



Exeter City Council

To the Chair and Members
of the Executive

Please ask for: Rowena Whiter
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Our ref:
Your ref:

A meeting of the **EXECUTIVE** will be held in the Rennes Room, Civic Centre, Paris Street, Exeter at **5.30 pm** on **TUESDAY 2 OCTOBER 2012** to consider the following business. If you have an enquiry regarding any items on this agenda, please contact Rowena Whiter, Member Services Manager on **Exeter 265110**.

Entry to the Civic Centre can be gained through the Customer Service Centre, Paris Street.

Pages

A G E N D A

Part I: Items suggested for discussion with the press and public present

1

APOLOGIES

To receive apologies for absence from Committee members.

2

MAJOR GRANTS AND NEW HOMES BONUS PANEL

To receive and adopt the minutes of the meeting held on 13 September 2012.

1 - 2

(Minutes circulated)

3

DECLARATIONS OF INTEREST

Councillors are reminded of the need to declare interests in relation to business on the agenda, before any discussion takes place on the item. Councillors requiring clarification should seek the advice of the Monitoring Officer prior to the day of the meeting.

4

LOCAL GOVERNMENT (ACCESS TO INFORMATION) ACT 1985 - EXCLUSION OF PRESS AND PUBLIC

RESOLVED that, under Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting during consideration of item 11 on the grounds that it involves the likely disclosure of exempt information as defined in paragraph 3 of Part I, Schedule 12A of the Act.

Office of Corporate Manager Democratic & Civic Support

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Part II: Items suggested for discussion with the press and public excluded

No representations have been received in accordance with the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012

11 **PROPOSAL TO BUILD A NEW SWIMMING AND LEISURE COMPLEX ON THE
BUS AND COACH STATION SITE**

To consider the report of the Strategic Director on the assessment of need and business case for a new swimming and leisure complex in Exeter.

93 - 112

(Report circulated to Members)

DATE OF NEXT MEETING

The next scheduled meeting of the Executive will be held on **Tuesday 20 November 2012** at 5.30 pm in the Civic Centre.

A statement of the executive decisions taken at this meeting will be produced and made available as soon as reasonably practicable after the meeting. It may be inspected on application to the Customer Service Centre at the Civic Centre or by direct request to the Member Services Manager on 01392 265110. Minutes of the meeting will also be published on the Council's web site as soon as possible.

Membership -

Councillors Edwards (Chair), Denham, Fullam, Hannaford, Mrs Henson, Martin, Sheldon and Sutton

Find out more about Exeter City Council services by looking at our web site <http://www.exeter.gov.uk>. This will give you the dates of all future Committee meetings and tell you how you can ask a question at a Scrutiny Committee meeting. Alternatively, contact the Member Services Officer on (01392) 265115 for further information.

Individual reports on this agenda can be produced in large print on request to Member Services on 01392 265111.

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Agenda Item 2

MAJOR GRANTS AND NEW HOMES BONUS PANEL

Thursday 13 September 2012

Present:-

Councillor Edwards (Chair)
Councillors Fullam, Hannaford and Sutton

Also Present:

Projects and Business Manager, Principal Accountant (SH), Senior Valuer (TJ),
Community Involvement and Inclusion Officer and Member Services Officer (SJS)

3 **MINUTES OF THE LAST MEETING**

The minutes of the meeting on 14 June 2012 were taken as read and signed by the Chair as correct.

4 **NEW HOMES BONUS LOCAL INFRASTRUCTURE FUND - PROGRESS REPORT**

The Projects and Business Manager presented the report giving Members an overview of current and anticipated applications to the New Homes Bonus Local Infrastructure Fund, the funds allocated so far this year and future budgets.

Members discussed the other potential applications that could come forward as outlined in the report. They clarified that the fund was principally intended for one-off grants for new community projects and start up monies and not for year on year revenue costs to support organisations. Where they were minded to recommend that Executive should approve a grant application, this would normally be for one year only and should an organisation require further monies they would need to re-apply to the fund the following year.

Members noted the report.

(Report circulated)

5 **LOCAL INFRASTRUCTURE FUND APPLICATIONS**

6 **APPLICATION 1 - WEAR UNITED AND COUNTESS WEAR VILLAGE HALL**

Representatives from Wear United and Countess Wear Village Hall gave a presentation on the application for funds to help towards the construction of a new community centre at Bridge Road. The presentation reflected the applicants' latest thinking, with the proposed building re-sited to avoid relocation of the existing tennis courts. The amount applied for was, in year one, £70,000, in year two, £50,000, in year three, £50,000 and £50,000 in year four, towards building costs.

Councillor Tippins spoke in support of the application.

Recommend to Executive that:-

- (a) Subject to confirmation that Parks and Open Spaces are satisfied with the revised siting of the building*, the application for £70,000 towards construction costs be approved, subject to the standard conditions and to conditions 12, 13, 14 and 15 below.
- (b) The above sum is available for three complete financial years, (ie. until March 2016).
- (c) Any grant from the allocation of Local Infrastructure Fund for future year(s) must be the subject of a separate application(s).

Additional conditions:-

- 12. The grant is conditional upon planning permission being received for the proposal.
- 13. The grant is conditional upon evidence being provided that funding has been secured to cover the entire anticipated construction costs.
- 14. The grant is conditional upon evidence being produced, in a form agreed by the Council as appropriate to the items concerned, that value for money is being achieved in relation to each element of the scheme.
- 15. The grant is conditional upon the project remaining substantially the same as that presented to the Major Homes and New Homes Bonus Panel on 13 September 2012, in terms of the location and nature of the building, although scaling down of the project to reduce costs will not in itself conflict with this condition.

*An update will be provided to Executive following discussion with Parks and Open Spaces.

(Report circulated)

(The meeting commenced at 4.30 pm and closed at 6.05 pm)

EXETER CITY COUNCIL

SCRUTINY COMMITTEE – RESOURCES 19 SEPTEMBER 2012

EXECUTIVE
2 OCTOBER 2012

COUNCIL
16 OCTOBER 2012

CAPITAL MONITORING STATEMENT TO 30 JUNE 2012

1. PURPOSE OF THE REPORT

- 1.1 To report the current position in respect of the Council's revised annual capital programme and to advise Members of the anticipated level of deferred expenditure into future years.

2.0 BACKGROUND

- 2.1 Local authorities are requested to estimate the total of capital expenditure that they plan to incur during the financial year when it sets the prudential indicators of the capital expenditure. This shows that its asset management and capital investment strategies are affordable, prudent and sustainable.
- 2.2 Capital expenditure is a significant source of risk and uncertainty since cost variations, delays and changing specifications are often features of large and complex capital projects.
- 2.3 This report is prepared on a quarterly basis in order to update Members with any known cost variations, slippage and acceleration of projects.

3. REVISIONS TO THE CAPITAL PROGRAMME

- 3.1 The 2012/13 Capital Programme, including commitments brought forward from 2011/12, was last reported to Scrutiny Committee – Resources on 20 June 2012. Since that meeting the following changes have been made that have increased the programme:

| Description | £ | Approval/Funding (%) * |
|---|-------------------|--|
| Capital Programme, as at 20 June 2012 | 19,684,780 | |
| Princesshay Artwork | 40,000 | New Homes Bonus – Major Infrastructure Fund |
| Parks Improvements – Cowick Barton Cycle Path | 25,000 | S106 monies |
| Social Housing Grants | 3,520 | S106 monies |
| Mincinglake/Northbrook Study | 3,500 | External Funding contribution – Environment Agency |
| Revised Capital Programme | 19,756,800 | |

* There is no additional borrowing required to fund the additional works above.

4. REQUESTS FOR ADDITIONAL FUNDING

4.1 Replacement Smoke Detectors (HRA Capital Programme)

Several years ago the Council undertook a programme of fitting smoke detectors in flats, houses and maisonettes. The detectors were hard wired into the electrical circuit but also had a battery back up, should, in the event of a fire the electrical supply be disrupted. The programme concentrated on carrying out works to flats during year one and the remaining properties the following year. The smoke detectors are checked and serviced each year to ensure they are operating correctly by contracted servicing engineers. It has been brought to our attention by the engineers that the smoke detectors in flats are now exceeding the recommended manufacturer's life span and that the detectors should be considered for replacement. The component that is coming to the end of its lifespan is the sensor unit which unfortunately cannot be replaced as a separate item so the complete detector has to be renewed. The Principal Health and Safety Officer recommend's immediate replacement of the detectors.

It is therefore proposed that additional funding of £200,000 is set aside to enable smoke detectors in flats to be replaced during this financial year. A budget of £200,000 for replacing smoke detectors in houses and maisonettes will be incorporated into the HRA Capital Programme for 2013/14 and approval sought as part of the annual budget setting process. The combined £400,000 funding required will be met from the Major Repairs Reserve.

4.2 E-FIMS Upgrade

The e-financials system was implemented in 2007/08; the system that we use sits on an Oracle database that Oracle no longer support. As a result Advanced Business Solutions will no longer support the e-financials system that we currently have from 1 January 2013. If the Council do not upgrade the system, there is a real risk that it will fail and no longer work after this date, resulting in the Council being unable to pay suppliers and produce our accounts.

In order to upgrade to the new version of the software a budget of £30,000 is required. There will be a number of improvements in the new system, including the ability to download more information into spreadsheets for analysis, a single sign-on facility (to cover the four to six modules that the users currently have to login to individually each day), an email password reminder function (saving time for users and less disruption for the system administrators), general improvements to the look and feel of the system making it more user friendly. It is intended that the upgrade will occur during the Autumn 2012. This will require additional borrowing of £30,000 to finance the project.

5. PERFORMANCE (Appendix 1)

5.1 The revised capital programme for the current financial year is £19.757 million. During the first three months of the year the Council spent £1.970 million on the programme, which equates to 9.97% of the revised programme. This compares with £2.489 million (10.90%) being spent in the first three months of 2011/12.

5.2 The current programme is detailed in Appendix 1. The Appendix shows a total forecast spend for 2012/13 of £18.746 million with £0.671 million of the programme potentially deferred to 2013/14.

6. VARIANCES AND ACHIEVEMENTS

6.1 The main variances, achievements and issues concerning expenditure in 2012/13, and that which may be deferred to 2013/14, are as follows:

6.1.1 Community & Environment

Cultural City

- **Play Area Refurbishments (Budget £301,640)**

Two good quality new items of play equipment have been provided and other general improvements have taken place at Looe Road Play Area.

The floodlighting at Pinhoe Station Road Multi Use Games Area (MUGA) has been completed and the lighting made operational.

These projects were funded via various Section 106 contributions and they all incorporated significant community engagement and public consultation.

Everyone Has A Home

- **Laings (Budget £50,000)**
- **Conversion 23 Longbrook Terrace (Budget £25,000)**
- **Wheelchair Homes in RNSD Depot (Budget (£250,000)**

The above three budgets are no longer required in 2012/13, therefore producing an overall saving of £325,000 in this area.

6.1.2 Economy & Development

- **Verney House (Budget £45,000)**

Works to roof covering, window surrounds and edge protection are now complete. A saving has been made on this project due in part to not decorating the windows at Verney House, as it was felt that it would not add to the energy efficiency of the building.

Prosperous City

- **Canal Basin and Quayside (Budget £406,850)**

The new Haven Road Outdoor Education Centre is currently under construction by DCC. ECQT are remarketing the listed buildings and site at the head of the Basin. ECC are to carry out a tree planting and seating scheme for Haven Banks; install coping stones to the walls in the Haven Road car park and bring forward some walkway works around the Basin in 2012/13.

