval of the Taunton LCWIP, the LPA is of the view that it requires an up to date, evidence-based plan for a network of cycling routes to inform implementation of these policies in the determination of relevant planning applications, and to boost the chances of successful negotiation with developers. The Plan will be publicly available and has been consulted on in line with the Council’s Statement of Community Involvement, likely amounting to “administrative provisions”.
3. Is the PP prepared for agriculture, forestry, fisheries, energy, industry, transport, waste management, water management, telecommunications, tourism, town and country planning or land use, AND does it set a framework for	N	The Plan has been prepared for the purposes of town and country planning and informing consideration of relevant development proposals. Relevant development proposals may include some of the projects referred to in Annex II of the EIA Directive (e.g. the Garden

<p>future development consent of projects in Annexes I and II to the EIA Directive? (Art 3.2(a))</p>		<p>Communities likely constitute urban development projects). However, the plan relates primarily to how these developments connect with existing communities, externally.</p> <p>The Plan does not set a framework for future development consent of such projects as this is already set by the existing adopted local plans covering the Taunton area of the SWT district. The Plan simply sets out aspirations for a connected network of walking, wheeling and cycling routes, and in doing so it responds to existing policy and provides aspiration for how policy implementation may be achieved.</p>
<p>4. Will the PP, in view of its likely effect on sites, require an assessment under Article 6 or 7 of the Habitats Directive? (Art. 3.2(b))</p>	<p>N</p>	<p>See section 3 of this Screening Report in relation to HRA Screening.</p>
<p>6. Does the PP set the framework for future development consent of projects (not just projects in Annexes to the EIA Directive)? (Art. 3.4)</p>	<p>N</p>	<p>The Plan relates to walking, wheeling and cycling routes, which in most cases will necessitate improvements within highways boundaries. Section 55(2) of the Town and Country Planning Act 1990 does not consider works by the Highways Authority required for the maintenance or improvement of the road within highways boundaries to constitute development, unless any works not exclusively for the maintenance of the road may have significant adverse effects on the environment. Therefore, where any projects arising from/responding to the Plan are located within the highways boundary and they are not anticipated to have a significant adverse effect on the environment, then the framework for their consent has already been established from a planning perspective and this is reflected in the Town and Country Planning (General Permitted Development) (England) Order 2015, Part 9, Class A.</p> <p>Development of walking and cycling infrastructure either within the highways boundary and which may have significant adverse effects on the environment, or outside of the highways boundary may</p>

		constitute development and require planning permission. However, in these circumstances, the Plan does not set the framework for future development consent of projects as this is already set by the existing adopted local plans covering the SWT district. The Plan simply sets out aspirations for a connected network of walking and cycling routes, and in doing so it responds to existing policy and provides aspiration for how policy implementation may be achieved.
7. Is it likely to have a significant effect on the environment? (Art. 3.5)	N	See screening assessment for environmental effects in Table 2 of this report, below.

2.14 Criterion 8 requires an assessment of whether the Plan is likely to have a significant effect on the environment in reference to Article 3.5 of the SEA Directive and Regulation 9(1) of the SEA Regulations. Schedule 1, Annex II of the SEA Regulations contains the criteria for determining the likely significance of effects on the environment. Table 3, below contains the criteria from Schedule 1 Annex II of the SEA Regulations and an assessment of whether the Plan would likely have a significant environmental effect or not.

Table 3 – Environmental impact screening assessment

Criteria for determining the likely significance of effects (Schedule 1 of SEA regulations)	Is the PP likely to have a significant environmental effect?	Justification for Screening Assessment
The characteristics of plans and programmes:		
a) the degree to which the PP sets a framework for projects and other activities, either with regard to the location, nature, size and operating conditions or by allocating resources;	N	<p>The Plan will not technically set a framework for decisions to be made against. However, it is intended to influence relevant planning decisions (see response to Q3 in Table 1).</p> <p>The Plan identifies broadly the locations for a network of walking and cycling routes. It is as specific as suggesting which streets routes may be accommodated within, but not so specific as to what the design of these routes may be. For instance, the Plan identifies the various barriers and opportunities along the routes identified, and hints at what may be necessary in the way of infrastructure but stops short of requiring this or committing to this in any way. Therefore, the design of the infrastructure to be accommodated on any of the identified routes is for future project level consideration. In some cases, this</p>

	<p>may necessitate more significant infrastructure delivery, in others it may necessitate no changes, or only minor improvements (e.g. signage). However, this detail is not set out by the Plan.</p> <p>Furthermore, whilst the plan identifies routes, the exact location and alignments may change as they progress through the design process.</p> <p>The Plan identifies some routes more specifically than others. The “core” routes are clearly aligned to specific streets, whilst the “aspirational, green infrastructure-led” routes are far more indicative, being straighter line connections suggesting broadly the locations to be connected.</p> <p>Locational considerations will be relevant to whether resulting infrastructure development and use will have significant environmental effects or not. A number of routes pass nearby and in some cases through areas of sensitivity to environmental impact (e.g. Conservation Areas, flood zones, Local Wildlife Sites, Local Nature Reserves, Special Area of Conservation consultation areas etc.).</p> <p>However, in the vast majority of cases for the “core” routes, they are located within the existing urban area, contain an element of highways infrastructure already, and they are already used by pedestrians and cyclists. Therefore, location is less likely to be a key determinant of whether significant environmental effects may arise for these routes – where the specifics of the infrastructure design are far more likely to be the determinant of any potential effects. The Plan does not set out the detail of infrastructure design, which will need to be considered at a project level.</p> <p>For the “aspirational” routes, these tend to be located in places where existing highways infrastructure either does not exist or where projects may need to consider more ambitious new infrastructure. In these cases, location potentially could play a key determining role on whether significant environmental effects may arise for these routes, but again the detail of infrastructure design will be key. The Plan is deliberately less specific about the location of these “aspirational” routes, reflecting their more sensitive nature, and refers to them as being “green infrastructure-led” which suggests that they may have a different design focus to the more urban “core” routes. However, the Plan does not set out the exact location or detail of</p>
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		<p>infrastructure design, which will need to be considered at a project level.</p> <p>The Plan sets out the journeys and user groups that each route is intended to serve, which may influence the nature, size and operation conditions of the routes and the type of infrastructure which may be needed. It also states an intention for infrastructure to aim for compliance with the Government’s Local Transport Note (LTN) 1/20 guidance on cycle infrastructure design wherever possible. However, it does not set out the detailed infrastructure design necessary and clearly states that infrastructure design will need to respond to its specific circumstances as it progresses through the design process at a project level. The Plan therefore allows for a flexible and locationally appropriate approach to be taken and does not seek to set a framework.</p>
<p>b) the degree to which the PP influences other plans and programmes including those in a hierarchy;</p>	<p>N</p>	<p>The Plan will influence the development of the project-level proposals, which may potentially need to be subject to project level EIA (depending on the scale and nature of proposals). It may also influence future policy development (e.g. for future Local Plan, Local Transport Plan and iterations of the Taunton LCWIP). However, new development plan policy will, once prepared and adopted be part of the development plan, hold statutory weight and as such sit above the Plan in a hierarchy and will be subject to its own Assessment. In this way, the Masterplan is intended to influence the production of other plans and programmes.</p> <p>However, it is considered that the degree of influence of the Plan is limited in this regard and subsequent project level EIA and plan level SA/SEA processes will address any concerns.</p>
<p>c) the relevance of the PP for the integration of environmental considerations in particular with a view to promoting sustainable development;</p>	<p>N</p>	<p>The Plan is intended to help ensure new developments come forward with the necessary walking, wheeling and cycling links to enable sustainable development. This will result in environmental (e.g. climate impact), social (e.g. health and wellbeing improvement) and economic (e.g. local service vitality and viability) benefits to the area.</p> <p>The integration of a wide range of social, economic and environmental factors has already been assessed and achieved via the existing adopted development plans. The relevance and influence of the Plan will be balanced in decision making alongside all relevant policies of the development plan and other material considerations with a view to promoting sustainable development in the round. Therefore, the Plan has</p>

		<p>relevance to the integration of environmental considerations as part of promoting sustainable development. However, the effects of the Plan in this regard are unlikely to be significant as the balance of different social, economic and environmental factors is already determined at a strategic level by the adopted development plan, with environmental considerations integral to what constitutes sustainable development and identified by requirements in policies such as CP8 of the Core Strategy.</p>
<p>d) environmental problems relevant to the PP;</p>	<p>Y</p>	<p>There are a number of environmental constraints in and nearby Taunton including Conservation Areas, Listed Buildings, flood zones, Air Quality Management Areas; Local Wildlife Sites, Local Nature Reserves and Special Area of Conservation and their consultation areas, and protected landscapes such as the Quantock Hills and Blackdown Hills AONBs. Development within or nearby these constraints may result in environmental problems if not appropriately addressed/mitigated. Such environmental problems which may occur without appropriate mitigation may include: impacts upon designated and non-designated heritage assets; increased flood risk; air quality impacts; landscape, townscape and visual impacts; ecological impacts.</p> <p>Adherence to the Plan's intention to deliver on the wide range of health, environmental, economic, safety and social co-benefits identified on page 22 of the Plan, should reduce the likelihood of environmental problems occurring from new developments, and from the delivery of the routes identified.</p> <p>However, some of the routes identified have higher potential to result in environmental problems without appropriate mitigations. For instance, a number of identified routes pass nearby and in some cases through areas of sensitivity to environmental impact (e.g. Conservation Areas, flood zones, Local Wildlife Sites, Local Nature Reserves, Special Area of Conservation consultation areas etc.). In particular:</p> <ul style="list-style-type: none"> • Routes 1, 21 and 22 run through the Staplegrove Conservation Area. • Routes 1 and 25 run through the Taunton: Staplegrove Road Conservation Area. • Route 5 runs through the Taunton: Park Street and Wellington Road and Taunton: Castle Green/Bath Place Conservation Areas. • Routes 6 and 28 run through the Trull Conservation Area. • Route 9 runs through the Trull Road, Fons George and Mount St / Vivary Park Conservation Areas.

		<ul style="list-style-type: none"> • Route 34 may run through/near the Cheddon Fitzpaine and Hestercombe Conservation Areas, though the exact routing is not determined. • A number of routes will run nearby Listed Buildings. • The majority of routes interact with floodzone 2/3 at some point. • Routes 5, 5a and 19 run along the Galmington Stream, Mill Stream and Blackbrook respectively, each of which are associated with the South Taunton Streams Local Nature Reserve. • Routes 22 and 25 border the Silk Mills Local Nature Reserve. • Route 5 runs along and Route 6 crosses the Galmington Stream Local Wildlife Site. • Routes 1, 9, 10, 18, 19, 24, 25, 26, 29, 35, 36 and 37 run along or cross the River Tone and Tributaries Local Wildlife Site. • Routes 10, 13, 14, 19, 34, 35 and 36 run along or cross the Bridgwater and Taunton Canal Local Wildlife Site. • Routes 2, 11, 13, 14, 34 and 38 border or overlap with the Hestercombe House SAC band B consultation zone. Route 34 may potentially be relevant to band A, though the exact routing is not determined. • Routes 33, 34 and 38 have the potential to involve routes within or nearby the Quantock Hills AONB. • Route 41 as a potential new bridge has the highest likelihood of potential for landscape, townscape and visual impact due to the height of any structure that may be required. <p>As previously stated, the Plan identifies routes but does not set out the design of those routes or the infrastructure to be accommodated. The identification of a route does not in itself result in an environmental problem. However, unless an appropriate design approach is taken, there could potentially arise problems e.g. through inappropriate lighting impacting on biodiversity, or raising of levels/installation of impermeable surfaces within the floodplain. However, the Plan does not set out the detailed design of the infrastructure to be accommodated, which will need to be considered at the project level.</p> <p>Where infrastructure delivery constitutes development, a planning application would be required and adopted planning policies would restrict inappropriate development accordingly. Furthermore, other permitting schemes such as with the Environment</p>
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		<p>Agency would protect against inappropriate development from taking place.</p> <p>As a result of all of the above, it is not expected that the Plan will lead to significant environmental effects in relation to the above potential environmental problems.</p>
<p>e) the relevance of the PP for the implementation of Community legislation on the environment (for example, plans and programmes linked to waste management or water protection).</p>	N	<p>The Plan holds no direct relevance to the implementation of Community legislation on the environment. The Plan identifies routes only and does not set the detailed design for infrastructure.</p> <p>However, development proposals related to the routes may need to satisfy the requirements of Community legislation in relation to waste management and water protection (e.g. the Water Framework Directive).</p> <p>Water courses may be particularly susceptible to pollution and contamination both during construction and once in use. Pollution and contamination of these water bodies could present significant environmental effects both locally and further downstream. The River Tone and its tributaries run through and have a high degree of impact on the Somerset Levels and Moors Special Protection Area (SPA) and Ramsar European Sites. Where routes require development in close proximity to watercourses, the design process will need to consider this and how adverse impacts can be avoided or mitigated as necessary.</p> <p>Any development proposals relating to the routes will need to consider effective and sustainable drainage as part of the design process. A WFD screening assessment and potentially detailed assessment may be required at the project stage.</p> <p>Existing planning policy deals with the above concerns and planning applications would need to show how they respond to these policies and the WFD. As a result of all of the above, it is not expected that the Plan will lead to significant environmental effects in this regard.</p>
<p>Characteristics of the effects and of the area likely to be affected:</p>		
<p>a) the probability, duration, frequency and reversibility of the effects;</p>	N	<p>The Plan sets out an aspiration for a connected network of walking, wheeling and cycling routes. There is no guarantee that these routes will come forwards, or that the routes will be on exactly the same alignment with them, though it is intended that the Plan influences the routings and future design. As set out above, the Plan is not considered to give rise to any environmental problems in itself as any potential impacts are likely to be associated with detailed design, and that this will be understood at a project level. The probability of effects as referred to in</p>

		<p>the above sections varies. At this stage, the probability of any potential effects in relation to identified potential environmental problems are uncertain as they relate to detailed design and not to the identification of a route in the Plan.</p> <p>Some potential environmental effects will be short-lived and temporary (e.g. if related to construction activity). However, any potential effects as a result of the design of the infrastructure may be longer term or permanent in effect. However, any potential effects relate to detailed design and not to the identification of a route in the Plan.</p>
b) the cumulative nature of the effects;	N	<p>Multiple developments in and around Taunton will result in cumulative effects upon biodiversity, the transport network, landscape, historic environment, air quality and carbon emissions amongst others. Successful delivery of the routes identified in the Plan may help to reduce the effects of other developments on issues such as transport network and air quality. However, cumulative impacts of development on other aspects like landscape, historic environment and biodiversity could potentially be more negative. However, route identification is not the main determinant, which is more likely to be detailed design.</p>
c) the transboundary nature of the effects;	N	<p>There would be no transboundary effects.</p>
d) the risks to human health or the environment (for example, due to accidents);	N	<p>Successful delivery of the routes identified in the Plan may help to address significant risks to human health (e.g. from physical inactivity, respiratory conditions, road safety etc.). Route identification and connections identified within the Plan are relevant here from a positive aspect. However, detailed design will be the key determinant on these effects. Well designed and locationally appropriate infrastructure may result in positive effects (e.g. resulting in improved road safety), whilst poorly designed and locationally inappropriate infrastructure could result in negative effects (e.g. causing more road safety risks). There are potential environmental effects arising from development proposals relating to the routes which may pose a risk to human health or the environment if not effectively mitigated (e.g. in relation to light pollution). Some of these may be a particular risk during site preparation and construction, others related to the ongoing use of the infrastructure. However, the Plan relates to route identification and not to detailed design of infrastructure. More detailed consideration of these issues and mitigations is not</p>

		possible until the project stage. Therefore, the Plan itself is not considered likely to give rise to significant environmental effects in this regard.
e) the magnitude and spatial extent of the effects (geographical area and size of the population likely to be affected);	N	<p>The Plan broadly covers the area of Taunton and its surrounding rural hinterland. However, the routes themselves cover corridors across the town and into the rural hinterland. Any potential effects arising are likely to be relatively contained and limited to the immediate areas surrounding these routes.</p> <p>The town of Taunton has a population of around 70,000, a significant proportion of which will have some relationship with points along one or more routes identified (either visually, through movements, or otherwise). The design of these routes will have a key influence on the future experience of the town movement network and town centre in particular, which is used by the majority of the population of the town as well as people from outside the area.</p> <p>Generally, the intended effects are likely to be positive and unlikely to be significant in relation to these populations. However, the plan considers only the routes themselves and not detailed design of infrastructure which will be the key determinant. Therefore, the Plan itself is not considered likely to give rise to significant environmental effects in this regard.</p>
f) the value and vulnerability of the area likely to be affected due to – i) special natural characteristics or cultural heritage; ii) exceeded environmental quality standards or limit values; or iii) intensive land-use; and	N	<p>The district of Somerset West and Taunton has a number of special natural, cultural and heritage characteristics which are specific to the district or wider area, including a relatively high concentration of historical assets within Taunton itself including Listed Buildings, Conservation Areas and Scheduled Ancient Monuments. Some of the routes identified have higher potential to result in environmental problems in relation to these assets without appropriate mitigations. In particular:</p> <ul style="list-style-type: none"> • Routes 1, 21 and 22 run through the Staplegrove Conservation Area. • Routes 1 and 25 run through the Taunton: Staplegrove Road Conservation Area. • Route 5 runs through the Taunton: Park Street and Wellington Road and Taunton: Castle Green/Bath Place Conservation Areas. • Routes 6 and 28 run through the Trull Conservation Area. • Route 9 runs through the Trull Road, Fons George and Mount St / Vivary Park Conservation Areas. • Route 34 may run through/near the Cheddon Fitzpaine and Hestercombe Conservation Areas, though the exact routing is not determined.

		<ul style="list-style-type: none"> • A number of routes will run nearby Listed Buildings. <p>These areas are considered to be of high value for their natural characteristics or cultural heritage and are sensitive to change to varying degrees. Generally, these assets are likely to have limited vulnerability to significant environmental effects from the development of walking and cycling infrastructure, particularly as the Plan has a clear focus on the placemaking benefits of such infrastructure, and where such infrastructure is replacing/improving existing highways infrastructure. However, the key determinant is route design, and the Plan does not set out the detail in this respect.</p> <p>Taunton is located in a vale between the Quantock Hills AONB and Blackdown Hills AONB, which provide an important backdrop to the town’s landscape context. Some of the routes identified have higher potential to result in environmental problems in relation to these assets without appropriate mitigations. In particular:</p> <ul style="list-style-type: none"> • Routes 33, 34 and 38 have the potential to involve routes within or nearby the Quantock Hills AONB. • Route 41 as a potential new bridge has the highest likelihood of potential for landscape, townscape and visual impact due to the height of any structure that may be required. <p>Taunton contains and lies in close proximity to a number of ecological designations and sites including the Hestercombe House Special Area of Conservation (SAC), Local Wildlife Sites (LWS) and Local Nature Reserves (LNRs). Some of the routes identified have higher potential to result in environmental problems in relation to these assets without appropriate mitigations. In particular:</p> <ul style="list-style-type: none"> • Routes 5, 5a and 19 run along the Galmington Stream, Mill Stream and Blackbrook respectively, each of which are associated with the South Taunton Streams LNR. • Routes 22 and 25 border the Silk Mills LNR. • Route 5 runs along and Route 6 crosses the Galmington Stream LWS. • Routes 1, 9, 10, 18, 19, 24, 25, 26, 29, 35, 36 and 37 run along or cross the River Tone and Tributaries LWS. • Routes 10, 13, 14, 19, 34, 35 and 36 run along or cross the Bridgwater and Taunton Canal LWS. • Routes 2, 11, 13, 14, 34 and 38 border or overlap with the Hestercombe House SAC band B consultation zone. Route 34 may potentially be
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		<p>relevant to band A, though the exact routing is not determined by the Plan.</p> <p>Taunton is crossed by the River Tone and a number of tributary watercourses as well as the Bridgwater and Taunton Canal. As such, the majority of routes interact with floodzone 2/3 at some point.</p> <p>The East Reach Air Quality Management Area is located within Taunton. Route 20 passes through this area and has the potential to (subject to design) help address the cause of poor air quality in this area. More generally, improved air quality is identified by the Plan as a key co-benefit of action.</p> <p>The Plan identifies routes across the town which have a locational relationship with the above factors. However, of itself this has no significant effects. The key determinant of the effects of the routes is in the detailed design of infrastructure.</p>
<p>g) the effects on areas or landscapes which have a recognised national, Community or international protection status.</p>	<p>N</p>	<p>As set out above, there are a number of assets with national (e.g. Conservation Areas) and Community (e.g. Hestercombe House SAC) protection status. The Plan however, only identifies routes, from which no effects are directly resultant. The key determinant for any effects is the detailed design of infrastructure which is beyond the scope of the Plan and needs to be understood at the project level.</p>

SEA Screening Conclusion

2.15 It is the opinion of the Council that the Connecting our Garden Communities Plan does not require Strategic Environmental Assessment in accordance with Part 3 of the SEA Regulations. However, it is important that as routes progress through the design process and relevant individual development proposals are developed, they are subject to project level Environmental Assessment as appropriate, in order to understand whether significant effects may arise.

3. HRA Screening

- 3.1 The basis for Habitat Regulations Assessment legislation is the European Habitats Directive 92/43/EEC (Habitats Directive), transposed into English law by the Conservation of Habitats and Species Regulations 2017 (Habitat Regulations).
- 3.2 The Habitats Directive and Regulations afford protection to plants, animals and habitats that are rare and vulnerable in a European context. Habitat Regulations Assessment (HRA) is a systematic process through which plans or projects are assessed for likely impact on the integrity of European Sites. European Sites, (also referred to as Natura 2000 sites), consist of Special Protection Areas (SPA), Special Areas of Conservation (SAC); Potential Special Protection Areas and candidate Special Areas of Conservation (pSPA and cSAC); and listed or proposed Ramsar sites.
- 3.3 There are seven Natura 2000 sites within the Somerset West and Taunton district, as set out in Table 3 below:

Table 3 – European Sites / Natura 2000 sites within Somerset West and Taunton district.

European Sites / Natura 2000 sites
Exmoor and Quantock Oak Woodlands SAC
Hestercombe House SAC
Holme and Clean Moor SAC
Quants SAC
Severn Estuary SPA/SAC/Ramsar
Somerset Levels and Moors SPA/Ramsar
Exmoor Heaths SAC

- 3.4 Article 6(3) of the Habitats Directive states that:
“Any plan or project not directly connected with or necessary to the management of the site but likely to have a significant effect thereon, either individually or in combination with other plans and projects, shall be subject to appropriate assessment of its implications for the site in view of the site’s conservation objectives”.
- 3.5 Under the Habitat Regulations, the Council is considered to be a “competent authority”. Regulation 63(1) of the Habitat Regulations states that:
“A competent authority, before deciding to undertake, or give any consent, permission or other authorisation for, a plan or project which –
a) is likely to have a significant effect on a European site or a European offshore marine site (either alone or in combination with other plans or projects), and
b) is not directly connected with or necessary to the management of that site,
must make an appropriate assessment of the implications of the plan or project for that site in view of that site’s conservation objectives.”
- 3.6 The first stage of the HRA process is to establish whether a “significant effect” is likely. This is referred to as screening. If the screening assessment concludes that a significant effect is not likely then no further action is required. If the screening assessment identifies potential effects and deems them to be significant, then further “Appropriate Assessment” is required.

- 3.7 The Plan, once adopted, would carry weight as a material consideration in the determination of relevant planning applications. As such, it is considered that Connecting our Garden Communities is a ‘plan’ for the purposes of Regulation 63 and must be subject to HRA screening.
- 3.8 In order to establish whether the Plan is likely to have any significant effects upon the European Sites, this Screening assessment considers the Plan in relation to four steps based around the Screening methodology set out in the Methodological guidance on the provisions of Article 6(3) and (4) of the Habitats Directive 92/43/EEC (European Commission 2001) as set out in Table 4, below.

Table 4 – Screening steps and responses

Question	Y/N	Reason
1. Is the PP directly connected with, or necessary to the management of a European site for nature conservation?	N	The Plan is not directly connected with and does not influence or set policy necessary to the management of any European Site.
2. Are there any other PPs that could in combination with this PP have potential to have significant effects upon a European Site?	N	<p>The Plan pertains to the identification of walking, wheeling and cycling routes across Taunton.</p> <p>Individual projects arising from this Plan could, <i>in theory</i>, have potential to have significant effects upon the Hestercombe House SAC if not appropriately designed with avoidance and mitigation in mind, either alone, in combination with one another, or in combination with other proposals. The Hestercombe House SAC is designated in recognition of its population of Lesser Horseshoe Bats.</p> <p>The development plan has previously been subject to Appropriate Assessment. As a result of this, the adopted plans include policies and mitigations to ensure that significant effects do not arise in relation to the European Sites (Policy CP8 of the Core Strategy). Where projects for delivery of the routes identified by this plan come forward requiring planning permission then development plan policy would restrict their design and construction accordingly.</p> <p>However, this Plan considers only the routes themselves and not detailed design of infrastructure which will be the key determinant. Therefore, the Plan itself is not considered likely to give rise to significant effects in this regard.</p>
3. Are there likely to be any potential effects upon the identified European Site(s)?	N	The most likely sources of any potential effects from the delivery of walking, wheeling and cycling routes may be in relation to either the introduction of inappropriate lighting or removal of vegetation. The Plan does not explicitly require either of these things as it considers

		<p>only route identification and no detailed design of infrastructure.</p> <p>Most routes identified are located /expected to be accommodated within highway land and as such will already benefit from a level of lighting and will not require removal of significant vegetation.</p> <p>However, some routes identified relate to darker, more ecologically sensitive corridors including along rivers, streams and the canal, which may present increased likelihood of relevance to bats. Furthermore, the Plan identifies a number of “aspirational” routes which link between Taunton and rural areas, including routes 33, 34 and 38 which indicatively link through land within the consultation zone B for the Hestercombe House SAC, with route 34 in particular routing through both consultation zone B and A and to Hestercombe House itself. But, the identification of a route is not in itself likely to lead to potential effects upon the European Sites. The key determinant is the detailed design of these routes, which is beyond the scope of the Plan.</p> <p>Detailed design will need to take account of various factors including impacts upon the European Sites and ensure that proposals are appropriate to their circumstances. Project level assessment may be required where location and specific proposals suggest that significant effect may arise.</p>
<p>4. What is the significance of the effects upon the identified European Site(s)?</p>	<p>N</p>	<p>The delivery of walking, wheeling and cycling routes broadly aligned to those identified by the Plan will not in themselves result in significant effects upon the Hestercombe SAC. It is the design of the respective infrastructure which may result in effects. If identified routes through more sensitive corridors were to be accompanied by insensitive lighting and or removal of important commuting structures in the way of vegetation, then this would likely constitute a significant effect. However, at this stage, the plan simply identifies routes (and in the case of those closest to the SAC, simply reiterates existing aspirations for routes through indicative lines). Therefore, the Plan itself is not considered likely to give rise to significant effects in this regard.</p>

HRA Screening Conclusion

3.9 It is the opinion of the Council that the Connecting our Garden Communities Plan does not require Appropriate Assessment under HRA legislation. However, it is important that as routes progress through the design process and relevant individual projects are developed, they are screened so that it can be understood whether significant effects may arise.

Somerset West and Taunton Council

Executive – 21 December 2022

Corporate Performance Report - Quarter 2 2022/23

This matter is the responsibility of Executive Councillor Member Benet Allen.

Report Author: Malcolm Riches, Business Intelligence and Performance Manager.

1. Executive Summary / Purpose of the Report

This paper provides an update on the council's performance for the first 6 months of the 2022/23 financial year. The report includes information for a range of key performance indicators and provides an update on progress against the council's annual plan commitments for the year. The report also includes the key business risks for the council.

Given the breadth of information contained in the report, it is unlikely that all questions can be answered at the meeting. It would be helpful if any detailed questions could be submitted in advance.

2. Recommendations

Members are asked to note the Council's performance report.

3. Risk Assessment

Failure to regularly monitor performance could lead to the council not delivering on some of its corporate priorities or key services.

4. Background and Full details of the Report

As part of the Council's commitment to transparency and accountability this report provides an update on performance. The Covid pandemic and economic climate continue to have an impact and the Council's response to these issues is being achieved in addition to the regular day-to-day responsibilities. In addition, services are increasingly having to focus on the transition to the new unitary council from 1 April 2023.

Specifically, the report provides:

- A progress update against the actions to deliver the Council's Annual Plan at the end of the first six months of the financial year,
- The position in respect of our key performance indicators at the end of September,
- A summary of the Council's key business risks and issues together with the current status of the actions being taken to respond to them.

4.1 Summary of Performance

The Council's Corporate Strategy contains four priority strategic themes. Each year the Council produces a plan (the Annual Plan) to identify actions to assist in the delivery of the strategic priorities. The year, the plan was in video format and identified 23 Priorities.

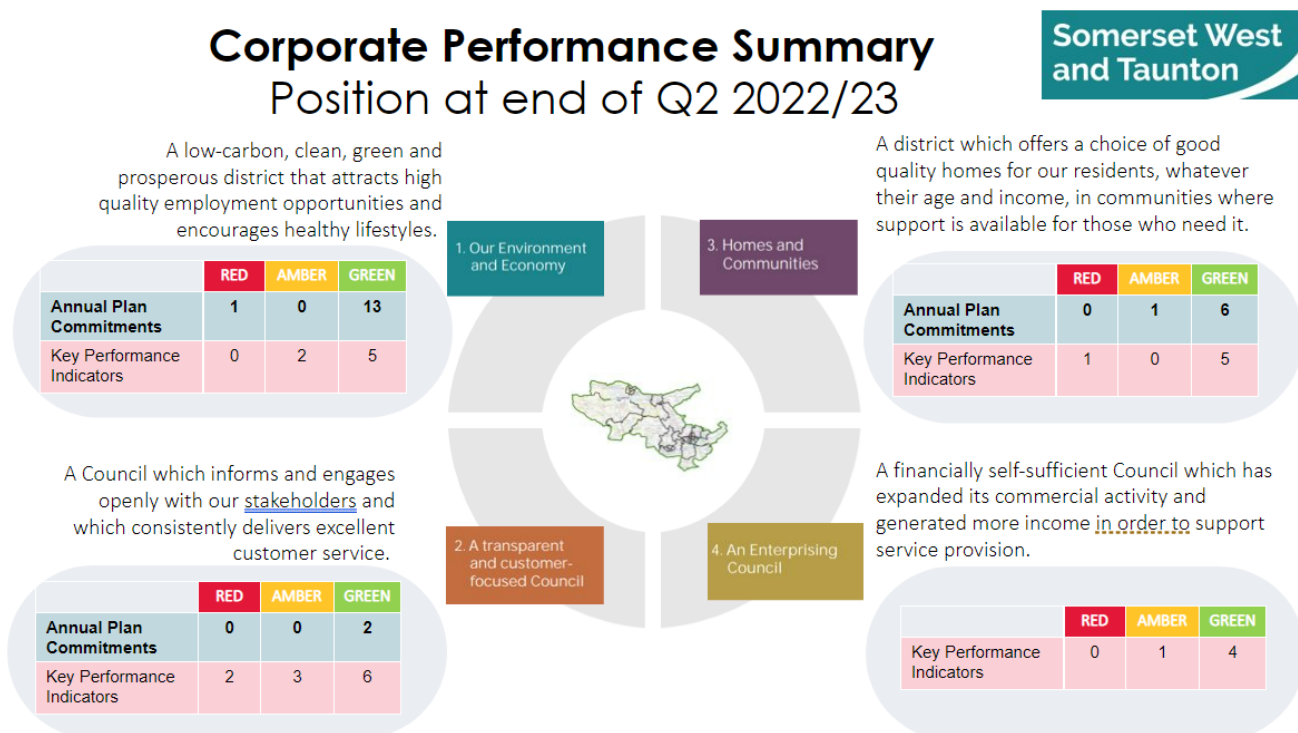
This year will see the transition of Somerset West and Taunton into the new Somerset Council, and as we have completed our commercial investment acquisitions in 2021/22 we have no specific actions for 'An enterprising council'. The income generated from the commercial acquisitions is monitored through one of the Key Performance Indicators (KPIs) which looks at whether the target income for commercial investment is being achieved.

Progress against a range of KPI's is reported quarterly. These KPI's are used to monitor progress in delivering key services and to enable us to quickly identify and rectify any problem areas. These indicators are also linked to the corporate priorities to indicate how they support the delivery of the Corporate Strategy.

The graphic below provides an overview of performance for the first 6 months of the 2022/23 financial year for the 23 commitments in the Annual Plan and our Key Performance Indicators.

Each commitment has been rated as either Red, Amber or Green to indicate whether we are on schedule. Full details of the progress to date against each of the KPIs and the Annual Plan actions can be found in appendices 1 & 2 below.

In summary this indicates that of the 23 Annual Plan commitments, 21 are Green, 1 is Amber and 1 is Red. Of the Key Performance indicators, 20 are Green, 6 are Amber and 3 are Red.



4.2 Key Performance Indicators

The table in Appendix 1 includes the councils Key Performance Indicators and shows how the council has performed during the first 6 months of the 2022/23 financial year. The table includes a “direction of travel” arrow to show whether performance has improved, worsened, or stayed the same, since the end of June.

For the majority of indicators, the target has either been met or, in many cases, has been exceeded. More information is provided below regarding the red and amber indicators:

Percentage of complaints responded to in 10 working days:

The percentage of complaints responded to in 10 days for the first 6 months of the year is 74%, which is below the target of 90%.

The breakdown of the complaints response times across the Directorates is detailed below:

Directorate	Number of complaints (Apr-Sept)	Number of complaints answered in 10 working days	Percentage of complaints answered in 10 working days
Internal Operations	127	111	87%
External Operations	111	82	74%
Development and Place	31	25	81%
Housing and Communities	170	106	62%

The reasons for this are varied and are summarised below:

- *Increased numbers of complaints* - the number of complaints received continue to be significantly higher than in the previous financial years. Higher volumes of complaints present challenges in some areas in being able to respond within the target time.
- *Complexity* - we are continuing to receive a greater number of more complex complaints. These take longer to investigate and respond to and often cannot be responded to within target. Where this is the case officers are under instruction to contact the complainant and agree a new realistic deadline for response.
- *Capacity* - the increased volumes and complexity are highlighting capacity problems in some areas around having enough sufficiently skilled officers to respond to complaints. The demands of LGR transition are also having an impact here. In addition, this is particularly of note in areas where vacancies have been difficult to fill, and sickness and holiday periods have led to further capacity reductions.

- *Customer expectations* - customer expectations are increasing resulting in a growth in the number of complaints being registered. This is a sector wide trend across local government. For example, the Housing Ombudsman reported a 230% increase in the number of complaints reported for the period April to June 2021 from the same period in the previous year.

We have and are actively taking steps to improve our performance on response times. These steps include:

- We have trained additional staff within the Customer Services team in the processes for initially triaging complaints and distributing them to the relevant services. This is helping to speed up the process for getting the complaints to the relevant officers.
- Refining and re-writing elements of the IT software (Firmstep) that manages the complaints process to make the routing of complaints easier. These changes have been implemented in the live system and are working as expected.
- Training is ongoing across the organisation to build both capacity and improve the quality of responses to complaints.
- Learning from complaints and complaint trends are driving new work. In Housing, for example, a working group is looking at damp and mould issues, and deep dive activity is being undertaken with other authorities to compare performance and share good practice.
- Our complaints lead continues to work closely with services to resolve issues and to ensure we can issue responses as quickly as possible. Localised reporting in some directorates has also continued in detail, for example weekly follow up on cases within Housing.
- Within Housing the average response rate of 62% above, is not indicative of recent improvements in complaint response times. Performance in August and September has improved significantly, but the average figure of only 62% is held back by poor performance earlier in the year.
- Within Housing we have recently undertaken a six monthly assessment against the Housing Ombudsman complaint handling code and published those results to our website. Compliance with the mandatory requirements is 92% and 94% for best practice requirements. Further details can be found [Self Assessment Form complaints \(somersetwestandtaunton.gov.uk\)](https://www.somersetwestandtaunton.gov.uk) .
- Learning from complaints and complaint trends are continuing to drive new initiatives. In Housing, for example, a working group is looking at damp and mould issues, repair call handling has changed and deep dive activity is being undertaken with other authorities to compare performance and share good practice.

We continue to monitor the workload in this area together with response times and implementing improvements. However, we are conscious that demand will continue to grow particularly in view of the anticipated impact of the fuel price increase, inflation and the worsening economic climate all of which will continue to make this a challenging target.

Average call wait times:

The indicator measures the length of time it takes one of our Customer Services Team to answer a call once the customer has listened to the initial recorded options and selected an appropriate queue.