6.1.4 Housing Revenue Account

Everyone Has a Home

- **Energy Conservation (Budget £133,240)**

Significant further spend of this budget is pending the outcomes of a pilot to super insulate properties and identification of suitable energy efficient measures to council dwellings. It is projected that £40,000 of this budget may need to be carried forward into 2013/14 to allow time for a plan of works to be formulated.

- **Fire Alarms at Sheltered Accommodation (Budget £140,000)**

The specification and tender documents are currently being prepared for fire alarms to be installed at ten sheltered accommodation sites. It is hoped that the appointed contractor will start work on site before the end of 2012. However, it is projected that £40,000 of this budget will need to be deferred into next financial year.

- **Communal Areas (Budget £198,110)**

This budget is intended to be spent on improvements to communal areas of flats including the provision of new flooring. Specifications are currently being prepared so that the tender process can commence. It is currently projected that £50,000 of the budget may need to be deferred into next financial year.

- **Rennes House Heating Replacement (Budget nil)**

A minor overspend will occur in 2012/13 in respect of the heating replacement at Rennes House. However, a compensating saving will be made from the Other Works budget.

- **Other Works (Budget £133,540)**

Additional works associated with the demolition of properties at Chestnut Avenue have been carried out and treated as revenue expenditure, as such works do not qualify as capital expenditure. The saving shown against this budget reflects the transfer of these costs to revenue plus the saving required relating to heating at Rennes House.

7.0 RECOMMENDED

7.1 It is recommended that Scrutiny Committee – Resources notes and Executive recommend that Council approves:

- (i) The current position in respect of the annual Capital Programme
- (ii) The amendments to the Council's annual Capital Programme

ASSISTANT DIRECTOR FINANCE

Local Government (Access to Information) Act 1985 (as amended)
Background papers used in compiling this report:

1. None

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2012-13
CAPITAL MONITORING TO 30 JUNE 2012

| | 2012-13 Capital Programme | 2012-13 Spend | 2012-13 Forecast Spend | 2012-13 Budget to be Carried Forward to Future Years | 2012-13 Programme Variances Under/(Over) |
|---|---------------------------|---------------|------------------------|--|--|
| | £ | £ | £ | £ | £ |
| COMMUNITY & ENVIRONMENT | | | | | |
| CULTURAL CITY | | | | | |
| Play Area Refurbishments | 301,640 | 9,013 | 301,640 | | 0 |
| Sports Facilities Refurbishment | 175,330 | 0 | 175,330 | | 0 |
| Parks Improvements | 52,760 | 2,645 | 52,760 | | 0 |
| Contribution to RAMM Re HLF Parks Bid | 65,200 | 21,833 | 65,200 | | 0 |
| Exwick Community Centre | 20,880 | 0 | 20,880 | | 0 |
| RAMM Redevelopment | 0 | 0 | 0 | | 0 |
| RAMM Off Site Store | 40,740 | 0 | 40,740 | | 0 |
| Neighbourhood Parks & Local Open Spaces | 33,530 | 1,372 | 33,530 | | 0 |
| Allotments - Toilet Replacement | 23,440 | 84 | 23,440 | | 0 |
| Replacement of Flowerpot Skate Park | 250,000 | 7 | 250,000 | | 0 |
| Refurbishment and Upgrade of Paddling Pools | 200,000 | 536 | 200,000 | | 0 |
| CARED FOR ENVIRONMENT | | | | | |
| Public Toilet Refurbishment | 990 | 0 | 990 | | 0 |
| Local Authority Carbon Management Programme | 107,910 | 29,737 | 107,910 | | 0 |
| Improvements to Cemetery Roads & Pathways | 11,950 | 0 | 11,950 | | 0 |
| Cemeteries & Churches Storage Improvements | 26,330 | 0 | 26,330 | | 0 |
| Midi Recycling Banks | 10,000 | 0 | 10,000 | | 0 |
| EXCELLENCE IN PUBLIC SERVICES | | | | | |
| New Technology for Cleansing | 14,190 | 7,270 | 14,190 | | 0 |
| Belle Isle Depot - Secure Equipment Storage | 11,820 | 11,919 | 11,820 | | 0 |
| HEALTHY & ACTIVE PEOPLE | | | | | |
| Disabled Facility Grants | 299,780 | 43,107 | 299,780 | | 0 |

**2012-13
CAPITAL MONITORING TO 30 JUNE 2012**

| | 2012-13 Capital Programme | 2012-13 Spend | 2012-13 Forecast Spend | 2012-13 Budget to be Carried Forward to Future Years | 2012-13 Programme Variances Under/(Over) |
|---|---------------------------|----------------|------------------------|--|--|
| | £ | £ | £ | £ | £ |
| EVERYONE HAS A HOME | | | | | |
| Warm Up Exeter/PLEA Scheme | 325,540 | 0 | 325,540 | | 0 |
| 5 Year House Condition Survey | 50,000 | 0 | 50,000 | | 0 |
| Renovation Grants | 126,140 | 0 | 126,140 | | 0 |
| Wessex Loan Scheme | 784,380 | 0 | 784,380 | | 0 |
| Glencoe Capital Works | 5,670 | 0 | 5,670 | | 0 |
| St Loyes Design Fees | 69,110 | 0 | 69,110 | | 0 |
| Private Sector Renewal Scheme | 349,180 | 23,647 | 349,180 | | 0 |
| WHIL Empty Properties | 200,000 | 0 | 200,000 | | 0 |
| HCA Empty Properties | 100,000 | 0 | 100,000 | | 0 |
| The Haven | 250,000 | 0 | 250,000 | | 0 |
| Social Housing Grants | 1,707,630 | 0 | 1,707,630 | | 0 |
| St Paul's Church PC | 100,000 | 0 | 0 | 100,000 | 0 |
| Exwick & Foxhayes School SOS | 300,000 | 0 | 0 | 300,000 | 0 |
| Steps Acquisitions | 50,000 | 0 | 50,000 | | 0 |
| Laiings | 50,000 | 0 | 0 | | 50,000 |
| 11-13 Stepcote Hill | 60,000 | 0 | 60,000 | | 0 |
| 22 St Davids Hill Conversion | 100,000 | 0 | 100,000 | | 0 |
| Hennis Project St Sidwells | 32,340 | 0 | 32,340 | | 0 |
| Other Temp Accom Improvement | 50,000 | 0 | 50,000 | | 0 |
| Temporary Accom Purchase | 170,000 | 0 | 170,000 | | 0 |
| Conversion 23 Longbrook Terrace | 25,000 | 0 | 0 | | 25,000 |
| Wheelchair Homes in RNSD Depot | 250,000 | 0 | 0 | | 250,000 |
| Sprinklers | 141,000 | 0 | 0 | 141,000 | 0 |
| Coronation Road / Wonford Street | 50,000 | 0 | 50,000 | | 0 |
| Infill Sites | 350,000 | 0 | 350,000 | | 0 |
| Sovereign Infill - Shakespeare Road | 375,000 | 375,000 | 375,000 | | 0 |
| Sovereign Infill - Leypark Road | 135,000 | 135,000 | 135,000 | | 0 |
| Sovereign Infill - Residue | 255,000 | 0 | 255,000 | | 0 |
| COB Phase 3 Fees | 135,300 | 0 | 135,300 | | 0 |
| COB Phase 3 - St Andrews Road | 19,800 | 0 | 19,800 | | 0 |
| COB - Land Purchase | 300,000 | 0 | 300,000 | | 0 |
| SAFE CITY | | | | | |
| Replace Digital Recording Equipment at Control Centre | 48,000 | 0 | 48,000 | | 0 |
| COMMUNITY & ENVIRONMENT TOTAL | 8,610,580 | 661,169 | 7,780,907 | 541,000 | 325,000 |

**2012-13
CAPITAL MONITORING TO 30 JUNE 2012**

| | 2012-13 Capital Programme | 2012-13 Spend | 2012-13 Forecast Spend | 2012-13 Budget to be Carried Forward to Future Years | 2012-13 Programme Variances Under/(Over) |
|--|---------------------------|----------------|------------------------|--|--|
| | £ | £ | £ | £ | £ |
| ECONOMY & DEVELOPMENT | | | | | |
| ACCESSIBLE CITY | | | | | |
| National Cycle Network | 30,030 | 14,189 | 30,030 | 0 | 0 |
| Signage / Pedestrian Interpretation | 31,600 | 0 | 31,600 | 0 | 0 |
| Well Oak Footpath/Cycleway | 80,150 | 0 | 80,150 | 0 | 0 |
| King William Street Car Park Refurb Stage 1 | 197,330 | 15,809 | 197,330 | 0 | 0 |
| King William Street Car Park Refurb Stage 2 | 858,260 | 302,365 | 858,260 | 0 | 0 |
| CULTURAL CITY | | | | | |
| 18 North Street Panelling | 870 | 0 | 870 | 0 | 0 |
| Corn Exchange Enhancements | 5,110 | 0 | 5,110 | 0 | 0 |
| Floodlighting | 1,120 | 0 | 1,120 | 0 | 0 |
| St Katherine's Priory Re-Roofing | 74,650 | 340 | 74,650 | 0 | 0 |
| CARED FOR ENVIRONMENT | | | | | |
| City Centre Enhancements | 473,840 | 3,391 | 473,840 | 0 | 0 |
| Mincinglake/Northbrook Study | 11,820 | 4,100 | 11,820 | 0 | 0 |
| Ibstock Environmental Improvements | 3,240 | 0 | 3,240 | 0 | 0 |
| Planting Improvements in Riverside Valley Park | 14,320 | 0 | 14,320 | 0 | 0 |
| Cowick Street Environmental Works | 200,000 | 190 | 200,000 | 0 | 0 |
| Exhibition Way Bridge Maintenance | 45,000 | 0 | 45,000 | 0 | 0 |
| Central Station Environmental Works | 185,000 | 0 | 185,000 | 0 | 0 |
| Princesshay Artwork | 40,000 | 0 | 40,000 | 0 | 0 |
| EXCELLENCE IN PUBLIC SERVICES | | | | | |
| Vemey House | 45,000 | 3,708 | 0 | 0 | 41,290 |
| LEARNING CITY | | | | | |
| Improvements to Quay House Visitor Centre | 1,470 | 0 | 1,470 | 0 | 0 |
| PROSPEROUS CITY | | | | | |
| Canal Basin and Quayside | 406,850 | 0 | 406,850 | 0 | 0 |
| Science Park | 735,990 | 0 | 735,990 | 0 | 0 |
| 137 Cowick Street | 33,850 | 30,060 | 33,850 | 0 | 0 |
| SAFE CITY | | | | | |
| Security Measures for Riverside Valley Park | 1,900 | 0 | 1,900 | 0 | 0 |
| ECONOMY & DEVELOPMENT TOTAL | 3,477,400 | 374,152 | 3,432,400 | 0 | 41,290 |

2012-13
CAPITAL MONITORING TO 30 JUNE 2012

| | 2012-13 Programme | 2012-13 Capital Spend | 2012-13 Forecast Spend | 2012-13 Budget to be Carried Forward to Future Years | 2012-13 Programme Variances Under/(Over) |
|---|----------------------|--------------------------|---------------------------|---|---|
| | £ | £ | £ | £ | £ |
| CORPORATE SERVICES | | | | | |
| ELECTRONIC CITY | | | | | |
| Electronic Document Management | 1,880 | 0 | 1,880 | 0 | 0 |
| Server and Storage Strategy | 39,930 | 0 | 39,930 | 0 | 0 |
| Authentication Module | 64,000 | 0 | 64,000 | 0 | 0 |
| IT Development Time | 37,500 | 6,738 | 37,500 | 0 | 0 |
| PC & Mobile Devices Replacement Programme | 178,010 | 12,950 | 178,010 | 0 | 0 |
| Corporate Network Infrastructure | 25,000 | 5,500 | 25,000 | 0 | 0 |
| EXCELLENCE IN PUBLIC SERVICES | | | | | |
| Vehicle Replacement Programme | 400,000 | 34,348 | 400,000 | 0 | 0 |
| Capitalised Staff Costs | 261,000 | 0 | 261,000 | 0 | 0 |
| CORPORATE SERVICES TOTAL | 1,007,320 | 59,536 | 1,001,520 | 0 | 0 |

2012-13
CAPITAL MONITORING TO 30 JUNE 2012

| | 2012-13 Capital Programme | 2012-13 Spend | 2012-13 Forecast Spend | 2012-13 Budget to be Carried Forward to Future Years | 2012-13 Programme Variances Under/(Over) |
|--|---------------------------|------------------|------------------------|--|--|
| | £ | £ | £ | £ | £ |
| HRA CAPITAL | | | | | |
| EVERYONE HAS A HOME | | | | | |
| Adaptations | 450,000 | 60,979 | 450,000 | | 0 |
| Rendering of Council Dwellings | 260,000 | 206 | 260,000 | | 0 |
| MRA Fees | 300,720 | 0 | 300,720 | | 0 |
| Communal Door Entry System | 14,740 | 3,685 | 14,740 | | 0 |
| Environmental Improvements - General | 55,060 | 5,533 | 55,060 | | 0 |
| Programmed Re-roofing | 300,000 | 103,816 | 300,000 | | 0 |
| Energy Conservation | 133,240 | 9,286 | 93,240 | 40,000 | 0 |
| Asbestos Survey | 150,000 | 18,058 | 150,000 | | 0 |
| Plastic Windows & Doors | 20,000 | 468 | 20,000 | | 0 |
| Kitchen Replacements | 1,413,260 | 107,605 | 1,413,260 | | 0 |
| Asbestos Removal Works | 250,000 | 69,553 | 250,000 | | 0 |
| Bathroom Replacements - Programmed | 517,350 | 39,244 | 517,350 | | 0 |
| Other Works | 133,540 | 0 | 133,540 | | (8,010) |
| Repainting | 73,850 | 10,804 | 73,850 | | 0 |
| Fire Precautionary Works to Flats | 331,050 | 37,682 | 331,050 | | 0 |
| Communal Areas | 198,110 | 50 | 148,110 | 50,000 | 0 |
| Structural Repairs | 71,490 | 0 | 71,490 | | 0 |
| Fire Alarms at Sheltered Accommodation | 140,000 | 1,401 | 100,000 | 40,000 | 0 |
| Replacement Concrete Canopies | 243,150 | 27,280 | 243,150 | | 0 |
| Rennes House Heating Replacement | 0 | 1,670 | 0 | | 1,670 |
| 472 Topsham Road Adaptations | 55,000 | 40,642 | 55,000 | | 0 |
| Acquisition of 16 Chanter Court | 75,000 | 3,750 | 75,000 | | 0 |
| Programmed Electrical Re-wiring | 510,000 | 77,684 | 510,000 | | 0 |
| Central Heating Programme | 705,940 | 175,685 | 705,940 | | 0 |
| Boiler Replacement Programme | 260,000 | 80,584 | 260,000 | | 0 |
| HOUSING REVENUE ACCOUNT TOTAL | 6,661,500 | 875,667 | 6,531,500 | 130,000 | (6,340) |
| CAPITAL AND PROJECT EXPENDITURE TOTAL | 19,756,800 | 1,970,524 | 18,746,327 | 671,000 | 359,950 |

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Agenda Item 6

EXETER CITY COUNCIL

SCRUTINY COMMITTEE - RESOURCES 19 SEPTEMBER 2012

EXECUTIVE
2 OCTOBER 2012

COUNCIL
16 OCTOBER 2012

OVERVIEW OF GENERAL FUND REVENUE BUDGET 2012/13

1. PURPOSE OF THE REPORT

- 1.1 To advise Members of the overall projected financial position of the General Fund Revenue Budget and Housing Revenue Account after three months, for the 2012/13 financial year.

2. REVENUE POSITION – EXECUTIVE SUMMARY

| FUND | Latest Approved Budget | Stewardship Variance June 2012 | Outturn Forecast 2012/13 |
|---------------------------|------------------------|--------------------------------|--------------------------|
| | £ | £ | £ |
| General Fund | 13,116,075 | 41,594 | 13,157,669 |
| HRA* | (2,320,270) | (37,280) | (2,357,550) |
| Council own Build Houses* | (17,570) | (25,280) | (42,850) |
| * (surplus) / deficit | | | |

GENERAL FUND – Appendix A

- 2.1 The Service Committee budgets shows a forecast overspend of £35,430 (0.26%) against a revised Service Committee Net Expenditure budget of £13,718,210 and an overall overspend of £41,594 against General Fund Expenditure including investment interest and funds set aside for the repayment of debt.
- 2.2 Details of the variances are being disclosed in stewardship reports to individual Scrutiny Committees during the current cycle of meetings. All areas have made a saving resulting from a lower pay award than the Council budgeted for. However the main variances across the Council are as follows:
- 2.3 **Scrutiny Committee Community – (An overspend of £90,000)**

Cleansing services is anticipated to overspend by £55,000 as a result of increased waste disposal costs and the delayed implementation of the revised garden waste collection procedure.

Within the Museums Service there will be an anticipated overspend of £118,500. As this is the first full financial year of the Museum being operational, it is apparent that the budget for utilities has been under estimated. Additionally, the Non Domestic Rates bill is 50% higher than estimate, however the Council are appealing against this valuation.

The cost of processing co-mingled materials is lower than anticipated resulting in an underspend on recycling of £26,500.

General Fund Housing is showing an overall underspend £8,000, which includes an approved overspend of £35,000 for a condition survey, off-set by salary savings.

Other variances within the Committee result in a net underspend of £49,000, leaving an anticipated total overspend for the Committee of £201,300.

2.4 Scrutiny Committee Economy – (An underspend of £386,830)

Car parking income is expected to exceed the estimate and has contributed to a projected £39,600 underspend.

Income from planning fees is currently 32% above budget. It is therefore anticipated that planning fee income will exceed the budget resulting in an underspend of £246,430.

Additional income is expected in respect of the Matford Centre and Corn Exchange, contributing to an estimated underspend on Markets and Halls of £41,400.

Other variances within the Committee result in a net underspend of £59,400, leaving an anticipated total underspend for the Committee of £386,830.

2.5 Scrutiny Committee Resources – (An underspend of £167,740)

The deletion of the posts of Assistant Chief Executive, Communications Manager, Head of Internal Audit, Head of IT Services and a reduction in hours for a member of IT staff, coupled with pay award savings, are expected to save a total of £406,840.

The administration teams from Economy, Community and Environment and General Services within Resources have been combined with all of the costs now being reported in Resources. The cost has been partly offset by vacancies and pay award savings in the Customer Service Centre, but overall the net increase in cost is £129,890.

A reduction in Housing Benefit subsidy for non-HRA rent allowances is expected to increase costs by £63,580.

The retail unit attached to Guildhall has been vacant for the first six months of the year with a subsequent loss of rental income and the payment of void rates of £72,370.

Other variances within the Committee total a net underspend of £26,740, leaving an anticipated total underspend for the Committee of £167,740.

3. OTHER FINANCIAL VARIATIONS

- 3.1 There is a net transfer to Earmarked Reserves of £1,160,982, a reduction of £36,083 from budget. The variance is to cover voluntary redundancies included within the Service Committee totals.

3.2 After the completion of the final accounts for 2011/12, the provision for the repayment of debt has been calculated and is £31,164 higher than the estimate. It is anticipated that net interest paid will be £25,000 lower than anticipated owing to continuing low interest rates for funds borrowed from other Local Authorities.

3.3 The overall net transfer from the General Fund Working Balance is estimated to be £1,066,482 at 31 March 2013 after accounting for July approved supplementary budgets of £138,260. This represents an increase of £5,024 against budget and would leave the General Fund Working Balance at £3,218,943 at the end of the year.

4. HOUSING REVENUE ACCOUNT (HRA) (APPENDIX B)

4.1 During this period the total budget variances indicate that there will be a net surplus of £2,357,550 which will be transferred to the HRA working balance at 31 March 2013. This represents an increase of £37,280 compared to the budgeted increase to the working balance of £2,320,270. It is estimated that the working balance will stand at £8,121,973 at 31 March 2013.

4.2 In respect of the Council Own Build sites, it is anticipated that there will be a net surplus of £42,850 to be transferred to the Working Balance at 31 March 2013. This is an increase of £25,280 and will result in an estimated Working Balance of £71,056 at 31 March 2013.

5. OUTSTANDING SUNDRY DEBT

5.1 The Council issues invoices for a range of sundry debts, including :-

- Commercial rent
- Trade waste
- Service charge and ground rent for leasehold flat owners
- Home call alarms
- Housing benefit overpayments
- A range of other services such as room rental.

This does not include housing rent, council tax or business rate debt.

5.2 An aged debt analysis of the Council's sundry debts is shown in the table below. Debt over 30 days old has decreased over the year from £1.973m to £1.708m – a reduction of £265,000. Debts over 5 years old relate in the main to two services, Housing Benefit overpayments (£145,141) and Housing (£12,563).

| Age of Debt | June 2011 | June 2012 |
|-------------------------|-------------------|-------------------|
| Up to 29 days (current) | £774,075 | £814,034 |
| 30 days – 1 Year | £962,441 | £814,945 |
| 1 – 2 years | £366,265 | £331,782 |
| 2 –3 years | £235,630 | £216,004 |
| 3 – 4 years | £155,317 | £101,240 |
| 4 – 5 years | £58,104 | £82,711 |
| 5 + years | £194,831 | £161,512 |
| Total | £2,746,663 | £2,522,228 |

5.3 Of the outstanding debt, the table below sets out the main services and debts owing:

| | Outstanding Debt – 30 June 2012 |
|--|--|
| | £ |
| ▪ Commercial rent | 672,427 |
| ▪ Markets & Halls | 22,135 |
| ▪ Trade waste | 96,117 |
| ▪ Service charge and ground rent for leasehold flat owners | 58,984 |
| ▪ Home call alarms | 5,428 |
| ▪ Housing benefit overpayments* | 1,114,402 |
| ▪ Recycling | 107,832 |
| ▪ Leisure / Museums | 56,195 |
| ▪ AFU | 36,616 |
| ▪ Economy & Tourism | 76,394 |
| ▪ HRA | 83,892 |
| ▪ General Fund Housing | 89,532 |
| ▪ River & Canal | 21,998 |

- These overpayments occur largely due to claimants' change of circumstances which leads to a lower benefit entitlement once a reassessment is made. This figure represents about 2.3% of the total annual benefits paid and more than 90% of these amounts are usually recovered.

6. DEBT WRITE-OFFS

6.1 The following amounts have been written-off during the first three months of 2012/13:

| | |
|-------------------|----------|
| • Council Tax | £ 55,086 |
| • Business Rates* | £ 0 |
| • Sundry Debt | £ 13,519 |
| • Housing Rents | £ 27 |

* Business Rates write-offs are considered during March 2013.

7. CREDITOR PAYMENTS PERFORMANCE

7.1 During the first three months of 2012/13, the percentage of invoices paid within 30 days was 95.0%, which is lower than the 2011/12 performance of 96.6%.