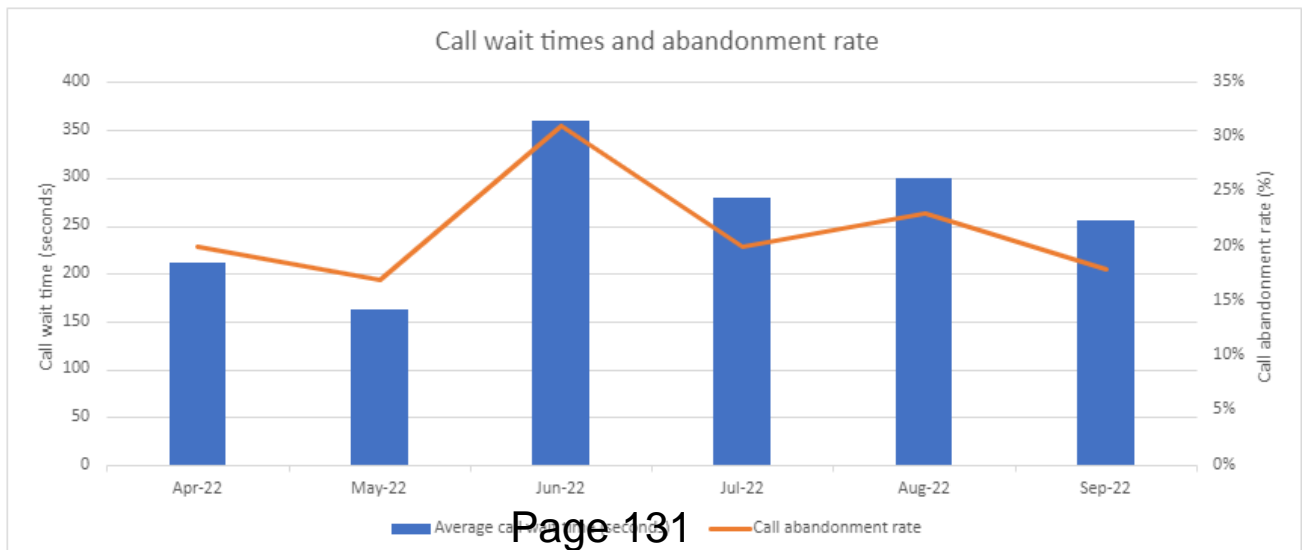
Our target is to answer all calls within 60 seconds. This is an ambitious target when compared with many other organisations where it is not uncommon to be waiting longer than 5 minutes. There is a clear relationship between the number and length of calls and the levels of staff resourcing required to maintain an answer rate of 60 seconds or below.

This target has proved extremely challenging over the past year, which has seen increases both in the number of calls we are receiving and the duration of calls. This trend has continued into the current year. During the first quarter of this financial year we received 60,000 calls, which represented a 5% increase on the same period for the previous year. In addition, the average duration of the calls received during quarter 1 this year has increased by 18%.

The increase in calls is driven:

- In part by business as usual activity (Council Tax bill issue in March 2022 and garden waste renewals), which are tending to generate more calls post-Covid; and
- By the Council Tax Fuel Rebate scheme announced by Government earlier in the year. This affected circa 60,000 properties. The delay between the Government communicating their intention in March 2022 and our actually being able to commence payments coupled with the requirement for a substantial number of people being required to apply for a rebate has inevitably driven up call volumes.

The chart below shows the call wait times and the abandonment rate for April to September. There is a clear correlation, and it is recognised that when call wait times are longer, the number of people who abandoned their call increases. The spike in June resulted from a combination of increased calls regarding Council Tax Fuel Rebates and garden waste renewals.



Locally we have continued to face resourcing challenges. Turnover within our customer service teams is higher than the average. This is a nationally recognised issue and not unsurprising given the nature of the work and the fact that, in our case, this is very much an entry point into the organisation. However, we are now also experiencing significant difficulties in being able to recruit, which again is a national problem.

In addition, a number of the senior staff within Customer Services are also having to spend increasing amounts of time focussing on the transition of the various elements of the service into the new unitary council. Customer services is one of the critical functions that needs to transition smoothly so this work is vital, but obviously will potentially distract from their ability to focus on immediate operational issues.

Actions have and continue to be taken to improve our call answering capacity and speed. These are summarised below:

- Additional agency staff were recruited to assist with the initial phase of the Council Tax Fuel Rebate enquiries;
- We utilised the services of a specialist external call handling services (Agilisys) to help with the application process;
- Two additional temporary posts are being added to the structure for the remainder of the financial year. The purpose of these posts is to provide additional resilience to help us work through the frequent occurrences of staff turnover; and
- We are currently looking at the backfill requirements to enable the senior staff to fully engage with the unitary transition programme.

Average processing times of new Housing Benefit claims:

Performance for processing new Housing Benefit claims for the period April to Sept has averaged 19.13 days, which is slightly worse than the target of 19 days. Over the past 3 months, performance has been much improved, and averaged 15.7 days, but the year to date average performance is longer than target due to the issues in Quarter 1. This resulted from an increase in workload elsewhere in the Benefits service to which we had to divert resourcing (specifically an increase in Universal Credit work items following annual uplifting) and increased workload resulting from LGR transition activities. In May we recruited a temporary Senior Case Manager whose focus will be on managing and maintaining business as usual service delivery. This enables other senior staff within the team to focus on the LGR transition activities.

The immediate focus for the new manager has been on ensuring the team prioritise those new claims and changes of circumstance where the customer has provided all the evidence and information we need to make a decision. This has resulted in a significant reduction in average processing times and much better performance over the past 3 months.

Sickness Absence (average days sickness per employee)

Although current performance is rated as Amber, the target of 7.2 days sickness per employee for the year is aspirational and ambitious yet is very nearly being reached. Particularly given the make up of our workforce which includes a reasonable proportion of manual work. The unprecedented impact of the pandemic on working patterns over recent years has made it is more challenging to set meaningful targets for sickness due to the issues with looking at trends in data from previous years. In 2021/22, this

target was met and performance for the year was 7.2 days, which was a significant achievement given that levels of sickness in previous years had been much higher.

Undoubtedly home working is a positive factor in reducing sickness absence. We are very close to achieving this target again, and based on Q2 performance, the forecast for the year would be 7.9 days. Sickness data is closely monitored by Directorate management teams on a monthly basis and will be kept under review.

Staff Turnover

The target for the year is to be under 12, which is very aspirational, and is very close to being met. In 2021/22, the figure for the year was 8.9. The Q2 performance is 6.47, suggesting a forecast for the year of 12.9. While not giving cause for concern at this stage, the data is monitored by Directorate management teams on a monthly basis and will be kept under review.

Risks to increased turnover include;

- The Local Authority sector is rapidly losing pace on pay with other employers. Whilst historically an increased salary is an outcome rather than a driver of job change. The current economic climate is likely to drive behaviour as employees feel the impact of inflation.
- Other employers (including the NHS) matching the flexibility that was previously a key selling point for Local Authorities.
- Post pandemic, employers are far more relaxed about staff living a considerable distance from their work base. This has resulted in employees moving to jobs with London salaries yet remaining in Somerset.
- There is some evidence of employees moving between districts to maximise their income. Indeed, one authority is offering incentives to planning staff to move to them.
- Job security related to LGR is a factor and this risk will heighten when news of the size of the MTFP gap becomes more widely known.

% of reported fly tipping incidents responded to within 5 working days

Performance for the year so far has been 76%, which is lower than the target of 80%. Although the majority of incidents have actually been collected in the required 5 working days a change in the contractors management team led to delays in the closing of the incidents on the CRM system.

% of communal areas with a Fire Risk Assessment (FRA) in place and FRA Review complete (where applicable)

FRA in communal areas at the end of September had slipped to 98.39%, below the target of 100% which has been achieved for much of the year. This reduction was due to 8 properties (one hall, seven communal areas). Our contractors schedule of attendance following the summer programme on shared roof properties overran and has delayed the autumn/winter programme for the month of September. Our in-house specialist will be trialling new software and will be conducting the assessments required in the interim to ensure compliance is delivered and an Officer has been assigned to complete. The outstanding FRAs were undertaken during October and performance returned to 100%.

% of other planning applications determined within 8 weeks or an agreed extension of time:

Performance for April to September has averaged has been 78% which is slightly lower than the target of 80%. This is due to workloads, staff sickness, vacant posts and the lack of extensions of time agreed.

Forecast budget variance for Housing Revenue Account,

Detailed commentary for this indicator is provided in the finance reports.

4.3 Risk Management update

The quarterly Corporate Performance Reports include an update on the key business risks and issues for the Council.

Processes are in place within each directorate to regularly review existing and identify any new risks and issues. As new risks or issues are identified they are included on the risk register or issues log and mitigations are identified and planned. A target date is set as to when the mitigations should be in place, and a lead officer is appointed.

The risks are all scored based on their probability and potential impact. The Risk Scoring Matrix used to score the risks is attached at Appendix 3. Risks with a higher score are likely to have a more detailed mitigation plan. Issues are things which have already happened, so they are not scored in the same way as risks, but they have a RAG status which relates to the severity of the issue.

As of the end of September there were 6 Key Business Risks (with a score of 15 or higher) on the risk register which are shown in Appendix 4.

As of the end of September the Corporate Issues Log contained 2 Issues which are shown in Appendix 5.

Appendices 4 and 5 provide a summary of the key risk or issue together with the current status of the development and delivery of any mitigation plans required to address them.

The risk register and issues log are updated as necessary and new risks/issues can be added at any point. They are routinely reviewed each month through the regular cycle of meetings. The lead officer is responsible for updating the risk register with progress made regarding mitigations, and this is reported back to Directorate performance meetings, and to the Corporate Performance Board where SMT review the key risks monthly

5. Links to Corporate Strategy

This performance report provides an update on Corporate Performance which is fundamental to the implementation of the Corporate Strategy.

6. Finance / Resource Implications

The detailed financial position is available in a separate budget monitoring report.

Democratic Path:

- **Scrutiny / Corporate Governance or Audit Committees – Yes**
- **Cabinet/Executive – Yes**
- **Full Council – No**

Reporting Frequency: Y Quarterly**List of Appendices**

Appendix 1	Key Performance Indicators Report
Appendix 2	Annual Plan actions update
Appendix 3	Risk Scoring Matrix
Appendix 4	Corporate Risk Register – Key Business Risks
Appendix 5	Corporate Issues

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Appendix 1

SWT Performance report 2022/23								
Link to Corporate Strategy	Full definition	Target 2022/23	Quarter 2	Direction of Travel	Denominator	Quarter 2	Numerator	Quarter 2
	% of complaints responded to in 10 working days	90%	74%	↓	Total number of complaints received	439	Number of complaints responded to within 10 working days	324
	% of FOI requests responded to in 20 working days	75%	89%	↔	Total number of FOI requests received	235	Number of FOI responded to within 20 working days	209
	% of calls to Deane Helpline answered in < 60 seconds	90%	96%	↔	Total number of calls to Deane Helpline in the month	174010	Number of calls answered in under 60 seconds	167390
	Average call wait time (secs) for the last month	60 secs	256	↑				
	Cumulative percentage of the amount of Council Tax collected*	97%	61.45%	↑	Total amount of Council Tax to be collected by the 31st March	£114,492,323	Amount of Council Tax collected in the year so far	£70,349,940
	Cumulative percentage of the amount of Business Rates collected*	95%	65.63%	↑	Total amount of Business Rates to be collected by the 31st March	£46,753,884	Amount of Business Rates collected in the year so far	£30,686,903
	Average processing times of new Housing Benefit claims	19 dys	19.13	↑	Number of new Housing Benefit claims received	300	Total number of days	5738
	Average processing times for changes in circumstances for Housing Benefit claims	9 dys	6.87	↑	Number of new Housing Benefit Change of Circumstances received	3810	Total number of days	26185
	% of Licensing applications processed within required timescales	90%	91%	↑	Number of licensing applications processed	898	Number of licensing applications responded within timescales	814
	Sickness Absence - average days sickness per employee (target is for the year)	7.2 dys	3.96	↑	Total working days lost for all employees (cumulative)	2379	Number of FTE staff	600
Staff Turnover (target is for the year)	< 12	6.47	↑	Total number of staff	2404	Total number of leavers	39	
An Enterprising Council Page 137	Forecast budget variance for General Fund	£0	-£218k	↑				
	Forecast budget variance for Housing Revenue Account	£0	£341k	↑				
	Forecast level of uncommitted reserves for General Fund.	£2.4m	£8.348m	↑				
	Forecast level of reserves for Housing Revenue Account.	£2m	£2.702m	↑				
	On target for Commercial Income Generation	£4.0m	Yes	↔				

Link to Corporate Strategy	Full definition	Target 2022/23	Quarter 2	Direction of Travel	Denominator	Quarter 2	Numerator	Quarter 2
Environment & Economy	% of reported fly tipping incidents responded to within 5 working days	80%	76%	↓	Number of fly tipping incidents	371	Number of fly tipping incidents responded to within 5 days	283
	% of service requests for street cleansing actioned within 5 working days	85%	86%	↑	Number of service requests for street cleansing	639	Number of service requests actioned within 5 working days	549
	% of major planning applications determined within 13 weeks or within agreed extension of time**	75%	80%	↓	Total number of major planning applications received	15	Total number of major planning applications determined within 13 weeks or agreed extension	12
	% of minor planning applications determined within 8 weeks or agreed extension of time**	65%	72%	↑	Total number of minor planning applications received	152	Total number of minor planning applications determined within 8 weeks	110
	% of other planning applications determined within 8 weeks or an agreed extension of time**	80%	78%	↑	Total number of other planning applications received	361	Total number of other planning applications determined within 8 weeks or an agreed extension	282
	% of planning appeals that have had the decision overturned	33%	33%	↑	Number of appeals received (last 12 months)	36	Number of appeals where the decision is overturned (last 12 months)	12
	% Play area inspections completed to schedule	100%	100%	↔	Play areas to be inspected	3288	Inspections carried out	3288
Homes and Communities	Current tenant arrears at the end of month %	2.72%	2.59%	↑				
	Number of families in B&B over 6 weeks (position at the end of the quarter)	0	0	↔				
	Average re-let time in calendar days (key to key)	49 dys	44	↔	Total Number of dwellings let following void process	177		
	% of housing dwellings with a valid gas safety certificate (LGSR)	100%	100%	↔	Total number of dwellings requiring a valid gas safety certificate	1330	Total number of dwellings without a valid gas safety certificate	0
	% of communal areas with a Fire Risk Assessment (FRA) in place and FRA Review complete (where applicable)	100%	98%	↓				
	Completion of housing emergency repairs within 24 hours	100%	100%	↔	Total number of emergency housing repairs	467	Total number of emergency housing repairs completed in 24hrs	467

The column titled Direction of Travel, shows whether performance has improved, worsened or is similar to the last report.

- ↑ Performance has improved
- ↓ Performance has got worse
- ↔ Performance is similar

* The current figures appear well below target, but these are cumulative totals.

** The planning indicators included in this report are calculated using nationally prescribed definitions to ensure performance is consistently reported and to allow for benchmarking and comparisons. The indicators calculate timescales upon completion. Due to the current issues with Phosphates, there are a number of applications which are held in abeyance, the details of which are available here: <https://www.somersetwestandtaunton.gov.uk/planning/phosphates-on-the-somerset-levels-and-moors>

Appendix 2 Annual Plan Commitments update

Corporate Priority Area	Ref	Annual Plan Commitments 2022/23	Update on position at the end of September 2022	RAG
Our environment and economy	1	The roll out of further electric vehicle charge points	The SWT EVCP Installation project is now complete. 7kw fleet chargers installed at Wellington Depot x 2, Deane House x 2 and Killkenny x 1 22kw public chargers installed at Wood Street car park, Castle Street car park and Belvedere Road car park in Taunton, North Street car park in Wellington, North Street car park in Wiveliscombe, Williton Central car park, Swain Street car park in Watchet, North Road car park in Minehead and Porlock Central. There are also Instavolt 50kw chargers located at Blackbrook Leisure Centre in Taunton, Alexandra Road car park in Minehead and Exmoor House car park in Dulverton.	Green
	2	Switch our pool car fleet to electric	Two vehicles currently delivered and being used. There are a further 11 vehicle being delivered in November as part of scheduled replacements. There are two vehicles that are not currently suitable to move to EV as they are emergency response 4 x 4's.	Green
	3	Commence the decarbonisation of our council-owned homes	The Low Carbon Retrofit Strategy has been presented at Members briefing and is progressing through the councils governance structure. The delivery plan identifies a number of schemes many of which use grant. Targets and delivery routes have been proposed within the strategy and delivery plan. Schemes at NTWP and Oake are approved by members and SWT is working with E-on on a £25m investment plan and with a consortium of 24 local authorities and housing associations on SHDF wave 2 grant fund.	Green
	4	Create an Ecological vision and action plan for the district	Working in partnership with SDC we have developed a joint ecological vision and action plan which was approved by both Councils at their Full Council meetings in July.	Green
	5	Deliver first phase of Taunton walking and cycling project	Due to various issues and improvements to the overall project timelines, nearly all delivery will now take place in 2023/24. Work is progressing well on all fronts. The two planned Highways schemes (St James St and Upper High St junctions) will now be delivered by SCC Highways teams as part of their Taunton work in 2023/24. The new bridge over the River Tone is in the design stage. Work to deliver the bridge will begin in Spring 2023. A new cycle hub is planned as part of the Crescent Car Park improvements, and could be delivered in 2022/23.	Green
	6	Complete the regeneration at Coal Orchard	The Coal Orchard development will be completed in Autumn 2022. As of 30 Sep, Block A and E were completed and open for buyers to move in - all flats have been reserved. The car park was also complete at this point as well. Discussions continue on many fronts with national and local businesses in relation to the commercial units. Deals are close on a couple of units.	Green
	7	Further construction at Firepool – (western boulevard and Digital innovation centre) + further planning applications	The Drainage and Levels work will start in November 2022, which will be followed by significant public realm works to complement the Innovation Centre which is due to finish in Spring '23. Consultation on a revised masterplan is due to launch in Nov 22 also, subject to Executive approval	Green

Corporate Priority Area	Ref	Annual Plan Commitments 2022/23	Update on position at the end of September 2022	RAG
	8	Work with partners to find long term solution to the phosphates issue	The Somerset authorities have been awarded £100k from DLUHC to progress a Nutrient Catchment Management Plan to identify the short/medium/long term measures required to address phosphates in Somerset Levels and Moors SPA. SWT Phosphates Planning Sub Committee has approved a package of interim measures to help unlock approx 150-780 dwellings. Whilst this helps in the short term, it represents approx 1 year of our 5 year housing land supply requirements. There remains significant uncertainty around Government policy to address this national issue in the long term.	Red
	9	Identify suitable employment land in West Somerset	Suitable employment land has been identified. Work to understand constraints, costs and layouts have been completed, and a financial case made ready. Funds have been requested under the Capital bids programme for 2023/24. Any business case cannot be taken forward until after Unitary happens. In the past few months there have been further developments. Instead of 1 certain pre-let business wishing to expand there are now 5 West Somerset businesses seeking larger premises to expand. The site being looked at does not provide enough space for all, but it does now mean that any business case will be based upon developing pre-let units only, which lessens the risk to any Council investment, and ensures full income from Day 1.	Green
	10	Undertake a wide range of economic development initiatives	<p>Initiatives completed to date from April 2022:</p> <ul style="list-style-type: none"> - Innovation Conference - Minehead People and Place Plan - Key SWT objectives included in Shared Prosperity Fund Investment Plan Joint submission with SDC to Levelling Up Fund for Health and Social Care Centre of Excellence. - Food and Drink sector mapping, supply chain portal and support programme. - SWITCH inward investment marketing campaign. - Town and Neighbourhood Centres grants programme and promotion campaign - Service Level Agreements with Destination Management Organisation and Tourist Information Centres - Tourism Innovation Grant Programme - Employment Hubs - outreach and virtual support for job seekers, Ukrainian guest support, careers fairs, HPC drop in sessions. - SWT Volunteer policy, guidance, recruitment and management process - Employer recruitment and retention guidance pack - SWT Health of the economy data reports and Town Centre performance reports. 	Green

Corporate Priority Area	Ref	Annual Plan Commitments 2022/23	Update on position at the end of September 2022	RAG
	11	Deliver a programme of cultural and town centre events	Established Cultural Forum Launched Cultural Strategy Established Flook House as new Arts Hub Commissioned Creative Economy work programme, to include Youth Creative Hub. Creative Sector Grant Programme Jubilee Celebration Event	Green
	12	Progress next stage of the business case for a railway station for Wellington	Network Rail is now leading on this project to deliver new stations at Wellington and Cullompton, with support from their alliance partner Great Western Railway. The £5million funding announced last year is being administered by Network Rail as part of the Restoring Your Railway, Rail Network Enhancements budget with specific outputs and milestones agreed between DfT and Network Rail. Network Rail has appointed WSP to continue with the next two phases of project development PACE 1 and PACE 2 (PACE is Network Rail's project delivery tool, Project Acceleration in a Controlled Environment). These phases of work will conclude the necessary surveys, assessments and various elements of civil, structural, rail, highways and architectural design required to get the project to the point of delivery.	Green
	13	Undertake a deep clean of our town centres and other high footfall areas	Street Washing of Town Centres was delayed at the start of September due to the team supporting various tasks following the death of The Queen. This work will now start in October and be completed by the end of Quarter 3.	Green
	14	Roll out litter enforcement scheme	The Enforcement trial commenced on 01/04/2022. From the beginning of the trial to the end of September 872 FPNs have been issued for Littering offences.	Green

Corporate Priority Area	Ref	Annual Plan Commitments 2022/23	Update on position at the end of September 2022	RAG
Homes and Communities	15	Hand over first of our new council homes in Priorswood to Tenants	The first handovers are expected December 2022 /January 2023.	Green
	16	Commence work on 54 new council homes in Minehead	Our Contractors, Classic Builders, commenced on site in April 2022, completing by summer 2024. The scheme is currently on programme with works progressing well on site. The properties are being built to zero carbon in occupation and EPC A.	Green
	17	Progress further council homes on 6 further sites in Taunton area	The Oxford Inn is seeking planning approval for 8 dwellings 12th October 2022. One scheme has been withdrawn from planning and four schemes are held at the planning application stage awaiting phosphate resolution and business plan considerations.	Green
	18	Deliver a further 200-300 affordable homes via housing developers and partners	Estimated Affordable Housing Completions for 2022-23 are as at Sept 2022 circa 300 new affordable homes. 88 affordable homes have been completed upto 31 Aug 2022. Some sites are reporting slippage primarily owing to material supplies therefore some affordable home completions may move into 2023/24. This is being closely monitored by the Housing Enabling team.	Green
	19	Acquire further properties to provide additional bed spaces for people experiencing homelessness	The Council recieved RSAP funding to purchase six properties for homeless purposes. To date on ehas been purchased with one to be completed w/c 10/10/22. The council continue to seek 4 other units.	Amber
	20	Work with partners to develop further food pantries in the district	Following the success of Rowbarton pantry, further pantries have opened in Minehead and Wellington.	Green
	21	Maintain funding to voluntary and community organisations in the district	Funding has been agreed and maintained for 2022/23 and an agreement is in place for 2023	Green
A Transparanet and Customer Focused Council	22	Create a Town Council for Taunton	Special SWT Council meeting held on 29/09/22 and SCC on 05/10/22 to approve the creation of a new town council for Taunton and changes to local governance arrangements. A Town Council will be created for Taunton on 1st April 2023 with Elections in May 2023. A Shadow Taunton Town Council will be established soon to lead and oversee the work to establish the new council.	Green
	23	Preparation for the safe transition of services and responsibilities to the New Somerset Council	The council continues to play its full role in the LGR programme through the CEO Board, Programme Steering group and Workstreams. Whilst the programme is very complex the safe transition of services, people and assets remains on track for Vesting day monitored and tracked through robust programme governance. The Council is also ensuring that the activities to close down the council are being tracked and overseen.	Green

APPENDIX 3

Risk Scoring Matrix

Impact

Risk Impact/Severity The impact of the threat being realised is defined as:

	Score	Impact	Definition
Very Low	1	No impact	No notable impact identifiable
Low	2	Minor	Affects only one group of stakeholders, with minimum impact
Medium	3	Significant	Affects more than one group of stakeholders, with widespread but short-term impact. May attract the short-term attention of legislative/regulatory bodies
High	4	Major	Affects more than one group of stakeholders with widespread medium-term impact. Attracts the medium-term attention of legislative/regulatory bodies
Very High	5	Catastrophic	Medium to long term impact on performance and delivery of services. Affects all groups of stakeholders, with a long-term impact. National impact with the rapid intervention of legislative/regulatory bodies

Risk Likelihood

The likelihood of the threat being realised is expressed on a scale of 1-5, using the definitions below

	Score	Likelihood	Definition
Very Low	1	Rare	May occur in exceptional circumstances
Low	2	Possible	Risk may occur in the next 3 years
Medium	3	Likely	The risk is likely to occur more than once in the next 3 years
High	4	Almost certain	The risk is likely to occur this year
Very High	5	Certain	The risk has occurred and will continue to do so without action being taken

Appendix 4 Key Business Risks

REF	Risk details			Current score			Action summary		
	Name	Summary of the risk (cause) / What is the impact?	Date added	Imp.	Prob.	Total	Owner	Mitigation plan development status	Mitigation plan implementation status
CR11	Cyber attack	Cause - Cyber Attack Impact - Potential for financial, legal and reputational damage or that we are targeted and locked out of essential systems.	Jun-20	4	5	20	Sean Papworth	Green	Green
CR23	Landlord Safety Checks	Cause: Failure to comply with Landlord Property Safety Compliance requirements. Impact: Regulatory failure, failure to comply with the law, incident causing injury or death, negative PR, and financial loss (compensation and / or fine)	Mar-21	4	4	16	Ian Candlish	Green	Green
CR34	Unitary council transition	Cause: Inability to adequately resource the unitary transition activities, business as usual service delivery and key programmes. Impact: Failure to deliver corporate objectives, inability to maintain key services, inability to deliver key functions in the new council, reputational damage, financial loss, legal challenge.	Sep-21	4	4	16	Alison North	Amber	Amber
CR35	Impact of conflict in Ukraine	Cause: The conflict in Ukraine increases the unpredictability, which may have an impact on a number of aspects of the Council's business. Impact: This may impact on oil/gas supply, other supply chains, add to inflationary pressures, which will add to further cost of living. This will have a knock-on impact on other workloads, inc homelessness where our capacity to respond is already a challenge as the system is under pressure.	Apr-21	4	4	16	Alison North	Amber	Amber
CR36	Cost of living crisis	Cause: With the increase in the cost of living, there will be an increased growth in demand for key services (Revs and Bens, Debt Recovery, inc rent arrears etc). Impact: This will have a knock-on impact on other workloads, inc homelessness where our capacity to respond is already a challenge as the system is under pressure.	Apr-21	4	4	16	Alison North	Amber	Amber
CR37	Homelessness Service failure caused by loss of management	Cause: The homelessness service will face unprecedented demand from late Summer 2022 due to ending of Homes for Ukraine sponsor arrangements; increased requirements to house asylum seekers and refugees; impact of cost of living on households and resultant home losses; Hinkley workforce peaking in December. There is also a slowdown in development of new housing (including affordable housing) due to hold-ups caused by the Phosphates issue. Impact: The risk is that the service has a fragile management structure, which will lead to increasing pressures and sickness on middle managers and staff and the service failing. Ultimately this could lead to failure of statutory duties and potential wider risks related to homelessness and rough sleeping that at their worst can result in fatalities.	May-21	4	4	16	James Barra	Amber	Amber

Green = key actions identified & mitigation plan in place	Green = mitigation actions on target or completed
Amber = key actions identified but plan not fully developed	Amber = mitigation actions behind target, but impact not significant
Red = key actions NOT identified & NO plan in place	Red = mitigation actions significantly behind target

Appendix 5 Corporate Issues

REF	Issue details					
	Name	Summary of the issue	Date added	Owner	Mitigation plan development status	Mitigation plan implementation status
CI 9	Phosphates	Management of phosphate levels in Tone catchment, particularly regarding impact on planning applications.	Nov-20	Alison Blom Cooper	Amber	Amber*
CI 14	Health and Safety Improvement Programme	Low maturity health and safety management systems leading to increased risk of injury, reputational damage, legal challenge and financial loss.	Oct-21	Sean Papworth	Green	Green

Green = key actions identified & mitigation plan in place	Green = mitigation actions on target or completed
Amber = key actions identified but plan not fully developed	Amber = mitigation actions behind target, but impact not significant
Red = key actions NOT identified & NO plan in place	Red = mitigation actions significantly behind target

* further details are in the technical report, published in March 2022: <https://www.somersetwestandtaunton.gov.uk/media/3232/solutions-report.pdf>

Report Number: SWT 166/22

Somerset West and Taunton Council

Executive – 21 December 2022

2022/23 Housing Revenue Account Financial Monitoring as at Quarter 2 (30 September 2022)

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

Report Author: Kerry Prisco (Management Accounting and Reporting Lead)

1 Executive Summary

1.1 This report provides an update on the projected outturn financial position of the Council's Housing Revenue Account (HRA) for the financial year 2022/23 (as at 30 September 2022).

1.2 The headline estimates for **revenue** costs are:

Revenue Budget	£0.330m forecast overspend	Red
General Reserves	£2.712m forecast balance = favourable (though low) compared to £2m minimum requirement	Amber
Earmarked Reserves	£54k opening balance	Green

1.3 It is well reported that the economic situation is challenging with the cost of living crisis, high inflation, and rising interest rates. These factors will hit our communities and businesses, and the Council is also not immune as seen in the latest forecasts.

1.4 The Q1 forecast outturn position reported an overspend of £745k. The Senior Management Team have since undertaken a thorough and in-depth review of all budgets, updated projections based on mid-year information, requested services to manage inflationary pressures within services where possible (e.g. pay award, utilities and material costs) and driven a focus on essential spend only where possible in order to bring the position back to budget. There have also been some contractual delays on delivering capital schemes pushing spend into future years and a need increase reserve balances this year to provide budget flexibility and financial resilience in 2023/24 on the face of significant financial pressures.

1.5 The updated projected outturn position of a £330k overspend is still significant. This is mainly driven by depreciation charges, the recently agreed national pay award, void repairs and tenancy management costs.

- 1.6 It is important to note that this is mid-year forecast for the year with 6 months remaining until year end. This will be carefully monitored with updates reported to Members on a quarterly basis. The level of General Reserves does provide the ability to cover the current predicted overspend, if required, but does not provide resilience to mitigate the risk of any further significant overspend or additional pressures. Housing Management will continue to take steps to reduce and halt spend especially for discretionary activities, to help mitigate the current position, and to try to maintain a more secure reserves position.
- 1.7 Members will be aware that budget setting for 2022/23 was significantly challenging, where some budgets required re-basing especially around repairs and maintenance, and consequently the service will be pursuing efficiency targets into next financial year and beyond.
- 1.8 Whilst best endeavours are used to forecast with as much accuracy as possible we have seen a historical change in forecasts each quarter and to year end. However, it is essential that control over spending continues to reduce the forecast overspend and maintain adequate reserves to support the budget gap in 2023/24.
- 1.9 The HRA **Capital Programme** has a total approved budget of £109.4m. The profiled budgeted spend for 2022/23 is £36.347m and this is currently forecast to underspend in the year by £9.073m; £8.700m due to slippage of work into 2023/24 and £273k budget to be returned.

2 Recommendations

- 2.1 This report is to be noted as the HRA's forecast financial performance and projected reserves position for 2022/23 financial year as at 30 September 2022.
- 2.2 Executive to approve the transfer funds from capital reserves to repay debt and to release the voluntary repayment of debt budget to offset the variance on depreciation charges.

3 Risk Assessment

- 3.1 Financial forecasts are based on known information and projections based on assumptions. As such any forecast carries an element of risk. The current forecasts included in this report are considered reasonable given the extra element of risk around inflation being experienced in the current economic operating environment and based on experience it is feasible the year end position could change. It is common for underspends to emerge during the year, reflecting an optimism bias within previous forecasting. There may also be matters beyond the Council's control that affect the final outturn position.
- 3.2 Salient in year budget risks are summarised in section 9 in this report. The Council manages financial risk in several ways including setting prudent budgets, carrying out appropriate monitoring and control of spend, operating robust financial procedures, and

so on. The Council also holds both general and earmarked reserves which include contingencies to manage budget risk, though these are low for the HRA.

- 3.3 Despite the risks related to forecasting assumptions, it is essential that measures are implemented promptly to ensure the financial resilience of the Housing Revenue Account and adequate reserves are maintained. The current forecast highlights a continued risk that reserves may fall below acceptable levels by the end of this financial year if the projected overspend outturn position was to increase and further in year financial pressures arise.

4 Background and Full details of the Report

- 4.1 This report provides the Housing Revenue Account (HRA) forecast end of year financial position for revenue and capital expenditure as at 30 September 2022.
- 4.2 The regular monitoring of financial information is a key element in the Council's HRA Performance Management Framework. Crucially it enables remedial action to be taken in response to significant budget variances, some of which may be unavoidable. It also provides the opportunity to assess any consequent impact on reserves and the HRA's Medium Term Financial Plan and 30-Year Business Plan.
- 4.3 Members will be aware from previous experience that the position can change between 'in-year' projections and the final outturn position, mainly due to demand-led service costs and income levels and where actual costs and income can vary from initial estimates and assumptions. The budget monitoring process involves a detailed review of the more volatile budgets and a proportionate review of low risk/low volatility budget areas. Budget Holders, with support and advice from their finance business partners, update their forecasts monthly based on currently available information and knowledge of service requirements for the remainder of the year. As with any forecast there is always a risk that some unforeseen changes could influence the position at the year-end, and several risks and uncertainties are highlighted within this report. However, the following forecast is reasonable based on current information.

5 HRA Revenue Budget 2022/23 Forecast Outturn

- 5.1 The HRA is a ring-fenced, self-financing, account used to manage the Council's housing stock of some 5,700 properties, with the Council acting as the Landlord.
- 5.2 The Council retains all rental income to meet the costs of managing and maintaining the housing stock, as well as meeting the interest payments and repayment of capital debt.
- 5.3 The current year end forecast outturn position for the Housing Revenue Account for 2022/23 is a net overspend of £330k.

Table 1: HRA Revenue Outturn Summary

	Current Budget	Forecast Outturn	Forecast Variance	
	£000	£000	£000	%
Gross Income	-28,404	-28,320	84	0.3%
Service Expenditure	16,937	16,854	-82	-0.3%
Other Expenditure	11,468	11,797	329	1.2%
Total	0	330	330	1.2%

5.4 The variances to budget are shown in more detail in Table 2 and further explanations for variances over £50k below.

Table 2: Summary of Forecast Variances for the Year

	Current Budget £000	Outturn £000	Q2 Variance £'000	Q1 Variance £000
Dwelling Rents	-25,581	-25,634	-54	-139
Non-Dwelling Rents	-767	-751	16	49
Charges for Services / Facilities	-1,649	-1,543	106	-2
Other Income	-408	-392	16	14
Sub-Total Gross Income	-28,404	-28,320	84	-78
Service Expenditure:				
Development & Regeneration	60	45	-15	-5
Community Resilience	153	153	0	-6
Tenancy Management	3,228	3,477	248	186
Maintenance	5,598	5,918	320	496
Assets	420	396	-24	-1
Capital Investment	563	302	-262	14
Compliance	1,829	1,715	-115	-150
Performance	5,084	4,848	-236	31
Provision: Pay Award Shortfall	-	-	-	269
Sub-Total Service Expenditure	16,937	16,854	-82	834
Central Costs / Movement in Reserves:				
Revenue Contribution to Capital	-	-	-	0
Interest Payable	2,883	2,795	-88	-94
Interest Receivable	-83	-72	11	83
Change in Provision for Bad Debt	180	180	-	0
Depreciation	7,666	9,093	1,427	0
Capital Debt Repayment	1,021	-	-1,021	0
Movement In Reserves	-200	-200	-	0

Sub-Total Central Costs / Movement in Reserves:	11,468	11,797	329	-12
Net Surplus(-) / Deficit for the Year	-	330	330	745

Income

- 5.5 **Dwelling Rent Income:** The budgeted income for 2022/23 is £25.581m, which reflects an assumption of 2% void losses and applying a 52-week year. The overall current projections suggest that more income will be recovered than predicted when setting the budget and providing an allowance for voids. The current projection for dwelling rent income is an over recovery against budget of £54k which partly relates to timings of predicted stock changes and levels of voids.
- 5.6 **Charges for Services / Facilities:** The budgeted income of £1.649m for 2022/23 includes (a) £1.406m for the Service Charge Income for Dwellings (after discounts have been applied to tenants such as Piper Charge to Sheltered Housing and Extra Care) less an average 2% void loss and applying a 52-week year, (b) £233k for Leaseholder Charges for Services, and (c) £10k for Meeting Halls.
- 5.7 The Leaseholder Charges for Services is forecasting an under recovery of income of £100k. The leaseholds are invoiced a year in arrears. The routine repairs continued to be low again last year due to COVID and lockdown. The major repairs were also lower and capped at £250 again.