8. CONCLUSION

- 8.1 The forecast increase in Service Committee net expenditure for 2012/13 totals £35,430 including the supplementary budgets of £138,260. This together with transfers from Earmarked Reserves, net interest paid, the New Homes Bonus and provision for the repayment of debt will result in a transfer of £1,066,482 from the General Fund Working Balance.
- 8.2 The forecast General Fund Working Balance at 31 March 2013 is £3,218,943 and equates to 24% of the General Fund net expenditure.
- 8.3 It is estimated that the HRA working balance will be £8,121,973 and the Council's Own Build Balance will stand at £71,056 at 31 March 2013.
- 8.4 The creditors' payment performance has dropped slightly and is currently 95.0%.

9. RECOMMENDATION

- 9.1 That Scrutiny Resources Committee notes and Executive recommend that the Council approve:
- The General Fund forecast financial position for the 2012/13 financial year
 - The HRA forecast financial position for 2012/13 financial year
 - The outstanding Sundry Debt position as at June 2012
 - The creditors' payments performance

ASSISTANT DIRECTOR FINANCE

Local Government (Access to Information) Act 1985 (as amended)
Background papers used in compiling the report:
None

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APPENDIX A

GENERAL FUND
2012/13 REVENUE ESTIMATES - SUMMARY
as at 30 June 2012

| | Annual Budget £ | Supplementary Budgets £ | Revised Annual Budget £ | Year End Forecast £ | Variance to Budget £ |
|---|------------------------|----------------------------|----------------------------|------------------------|-------------------------|
| SCRUTINY - COMMUNITY | 13,552,090 | 55,200 | 13,607,290 | 13,697,290 | 90,000 |
| SCRUTINY - ECONOMY | (2,537,130) | 71,060 | (2,466,070) | (2,852,900) | (386,830) |
| SCRUTINY - RESOURCES | 6,094,780 | 12,000 | 6,106,780 | 5,939,040 | (167,740) |
| Senior Management Restructure | (500,000) | | (500,000) | 0 | 500,000 |
| less Notional capital charges | (3,029,790) | | (3,029,790) | (3,029,790) | 0 |
| <u>Service Committee Net Expenditure</u> | 13,579,950 | 138,260 | 13,718,210 | 13,753,640 | 35,430 |
| Net Interest | 150,000 | | 150,000 | 125,000 | (25,000) |
| Local Services Support Grant | (505,470) | | (505,470) | (505,470) | 0 |
| New Homes Bonus | (1,322,665) | | (1,322,665) | (1,322,665) | 0 |
| Minimum Revenue Provision | 1,076,000 | | 1,076,000 | 1,107,164 | 31,164 |
| <u>General Fund Expenditure</u> | 12,977,815 | 138,260 | 13,116,075 | 13,157,669 | 41,594 |
| Transfer To/From(-) Working Balance | (923,198) | (138,260) | (1,061,458) | (1,066,482) | (5,024) |
| Transfer To/From(-) Earmarked Reserves | 1,197,065 | | 1,197,065 | 1,160,982 | (36,083) |
| <u>General Fund Net Expenditure</u> | 13,251,682 | 0 | 13,251,682 | 13,252,169 | 487 |
| Formula Grant | (8,257,807) | | (8,257,807) | (8,257,807) | 0 |
| Council Tax Freeze Grant | (237,283) | | (237,283) | (237,770) | (487) |
| <u>Council Tax Net Expenditure</u> | 4,756,592 | 0 | 4,756,592 | 4,756,592 | 0 |
| | Working Balance | £ 4,285,425 | | £ 3,218,943 | March 2013 |
| | March 2012 | | | | |

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APPENDIX B

HOUSING REVENUE ACCOUNT
2012/13 REVENUE ESTIMATES - SUMMARY
as at 30 June 2012

| Code | Approved Annual Budget | Current Outturn Forecast | Variance To Budget |
|----------------------------------|------------------------|--------------------------|--------------------|
| | £ | £ | £ |
| 85A1 Management | 2,992,070 | 2,958,590 | (33,480) |
| 85A3 Sundry Lands Maintenance | 262,170 | 262,170 | 0 |
| 85A4 Repairs Fund Contribution | 9,924,020 | 9,924,020 | 0 |
| 85A6 Capital Charges | 1,915,320 | 1,915,320 | 0 |
| 85A8 Rents | (17,387,550) | (17,391,350) | (3,800) |
| 85B2 Interest | (26,300) | (26,300) | 0 |
| 85B4 Variance in Working Balance | 2,320,270 | 2,357,550 | 37,280 |
| Net Expenditure | 0 | 0 | 0 |
| Working Balance | 1 April 2012 | 31 March 2013 | £ 8,121,973 |
| | £ 5,764,423 | | |

COUNCIL OWN BUILD SITES

| Code | Approved Annual Budget | Current Outturn Forecast | Variance To Budget |
|------------------------------------|------------------------|--------------------------|--------------------|
| | £ | £ | £ |
| H006 Rowan House | (6,450) | (6,450) | 0 |
| H007 Knights Place | (36,400) | (51,400) | (15,000) |
| H008 Capital Financing | 15,000 | 15,000 | 0 |
| H009 Capital Charges | 10,280 | 0 | (10,280) |
| Variance in Working Balance | 17,570 | 42,850 | 25,280 |
| Working Balance | 1 April 2012 | 31 March 2013 | £ 71,056 |
| | £ 28,206 | | |

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EXETER CITY COUNCIL
SCRUTINY COMMITTEE - RESOURCES
19 SEPTEMBER 2012

EXECUTIVE
2 OCTOBER 2012

ANNUAL SUSTAINABLE PROCUREMENT AND COMMISSIONING REPORT 2012/13

1. PURPOSE OF THE REPORT

- 1.1 To report on progress made against the Sustainable Procurement and Commissioning Action Plan 2011/12.
- 1.2 To outline the Sustainable Procurement and Commissioning Action Plan for 2012/13

2. BACKGROUND

- 2.1 In March 2009, the Sustainable Procurement and Commissioning Strategy 2009-2012 was published. Each year an action plan is developed, informed by the strategy and changes in wider procurement policy.

3. PROGRESS TO DATE

Sustainable Procurement and Commissioning Strategy

- 3.1 The Sustainable Procurement and Commissioning Strategy is supported by a Procurement and Commissioning Good Practice Guide and a number of toolkits. The toolkits in particular provide straight-forward guidance on key elements of procurement and commissioning, such as developing a specification, risk management, appointing consultants, etc. This guidance is available on the intranet to assist officers considering contracting as an option.
- 3.2 The guidance is generic enough to enable tendering for work as diverse as dealing with abandoned vehicles and the disposal of composted material to achieve a consistently good standard of procurement across the council.

Working with small businesses

- 3.3 We will continue to work with small businesses in Exeter and the surrounding region to increase their involvement in bidding for Council work, in particular involving the voluntary and community sector where possible. In addition, efforts will be directed to encourage those bidding for council work to offer apprenticeships, particularly for young people, within their companies. The increasing use of the *Selling to the Council* web page is essential to continue this work.
- 3.4 The website: www.exeterbuysellprosper.co.uk was designed to actively encourage those making buying decisions in local public sector and large employers, particularly for contracts that do not need to go out to formal tendering to buy from local small businesses. This initiative was coordinated by Exeter City Council on behalf of its partners and in collaboration with Exeter Business Support, Business Link, Exeter Chamber of Commerce and the Exeter Federation of Small Businesses.

The Green Accord

- 3.5 The Green Accord is the subject of a separate report on this agenda and is a prime tool in the Council's Sustainable Procurement and Commissioning Strategy.

4. CHANGES TO PUBLIC PROCUREMENT PROCEDURES

- 4.1 A number of changes have been introduced at a national level that may impact on the Council's procurement processes. These include:
- 4.2 The introduction of standard core pre qualification questions with the aim to be incorporated in all pre qualification questionnaires (PQQ). The PQQ is used to make an initial assessment of a potential bidder's suitability. It has long been a general issue with businesses that there is little consistency across Councils over what questions are asked and the level of detail required. Small and medium enterprises (SMEs) have cited this as a perceived barrier to their engagement with Councils. In Exeter we have for a long time used a PQQ format that contains the core questions recommended by the national PQQ and now a compliant model PQQ has been developed for use across the South West.
- 4.3 With effect from January 2011, and as part of the Coalition Government's transparency agenda, the Council is required to publish all new contracts and tenders on the internet above £500 in value in a mandated format. Details include the name of the successful bidder and the price of the winning bid. Guidance for officers has been produced and the work is co-ordinated centrally. However the ultimate intention is to deliver this information through a regional web portal.
- 4.4 The Council's Standard Terms and Conditions and Contract Regulations have been assessed against the requirements of the new Equality Act and no changes are required.

5. COLLABORATING WITH PROCUREMENT BODIES ACROSS DEVON

- 5.1 The Council continues to take an active role in the Devon Procurement Partnership (DPP). This is comprised of all public procurement bodies in Devon including local authorities, emergency services and academic institutions. It seeks to develop best practice in terms of procurement and initiates collaborative procurements for the benefit of its members.
- 5.2 In the light of the specific challenges faced by local authorities, the need for a more strategic group was identified. A Heads of Procurement Group, comprising the procurement leads from Devon County Council, Torbay, Plymouth and Exeter, together with the chair and deputy chair of the DPP, has been established. Exeter's involvement remains particularly beneficial as it recognised that it can ensure that the City's unique contribution comes from being the only urban Devon district.

6. FUTURE PLAN OF WORK

- 6.1 The progress achieved against the 2011/12 Sustainable Procurement and Commissioning Action Plan is attached at Appendix I.
- 6.2 The Action Plan for the coming year, attached as Appendix II, sets out plans for wider, more challenging changes to seek to deliver greater probity, transparency and financial control in procurement and purchasing procedures across all council activities. This plan details how the council will seek to work with the wider business community to drive economic, social and environmental sustainability in Exeter to both reduce the effect of their operations on the environment and effectively reduce the amount of carbon released to the atmosphere. The plan also details how changes will be made to encourage and afford the better opportunity for small business to be awarded work from the council.

7. RECOMMENDED

That Scrutiny Committee Resources and Executive:

- 1) notes the Sustainable Procurement and Commissioning Action Plan for 2012/13
- 2) notes the actions taken to reflect the new national requirements identified in section 4 of the report.

ASSITANT DIRECTOR HOUSING AND CONTRACTS

Local Government (Access to Information) Act 1985 (as amended)

Background papers used in compiling this report:

None

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**SUSTAINABLE PROCUREMENT & COMMISSIONING ACTION PLAN
APRIL 2011 TO MARCH 2012**

| TASK | BY WHOM | BY WHEN |
|---|--|--|
| Review and revise the Council's Sustainable Procurement and Commissioning Strategy such that a new strategy, reflecting best practice is in place for April 2012 | Previous Head of Contracts in consultation with Procurement Group and appropriate officers | To be reconsidered and reviewed in 2012/13 |
| Integrate the Sustainable Procurement Policy into the revised Sustainable Procurement and Commissioning Strategy thereby ensuring that sustainability is at the heart of all procurement and commissioning. | Previous Head of Contracts | Ongoing alongside part of other reviews in 2012/13 |
| Comply with the Governments Local Transparency Agenda as it relates to contracts and tendering | Previous Head of Contracts/ Procurement Group/HoS | Ongoing throughout year |
| Respond to the proposals to introduce a Community Right to Challenge and in turn develop procedures to respond to the requirements once they are introduced. | Previous Heads of Contracts and Policy | Response by May 2011. Procedures in accordance with timetable. |
| Work proactively with the Low Carbon Task Force to introduce photovoltaic schemes on Council housing stock and Civic buildings that maximises the benefit to the Council of feed in tariffs. | Previous Heads of Contracts/ Housing / Estates | Develop contract documents April 2011 Tendering complete September 2011 |
| Prepare to retender master vendor agency provider contract to incorporate changes to legislation in respect of agency workers rights in collaboration with other Devon Councils. | Previous Heads of Contracts/ Procurement Group/ Human Resources | New arrangements planned to be in place by April 2013 |
| Revisit the constitution of the Procurement Group to ensure it reflects the structural changes within the Council in order for it to continue to fulfil its objectives. | Previous Head of Contracts / Procurement Group | To be implemented alongside other reviews in 2012/13 |
| Support contracting and tendering processes across the Council ensuring that procurement objectives are met via a process of ongoing review of Procurement Strategies. | Previous Head of Contracts/ Procurement Group | In accordance with procurement project plan |
| Monitor the take up of contract opportunities by Small and Medium Enterprises, Black Minority Ethnic, Disabled and Women Only Organisations using check list | Previous Head of Contracts/ Devon Councils | Still to be implemented needs further consideration in 2013 |
| Review and improve the 'Selling to the Council' web pages with particular emphasis on businesses in the local area, develop the web based information to assist SME involvement in council tenders in accordance with the Government recommendations and promote to the business community. | Previous Head of Contracts/ Procurement Group | Ongoing |
| Continue to develop procurement good practice guide and toolkit and continue to provide advice, guidance and gateway reviews to strategic procurement projects | Previous Head of Contracts | Ongoing |
| Work with Heads of Procurement Group, District Councils and Devon Procurement Partnership to identify opportunities to share expertise and maximise competitive advantage. | Previous Head of Contracts | Ongoing |
| Identify areas of existing procurement procedures that need to be improved and implement changes to comply with legislation and good practice | Previous Procurement Group | Ongoing alongside part of other reviews in 2012/13 |

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**SUSTAINABLE PROCUREMENT & COMMISSIONING ACTION PLAN
MAY 2012 TO MARCH 2013**

| TASK | COMMENT AND TARGETS |
|---|---|
| SUSTAINABILITY | |
| Review the Sustainable procurement and Commissioning Strategy 2009-2012 | Target December 2012 |
| Review improvements identified in the Environmental Sustainability Audit as they relate to procurement in order to ensure they better address social, environmental and economic issues. | Review needed following deferral due to restructure and arrival of new Assistant Director in May 2012 prompting a review of procurement generally. Target date Nov 2012 |
| Set in place an Energy Management Function from existing resources to identify opportunities to deliver better sustainability through procurement that involves better cooperation and coordination with suppliers to jointly deliver carbon reduction measures | Target November 2012 |
| Continue to drive and seek internal capacity of awareness and use of sustainability in procurement activity by extending the Green Accord to further Council supply chains, including the embedding of equality and diversity within the awarding of contracts and compliance monitoring. | Whilst part achieved in the past; there is an ongoing need to extend Green Accord accreditation to deliver reduced carbon. Target March 2013 |
| Achieve level 5 across all categories in the Sustainable Procurement Flexible Framework. | Substantively achieved; independently verified by Global Action Plan, but some further categories to consolidate. |
| PROCUREMENT | |
| Review how procurement and tendering is operated across the council. Seek to centralise procurement, tendering and purchasing processes to bring more probity, consistency, control and transparency in these processes throughout the council. Consider how a corporately centred function would be better placed to deliver consistent working practices and tighter controls in terms of whenever services and goods are to be either purchased or procured for the council. | By March 2013 |
| Identify areas of existing procurement procedures that need to be improved and implement changes to comply with legislation and good practice | Ongoing |
| Review financial competitive qualification levels in Contract Regulations and alter as required to deliver greater consistency in their application across the council and so more tighter control of how competitive procurement is utilised | By December 2012 |
| As an extension of the above, review the existing project value categories that suppliers can apply for and look to simplify. | Presently lists are up to £75k, £75k to £250k, £250k to £750k, £750k to £1m, over £1m. New levels to be set in place, target December 2012 |
| Review and set in place new select lists of Construction companies, material suppliers, consultants, asbestos analysis and removal companies along with electrical and mechanical services companies. | This will also cover the appointment of companies and material suppliers to in-house service teams. Target March 2013 |
| In tandem with the above combine the building and engineering approved lists into a consolidated list to provide greater consistency and clarity and seek to extend in partnership with other districts and stakeholders. | Some progress made internally here but not fully achieved, deferred due to restructure but can now be revisited. Target March 2013 and ongoing. In respect of extending approved lists with other districts, not achieved before as |

| TASK | COMMENT AND TARGETS |
|--|---|
| | lack of desire from other regional local authorities to participate. |
| Review to further develop and promote guidance on involving users in the procurement process working with them to provide training and improved awareness on their role in the procurement and commissioning process such as the better evaluation tenders in terms of cost and quality. | Whilst achievement was made in respect of Mears' Housing Reactive Repair Contract, where this fully involved housing tenant representatives being trained and then involved in all aspects of the process, this model needs to be reviewed to see if it would be appropriate and proportionate for other procurement processes. Target March 2013 |
| Review and set up reporting feedback processes to ensure procurement and commissioning processes are developed and based on users needs. | Carry out as part of the general review of procurement and tendering processes. Target March 2013 |
| Further develop procurement good practice guide and toolkit and to disseminate procurement advice, guidance and gateway reviews to client officers acting as contract administrators for strategic projects | Whilst there was previously some achievement; in response to Internal Audit recommendations, progress was limited due to other priority work pressures. A review of the need and focus for this should receive higher priority for exploration. Target March 2013 |
| e-PROCUREMENT | |
| Review opportunities for integration of all the Council's e-procurement solutions with the corporate financial systems to streamline the procurement process and maximise transactional savings. | As above but target March 2013 |
| Ensure all sourcing and routine procurement activity across the Council is undertaken electronically as far as is possible. | Whilst previously achieved; for those procurements managed centrally, the progress in electronic procurement in other areas needs to be reviewed to see if this can be expanded more widely across services. Target March 2013 |
| Work with Devon Procurement Partnership and SWRIEP to identify opportunities to share expertise and maximise competitive advantage. | Whilst collaborative procurements have been undertaken on diverse contracts such as recovery of abandoned vehicles and stair lift installations the derived benefits of same have to date been limited. Whilst collaboration is valuable it is important that these partnerships are seen to focus in future on driving opportunities and benefits that can be specifically exploited by Exeter City Council. Target March 2013 |
| Work with Devon Procurement Partnership to particularly review and prioritise the drive for greater cooperation in the wider use of e procurement facilities in Devon such that the use of existing available information technology software is better utilised to deliver savings in the cost of administrative procurement processes. | Previous collaboration with Devon Procurement Partnership in relation to e procurement has not brought significant success due to the need for ECC to commit resources to other priorities. However, ECC's resource position is not unique in Devon. This has already been identified by DPP and the DPP is now considering how greater cooperation in terms of e procurement mentoring can be developed to address council learning resource issues so to drive the wider use of available e |

| TASK | COMMENT AND TARGETS |
|--|---|
| | procurement software. Target March 2013 |
| EQUAL OPPORTUNITIES | |
| As part of the review to simplify existing project value categories that suppliers can apply for as detailed under PROCUREMENT above, a lower level of project value will be set, at under £10,000. In this category less stringent qualifications will be set to encourage and provide better opportunity for small business, that being those with less than 5 employees, to win work from the council | New levels to be set in place, target December 2012 |
| Review the take up of contract opportunities by Small and Medium Enterprises, Black Minority Ethnic, Disabled and Women only organisations | As not yet sufficiently successful need to consider development of joint approach with other authorities in Devon. Target March 2013 |
| Review the need to further improve the 'Selling to the Council' web pages so better aimed to encourage local businesses and assist SME involvement in council tenders in accordance with the Glover Report recommendations. | Some improvements already in place such as 'Exeter Buy and Sell Prosper' linked to Selling to the Council website to encourage SME involvement. However consider if further improvements are needed. Target December 2012 |

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE - ECONOMY 6 SEPTEMBER 2012

PLANNING MEMBER WORKING GROUP 18 SEPTEMBER 2012

EXECUTIVE 2 OCTOBER 2012

SUPPLEMENTARY PLANNING DOCUMENT ON SUSTAINABLE TRANSPORT

1 PURPOSE OF REPORT

- 1.1 This report is to enable Members to approve a draft Supplementary Planning Document on sustainable transport for public consultation.

2 BACKGROUND

- 2.1 The Council is in the process of preparing a Local Development Framework (LDF) which, once complete, will supersede the Exeter Local Plan First Review, adopted in 2005. The LDF comprises a suite of documents, divided into:-
- Development Plan Documents (DPDs) such as the Core Strategy, adopted in February 2012, which contains strategic policies, and the Site Allocations and Development Management DPD which is currently published in draft for consultation; and
 - Supplementary Planning Documents (SPDs) which are not subject to independent examination but will have full public consultation, an example being the Residential Design SPD adopted in September 2010.
- 2.2 The Council's Local Development Scheme sets out its proposals in relation to other elements of the LDF. These include an SPD to "clarify and amplify policy relating to the provision of sustainable transport". A draft has been prepared following initial consultation within the Council and Devon County Council, and forms Appendix 1 to this report.

3 THE DRAFT SUSTAINABLE TRANSPORT SPD

- 3.1 The new National Planning Policy Framework (NPPF) says that local authorities should use SPDs where they can help applicants make successful planning applications or aid infrastructure delivery¹, and this SPD is designed to do both. From Chapter 4 onwards, it takes the form of a practice manual, setting out the type of development to which each chapter applies and the relevant policies in the Local Plan or elsewhere in the LDF. It is designed so that the earlier chapters apply to all development including the smallest applications, whereas later chapters apply to progressively larger schemes. This is explained in Table 1 on Page 3, and means that applicants with minor proposals can stop reading at the appropriate point. Each

¹ At paragraph 153

chapter also contains, where relevant, a checklist for applicants, and conditions and section 106 obligations which are likely to apply.

- 3.2 While it is not practical to summarise the whole document in this report, the following paragraphs highlight some points of particular interest.
- 3.3 **Chapter 4 - Access and facilities for people with disabilities** precedes the other policy chapters, because it is relevant in part to nearly all development proposals, however small. It summarises a number of transport and access needs relevant to people with a variety of disabilities, some of which are expanded upon in subsequent chapters.
- 3.4 **Chapter 5 - Parking and other facilities for cyclists** takes the opportunity to update the cycle parking standards contained in Schedule 2 of the Local Plan. Surveys have been undertaken at workplaces (through staff bicycle user groups) and shops and other public places (using Sustrans volunteers) to check the adequacy of actual provision. People on the Wavelength panel have been asked about the adequacy of cycle parking where they live and work, and elsewhere. The standards have also been compared with those of other authorities.
- 3.5 **Chapter 6 - Car parking** contains a rationale for the inclusion of this subject in an SPD on sustainable transport. This includes the fact that the NPPF does not advocate maximum standards for parking, but permits the setting of local standards based on factors including the need to reduce the use of high-emission vehicles, local car ownership levels, and the availability of public transport². The SPD restates the parking standards from the Local Plan, but as indicative rather than maximum standards, because it was considered that to omit parking standards altogether would be unhelpful to applicants.
- 3.6 **Chapter 7 - Connections between the site and its surroundings** deals with proposals that require existing infrastructure to be altered, for example to form or close an access. It points out that providing more than one access to a site for pedestrians and cyclists can encourage use of those modes by reducing travel distances.
- 3.7 **Chapter 8 - Travel plans and travel packs** has been prepared in close consultation with Devon County Council, who have specific requirements related to the size and impact of developments.
- 3.8 **Chapter 9 – Off-site improvements** applies to developments whose impact is such that they are required to make a financial contribution towards improving transport infrastructure or services. This complements Core Strategy policy CP18 and the Planning Obligations SPD in relation to section 106 contributions, but also anticipates the adoption of a Community Infrastructure Levy in Exeter.
- 3.9 **Chapter 10 – On-site movement networks** applies to developments that are large enough to have roads and/or paths within the site. It aims to ensure that layouts cater not only for cars, but provide safe and convenient routes for pedestrians and cyclists, as well as roads capable of accommodating buses where appropriate.