Expenditure

- 5.8 **Tenancy Management:** This area covers lettings, supported housing, rent recovery, leaseholders and other tenancy management support activities. The total current budget is £3.228m and it is forecasting an overspend of £248k. This mainly relates to an overspend on staffing costs due to additional resources required to manage the increasing number of cases raised by tenants following the aftermath of COVID, as well as backfill for maternity and sick leave and the pay award. Part of the overspend relates to a budget saving for 2022/23 by undertaking RTB surveys using our in-house resources, however this resource is now unavailable, and the activity is now being procured externally.
- 5.9 **Maintenance:** The overspend relates to the ongoing repairs and maintenance of the housing stock through void activity undertaken to ensure our Lettable Standard is met before reletting. Whilst this is a very demand led and reactive service based on the condition of the properties being returned this service is experiencing an increase in cost pressures as inflation drives up the cost of materials (as seen nationally). There is an in-house initiative called the "Leaving Well" scheme which aims to work with and support the tenants to leave their homes in a suitable manner to reduce the time and cost of work then required on void properties before reletting.

- 5.10 Since the Q1 report further work has been undertaken to identify opportunities for the capitalisation of material costs. For example, where the activity is of a capital nature and has an impact on the major works replacement programme. So far c£250k of costs have been identified and is reflected in the change in variance from Q1 to Q2.
- 5.11 **Capital Investment:** The Capital Investment Team are responsible for driving the delivery of the Majors and Improvement capital programme. Since the Q1 report and in light of the predicted overspend the opportunities for capitalisation have been revisited and these salary costs of £254k are now being capitalised.
- 5.12 **Compliance:** The service is forecasting an underspend of £115k. Following a validation of apparatus / installations on site, the service has identified that the previous data estimations were greater than those required in year. Therefore, the budget requirement for compliance activity for 2022/23 have been revised and reduced by £149k.
- 5.13 **Performance:** Of the total budget of £5.084m, £3.920m relates to shared costs such as support services, pension deficit, and governance, leaving £1.164m on operating costs such as staffing, insurance, training, travel, stationery, printing and bank charges, as well as the Tenants Empowerment and Tenants Action Group.
- 5.14 The forecast underspend of £236k mainly relates to a £320k favourable adjustment following the completion of a thorough review of the non-staff related cost apportionments between the General Fund and Housing Revenue Account (HRA), to ensure this reflects the up-to-date position and reasonable assumptions around the relative use of resources. This is offset by staffing pressures related to the pay award, job evaluation and performance team restructure.
- 5.15 **Pay Award 2022:** The 2022/23 approved budget assumed a 2% pay award. The Pay Award has now been agreed at £1925 per scale point which gives an average 5.5% increase for SWT. This assumption has been included within the forecast outturn position provided by services (reported above).
- 5.16 **Interest Payable:** The budget estimate for 2022/23 was £2.883m. This was based on assumptions for the refinancing of £10m of debt repaid in March 2022 which differ to the actual cost of borrowing and the term of the loan resulting in an underspend of £88k.
- 5.17 **Interest Receivable:** The budget estimate for 2022/23 was £82k. The outturn position is dependent on the final capital financing requirement for the year, as well as levels of borrowing and reserves. Since Q1 the capital outturn forecast has been refined and is now reporting an underspend of £5m. The current projections of capital spend, and level of reserves suggest that there will be £71k of interest income for the year, though it is highly likely that this will change by the end of the year.
- 5.18 **Depreciation:** The depreciation charge for the HRA is calculated at the end of the financial year and then transferred to the Major Repairs Reserve (MRR) to be reinvested in the housing stock through financing of the capital programme and/or repay capital debt.

- 5.19 In prior years, elements of the depreciation calculation saw some components of the assets having a useful life over 100 years. For 2021/22 there was a recommended technical accounting update requiring components to have a maximum useful life of 70 years. This was applied to the calculation for 2021/22 resulting in an increase in the dwelling depreciation charge. This financial impact was managed strategically in 2021/22 by reducing the voluntary repayment of debt through the revenue account and replacing this with existing capital receipts to eliminate the financial impact on repaying debt as well as the impact on the revenue account.
- 5.20 Due to timings of the annual budget preparation, this technical accounting update was not applied to the budget estimates for depreciation for 2022/23. As such an early provisional calculation has been undertaken to estimate the depreciation charge for the year. This has resulted in an adverse variance against budget of c£1.4m. This variance results from a combination of the reduction in useful life that may reasonably be applied, in line with accounting standards, as well as the increase in year-end "existing use" valuations, which are driven by the effects of economic conditions impacting upon house price inflation.
- 5.21 This financial impact will again be managed strategically by offsetting this pressure in part against the voluntary repayment of debt through the revenue account and replacing this with existing capital receipts to eliminate the financial impact on repaying debt as well as the impact on the revenue account. This currently leaves a £406k pressure which is expected to change once final year end calculations are undertaken.
- 5.22 **Capital Debt Repayment:** As per the Budget Setting Report for 2022/23 (Full Council Feb 2022) the HRA financial strategy presented a one-off reduction in budget (from £1.821m) of £800k to provide revenue capacity in 2022/23 replacing this with £800k of non-RTB capital receipts. The budget of £1.021m is being used to offset the adverse variance on the depreciation charge as described above.

6 Capital Programme

- 6.1 The HRA current approved Capital Programme is £109.4m. This consists of £14.4m of new schemes approved for 2022/23 plus £95m of previously approved schemes in prior years (see **Appendix A**).
- 6.2 The Council plans to finance this investment through the Major Repairs Reserve, Capital Receipts, Capital Grants, Revenue Funding and Borrowing (see **Appendix B**).
- 6.3 The HRA Capital Programme relates to in-year works and longer-term schemes that will be completed over the next nine years. The current planned profiled spend is summarised in **Appendix C**. The budget has been profiled to reflect the estimated timing of costs for the approved schemes, with £36m profiled to be spent in 2022/23 with the balance of £73m projected forward into future years.
- 6.4 Further information on the three distinct areas of the HRA capital programme and its financial performance to date against this financial year can be found below and in **Appendix D**. The current forecast outturn is £27.373m. The programme will underspend against profiled budget for 2022/23 by £8.973m; £8.700m slipping into subsequent years

and £273k being returned.

- 6.5 **Major Works:** The approved budget of £14.9m is funded by the Major Repairs Reserve and Borrowing and relates to spend on major works to existing dwellings. New schemes approved for 2022/23 total £11m with slippage from the prior year of £3.9m.
- 6.6 The 2022/23 capital programme includes major programmes such as:
- Kitchens
 - Bathrooms
 - Heating improvements
 - Insulation and ventilation
 - Door entry systems
 - External doors
 - Fasciae and soffits
 - Roofing
 - Windows
- 6.7 The current forecast projected spend is £9.9m resulting in an underspend against budget of £5.0m which will fall into subsequent years. Progress on a number of capital work programmes continues on-site; including kitchen and bathroom replacements, roofing, replacement gutters and fasciae, and door entry systems. It should be noted, however, that available contractor resource remains a challenge and accordingly some programmes may not be completed by the end of this financial year.
- 6.8 **Improvements:** The approved budget of £5.2m is funded by the Major Repairs Reserve and relates to spend on improvements to existing dwellings and related assets. New schemes approved for 2022/23 total £3.3m with slippage from the prior year of £1.9m.
- 6.9 The current forecast projected spend is £4.6m resulting in an underspend against budget of £538k of which £200k will fall into subsequent years and £338k proposed to be returned. Progress on fire safety works (replacement fire doors, fire safety flooring and emergency lighting) is progressing well on site, although again it should be noted that available contractor resource remains an ongoing challenge. The budget return relates to the implementation of a new accounting standard (IFRS16 - Leases) being deferred, meaning the finance lease costs for the fleet contract will be accounted for in revenue. The budget return also relates to a forecast underspend on related assets.
- 6.10 **Social Housing Development Programme:** The current approved budget of £89.3m is for the provision of new housing through schemes such as Phases A-E for North Taunton Regeneration (NTWP), Seaward Way, Oxford Inn and Zero Carbon Affordable Homes to increase the Council's housing stock. This will be funded through by RTB Capital Receipts, Capital Grants and Borrowing.
- 6.11 The current Social Housing capital programme for 2022/23 is progressing well with contractors on site at phase A of NTWP and Seaward Way, together developing 101 new homes. Although the contract remains in negotiation for phases B&Ci and Di the service expects to start and complete demolition of NTWP within the financial year and

then commence the building of 51 homes. The Oxford Inn development is due to be considered at November's planning committee. The refurbishment of properties at Oake and NTWP phase E has been delayed due to an unsuccessful procurement exercise. A second procurement exercise is underway.

- 6.12 Members should note that the economic environment is very challenging in relation to the building of homes. SWT's key risks include inflation, especially in relation to the NTWP which spans several phases and is delivered over many years, contractors risk appetite, availability of staff and sub-contractors, insurance premiums and materials shortages are also challenges. In addition, statutory and voluntary requirements in terms of energy efficiency and climate change, highway infrastructure, phosphates and fire prevention are also increasing the time and cost pressures relating to the development of new homes. The Council is delivering affordable housing for rent and therefore does not have the ability to benefit from house price inflation to offset some of the additional costs. The HRA's Medium Term Financial Plan (MTFP) and 30-Year Business Plan is being reviewed to ensure the capital programme expenditure remains affordable.

7 HRA Earmarked Reserves

- 7.1 The HRA Earmarked Reserves at the beginning of 2022/23 totalled £54k (see **Table 3** below). The remaining funds have been earmarked to be spent within the next two years.

Table 3: Earmarked Reserves Balances

Description	Opening Balance 01/04/2022 £000	Transfers £000	Projected Balance 31/3/2023 £000
HRA One Teams	6	0	6
HRA Hinkley	48	0	48
HRA Total	54	0	54

8 HRA General Reserves

- 8.1 The opening HRA general reserves balance as at 1 April 2022 is £3.413m, representing unearmarked reserves held to provide ongoing financial resilience and mitigation for unbudgeted financial risks. This is £1.413m above the minimum recommended reserve level of £2m.
- 8.2 As part of the budget setting proposals to Full Council on 8 February 2022 £200k of current reserves will be used to support the base budget in 2022/23. Further approved (or proposed) allocations to / from general reserves are shown in the table below.

Table 4: HRA Unearmarked Reserves Balance

	Approval	£'000
Balance Brought Forward 1 April 2022		3,413
Budgeted Contribution to support base budget 2022/23	FC - 08/02/22	-200

Current Balance		3,213
Forecast: Housing Policy Review		-30
Forecast: Procurement Support		-140
Forecast: 2022/23 Projected Overspend		-330
Projected Balance 31 March 2023		2,712
Recommended Minimum Balance		2,000
Projected Balance above Minimum Reserve Balance		712

- 8.3 The current outturn position is forecast to be a net overspend of £330k. If the forecast outturn position does not improve the deficit will reduce reserve balances to £2.712m, which is only £712k above the recommended minimum balance of £2m. It is essential that control on spending for the remainder of the year continues to reduce the forecast overspend and maintain adequate reserves. Financial risks are increasing with rising household costs for tenants and rising operating and capital financing costs for the Council. Management must take the necessary steps to control costs and manage risk to ensure financial resilience is maintained. The minimum balance is currently at risk.
- 8.4 If reserves do fall below adequate minimum levels it will be vital that sustainable plans are implemented rapidly during 2023/24 to restore balances to an acceptable level. The emerging financial pressures this year demonstrate the potential scale of financial risks, which will almost certainly be exacerbated during the transition to the unitary authority and in an increasingly volatile operating environment. It is vital that costs are managed within annual income totals to ensure ongoing affordability of services.

9 Risk and Uncertainty

- 9.1 Budgets and forecasts are based on known information and the best estimates of the housing service's future spending and income. Income and expenditure over the 2022/23 financial year are estimated by budget holders and then reported through the budget monitoring process. During this process risks and uncertainties are identified which could impact on the financial projections, but for which the likelihood, and/or amount are uncertain. The Council carries protection against risk and uncertainty in several ways, such as insurances and maintaining reserves. This is a prudent approach and helps to mitigate unforeseen pressures.
- 9.2 The following general risks and uncertainties have been identified:
- 9.3 **Inflation:** The current economic operating environment is placing financial risk on the Council in terms of rising inflation increasing the cost of supplies such as utilities and materials. The Council is seeing price increases on our corporate contracts of c60% on electricity, c80% on gas and c45% on fuel. However further variances may come to light during the year based on levels of usage in these areas. There is also uncertain inflationary pressures on other revenue and capital contracts. Budget Holders have undertaken an impact assessment of the inflationary pressure placed on their services and included best estimates as part of their quarterly review.
- 9.4 **Insurance Premiums:** The Council's insurance policies are due for renewal on 1 August 2022. Premiums are affected by inflation as well as risk, thus high inflation which may

lead to an adverse variance to budget. The renewal falls just eight months ahead of the Unitary Vesting Day, with the risk that an additional premium may be payable for a shorter policy period. Whilst the invoices have now been received these were received too late to be updated within the Q2 forecasts therefore an update will be provided in the Q3 report.

- 9.5 **Bad Debt Provision:** The budgeted bad debt provision of £180k provides financial capacity for any increase in arrears and / or aging debt from one year to the next as well as any in-year write offs. This is a year-end technical accounting adjustment. The key challenges facing the arrears position are the pressures on SWT to maximise rental income in an environment of reduced government support and greater need to utilise internal resources; the 'cost of living crisis' marked by reductions in real income accompanied by increases in fuel costs and food prices; welfare reforms which have made extensive use of sanctions and reductions in eligibility; and the impact of the COVID pandemic. On average 25% of SWT HRA tenants are in arrears at any one time.
- 9.6 The approaches incorporated at SWT to aid the HRA's enforcement of debt and support to tenants include providing direct welfare benefit advice and support; facilitating access to employment and training, support and advice; facilitating access to debt prevention support; and opportunities for flexible rent payment.
- 9.7 **Recruitment:** There are a number of vacancies across the Council and assumptions have been made as to when these vacancies will be filled. The Council is experiencing recruitment issues (as seen country-wide) therefore assumptions and forecasts may change, in addition to higher agency costs to cover roles where permanent recruitment is not successful.
- 9.8 **Capital Programme Forecasts:** Engaging with Contractors at all tiers continues to be very challenging, therefore the risk to the capital programme and forecast costs should be considered. The labour and materials market is still in short supply, with Contractors unable to resource both tenders being issued on projects on site. As such, competition in the market is more limited than it has been for some time.
- 9.9 The cost pressure created by inflation, the liquidation of a number of contractors, logistics challenges and the general acceleration to get projects to site post-lockdown, is causing previous fixed price contracts to be re-appraised within a matter of months of a successful tender. This could move schemes to the limits of viability. The resulting impact of this cost pressure is resulting in Tier One (larger scale) Contractors often turning down tender opportunities unless an inflation clause (requiring the Client to take the risk of inflation), is included in Contracts, whilst smaller Contractors are withdrawing tenders after submission or operating on such a small margin as to put them at risk of failure.
- 9.10 The forecast tender price inflation for 2022 is 8–10% (although some materials are seeing 30-40% increases) and there is limited prediction from the marketplace of the rate of inflation easing until Quarter 3 2024. Whilst due diligence is undertaken on tenderers during the process, both in flight and imminent projects will continue to be at risk whilst resource and materials are scarce and/or increasing in cost at current trajectories.

- 9.11 **Fleet Contract / IFRS16 Leases:** CIPFA has delayed the implementation of IFRS16 however we could have chosen to adopt this early but due to the implementation of the Unitary Council all Somerset Councils have made the decision to delay adoption. Therefore, where SWT had budgeted for the lease as a capital cost these now fall to revenue. The services hope to absorb this cost through in-year underspends and delays in receiving new vehicles.
- 9.12 **Repairs & Maintenance:** Overall this is a very demand led and reactive service based on the needs of the tenants. There are also a number of uncontrollable variables associated with this service such as the weather (e.g. cold winters causing burst pipes, roof leaks, etc), condition of properties when returned (e.g. void refurbishments), consumer demand on minor internal / external repairs (e.g. broken door or fence) and the type of repair work required. Market pricing of materials etc can also be volatile with some unit costs increasing in recent months. As such the levels of demand do not always follow a recognisable trend. We therefore caveat the forecasts in these areas to account for fluctuations.
- 9.13 **Landlord Compliance:** A review of all compliance areas against every property for which Somerset West and Taunton Council has landlord property compliance responsibility has largely been undertaken. The compliance works required following this review are currently being procured and delivered. Whilst additional budget provision has been added previously, new regulatory requirements and assurance process are still emerging, the full extent of the full financial pressure of these remains uncertain.
- 9.14 **Cost of living crisis, Welfare Reform and Universal Credit (UC):** The impacts of these are significant with the number and value of rent accounts in arrears expected to increase considerably. Several mitigations are already in place to help support tenants affected particularly by the rising cost of living such as debt advice, access to discretionary housing payments and an arrears management team with redesigned workflow processes. These issues may require the Council to revise future income projections.
- 9.15 **Responding to increased stock quality standards:** Changes to the Regulator of Social Housing's decent home standard as well as higher thermal efficiency standards which may not be fully supported by additional external grant funding would place an additional burden on HRA resources available for elemental investment in homes. Once the detail is known, we will need to adapt to ensure we continue to maintain stock at the Decent Homes Standard and prepare to meet all the evolving expectations, incorporating the financial impacts into the Business Plan.
- 9.16 **Housing White Paper:** In November 2020 the Government published the Housing White Paper which sets out the changes to how social landlords will operate. It will require several changes to home safety, tenant satisfaction measures, complaints handling, a new inspection regime for social landlords and a strengthened role for the Regulator of Social Housing. Many of the new changes in the white paper have already been mitigated in Housing by strengthening our compliance activities, setting up the new Housing Performance Team to be responsible for communications, performance data

and engagement but this will need to be kept under review and self-assessment has begun.

- 9.17 **Right To Buy (RTB) Receipts:** This is a government policy that enables tenants to purchase their homes at a discount, subject to meeting qualifying criteria. The receipts allowed to be retained by the Council can now fund up to 40% of new social housing costs and must be used within five years of receipt. To date, the Council has successfully fully spent all of their retained 1-4-1 receipts within the require timescales resulting in no returns being made to the Treasury/DLUHC.
- 9.18 Whilst projected spend on new build developments is currently adequate to meet 1-4-1 spend requirements this is dependent on the successful delivery of these social development schemes. Therefore, there is still a risk that the current delivery plan on new build schemes could be delayed and may result in funds being return to DLUHC/Treasury.
- 9.19 **Unitary Council:** The transition to the new Unitary places a significant demand on management and staff. It is currently unknown what the future potential HRA costs will be and whether these costs will need to be funded using revenue or capital budgets. From a capital perspective the business plan does provide some headroom to allow non-right to buy receipts to be used as flexible capital receipts to fund transformation costs. Revenue costs of implementation are not currently budgeted and will place additional pressures on the HRA budget and reserves, thus we will need to review planned expenditure and reserves to make this affordable.
- 9.20 **Forecasting Assumptions:** It is conceivable that, whilst budget holders are optimistic that they will spend all their budget, experience shows an increase in underspends often reported in the last quarter of the financial year. The pace of spending may also reduce as capacity and delivery of priorities is affected by local government structural change.
- 9.21 **Fluctuation in demand for services:** We operate many demand-led services and the levels of demand do not always follow a recognisable trend, which may lead to fluctuations in costs and income compared with current forecasts.
- 9.22 **Year-end Adjustments:** There are certain items that are not determined or finalised until the financial year-end. For example, the final assessment of provisions required for bad debts and final allocations of support service recharges. These can result in potentially significant differences to current forecasts.

10 Links to Corporate Strategy

- 10.1 The financial performance of the Council underpins the delivery of corporate priorities and therefore all Corporate Aims.

11 Unitary Council Financial Implications and S24 Direction Implications

- 11.1 The main considerations within scope of this report is the impact of in-year financial performance on year end reserve balances that will transfer to the new unitary council on 1 April, and potential impact of variances on future budget estimates. Reserves are

currently projected to remain above the minimum requirement. Finance officers and budget managers will feed in ongoing and future risks and implications through the budget setting process for 2023/24.

12 Partnership Implications

- 12.1 A range of HRA services are provided through partnership arrangements such as MIND, citizen's advice, Taunton East Development Trust, North Taunton and Wiveliscombe Area Partnership. The cost of these services is reflected in the Council's financial outturn position for the year.

13 Scrutiny Comments / Recommendations

- 13.1 The report was considered by Community Scrutiny on 30 November 2022. A summary of the comments and recommendations discussed are provided here for the Executive to consider.
- 13.2 The Community Scrutiny Committee requested an update on any potential savings as part of the Q2 report. A verbal update was provided and included specific reference to sections within the report including paragraph 5.10, 5.11, 5.14, 5.17 and 5.18. It was acknowledged that these are mainly technical financial adjustments or updated forecasts, but that the ability to make any immediate savings on essential services is incredibly difficult. The service is working on some operational improvements such as progress towards a new material supply contract to deliver efficiency savings and an updated review of service charges to maximise income. Further clarification questions were raised with regards to paragraph 5.11.
- 13.3 Clarification was provided that the 22.23 projected outturn position (an overspend of £330k) could be funded by general reserves. If this was the case then general reserves would remain above the minimum balance at year and as it moves into the new Somerset Council.
- 13.4 Clarification was provided that SWT budgeted for a 2% pay award. This has now been agreed at £1,925 at every spinal point which is approximately 5.5% as a total cost increase. Therefore, a budget shortfall of c3.5% is reflected in the forecast for staff costs.
- 13.5 A request for trend information on the HRA's arrears position. This will be picked up outside of this finance report.
- 13.6 A question was raised with regards to whether we had any issues with damp in our properties. The Assistant Director of Housing & Communities provided a response that the Housing Service has an established damp and mould group in place with tenant involvement and a number of actions to enhance our approach to quickly responding to this issue as well as proactively identifying and addressing properties where we know this is a problem. Some of this work ties into our retrofit plans as well. We will be responding the DLUHC to provide them our position statement on this as requested from all Housing Providers.

Democratic Path:

- **Community Scrutiny – 30 November 2022**
- **Executive – 21 December 2022**
- **Full Council - No**

Reporting Frequency: Quarterly**List of Appendices**

Appendix A	Approved Capital Budget
Appendix B	Capital Financing of Total Approved Budget
Appendix C	Annual Profiling of Approved Capital Budget
Appendix D	Profiled Capital Budget for 2022/23 Vs Forecast Capital Outturn for 2022/23

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Appendix A: HRA Approved Capital Budget

SWT Capital Programme	Prior Year Slippage	Current Year Approval Feb 2022 Budget Setting for 2022/23	Total Approved Budget	Current year Virements	Current Year Supplements	Current Year Returns	Revised Current Year Approved Capital Budget
Major Works	3,895,968	11,051,000	14,946,968	0	0	0	14,946,968
Fire Safety	1,440,637	2,133,000	3,573,637	0	0	0	3,573,637
Related Assets	0	120,000	120,000	0	0	0	120,000
Exceptional & Extensive	0	350,000	350,000	0	0	0	350,000
Vehicles	65,000	155,000	220,000	0	0	0	220,000
ICT & Transformation	351,405	200,000	551,405	0	0	0	551,405
Aids & Adaptations & DFGs	0	370,000	370,000	0	0	0	370,000
Sub-Total Majors & Improvements	5,753,010	14,379,000	20,132,010	0	0	0	20,132,010
Social Housing Development	89,268,617	0	89,268,617	(0)	0	0	89,268,617
Total HRA	95,021,627	14,379,000	109,400,627	(0)	0	0	109,400,627

Appendix B: HRA Capital Financing of Total Approved Budget

SWT Capital Programme	TOTAL CAPITAL FINANCING	Capital Grants	Right To Buy (RTB) Capital Receipts	Capital Receipts	HRA Revenue Contribution	Major Repairs Reserve	Other Earmarked Reserves	Borrowing
Major Works	14,946,968	0	0	0	0	10,681,958	0	4,265,009
Fire Safety	3,573,637	0	0	0	0	3,573,637	0	0
Related Assets	120,000	0	0	0	0	120,000	0	0
Exceptional & Extensive	350,000	0	0	0	0	350,000	0	0
Vehicles	220,000	0	0	0	0	220,000	0	0
ICT & Transformation	551,405	0	0	200,000	0	351,405	0	0
Aids & Adaptations & DFGs	370,000	0	0	0	0	370,000	0	0
Sub-Total Majors & Improvements	20,132,010	0	0	200,000	0	15,667,000	0	4,265,009
Social Housing Development	89,268,617	402,229	16,303,315	0	0	0	0	72,563,072
Total HRA	109,400,627	402,229	16,303,315	200,000	0	15,667,000	0	76,828,082

Appendix C: HRA Annual Profiling of Approved Capital Budget

SWT Capital Programme	Total Approved Budget	Planned Capex 2022/23	Planned Capex 2023/24	Planned Capex 2024/25	Planned Capex 2025/26	Planned Capex 2026/27	Planned Capex 2027/28	Planned Capex 2028/29	Planned Capex 2029/30	Planned Capex 2030/31
Major Works	14,946,968	14,946,968	0	0	0	0	0	0	0	0
Fire Safety	3,573,637	3,573,637	0	0	0	0	0	0	0	0
Related Assets	120,000	120,000	0	0	0	0	0	0	0	0
Exceptional & Extensive	350,000	350,000	0	0	0	0	0	0	0	0
Vehicles	220,000	220,000	0	0	0	0	0	0	0	0
ICT & Transformation	551,405	551,405	0	0	0	0	0	0	0	0
Aids & Adaptations & DFGs	370,000	370,000	0	0	0	0	0	0	0	0
Sub-Total Majors & Improvements	20,132,010	20,132,010	0	0	0	0	0	0	0	0
Social Housing Development	89,268,617	16,214,803	16,421,411	16,626,272	12,694,184	4,271,334	6,800,000	7,793,039	6,950,000	1,497,575
Total HRA	109,400,627	36,346,812	16,421,411	16,626,272	12,694,184	4,271,334	6,800,000	7,793,039	6,950,000	1,497,575

Appendix D: HRA Profiled Capital Budget for 2022/23 Vs Forecast Capital Outturn for 2022/23

SWT Capital Programme	Profiled Capex Budget 2022/23	Expenditure YTD	Forecast Outturn 2022/23	Variance; - underspend + overspend	- Slippage c/f	In Year - Underspend + Overspend
Major Works	14,946,968	1,760,697	9,904,607	(5,042,361)	(5,042,361)	0
Fire Safety	3,573,637	1,063,579	3,573,637	(0)	(0)	0
Related Assets	120,000	2,075	2,075	(117,925)	0	(117,925)
Exceptional & Extensive	350,000	12,842	350,000	0	0	0
Vehicles	220,000	780	0	(220,000)	0	(220,000)
ICT & Transformation	551,405	120,018	351,405	(200,000)	(200,000)	0
Aids & Adaptations & DFGs	370,000	92,190	370,000	(0)	(0)	0
Sub-Total Majors & Improvements	20,132,010	3,052,181	14,551,724	(5,580,286)	(5,242,361)	(337,925)
Social Housing Development	16,214,803	2,874,959	12,821,695	(3,393,108)	(3,458,303)	65,196
Total HRA	36,346,812	5,927,139	27,373,419	(8,973,393)	(8,700,664)	(272,729)

Report Number: SWT 167/22

Somerset West and Taunton Council

Executive – 21 December 2022

2022/23 General Fund Financial Monitoring as at Quarter 2 (30 September 2022)

This matter is the responsibility of Executive Councillor Benet Allen, Portfolio Holder for Communication and Corporate Resources

Report Author: Kerry Prisco, Management Accounting and Reporting Lead

1 Executive Summary

1.1 This report provides an update on the projected outturn financial position of the Council's General Fund (GF) for the financial year 2022/23 (as at 30 September 2022 forecast).

1.2 The headline estimates for **revenue costs** are:

Revenue Budget	£0.219m forecast underspend	Green
General Reserves	£8m forecast balance = favourable compared to £2.4m minimum requirement	Green
Earmarked Reserves	£28m at start of year, forecast to reduce to £12m by year end as funds are used as planned.	Green

1.3 It is well reported that the economic situation is challenging with the cost of living crisis, high inflation, and rising interest rates. These factors will hit our communities and businesses, and the Council is also not immune as seen in the latest forecasts.

1.4 The Q1 forecast outturn position reported an overspend of £326k. The Senior Management Team have since undertaken a thorough and in-depth review of all budgets, updated projections based on mid-year information, requested services to manage inflationary pressures within services where possible (e.g. pay award, utilities and material costs) and driven a focus on essential spend only where possible in order to bring the position back to budget. There have also been some contractual delays on delivering capital schemes pushing spend into future years and a need increase reserve balances this year to provide budget flexibility and financial resilience in 2023/24 on the face of significant financial pressures.

1.5 The updated projected outturn position is reporting an underspend of £219k. However, it is important to note that this is mid-year forecast for the year with 6 months remaining until year end and whilst management will control the overall position to remain within budget the final outturn position may still present further underspends or variances to budget. This will be carefully monitored with updates reported to Members on a quarterly

basis. The level of General Reserves provides significant resilience to mitigate the risk of overspend if required.

- 1.6 The current total approved **Capital Budget** is £64.085m and relates to the Capital Programme for continuing and new schemes approved for 2022/23. The budget is profiled with estimated spend totalling £25.465m in this financial year and £38.620m in later years. A net underspend of £10.414m is currently projected against the total profiled capital budget for 2022/23 of which £9.148m is slippage into future years and £1.266m is actual underspend against the total programme. Whilst there is an ongoing inflation risk to works not yet under contract, budget managers are not yet forecasting significant pressures for General Fund schemes – this will be kept under review throughout the year.

2 Recommendations

- 2.1 Executive to note the Council's forecast financial performance and projected reserves position for 2022/23 financial year as of 30 September 2022.
- 2.2 Executive to approve the transfer of £1.294m of revenue funds previously planned to finance the capital programme in 2022/23 to be returned to General Reserves reflecting updated capital financing plans.
- 2.3 Executive to approve the transfer of £500k Treasury Management surpluses to general reserves.
- 2.4 Executive to approve the transfer of £440k to the Somerset Waste Partnership Earmarked Reserve, and delegate authority to the S151 Officer to adjust the amount transferred at year end based on final outturn for the SWP surplus.
- 2.5 Executive to approve a virement between funds for the Covid Additional Relief Fund (CARF) scheme that was not implemented.

3 Risk Assessment

- 3.1 Financial forecasts are based on known information and projections based on assumptions. As such any forecast carries an element of risk. The current forecasts included in this report are considered reasonable given the extra element of risk around inflation being experienced in the current economic operating environment and based on experience it is feasible the year end position could change. It is common for underspends to emerge during the year, reflecting an optimism bias within previous forecasting. There may also be matters beyond the Council's control that affect the final outturn position.
- 3.2 Salient in year budget risks are summarised in section 9 in this report. The Council manages financial risk in several ways including setting prudent budgets, carrying out appropriate monitoring and control of spend, operating robust financial procedures, and so on. The Council also holds both general and earmarked reserves which include contingencies to manage budget risk.

4 Background and Full details of the Report

- 4.1 This report provides the Council's General Fund forecast end of year financial position in March 2022 for revenue and capital expenditure, as at 30 September 2022.
- 4.2 The regular monitoring of financial information is a key element in the Council's Performance Management Framework. Crucially it enables remedial action to be taken in response to significant budget variances, some of which may be unavoidable. It also provides the opportunity to assess any consequent impact on reserves and the Council's Medium Term Financial Plan.
- 4.3 Members will be aware from previous experience that the position can change between 'in-year' projections and the final outturn position, mainly due to demand-led service costs and income levels and where actual costs and income can vary from initial estimates and assumptions. The budget monitoring process involves a detailed review of the more volatile budgets and a proportionate review of low risk/low volatility budget areas. Budget Holders, with support and advice from their finance business partners, update their forecasts monthly based on currently available information and knowledge of service requirements for the remainder of the year. As with any forecast there is always a risk that some unforeseen changes could influence the position at the year-end, and several risks and uncertainties are highlighted within this report. However, the following forecast is reasonable based on current information.

5 General Fund Revenue Budget 2022/23 Forecast Outturn

- 5.1 The Council's General Fund is currently forecasting an overall net underspend of £219k (1.3% of £17.018m Net Budget). The main reasons for this are shown in tables 1 to 6 below.
- 5.2 The forecast remains volatile and subject to change. It includes a significant number of assumptions about demand for services and the timing of planned spend to meet service objectives. Rising inflation and interest rates adds to uncertainty and risk. There has been an immediate impact on service costs and income, for example a rise in the cost of materials, gas, electric and fuel.
- 5.3 As previously reported, despite the reported pressures and uncertainties summarised in this report, the Council is currently resilient to estimated losses this year.
- 5.4 The following table presents a summary of the revenue budget and current forecast outturn for the year by directorate.

Table 1: General Fund Revenue Outturn Summary 2022/23

	Original Budget	Approved Changes	Current Budget	Outturn Forecast	Variance	
	£'000	£'000	£'000	£'000	£'000	%
Development and Place	4,044	90	4,134	4,175	41	1.0%
External Operations & Climate Change	10,037	640	10,678	9,764	-914	-8.6%
Housing & Communities	3,234	0	3,234	3,333	99	3.1%

	Original Budget £'000	Approved Changes £'000	Current Budget £'000	Outturn Forecast £'000	Variance	
					£'000	%
Internal Operations	9,750	194	9,944	10,561	617	6.2%
Senior Management	594	-129	464	457	-7	-1.5%
Local Government Reorganisation	1,375	0	1,375	1,375	0	0.0%
Net Cost of Services	29,034	795	29,829	29,665	-163	-0.5%
COVID General Grants	0	0	0	0	0	0.0%
Investment Properties	-4,490	0	-4,490	-4,490	0	0.0%
Interest and Investment Income	-516	0	-516	-1,222	-706	136.7%
Expected Credit Losses	0	0	0	0	0	0.0%
Transfers to Earmarked Reserves	-5,387	-1,246	-6,634	-6,494	140	-2.1%
Transfers from General Reserves	-1,375	12	-1,363	492	1,855	-136.1%
Capital and Other Adjustments	-248	450	202	-1,142	-1,344	-666.5%
Net Budget	17,018	10	17,028	16,809	-219	-1.3%
Funding	-17,018	-10	-17,028	-17,028	0	0.0%
Variance	0	0	0	-219	-219	-1.3%

5.5 A summary of the forecast outturn position is summarised per directorate below.

Development & Place:

5.6 The Development and Place directorate has a current net expenditure budget of £4.134m in 2022/23, which plans to deliver a range of services and projects including:

- Strategy, policy development including the Local Plan and implementation of infrastructure projects.
- Planning services including Development Management pre-application advice, applications processing and enforcement, and implementation of interim phosphate measures
- Economic development, culture & arts
- Town centre regeneration
- Heritage at Risk projects
- Major Capital Projects for regeneration purposes and where possible to generate a return to the Council
- Commercial investment (investment properties budget is reported 'below the line')

5.7 The directorate is currently forecasting a net overspend of £41k for the year, largely derived from the use of agency staff in Development Management due to the difficulty in recruiting to key roles plus the impact of the pay rise. This has been offset in part by 2021/22 deferred income on planning applications that have now been determined.

5.8 The Environment & Leisure Improvement Fund (ELIF) initiative is currently being delivered, and of the £600k approved budget:

- a. £130k has been used to resurface the Vivary Park pathways and areas around the water feature and fountain, and as a contribution to the Coal Orchard public realm.
- b. £247k is committed to numerous town centre projects including the Changing Places facility on Tower Street, Crescent Car Park public realm works and the Minehead Town Council maintenance programme.
- c. £223k has been allocated to various initiatives including dredging Vivary Park pond and Taunton Town centre highways and public realm works.

5.9 The current inflationary pressure does not have any significant impact on the directorate as there are few premises or transport related costs.

5.10 The directorate's budget volatility and forecast has been managed via robust contract and financial / budget management by budget holders.

Table 2: Development & Place Forecast Variances

Department Notes	Q1 Variance £'000	Q2 Variance £'000
Development Management/Planning: The current variance is driven by the expectation that staff vacancies will be covered by agency staff costing c£150k for the remainder of the year, as well as additional supplementary agency support c£63k, illness cover of £22k and pay increase of £36k. In addition, there are also unbudgeted IT support costs relating to the Acolaid infrastructure of £9k and £58k estimated for legal fees. This has been partially offset by contributions from reserves and additional income of £73k. The Q2 current year fee income rate is tracking to budget and has been forecast as such. A carried forward of the planning fee income related to undetermined applications from 21/22 is in place. Of this carry forward £242k has been determined and released to income this year. There is a further amount of £133k that will be released to income upon those applications being determined; this is not included in the forecast as it cannot be guaranteed at this stage.	166	28
Other Minor Variances	-3	13
Total	163	41

External Operations and Climate Change:

5.11 The External Operations and Climate Change directorate has a current net expenditure budget of £10.678m in 2022/23, which plans to deliver a range of services and projects including:

- Climate change strategy development and Carbon Neutrality and Climate Resilience (CNCR) action plan implementation
- Asset and property management for general fund assets
- Regulatory services such as environmental health and licensing
- Service resilience and emergency planning
- Open spaces and street scene

- Client for major contracts including waste, building control, leisure, street cleansing
- Harbours, coastal protection, and flood management
- Cemeteries and crematorium
- Car parks

5.12 The directorate is currently forecasting a net underspend of £914k for the year. This underspend is largely derived from Somerset Waste Partnership savings, and underspend against the Climate Change budget, increased income across both Assets and Bereavement and an overall active management of costs.