² See NPPF paragraph 39

- 3.10 **Chapter 11 – Car clubs** is intended to supersede the current Supplementary Planning Guidance on the subject, updating the financial and other details, and extending the concept from car-free city centre sites to larger development areas where a car club might form part of a package of sustainable travel measures.
- 3.11 **Chapter 12 – Significant transport proposals** includes for completeness a summary of such projects, including the Devon Metro package of rail improvements and plans for the bus, road and park and ride networks.

4 NEXT STEPS

- 4.1 It has been necessary to screen the SPD to determine whether it needs to be subject to a Strategic Environmental Assessment. It is considered that it does not, principally because it amplifies higher level policies rather than itself creating a policy framework, and this preliminary view has been communicated to the statutory consultees, namely English Heritage, the Environment Agency, and Natural England. Any comments from those consultees will be reported verbally at the meeting.
- 4.2 If approved by Executive, the SPD will be made available to the public and interested organisations for at least four weeks, by way of consultation. Representations received during that period will be considered and a further report presented to Planning Member Working Group and Executive.

5 RECOMMENDED

- 5.1 That Scrutiny Committee – Economy and Planning Member Working Group support the draft Sustainable Transport SPD.
- 5.2 That Executive approve the draft Sustainable Transport SPD for public consultation.

RICHARD SHORT
ASSISTANT DIRECTOR, CITY DEVELOPMENT

Originator: Ross Hussey
Projects and Business Manager

Local Government Act 1972 (as amended)
Background papers used in compiling this report:-
Screening for Strategic Environmental Assessment
Cycle parking survey material

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Appendix 1



Exeter City Council

Sustainable Transport Supplementary Planning Document

July 2012

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1 Introduction

1.1 Purpose of this document

- 1.1.1 Development gives rise to a need to travel. This document offers guidance to applicants for planning permission, developers, and others on the design features and contributions that may be required to satisfy planning policies and ensure that development results in sustainable travel outcomes. It has been designed to fit within the overall context of the Development Plan for Exeter, for the purpose of achieving a consistent approach to determining planning applications and mitigating the impact of development.
- 1.1.2 If development generates a need to travel that is greater than, or significantly different from, that generated by the previous use of a site, improvements are likely to be required to the infrastructure, services and facilities in the locality. Not doing so could result in adverse effects for local amenity, the environment, and the wider transport networks. The policies contained in the Development Plan are designed to ensure that developers mitigate the impacts of, and provide for the infrastructure required by, development in a sustainable way.
- 1.1.3 This is a Supplementary Planning Document forming part of Exeter's Local Development Framework. In accordance with the National Planning Policy Framework¹, it sets out practical steps that will ensure compliance with policies in the Core Strategy, the existing Local Plan First Review, and the emerging Site Allocations and Development Management DPD². It is designed to help applicants make successful planning applications, as well as aiding the delivery of necessary infrastructure, and is therefore essential reading for anyone proposing development in Exeter.

1.2 Structure of this document

- 1.2.1 Chapter 2 sets the national context, in terms of legislation, policy and guidance. Chapter 3 then summarises the applicable local policy documents. Subsequent chapters contain the policy material itself.
- 1.2.2 The contents of Chapters 4 to 11 have been arranged so that Chapters 4, 5 and 6 apply to all but the smallest forms of development, whereas the later chapters apply progressively to development that is more extensive or has a higher impact.
- 1.2.3 The requirements are generally cumulative, so that where, for example, Chapter 9 is relevant to a proposal, the preceding chapters, in this case Chapters 4 to 8, should also be referred to. Chapter 11 on car clubs is something of a special case, because these can form part of a package of travel plan measures in a number of situations, ranging from larger developments down to small car-free

¹ Paragraph 153 of the NPPF. See also Chapter 2 of this document.

² See Chapter 3 of this document.

schemes. In the latter situation, some of the preceding chapters may not be applicable. Table 1 sets this out in more detail.

- 1.2.4 Finally, Chapter 12 refers to significant transport proposals which are generally location-specific.

1.3 Why promote sustainable transport?

- 1.3.1 The following chapters set out how proposals need to enable and encourage sustainable travel to comply with national and local policies. However, this is not purely a matter of policy, but also of economics and common sense.

- 1.3.2 Just as it would be unthinkable to provide development without road access, it should be instinctive to design it so as to encourage people to walk, cycle or use public transport. This applies both to the overall layout of the site and its connections to its surrounding area, and to the design of individual premises. Nationally, 25% of households do not have access to a car, and the number of driving licence holders appears to be declining in younger age groups³. Older people may reduce their driving or cease altogether, either through choice or necessity. In the latter case they may become dependent on community transport. Planning development around the motorist, to the exclusion of other modes, makes development inaccessible to a significant proportion of the population. For housebuilders or retailers this excludes potential customers; for businesses it excludes potential employees.

- 1.3.3 Making development easily accessible by different modes can add little or nothing to the cost if designed in from the outset, and may even enhance the sale price or rental that can be realised.⁴ The National Planning Policy Framework recognises this in saying that the transport system needs to be balanced in favour of sustainable transport modes to give people a real choice about how they travel.⁵ Even if a household considers it essential to own a car, a wide range of transport options can save them the need to, and the cost of, running a second vehicle. That said, the policy objective is to reduce car use, not ownership; any cost saving to households is therefore an incidental benefit.

³ National Travel Survey 2010 - <http://www.dft.gov.uk/statistics/releases/national-travel-survey-2010>.

⁴ See for example <http://www.guardian.co.uk/environment/green-living-blog/2009/nov/05/bike-storage>.

⁵ At paragraph 29.

2 National Planning Context

2.1 National Planning Policy Framework

2.1.1 Transport is key to all three of the dimensions to sustainable development identified in the [National Planning Policy Framework](#) (NPPF). It is relevant to the three corresponding roles to be performed by the planning system:-

- the economic role, which includes the provision of infrastructure required by the development;
- the social role, which includes the creation of a high quality built environment with accessible local services; and
- the environmental role, which includes minimising pollution and mitigating and adapting to climate change, including moving to a low carbon economy.⁶

2.1.2 Paragraph 29 explicitly recognises the role to be played by transport policies in facilitating sustainable development, as well as contributing to wider sustainability and health objectives. Section 4 contains advice on promoting sustainable transport. This document builds upon that advice.

2.1.3 Section 7 “Requiring good design” is also highly relevant. Good design can promote use of sustainable travel modes. While the NPPF discourages prescriptive design policies, it lists “layout” among the issues that policies should concentrate on, as well as the access arrangements for new development in relation to neighbouring buildings and the local area more generally.⁷ There is some overlap with section 8 “Promoting healthy communities”, which stresses the need for places to promote active street frontages, safe and accessible environments, clear and legible pedestrian routes and high quality public space.⁸

2.1.4 Paragraphs 203 to 206 require local planning authorities to consider whether unacceptable development could be made acceptable through the use of conditions or planning obligations, and sets out the tests to be satisfied in using those mechanisms.

⁶ NPPF paragraph 7.

⁷ At paragraph 59.

⁸ At paragraph 69.

2.2 Community Infrastructure Levy

- 2.2.1 The Planning Act 2008 has made provision for the collection of a Community Infrastructure Levy (CIL) to ensure the costs incurred in providing infrastructure to support the development of an area are funded by owners or developers of land. The levy would not replace the need for all planning obligations, which would continue to play a role in securing site-specific requirements. References in this document to financial contributions from developers are intended to apply not only to contributions payable pursuant to planning obligations created under section 106 of the Town and Country Planning Act 1990, but also to funds generated by CIL.

2.3 DfT Guidance on Transport Assessment

- 2.3.1 This Guidance sets out indicative thresholds for the production of Transport Statements, Transport Assessments and travel plans⁹, and gives guidance on their preparation. It has not been superseded by the National Planning Policy Framework, which says that “all developments that generate significant amounts of movement should be supported by a Transport Statement or Transport Assessment”¹⁰.

<http://www.dft.gov.uk/pgr/regional/transportassessments/guidanceonta>

2.4 Manual for Streets

- 2.4.1 This Government publication specifically discourages the building of streets that are primarily designed to meet the needs of motor traffic, are unsafe and unwelcoming to pedestrians and cyclists, and difficult to serve by public transport¹¹. It requires the street’s function as part of the movement network to be considered not in isolation, but in conjunction with its other functions as a place¹².
- 2.4.2 This document has not been superseded by the NPPF, which promotes the design of development so as to give priority (among other things) to pedestrian and cycle movement¹³.

<http://www.dft.gov.uk/publications/manual-for-streets/>

⁹ Appendix B of the Guidance.

¹⁰ At paragraph 32.

¹¹ At paragraph 1.1.6.

¹² At paragraph 2.3.6.

¹³ At paragraph 35.

2.5 Design and Access Statements

2.5.1 From August 2006 Design and Access statements have been required to accompany applications, to illustrate the process that has led to the proposal, and to explain and justify the proposal in a structured way. The level of detail required within a statement will depend on the scale and complexity of a proposal, but it should show how access arrangements will ensure that all users will have equal and convenient access to buildings and spaces and the public transport network.

2.5.2 Many Design and Access Statements give detailed consideration to design, but limited attention to access issues. In particular, a statement must address:

- The development plan policy context (including this document) and how policies have been taken into account;
- Points of access to the site from roads and public transport;
- Access to buildings within the site (in the case of an outline application, the statement should explain the principles which will be used to inform the access arrangements with reference to neighbourhood movement patterns);
- How the access arrangements help to create an environment which is safe from crime and other hazards;
- In relation to the inclusion of disabled people:-
 - What consultation has been carried out in relation to access, and how that has informed the proposals;
 - How sources of advice on design and accessibility and technical issues will be or have been followed;
- Arrangements for emergency evacuation, and access for the emergency services.

2.5.3 Further information can be found in:-

The Residential Design SPD¹⁴, Chapters 2 to 4 generally, but especially paragraphs 2.9 and 4.4 (IV).

DCLG Circular 01/2006:

<http://www.communities.gov.uk/publications/planningandbuilding/circularcommunities2>;

CABE's publication 'Design and access statements: how to write, read and use them': <http://www.cabe.org.uk/publications/design-and-access-statements>.

¹⁴ See Section 3.4.

3 Local Policy Context

3.1 Exeter Core Strategy

3.1.1 The [Exeter Core Strategy](#) was adopted on 21 February 2012.

3.1.2 Chapter 8, on Transport, points out that adequate transport infrastructure is necessary for the delivery of sustainable growth. It gives examples of the relationship between planning and transport, including how transport links help to determine where development takes place, and how transport capacity is constrained by the layout of development.