5.13 Somerset Waste Partnership: The council pays a fixed amount to Somerset County Council each year. Contract savings has led to a forecast surplus of £440k, meaning there will be an underspend against budget. The Executive is requested to endorse a transfer to earmarked reserves for the forecast surplus of £440k.

5.14 Car Parking: On the 21st of September 2022 the Executive approved a budget virement of £302,040 to further reduce the car parking income budget. This was in line with the forecast reduction and change in usage that the council is seeing across its car parks following COVID-19. The current forecast position is a minor variance against the revised income budget and therefore not included in table 3 below.

5.15 Rising inflation is placing financial risk on the council as it sees an increase in the cost of supplies such as utilities and materials. Across the Directorate it is forecast that electricity will be c£140k above budget and gas c£40k. The Directorate has reviewed the pressure placed on its services and is currently mitigating this through proactive budget management.

5.16 **Table 3: External Operations and Climate Change Forecast Variances**

Department Notes	Q1 Variance £'000	Q2 Variance £'000
<p>Major Contracts: Major Contracts includes the following areas: Leisure, Waste, Building Control, Street Cleansing and Fleet Management.</p> <p>The current variance mainly includes (a) £440k for the Somerset Waste Partnership underspend (see paragraph 5.13 above), (b) a £60k contingency budget was allocated for the Environment Enforcement Litter Scheme, this budget is currently not required as the income from the Fixed Penalty Notices is offsetting costs. It has therefore been agreed to transfer £45k back to General Fund Reserves, and (c) the capitalisation of salary costs of the Project Officer for the Car Park Improvement Scheme has created an underspend of £45k.</p>	-125	-507
<p>Street Scene/Open Spaces: A 2021/22 carry forward budget of £100k was approved for the maintenance works to Vivary Park</p>	6	-61

Bandstand. This was an estimated figure and actual costs have come in £50k less than budget.		
<p>Asset Management: There is a forecast increase in income of £287k. This is owing to (a) new lettings which were unknown at budget setting time £70k, (b) delayed vacation of tenants £75k, (c) transfer of units at Coal Orchard £90k, and (d) proactive recovery of proportionate costs, £42k.</p> <p>At budget setting time it was assumed that the income and expenditure would balance out for Coal Orchard, however due to the delay in site handover the void costs are forecast to be higher than anticipated, c£160k. Assumptions have been made on the timing of tenant occupancy, therefore this forecast overspend could change.</p> <p>Forecast increase in electricity costs across all buildings, £85k. A budget of £50k was identified for bad debt provision, it is predicted that this is no longer required.</p> <p>Active management of budgets and costs has led to an overall saving of £65k across various budget lines.</p> <p>Allocation of salary costs to Commercial Investment Properties £39k.</p>	-121	-195
<p>Climate Change: There will be no budget carry forwards into next financial year. This forecast underspend represents budget which was set aside to meet future commitments to key Climate Change projects, which have now been captured as a budget growth as part of the budget setting process for the new Unitary Council.</p>	0	-150
<p>Private Sector Housing: The third-party data used at budget setting time to identify potentially unlicensed Housing Multiple Occupation properties projected too high a number and therefore artificially inflating the income target.</p>	0	80
<p>Bereavement Services: This is a demand led service and the current forecast position on income is c£100k above budget. This is part offset by a forecast increase in utility costs, electric £16k and gas £24k. There is also an £11k forecast underspend on maintenance costs.</p>	7	-73
Other Minor Variances	31	-8
Total	-202	-914

Housing & Communities:

5.17 The Housing and Communities directorate has a current net expenditure budget of £3.234m in 2022/23, which plans to deliver a range of services and projects including:

- Housing options include accommodation and support for homelessness and rough sleepers
- Housing strategy development
- Housing enabling, including affordable and rural housing
- Community resilience services such as CCTV, public safety, and community engagement

- The service also manages council housing and supported housing services through the Housing Revenue Account which is accounted for separately.

5.18 The directorate is currently reporting a forecast net overspend of £99k.

5.19 We are expecting some volatility particularly in our homelessness service as a legacy of the COVID restrictions, the cost of living crisis and in the knowledge that patterns of substantial community hardship are already starting to become apparent. We have some ability to manage the financial impacts of this by using earmarked reserves of specific Government funding, however we will need to keep this under close review. Aside from this, there is increasing demand from the Homes for Ukraine scheme with some placements now ending as well as expected relocation of refugees (largely from Syria and Afghanistan) under the government's Resettlement Scheme for Refugees. This is all within the context of substantial pressure on our resources to deliver our ambitions for single homeless customers and our need to decant the Canonsgrove facility, which makes financial certainty challenging.

5.20 The inflationary pressure within this Directorate is minimal and will mainly relate to the cost of materials, contracts and staffing costs to deliver services within the Homelessness function.

Table 4: Housing & Communities Forecast Variances

Department Notes	Q1 Variance £'000	Q2 Variance £'000
Community Resilience: This underspend is attributable to a number of staffing changes, including a secondment that was not backfilled.	-56	-23
Homelessness: The Homelessness Service is experiencing high levels of demand this year with B&B costs exceeding budget. The service is also facing recruitment and retention pressures that are driving up staffing costs. Furthermore there are costs associated with the return of Canonsgrove and the final decant of tenants to alternative accommodation. Despite receiving government funding the service is predicting an overspend which it is currently able to mitigate through existing levels of earmarked reserves (see Table 6).	0	239
Maintenance: The Corporate Property Team has been relocated to the Repairs & Maintenance Trade Team, filling vacant posts within the HRA.	0	-112
Other Minor Variances	8	-5
Total	-48	99

Internal Operations:

- 5.21 The Internal Operations directorate has a current net expenditure budget of £9.944m in 2022/23. This delivers a range of support services and corporate projects, as well as budgets for a range of centrally held corporate costs and corporate savings targets. The main services and projects delivered within this directorate include:
- Customer Services including call-handling, front of house, Deane Helpline and Emergency Response Team
 - Council Tax and Business Rates administration and income collection services
 - Housing benefits and local council tax support administration
 - Administration of COVID and other hardship grant schemes
 - Income control and collection from customers ('Accounts Receivable')
 - Payments to suppliers ('Accounts Payable')
 - Corporate strategy, corporate performance, and business intelligence
 - Operational support and digital mailroom
 - Finance and procurement services
 - Corporate Services including Communications and Engagement, People Management including HR and Payroll, Corporate Health and Safety, ICT services
 - Corporate governance including Committee administration and Elections services
 - Internal Change programmes and projects
- 5.22 The directorate is currently forecasting a net overspend against budget of £617k for the year. The figures are somewhat distorted by larger variances against two 'corporate' items:- A £320k adjustment following the completion of a thorough review of the non-staff related cost apportionments between the General Fund and Housing Revenue Account (HRA), to ensure this reflects the up to date position and reasonable assumptions around the relative use of resources. A £200k variance regarding the operational cashable savings target applicable to the Service Improvement and Efficiency Programme which is not now likely to be achieved.
- 5.23 The remaining £97k projected net overspend relates to a range of variances across the Directorate's main operational areas. Cost pressures and investment in service priorities such as change management, health and safety, customer services and Deane Helpline as well as pay award costs are offset to a degree by staff vacancies, control of costs and managed savings for example in publicity and promotion costs.
- 5.24 Within Internal Operations there are not many utility or transport costs and hence the main impact of inflation is within IT. Within the current forecast, where contract figures are unknown, we have estimated the increase at 6%. However, some of the known increases to date have been 7 – 8.5%. If this was the case for all currently unknown contract figures, then there would be a further cost pressure of £10-15k. In addition, the pay award adds to inflationary cost pressures exceeding original budget estimates, with an average cost of 5.6% versus 2% allowed within the budget.
- 5.25 Although not reported within the Internal Operations service budgets, the service is responsible for treasury management operations. This is performing very well against

budget as highlighted later in this report, which helps to mitigate the net overspend reported for Internal Operations service costs.

Table 5: Internal Operations Forecast Variances

Department Notes	Q1 Variance £'000	Q2 Variance £'000
Comms and Engagement: This is savings in staff costs through a vacancy and not backfilling a maternity leave, plus managed in year savings primarily reducing costs of publicity and promotions identified in quarter 2.	-15	-70
Governance: This is due to vacant posts and the SHAPE legal services contract costing less than budgeted. There are less costs than anticipated for Community Governance Review (CGR) due to these costs being absorbed in other budgets.	-2	-108
Internal Change: Forecast variance mainly due to Service Efficiency and Improvement Programme (SEIP) and similar project management costs to December. This programme has delivered many improvements and non-cashable efficiencies despite the impact of LGR on capacity and available focus areas. Funding options are being explored to mitigate this cost. Since Q1 there has been increased cost of the pay award, a Health and Safety project and Data Protection Services.	78	175
Benefits: £73k of this underspend results from receiving a greater amount of administration grant, Verify Earnings and Pensions (VEP) and new burdens grant than budgeted for. We may need to utilise some of this budget underspend later in the year to ensure we have sufficient resourcing to deliver to the required DWP standards.	-100	-86
Customer Contact: Staff costs are projected to exceed budget due to the pay award. Two supernumerary posts have been agreed with SMT above establishments providing resilience to a higher rate of staff turnover within this service. Most of the cost will be covered within the existing budget with any remainder managed within the wider Internal Operations budget.	4	43
Visitor Centre: Electricity prices are rising quickly, the visitor centre also pays for the electricity used by Tone FM. We've estimated our spend but this could be higher due to the expected increase in October. Income from sales remain unpredictable. Both purchases and sales are projected around 50% of budget which broadly offsets in the forecast outturn, and whilst below budget represents doubling of last year's sales performance. £10k relates to an income budget duplication where the income and a corresponding budget for this amount is shown under another cost centre.	31	28
Deane Helpline: £58k of the projected overspend relates to the pay award exceeding budget estimates. Some of the additional cost of allowances for one part of the team together with all the additional payments for holiday pay were agreed after budget setting and therefore exceeds the budget for 22/23. The cost of overtime to cover	81	140

Department Notes	Q1 Variance £'000	Q2 Variance £'000
holiday and other absences also adds to cost pressures. The service is recruiting additional relief staff to minimise overtime costs in the future.		
Finance: Centrally funded pension costs is projected £30k below budget and overall staff savings are projected to be £39k after absorbing higher pay award costs.	-69	-65
HRA Recharges: A thorough review of the non-staff related cost apportionments between the General Fund and Housing Revenue Account (HRA) has been mostly completed, to ensure this reflects the up to date position and reasonable assumptions around the relative use of resources. A couple of residual elements will be finalised and reported in Q3 but this reflects the current best estimates.	0	320
Other Minor Variances	22	40
Total	30	417

5.26 Reported within Internal Operations are corporate savings budgets regarding staff vacancies and service efficiencies. The vacancy savings budget of £100k has been fully dispersed to services in the first half of the year. Additional vacancy savings are reflected within individual service cost projections.

Savings Targets

Department Notes	Q1 Variance £'000	Q2 Variance £'000
Efficiency Savings: Whilst significant efficiencies are being delivered the budget requires cashable savings to be realised, which are currently below target. This programme has delivered many improvements and non-cashable efficiencies despite the impact of LGR on capacity and available focus areas. It is now anticipated that cashable savings are unlikely to be delivered this year, with future efficiency and transformation being a key part of the LGR programme.	200	200
Total	200	200

Senior Management Team (SMT)

5.27 The SMT has a current net expenditure budget of £464k in 2022/23. This budget line holds the costs of the senior leadership team (Chief Executive and Directors) plus a small contingency to support strategic priorities arising in-year. A very minor variance to budget is forecast at the end of Quarter 2.

Local Government Reorganisation (LGR)

5.28 This one-off budget of £1.375m provides for SWTC costs related to LGR in Somerset. It includes £1m for LGR Implementation (£912k budgeted contribution plus £88k contingency) plus £375k to provide for additional capacity to support transition costs

incurred by SWTC because of the programme. This is currently forecasting to budget. At this stage it is considered unlikely that SWT will be asked to contribute more than £912k, therefore the Director of Internal Operations and S151 Officer propose to allocate the £88k contingency to provide budget capacity for set up costs incurred this year related to a new town council for Taunton. This removes the need to allocate funds from General Reserves for this purpose, which Council has agreed in principle.

Pay Award 2022

5.29 The 2022/23 approved budget assumed a 2% pay award. The Pay Award has now been agreed at £1925 per scale point. This assumption has been included within the forecast outturn position provided by services (reported above).

Other Costs, Income and Reserve Transfers

5.30 As well as budgets allocated to directorates for the delivery of services, several budgets are reported 'below the line' as centrally held/corporate items. This area includes items such as:

- Investment properties net income
- Other interest costs and income
- Accounting provisions for Expected Credit Losses (commonly known as bad debt provisions)
- Transfers to and from general and earmarked revenue reserves
- Capital accounting adjustments including capital debt repayment, revenue financing of capital costs, and transfers to and from capital reserves

5.31 A net underspend / income surplus of £55k is currently being forecast for the year, predominantly due to a more favourable interest payable and investment income position.

5.32 Investment Properties are forecasting a shortfall in income due to voids £103k, which has largely been offset by a reduced interest cost with the balance of £17k to be made up from the risk reserve. On the Legacy Investment properties, repair and maintenance costs are forecast to be £30k higher than budget, and this will be funded from the risk reserve.

Table 6: Forecast Variances

Department Notes	Q1 Variance £'000	Q2 Variance £'000
<p>Interest Payable and Investment Income: Interest Payable - In a complex and volatile economic environment, the risk of interest cost variations has continued to be highlighted to Members. A blend of taking well-timed early opportunities for new borrowing during 2021/22, utilising internal balances in lieu of external borrowing and the scaling down of the General Fund capital programme have, together, generated a positive variance to</p>	-384	-706

<p>the budget estimate. The nature of borrowing taken (i.e. fixed term loans) should substantially reduce the risk of further variations in year.</p> <p>Interest Receivable - The Council holds a portfolio of investments that comprise a combination of contingency balances (reserves) cashflow (e.g. funding from grants and contributions received in advance) and liquidity balances (to provide for immediate payments as they become due). A combination of market interest rate increases and good performance in the Council's investment portfolio have generated a positive variance to the budget estimate. With continued economic volatility, further variations should be expected as the year progresses.</p> <p>The Executive are requested to approve the transfer of £500k of these Treasury Management surpluses to general reserves.</p>		
<p>Transfers to and from Earmarked Reserves: This variance relates to (a) £60k of released earmarked reserves in Q2, (b) £440k transferred to the Somerset Waste Partnership reserve, and (c) the use of £239k of Homelessness reserves to offset their forecast overspend.</p>	0	140
<p>Transfers to and from General Reserves: This variance relates to (a) £60k of released earmarked reserves in Q2, (b) £500k of Treasury Management surpluses proposed to be transferred to general reserves, and (c) £1.294m of revenue funded capital financing released to general reserves.</p>	0	1,855
<p>Capital and Other Adjustments: In order to increase reserve balances this year to provide budget flexibility and financial resilience in 2023/24 on the face of significant financial pressures, and in light of the reduced capital programme, £1.294m of revenue funded capital financing is being proposed to be released and transferred to general reserves. The remaining £50k is revenue funded capital financing not required for Closed Churchyards capital scheme.</p>	0	-1,344
Total	-384	-55

General Reserves

- 5.33 The opening general reserves balance as at 1 April 2022 is £7.592m, representing unearmarked reserves held to provide ongoing financial resilience and mitigation for unbudgeted financial risks.
- 5.34 As part of the budget setting proposals to Full Council on 24 February 2022 and the Financial Strategy agreed by the Executive in July 2021, £1.375m of current reserves will be used to fund a contribution towards the Local Government Reorganisation (LGR) costs. Further approved (or proposed) allocations to / from general reserves are shown

in the table below.

Table 7: General Reserve Balance

	Approval	£000
Balance Brought Forward 1 April 2022		7,592
2022/23 Original Budget Transfers from Reserve	Council – 24/02/2022	-1,375
Current Balance		6,217
Transfer to Coal Orchard Warranty Earmarked Reserve	Council – 05/07/2022	-185
Released Earmarked Reserves in Q1	S151 / SMT – 10/08/22	197
Release Surplus Contingency for Litter Enforcement	S151 – 27/10/22	45
Balance After In-Year Approvals		6,274
Proposed Earmarked Reserves released in Q2		61
Proposed transfer of Treasury Management surpluses to reserves		500
Proposed transfer of RCCO surplus to reserves		1,294
Forecast – 2022/23 Projected Underspend as at Q2		219
Projected Balance 31 March 2023		8,348
Recommended Minimum Balance		2,400
Projected Balance above recommended minimum		5,948

5.35 As well as managing the adequate level of reserves to mitigate financial risks for SWT, the S151 Officer has discussed the reserves strategy with SMT and the other S151 officers in Somerset in the context of financial strategy and MTFP for the new Somerset Council. It is prudent to maintain and ideally increase reserve balances this year to provide budget flexibility and financial resilience in 2023/24 on the face of significant financial pressures.

5.36 In support of this the Executive is asked to endorse the following measures which are reflected in the forecasts above:

- The transfer of surplus earmarked reserves to general reserves (see below)
- The release of revenue funds previously planned to finance the capital programme in 2022/23, which can be replaced by borrowing with marginal impact on the overall level of borrowing due to underspends within the capital programme.
- The transfer of Treasury Management surpluses to general reserves.

Earmarked Reserves

5.37 The General Fund Earmarked Reserves brought forward balance for 2022/23 is £28m. This balance is forecast to reduce by c£16m this year as funds are utilised to offset the Business Rates Collection Fund Deficit; for capital financing purposes; and funding of service costs and grant-funded activities. A remaining balance at year end of c£12m is currently projected of which c£9m mitigates financial risks related to business rates funding and property investments.

5.38 The original net budgeted/approved and projected transfers from earmarked reserves in 2022/23 is £12.929m.

5.39 Following reviews during Q2 the following earmarked reserve balances are proposed to be released and recommended to be transferred to general reserves. This is reflected in the Q2 forecast (Table 1) and the Forecast Transfers column in Table 8 below.