3.1.3 The same chapter sets out specific and generic proposals to improve the travel experience in and around Exeter. Policy CP9 reads as follows:-

“Comprehensive strategic transport measures to accommodate the additional development proposed for the City and adjoining areas shall include:

- a step change in the quality, capacity and environmental performance of public transport, especially between the City Centre and proposed developments adjoining the City to the east in East Devon and to the south west in Teignbridge;
- additional Park and Ride sites around the City including Ide interchange;
- improvements to the strategic road infrastructure including key junctions on the M5, outer bypass and the Alphington Road corridor;
- new rail halts at Hill Barton and Newcourt on the Exeter to Exmouth line and at Matford on the Exeter to Plymouth line;
- demand management measures; and,
- improvements to facilities for pedestrians and cyclists.

The contributions necessary to ensure the delivery of transport infrastructure will be secured through the application of Policy CP18.”

3.1.4 Chapter 10 on the Environment includes a section on air quality¹⁵. It refers to the Council’s local Air Quality Strategy¹⁶ which has identified a need to tackle emissions of nitrogen dioxide generated by motor vehicles along the busiest roads into the city. This has resulted in the designation of an Air Quality Management Area (AQMA), and production of an Air Quality Action Plan. Policy CP11 requires development to be located and designed so as to minimise and, if necessary, mitigate against environmental impacts. Within the AQMA, it provides that measures to reduce pollution and meet air quality objectives will be brought forward, as proposed by the Air Quality Action Plan and Local Transport Plan. This is also relevant outside the AQMA; development of an area such as

¹⁵ Paragraphs 10.3 to 10.7 of the Core Strategy.

¹⁶ See also paragraph 3.11 of this document.

Newcourt or Monkerton without robust sustainable transport measures is likely to increase congestion and therefore have an adverse effect on air quality along radial routes.

3.1.5 Chapter 10 requires enhanced walking and cycling links as part of a Green Infrastructure network.¹⁷ It also contains a section on Design and Local Distinctiveness¹⁸, which requires permeable layouts that encourage travel by foot, cycle, and public transport, along safe and convenient routes, together with the provision of associated facilities.¹⁹

3.1.6 The Infrastructure Schedule at Appendix 2 to the Core Strategy identifies the transport, green and other infrastructure needed to deliver the quantum of development envisaged for the city. Where possible, cost is estimated, and funding sources including developer contributions are identified.

3.1.7 Policy CP18 reads as follows:-

“New development must be supported by appropriate infrastructure provided in a timely manner. The City Council will continue to work in partnership with infrastructure providers and other delivery agencies to keep an up to date infrastructure delivery plan that will enable proposals, in accordance with the spatial strategy, to be brought forward.

Developer contributions will be sought to ensure that the necessary physical, social, economic and green infrastructure is in place to deliver development. Contributions will be used to mitigate the adverse impacts of development (including any cumulative impact). Where appropriate, contributions will be used to facilitate the infrastructure needed to support sustainable development.”

3.1.8 Chapter 12 sets out the infrastructure needs of the various strategic allocations. Further detail is to be found in the site specific Masterplans referred to at paragraph 3.7 below:-

Newcourt²⁰

- a transport hub to be focussed on a new rail station;
- good permeability through a safe network of walking and cycling routes;
- bus routes with priority eg. along Topsham Road;
- improvements to the strategic road network, particularly at Countess Wear roundabout.

Monkerton/Hill Barton

- a comprehensive footpath and cycleway network;
- public transport to be convenient to all dwellings;

¹⁷ Paragraph 10.32 onwards of the Core Strategy and policy CP16.

¹⁸ Paragraph 10.53 onwards of the Core Strategy and policies CP15 and CP17.

¹⁹ Paragraph 10.55 of the Core Strategy, especially (iv) to (vi).

²⁰ Paragraph 12.5 onwards of the Core Strategy and policy CP19.

- highest densities along public transport corridors;
- a road link to the area east of motorway, for use by an enhanced bus service;
- a rail station on the Exmouth branch line.

South of Alphington

- good permeability and links for pedestrians and cyclists;
- high quality bus service to city centre;
- a rail station in the Matford area.

3.1.9 These are brief summaries of the requirements and reference should be made to the Core Strategy document for full details.

3.2 Exeter Local Plan First Review

3.2.1 It is intended that a Strategic Allocations and Development Management DPD will form part of the Local Development Framework. In the meantime, for detailed development management policies, it is necessary to refer to the [Exeter Local Plan First Review](#), adopted in 2005. This advocates the use of spatial planning to minimise travel and, where travel is essential, to encourage the use of more sustainable forms of transport.²¹

3.2.2 In the Local Plan, transport policies are principally to be found in Chapter 9. Policy T3 contains a package of requirements designed to maximise the use of sustainable modes:-

- “(a) all existing and proposed walking and cycle routes are safeguarded or alternative reasonably convenient routes are provided;
- (b) suitable cycle parking provision is provided in accordance with the standards set out in Schedule 2;
- (c) where more than 20 people are employed facilities for showering and changing are provided;
- (d) full account is taken of the needs of bus operation through and alongside new development by the provision of lay-bys, roads and other associated facilities;
- (e) where appropriate, pedestrian and cycling links are provided to existing or proposed rail stations;
- (f) the particular needs of people with disabilities are taken into account.”

3.2.3 Certain other policies require transport provision to be made in connection with other types of development. For example, Policy H2(d) promotes city centre development without private parking (except for disabled people). In the latter

²¹ Exeter Local Plan, Chapter 9 – “Objectives”.

case, as well as secure cycle parking, a contribution towards facilities for public transport, cyclists and pedestrians will be required.²²

3.3 Exeter Sustainable Community Strategy (Exeter Vision)

3.3.1 The Exeter Vision is the Sustainable Community Strategy for Exeter, produced by the Exeter Local Strategic Partnership.

3.3.2 Under the theme “An Accessible City”, the Vision is one of a city where:-

- jobs, key services & facilities can be accessed by public transport, walking and cycling, and
- local and national transport networks are easily accessible, with less dependence on cars.

3.3.3 Under the theme “A City that cares for the environment”, the Vision proposes measures to reduce carbon emissions, 22% of which are produced by road traffic. These measures include developing a strategic partnership approach to transport and implementing the Green Infrastructure Strategy²³.

<http://www.exeter.gov.uk/vision>

3.4 Green Infrastructure Strategy

3.4.1 The Green Infrastructure Study (Phase 1) and the Green Infrastructure Strategy (Phase 2) were commissioned by East Devon District Council, Exeter City Council, Teignbridge District Council and Natural England as part of their ongoing commitment to meeting the needs of new and future communities and to general environmental protection and enhancement.

3.4.2 The Green Infrastructure work provides a framework for green infrastructure to be taken into account in planning for the significant amount of new growth in the area. Although not all GI is accessible, the Strategy promotes measures which facilitate and encourage walking, cycling and use of public transport as the primary means of movement within the strategic development areas.

<http://www.exeter.gov.uk/index.aspx?articleid=10986>

3.5 Residential Design SPD

3.5.1 The Residential Design SPD was adopted on 28 September 2010. In providing guidance on good design practice for buildings and the public realm, it takes into account the need to enable and encourage the use of sustainable modes of transport wherever possible.

3.5.2 The RD SPD contains much of relevance to this current document, including:-

- permeable and well-connected layouts;

²² Paragraph 4.8 of the Local Plan.

²³ See section 3.4.

- priority for pedestrians and cyclists, and facilities such as cycle parking;
- sustainable design, including safe and attractive public realm.

Cross-references are included in this document where they are relevant.

<http://www.exeter.gov.uk/index.aspx?articleid=12730>

3.6 Planning Obligations

- 3.6.1 The [Planning Obligations SPD](#) sets out how, during pre-application discussions with developers, planning officers will identify a list of issues relevant to the development site to be considered in respect of planning obligations. Developers should identify what measures might be taken to mitigate the impact of their development and ensure its sustainability²⁴. Where specific issues need to be discussed with the City or County Council, that is highlighted in this document.²⁵
- 3.6.2 Developers should explain through Heads of Terms what they are proposing should be contained in and secured through planning obligations.²⁶
- 3.6.3 It is intended that developers should provide for all infrastructure and services necessary to achieve sustainability from their proposals. Until adoption of Community Infrastructure Levy (CIL), the City Council's normal position will be to secure this through planning obligations.²⁷
- 3.6.4 The Council's standard clauses for planning obligations, including those for financial contributions and highway works, are on its website at www.exeter.gov.uk/planningobligations. Relevant obligations and model planning conditions are listed, where applicable, at the end of each chapter of this document.

3.7 Site-specific Masterplans

- 3.7.1 Masterplans currently exist for the areas of Newcourt and Monkerton/Hill Barton, where considerable development is proposed (and in the case of Newcourt, under way). As with the Residential Design SPD, these indicate how development should be planned to make sustainable travel choices a realistic and attractive proposition. They have been subject to public consultation and have been approved for development management purposes.

<http://www.exeter.gov.uk/newcourt>

<http://www.exeter.gov.uk/monkerton>

²⁴ Paragraphs 4.2.1 and 4.2.2 of Planning Obligations SPD.

²⁵ See for example paragraphs 9.1.2 and 10.2.2.

²⁶ Paragraph 4.2.3 of Planning Obligations SPD.

²⁷ Paragraph 4.4.1 of Planning Obligations SPD.

3.8 Car Club SPG

- 3.8.1 The Council has previously produced Supplementary Planning Guidance (SPG) in relation to car clubs. This SPD (specifically Chapter 11) will, when adopted, replace that SPG.

<http://exeter.gov.uk/index.aspx?articleid=4783>

3.9 Devon County Council Local Transport Plan (LTP3)

- 3.9.1 Devon County Council's Local Transport Plan (LTP3) was adopted in April 2011. In its Exeter Strategy it outlines successes in achieving more use of sustainable travel modes than the national average. For example, as a Cycling Demonstration Town from 2005 to 2011, the city saw a 10% increase in people cycling to work and 40% in students cycling to school. Patronage of rail, park and ride and bus services has also increased steadily; in the case of bus this represents an exception to the national trend.

- 3.9.2 The Exeter Strategy highlights the need to make greater use of sustainable travel options to accommodate the level of development and growth expected by 2026. It identifies the priorities for the city as being to:-

- improve access to the city;
- enable and support smarter travel;
- unlock major growth east of Exeter;
- deliver major development within Exeter;
- protect Exeter as a gateway.

- 3.9.3 The document points out that "with funding opportunities limited, it will be necessary to negotiate contributions towards sustainable transport infrastructure from all new development, including funding for travel planning measures. Alternative sources of funding will also need to be sought and using demand management measures such as workplace parking for new developments will help generate income for reinvesting in the transport system."²⁸

http://www.devon.gov.uk/index/transportroads/devon_local_transport_plan/ltp3.htm

3.10 Walking, Cycling and Bus Strategies

- 3.10.1 The City and County Councils have prepared a Walking Strategy and a Cycling Strategy, as well as a Growth Bus Strategy for Exeter.

<http://www.devon.gov.uk/eldf-exeter-cycle-strategy.pdf>

[Other hyperlinks to be inserted when documents available.]

3.11 Air Quality Strategy and Air Quality Action Plan

²⁸ At page 62 of LTP3.

3.11.1 The City Council has prepared a local Air Quality Strategy which outlines the measures it will take in order to protect and improve air quality throughout Exeter. It identifies a need to tackle emissions of nitrogen dioxide generated by motor vehicles along the busiest roads into the city, which has resulted in the designation of an Air Quality Management Area (AQMA), and production of an Air Quality Action Plan. This identifies the Council's role, as part of its forward planning function, in ensuring that future development does not significantly adversely affect the air quality within the city.²⁹

Air Quality Strategy: <http://www.exeter.gov.uk/index.aspx?articleid=4261>

Air Quality Action Plan: <http://www.exeter.gov.uk/index.aspx?articleid=4292>

²⁹ At Page 11 of the Executive Summary.