Reserve	Amount £000
Council Tax Income Guarantee (TIG) grant	34
Preventing repossessions grant	27
Total	61

5.40 The following table details those reserves with balances greater than £500,000.

Table 8: General Fund Earmarked Reserves

	<i>Info: Budgeted Transfers £000</i>	Balance 1 April 2022 £000	Transfers To Date £000	Forecast Transfers £000	Balance 31 March 2023 £000
Business Rates Holiday S31 Grant	-6,645	5,811	-5,811	0	0
Business Rates Volatility	-718	5,353	-1,552	-1,200	2,601
Investment Risk	0	3,151	0	992	4,143
Business Rates Losses S31 Grant	-897	2,499	-897	0	1,602
Investment Financing Fund	-2,000	2,000	-2,000	0	0
Capital Funding	-738	1,413	-738	-76	599
Sub-Total Risk Reserves	-10,998	20,227	-10,998	-284	8,945
General Carry Forwards	-900	2,075	-2,075	0	0
Garden Town Fund	-213	978	-213	-524	241
Economic Development Initiatives	-372	643	-372	-271	0
Homelessness Prevention	-113	564	-113	-60	391
Asset Management	-280	519	-280	-239	0
Investment Assets Sinking Fund	0	500	0	200	700
Other Smaller Balances	-53	2,484	-152	-808	1,524
Sub-Total Other Reserves	-1,931	7,763	-3,205	-1,702	2,856
Total	-12,929	27,990	-14,203	-1,986	11,801

5.41 Earmarked reserves are set aside for a specific purpose and are reviewed on a regular basis. As reported in the Q1 report, £197k of earmarked reserves have been released and returned to General Reserves as they were no longer required for their original purpose. In addition, in Q1 the Executive agreed to transfer £1.2m from the Business Rates Volatility reserve, with £1m to the Investment Risk Reserve and £200k to the Investment Assets Sinking Fund.

6 Business Rates

6.1 The Executive is requested to approve a virement, which is purely presentational in nature, to adjust for the Covid Additional Relief Fund (CARF) scheme that was anticipated at budget setting but subsequently was not implemented.

	Original Budget	Virement	Revised Budget
M0032 CARF S31 Grant	(1,162,050)	1,162,050	0
M0030 Business Rates Holiday Grant	(5,482,790)	(328,690)	(5,811,480)
M0025 Transfers To / From EMR*	(5,378,050)	(833,360)	(6,211,410)

*Note: other virements may have taken place during the year of a different nature affecting the revised budget on this account.

7 Debt Write Off

7.1 As per the Financial Procedure Rules, any write off per debtor greater than £25,000 in any year will be reported to the Executive for information. During Q2 there was one individual customer where individual debts greater than £25,000 were written off (please see **confidential Appendix F**).

8 General Fund (GF) Capital Programme

8.1 The current Capital Programme Budget is £64.085m in total (see Appendix A). This consists of £60.977m of previously approved schemes from prior years and £1.715m of new schemes approved in February 2022, as well as in year approvals of £1.521m of supplementary budgets and £128k of budget returns.

8.2 In-year supplementary budgets include:

(a) Development & Place: £775k for Coal Orchard additional costs approved by Full Council on 5th July 2022.

(b) External Operations: £40k for Litter Bins, £70k for Vivary Park Footpaths, £75k for Wellington Leisure Centre Air Handling units and £120k for Taunton Green Pavillion have all been approved by the Deputy Chief Executive & Director Place and Climate Change and the Assistant Director - Finance (S151 Officer). £262,280 for Blue Anchor Coast Protection, approved by Full Council on 5 July 2022.

(c) S106 funded projects that have commenced.

8.3 In-year budget returns include £128k in Internal Operations mainly with respect to change projects where there has been an underspend.

8.4 The current high inflation rate creates an inherent risk within the ongoing projects and those for which the budgets have been approved but have not yet commenced.

8.5 The Council plans to finance this investment through Capital Receipts, Capital Grants, Revenue Funding and Borrowing (see **Appendix B**).

- 8.6 The General Fund Capital Budget relates to schemes which are estimated to be completed over the next four years. The current annual profiling of approved budget is summarised in **Appendix C**.
- 8.7 Financial performance to date against this profiled spend for this financial year can be found in **Appendix D**. Overall, the Council is currently forecasting a capital outturn of £15.015m, with carry forwards of £9.148m and a net underspend of £1.266m against profiled budget for 2022/23. The reasons for the forecast carry forward and underspend are detailed in the Directorate updates below.
- 8.8 The current forecast capital outturn financing position is shown in **Appendix E**. This is being funded by CIL and S106 grants, and other capital grants being mainly for the Active Travel, Firepool, Flood Alleviation, Heritage at Risk and Coastal Protection projects.
- 8.9 The completion and exchange of the residential units at Coal Orchard commenced this quarter, so the current year costs will be funded from those capital receipts and the excess capital receipts will be applied to borrowings as per the business plan. The capital receipts forecast excluding Coal Orchard are sufficient to cover the projects they have been allocated to them.
- 8.10 In addition, as mentioned above, in order to increase reserve balances this year, £1.294m of revenue funded capital financing is being proposed to be released and transferred to general reserves.
- 8.11 **Development and Place:** The capital programme includes development and regeneration projects. These budgets are governed via the Directorate and Programme Boards before being reported to Full Council. The main reasons for the £7.8m carry forward and the £350k underspend include:
- a) The Future High Street funded works on Firepool is forecast to carry forward £2.4m due to delays in awarding the Drainage & Levels contract, Highways rescheduling the work on the Trenchard Way access and the Planning application for the Southern Boulevard still in progress.
 - b) Phosphates carry forward of £1.8m due to the ongoing negotiation of the Following Land solution. This is expected to be billed and collected via S106 prior to purchasing any credits with the cost of purchasing the credits expected to slip into next year.
 - c) The Active Travel project, funded by the Future High Street Fund, is forecast to carry forward £558k together with the related CIL funded Cycle and Pedestrian (£500k) and Town Centre Regeneration (£500k) projects.
 - d) There is a carry forward of £1.1m CIL funded Education contribution to Orchard Grove school in Comeytrove which is not expected to be called on by SCC this financial year.

- e) There is a £910k carry forward on the Taunton Flood Alleviation projects as the work has not progressed at the rate anticipated when the budget phasing was done. This project is fully funded via Grant and CIL funding.
- f) The Coal Orchard project is expected to complete in the autumn and is currently forecast to overspend by £104k against a total approved budget of £15.3m. This may reduce once the current open purchase orders are reviewed and closed on completion of the project.
- g) There is forecast underspend of £482k on Firepool budgets approved prior to the Future High Street Funding (FHSF) award, as those works will now be included in the fully funded project.

8.12 **External Operations and Climate Change:** The capital programme spans a diverse range of activities that also, in part, span across two financial years. The Directorate has a robust programme management system to ensure the capital schemes are tracked and spent in a timely manner. There is a reported underspend of £193k, this is mainly due to the implementation of a new accounting standard (IFRS16–Leases) being deferred, meaning that the finance lease costs for the fleet contract will be accounted for in revenue £125k, and the budget for Closed Churchyards no longer being required £50k. It has been agreed to return both budgets, this will be reflected in the Q3 budget monitoring report. Slippage of £1,035m relates to the Blue Anchor Coastal Protection works, the project has encountered delays due to vessels being unavailable, meaning spend will fall into next financial year.

8.13 **Housing and Communities:** The capital programme has been updated to reflect the Single Homelessness and Rough Sleeper Accommodation Strategy & Delivery Plan. The strategy identifies the demand for additional accommodation, splits this down by specific need, and puts in place an end-to-end process of interventions, from early help through to tenancy support. The Housing Service is supporting the Homeless service in delivering the plan for example the purchase of 6 acquired units and 6 of its own units for a Housing First approach. These costs will emerge in the capital programme spend over the four quarters. The Better Care Fund has incurred slippage and the programme is being reviewed to align to existing and future unitary requirements.

8.14 **Internal Operations:** The capital programme relates to the annual PC refresh upgrades and alarms for the lifeline service. Of this £122k of the IT capital budgets have been returned as no longer required.

8.15 **Hinkley:** One of the Hinkley funded projects is expected to be completed in the 2023/24 year.

8.16 **S106 Schemes:** The S106 projects relate to schemes on which costs have been incurred in the current year as per the obligations under the S106 agreements.

9 Risk and Uncertainty

9.1 Budgets and forecasts are based on known information and the best estimates of the

Council's future spending and income. Income and expenditure over the 2022/23 financial year are estimated by budget holders and then reported through the budget monitoring process. During this process risks and uncertainties are identified which could impact on the financial projections, but for which the likelihood, and/or amount are uncertain. The Council carries protection against risk and uncertainty in several ways, such as insurances and maintaining reserves. This is a prudent approach and helps to mitigate unforeseen pressures.

- 9.2 The following general risks and uncertainties have been identified:
- 9.3 **Inflation:** The current economic operating environment is placing financial risk on the Council in terms of rising inflation increasing the cost of supplies such as utilities and materials. The Council is seeing price increases on our corporate contracts of c60% on electricity, c80% on gas and c45% on fuel. However further variances may come to light during the year based on levels of usage in these areas. There is also uncertainty to the inflation to be seen on other contracts such as IT systems and maintenance works where contracts are still out to tender. Directors have undertaken an impact assessment of the inflationary pressure placed on their services and included best estimates as part of their quarterly review.
- 9.4 **Insurance Premiums:** The Council's insurance policies are due for renewal on 1 August 2022. Premiums are affected by inflation as well as risk, thus high inflation which may lead to an adverse variance to budget. The renewal falls just eight months ahead of the Unitary Vesting Day, with the risk that an additional premium may be payable for a shorter policy period. Whilst the invoices have now been received these were received too late to be updated within the Q2 forecasts therefore an update will be provided in the Q3 report.
- 9.5 **Recruitment:** There are a number of vacancies across the Council and assumptions have been made as to when these vacancies will be filled. The Council is experiencing recruitment issues (as seen country-wide) therefore assumptions and forecasts may change, in addition to higher agency costs to cover roles where permanent recruitment is not successful.
- 9.6 **Unitary Council:** The transition to the new Unitary places a significant demand on management and staff. This may lead to additional costs to deliver the transition and ensure day to day services are maintained at satisfactory performance standards. It could also slow down spending in some areas as priorities and capacities adjust during the transition period.
- 9.7 **Fleet Contract / IFRS16 Leases:** CIPFA has delayed the implementation of IFRS16 however we could have chosen to adopt this early but due to the implementation of the Unitary Council all Somerset Councils have made the decision to delay adoption. Therefore, where SWT had budgeted for the lease as a capital cost these now fall to revenue. The services hope to absorb this cost through in-year underspends and delays in receiving new vehicles.
- 9.8 **Business Rates (Risk):** There are inherent risks and uncertainties within the Business Rates Retention system, both in terms of income volatility and accounting timing

differences between financial years. The Council holds earmarked risk reserves to mitigate in year pressures. As the 2022/23 budget was reduced for the anticipated decommissioning of Hinkley Point B nuclear power station, which accounts for almost 20% of the current tax base, the risk should be reduced this year. The first reactor was switched off in July and the second on 1 August 2022. The Valuation Office Agency will need to advise the resulting changes to the rateable value, and we will then assess the impact on our business rates retention funding estimates.

- 9.9 **Council Tax (Risk):** There are inherent risks and uncertainties within the Council Tax collection system, especially in light of the current economic climate and the risk of non-payment. An increased impairment allowance has been applied for 22/23 in light of this. This will have an impact on the Collection Fund for the General Fund budget in future years through the Surplus or Deficit recovery. Regular review of statistics will be undertaken to monitor the situation.
- 9.10 **Development Management:** Due to the volatility of planning income, which is significantly demand led, it is difficult to forecast the full year income impact accurately.
- 9.11 **Homelessness:** This is a demand led service supporting a variety of complex needs. This service has received further Homelessness Prevention Grant and Rough Sleeper Initiative Government funding in 2022/23. The position needs to be kept under review pending the delivery of the Homelessness Strategy including the planned decant from the Canonsgrove site. As mentioned above, the current forecast overspend can be managed within the services existing earmarked reserves, however if the overspend increases this will impact on the overall corporate outturn position.
- 9.12 **Revenues & Benefits:** The position on rent allowances/rent rebates could change significantly (approximately £200k-£300k either way) because of recoupment and debt impairment adjustments. We can calculate these at a given point in time but are unable to reliably forecast what these will be at year end as the financial implications are volatile.
- 9.13 **Interest and Investment Income:** UK economic volatility will continue to present a risk of variations in interest receivable. In addition, cashflow forecasts remain difficult to predict with certainty in respect of the timing and progress of capital projects and in relation to the receipt and application of large grant funding. Careful daily monitoring and management of the Council's overall liquidity mitigate this risk as far as possible. Meanwhile, the risk of exposure to rising interest rates on borrowing, previously reported, has been contained for the current year leading up to the new Unitary Council.
- 9.14 **Forecasting Assumptions:** It is conceivable that, whilst budget holders are optimistic that they will spend all their budget, experience shows an increase in underspends often reported in the last quarter of the financial year. The pace of spending may also reduce as capacity and delivery of priorities is affected by local government structural change.
- 9.15 **Fluctuation in demand for services:** We operate many demand-led services and the levels of demand do not always follow a recognisable trend, which may lead to fluctuations in costs and income compared with current forecasts.
- 9.16 **Year-end Adjustments:** There are certain items that are not determined or finalised

until the financial year-end. For example, the final assessment of provisions required for bad debts and final allocations of support service recharges. These can result in potentially significant differences to current forecasts.

10 Links to Corporate Strategy

10.1 The financial performance of the Council underpins the delivery of corporate priorities and therefore all Corporate Aims.

11 Unitary Council Financial Implications and S24 Direction Implications

11.1 The main considerations within scope of this report is the impact of in-year financial performance on year end reserve balances that will transfer to the new unitary council on 1 April, and potential impact of variances on future budget estimates. Reserves are currently projected to remain above the minimum requirement. Finance officers and budget managers will feed in ongoing and future risks and implications through the budget setting process for 2023/24.

12 Partnership Implications

12.1 A wide range of Council services are provided through partnership arrangements e.g. SLM for leisure services and Somerset Waste Partnership for Waste and Recycling services. The cost of these services is reflected in the Council's financial outturn position for the year.

13 Scrutiny Comments / Recommendations

13.1 This report was considered by Corporate Scrutiny on 7 December 2022. A summary of the comments and recommendations discussed are provided here for the Executive to consider.

13.2 Clarification was provided on the relationship between the General Fund and Housing Revenue Account for shared costs which are recharged between the funds, with revised recharge calculations in year reducing costs for the HRA with an equal increase in costs to the General Fund.

Democratic Path:

- **Corporate Scrutiny – 7 December 2022**
- **Executive – 21 December 2022**
- **Full Council - No**

Reporting Frequency: Quarterly

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Appendix E	Financing of Forecast Capital Outturn for 2022/23
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Appendix A: General Fund Approved Capital Budget

SWT Capital Programme	Prior Year Slippage	Current Year Approval Feb 2022 Budget Setting for 2022/23	Total Approved Budget	Current Year Virements	Current Year Supplements	Current Year Returns	Revised Current Year Approved Capital Budget
Development and Place	48,843,459	0	48,843,459	0	775,000	0	49,618,459
External Operations and Climate Change	5,937,107	1,666,800	7,603,907	0	567,280	0	8,171,187
Housing & Communities	5,010,529	228,063	5,238,592	0	0	0	5,238,592
Internal Operations	557,231	(180,000)	377,231	0	0	(128,460)	248,771
Hinkley Capital Schemes	130,005	0	130,005	0	0	0	130,005
S106 Capital Schemes	498,603	0	498,603	0	179,199	0	677,802
Total GF	60,976,934	1,714,863	62,691,797	0	1,521,479	(128,460)	64,084,816

Appendix B: Capital Financing Plan of Total Approved Budget

SWT Capital Programme	TOTAL CAPITAL FINANCING	Capital Grants CIL	Capital Grants	Section 106 Agreements	Capital Receipts	General Fund RCCO	Other Earmarked Reserves	Borrowing
Development and Place	49,618,459	12,286,578	13,018,025	1,795,050	1,186,099	50,000	98,400	21,184,308
External Operations and Climate Change	8,171,187	0	3,827,350	0	1,434,770	1,942,335	76,346	890,386
Housing & Communities	5,238,592	0	4,110,675	374,791	385,446	0	259,178	108,502
Internal Operations	248,771	0	0	0	244,768	0	0	4,004
Hinkley Capital Schemes	130,005	0	130,005	0	0	0	0	0
S106 Capital Schemes	677,802	0	0	677,802	0	0	0	0
Total GF	64,084,816	12,286,578	21,086,055	2,847,643	3,251,082	1,992,335	433,924	22,187,199

Appendix C: General Fund Annual Profiling of Approved Capital Budget

SWT Capital Programme	Total Approved Budget	Planned Capex 2022/23	Planned Capex 2023/24	Planned Capex 2024/25	Planned Capex 2025/26
Development and Place	49,618,459	15,895,788	17,021,402	10,631,942	6,069,333
External Operations and Climate Change	8,171,187	5,857,381	2,313,806	0	0
Housing & Communities	5,238,592	2,655,504	1,112,766	876,524	593,798
Internal Operations	248,771	248,768	0	0	0
Hinkley Capital Schemes	130,005	130,005	0	0	0
S106 Capital Schemes	677,802	677,802	0	0	0
Total GF	64,084,816	25,465,247	20,447,974	11,508,466	6,663,131

Appendix D: Profiled Capital Budget for 2022/23 Vs Forecast Capital Outturn for 2022/23

SWT Capital Programme	Profiled Capex Budget 2022/23	Expenditure YTD	Forecast Outturn 2022/23	Variance; - underspend + overspend	- Slippage c/f	In Year - Underspend + Overspend
Development and Place	15,895,788	2,686,013	7,777,147	(8,118,641)	(7,768,524)	(350,117)
External Operations and Climate Change	5,857,381	608,060	4,628,513	(1,228,868)	(1,035,328)	(193,540)
Housing & Communities	2,655,504	42,349	2,055,504	(600,000)	(0)	(600,000)
Internal Operations	248,768	32,041	126,768	(122,000)	0	(122,000)
Hinkley Capital Schemes	130,005	0	30,005	(100,000)	(100,000)	0
S106 Capital Schemes	677,802	110,744	433,339	(244,463)	(244,463)	0
Total GF	25,465,247	3,479,206	15,051,275	(10,413,972)	(9,148,316)	(1,265,657)

Appendix E: Financing of Forecast Capital Outturn for 2022/23

SWT Capital Programme	Forecast Outturn 2022/23	Capital Grants CIL	Capital Grants Other	Section 106 Agreements	Capital Receipts	Other Earmarked Reserves	Borrowing
Development and Place	7,777,147	1,120,292	4,467,759	0	1,682,947	155,339	350,810
External Operations and Climate Change	4,628,513	0	1,509,786	0	678,410	76,346	2,363,970
Housing & Communities	2,055,504	0	1,715,297	0	340,207	0	0
Internal Operations	126,768	0	0	0	126,768	0	0
Hinkley Capital Schemes	30,005	0	30,005	0	0	0	0
S106 Capital Schemes	433,339	0	0	433,339	0	0	0
Total GF	15,051,275	1,120,292	7,722,847	433,339	2,828,332	231,685	2,714,780

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

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