4 Access and facilities for people with disabilities

Applicable to the following:

All development where access arrangements and/or facilities are affected.

Relevant policies:

Core Strategy especially paragraphs 8.6 (e) and 10.55 (viii); and policies CP9 and CP17.

Local Plan policy T3(f) and T9.

Emerging Site Allocations and Development Management DPD especially policy DM26(e).

Residential Design SPD.

4.1 Requirements

4.1.1 The transport and access needs of residents and visitors with disabilities must also be taken into account in the design of all development:-

- Footpaths and footways must be designed to take account of the needs of users of pushchairs, wheelchairs and buggies.
- Routes from public transport stops and car parks must be free from hazards and accessible to wheelchair users.
- Raised kerbs should be provided at bus stops.
- Where obstructions are unavoidable, they should be detectable by visually impaired people, for example through use of colour contrasts, and tap rails to enable identification by long cane users.
- Crossing points should be identified using tactile paving of the appropriate colour.³⁰
- Seating should be provided at bus stops where space permits, and at intervals along (but not obstructing) key pedestrian routes.
- Dedicated parking should be provided for people with disabilities, in accordance with Table 4 at paragraph 6.2.2. There are recommended dimensions in the DfT's Traffic Advisory Leaflet.³¹
- Entrances to buildings, internal doorways and circulation space should be accessible to wheelchair users.
- Toilets should be accessible to wheelchair users and people with other disabilities.

³⁰ See "[Guidance on the use of Tactile Surfaces on Pavements](#)", DfT 2007.

³¹ No. 5/95:

http://webarchive.nationalarchives.gov.uk/20090505152230/http://www.dft.gov.uk/adobe/pdf/165240/244921/244924/TAL_5-951/.

- There should be appropriate means of access to upper floors, with corresponding means of escape.

4.1.2 The Residential Design SPD elaborates on these requirements.³² While directed at dwellings, much of the guidance is appropriate to other types of development. Further information can be found in the relevant Government guidance.³³ In addition, buildings must comply with Part M of the Building Regulations.

4.1.3 A contribution towards community transport services may form part of a package of transport measures funded by development³⁴. Community transport in Exeter is generally provided by the third sector, with considerable local authority support. It provides an essential service for people who would not otherwise be able to travel, for example because the distance to a bus stop is too great, or because their disability prevents them using conventional vehicles. The existing network will need to be improved and extended in order to serve new development.

4.2 Checklist for applications

- On the application form, include the number of parking spaces for people with disabilities.
- On the drawings, indicate the location and dimensions of these spaces, and identify any other features listed in paragraph 4.1.1.
- In the Design and Access or Planning Statement, describe the rationale for these features, with reference to the relevant guidance documents.

4.3 Model conditions

4.3.1 Highways condition (see paragraph 10.4.3).

4.3.2 Pedestrian and cycle routes condition (see paragraph 10.4.1).

4.3.3 Parking condition (see paragraph 6.8.1).

4.4 Planning obligations

4.4.1 Contribution towards community transport – see [Standard Clause 04](#) – “Financial contribution”.

³² For example at RD SPD paragraphs 6.46 and 9.50 onwards.

³³ Those cited above, plus “[Inclusive Mobility](#)”, DfT 2005.

³⁴ See paragraph 9.2.6.

5 **Parking and other facilities for cyclists**

Applicable to the following (ie. all but the smallest proposals):

Residential newbuild or conversion (including multiple occupation), from single dwellings upwards.

Residential extension increasing the number of bedrooms, and/or affecting cycle parking arrangements.

Non-residential newbuild or conversion/change of use, from single premises upwards.

Extension increasing the number of staff and/or visitors, and/or affecting cycle parking arrangements.

Relevant policies:

Core Strategy especially policy CP9.

Local Plan policy T3.

Emerging Site Allocations and Development Management DPD policy DM28.

Residential Design SPD.

Site-specific Masterplans.

5.1 **Quantity**

- 5.1.1 Cycle parking standards are set out in Policy T3 and Schedule 2 of the Local Plan, but have been reviewed in the light of local experience, the high levels of cycling in Exeter³⁵, and examples of good practice³⁶, and revised standards are detailed in Table 2 below.
- 5.1.2 These are intended to indicate an appropriate level of cycle parking, as required by the emerging Strategic Allocations and Development Management DPD. In the meantime these standards update those set out in the Local Plan.
- 5.1.3 These are minimum standards; applicants should consider providing more parking if, for example, the site is well located in relation to high quality cycle routes. For extensions to existing premises, the use made of existing cycle stands may be a good guide to the appropriate level of future provision.
- 5.1.4 Newbuild properties will always be expected to include cycle parking in accordance with the policy requirement. It is accepted that this may be more difficult to achieve with conversions.

³⁵ Exeter's status as a Cycling Demonstration Town from 2005 to 2011 and accompanying investment in infrastructure and measures such as training, resulted in substantial increases in cycling; see paragraph 3.9.1.

³⁶ See for example [TfL Proposed Guidelines](#). London is seen as comparable in that, like Exeter, it has seen a dramatic increase in cycling using a mixture of dedicated facilities and heavily trafficked roads.

Table 2 - Cycle parking standards (minimum)

| <p>The standards below are cumulative, eg. for retail, cycle parking is required for both staff and customers.</p> <p>The absence of a use from this table does not mean no cycle parking is required. Applicants should consider likely numbers of residents, staff and visitors, and assess their likely needs by comparison with the following examples.</p> | | | |
|---|---|-------------------------------------|---|
| Land use | | Number of cycles | Notes |
| Parking for residents | | | |
| Houses and flats | 1 or 2 bedrooms | 1 per dwelling | |
| | 3+ bedrooms | 2 per dwelling | |
| HMOs, bedsits, cluster flats, student accommodation | For first 10 bedrooms | 1 per bedroom | |
| | For 11 th bedroom upwards | 1 per 2 bedrooms | |
| Retirement flats (includes staff parking) | For first 4 flats | 1 per flat | Assumes lower age limit of 60 or less. Reduce requirement if age limit is higher. |
| | For subsequent flats | 1 per 5 flats (minimum 4 spaces) | |
| Parking for staff | | | |
| General rule | For first 4 full time equivalents (FTEs) | 1 per FTE | |
| | For subsequent staff | 1 per 7 FTEs (minimum 4 spaces) | |
| Example for specific cases - | | | |
| Offices | Assume 1 FTE per 12.5m ² of office space, and provide cycle parking as above. | | |
| Method of calculation for other uses which include office space | Consider level of staffing likely to be accommodated in the building, eg. medical practice - assume 1 FTE per consulting room, plus 1 FTE per 12.5m ² of office space, and provide cycle parking as above. | | |
| Industrial uses | If number of staff is not known, assume 1 FTE per 50m ² of workshop space, plus 12.5m ² of office space, and provide cycle parking as above. | | |
| Retail | 1 staff cycle space per 350m ² of net retail floorspace. | | |

| Parking for visitors/customers | | | |
|--|---|--|--|
| Retail | Food | 1 per 350m ² of net retail floorspace (minimum 10 spaces) | |
| | Non-food | 1 per 500m ² of net retail floorspace (minimum 4 spaces) | |
| Hotels and conference facilities | Overnight guests | Equal to staff parking, and may be in same secure space | |
| | Day visitors (conferences etc) | 1 per 20 peak period visitors | |
| Sports facilities | | 1 per 20 peak period visitors | |
| Other premises open to the public | eg. other leisure uses, medical practices, food and drink | Same number of spaces as for staff | |
| Offices and industrial uses not generally open to the public | | One or two spaces for ad hoc callers | |
| Student accommodation | | One space per 20 beds (minimum 2 spaces) | |
| Other residential blocks | | One or two spaces for ad hoc callers | |
| Educational establishments | Consider on an individual basis depending on age and other characteristics of students. | | |

5.2 Cycle parking at home

5.2.1 Cycle parking must be secure and convenient. The Residential Design SPD sets out detailed requirements for cycle storage at paragraph 6.56 onwards.

- For a single garage measuring 6m x 3m, 0.5m needs to be added to either the length or the width for bike storage. If added to the length, a personal door should be included so the bikes can be taken in and out with the car in situ.
- Individual stores in gardens should have easy access to the road via a gate. For two bikes, the store should measure about 2m x 1m (a 6' x 4' shed will suffice).

- Communal stores should be conveniently located and secure. See [Devon County Council's Cycle Parking Design Guidance](#) in relation to storage systems.
- Storage space for bikes is additional to that required for bins; the same space cannot be counted for both.

5.2.2 In the case of an application to convert a garage to living accommodation, while it is accepted that this will usually be designed to meet the requirements of the current occupier, consideration should be given to how cycle storage could be provided in future, such as a shed within the curtilage.

5.3 Cycle parking at workplaces

5.3.1 For staff who will be leaving their cycles on site for the whole day, security will be paramount.

- Cycle parking should be in a secure location within the curtilage and/or in a secure structure wherever possible. The location should be such that users feel safe accessing it. See [Devon County Council's Cycle Parking Design Guidance](#) in relation to storage systems.
- Showers, lockers, and space to dry clothes will all encourage staff to cycle to work. Where more than 20 people are to be employed, these facilities must be provided³⁷. Where possible, they should also be provided for smaller employment premises, particularly newbuild development which is well-located in relation to the city's cycle network. See model condition at paragraph 5.6.1.

5.4 Cycle parking for visitors

5.4.1 Cycle parking should be provided in convenient and safe locations, immediately adjacent to destinations such as shops or schools, at transport interchanges or next to community facilities.³⁸

- For casual visitors, cycle parking should be located by the main entrance, in a well-overlooked position, to which cycles can be locked. Conveniently sited parking will prevent bikes being chained to other structures.
- In areas like retail parks with multiple premises, small groups of bike stands close to individual shop entrances will be preferable to one large group of stands. The former will be more convenient for users, easier to accommodate, and less visually intrusive.
- At premises where visitors stay for hours rather than minutes, covered parking is preferable.
- Conference centres and hotels should provide secure cycle parking. If visitors are allowed to use the store provided for staff, the size of the store needs to reflect this.

³⁷ Local Plan policy T3(c).

³⁸ Paragraph 10.53 of the RD SPD.

- In city centre or local centre locations where there is no space on site for cycle parking for visitors, it may be appropriate for the developer to contribute to additional provision in the vicinity.
- Good surveillance is essential, to ensure the security of cycles and their users.
- See [Devon County Council's Cycle Parking Design Guidance](#) in relation to storage systems.

5.5 Checklist for applications

- On the application form, include the number of cycle parking spaces.
- On the drawings, indicate the location of cycle parking, and dimensions so that capacity can be verified. The Council has produced a ready-reckoner showing how many bicycles will fit in a given area. [Insert hyperlink]
- In the Design and Access or Planning Statement, describe the quantity and nature of cycle parking, including storage system used (eg. Sheffield stands), security arrangements where applicable, and method of controlling access to communal stores.

5.6 Model conditions

5.6.1 Cycle parking identified in application:

Prior to occupation of the development hereby permitted, secure cycle parking^{(a)(b)} shall be provided^(c) in accordance with [details^(d) previously submitted to and approved in writing by the Local Planning Authority]^(e), and the cycle parking shall be maintained at all times thereafter.^(f)

Reason - to ensure that cycle parking is provided, in accordance with Local Plan policy T3, to encourage travel by sustainable means.

Variations:-

- May need to specify "cycle parking for visitors and secure cycle parking for residents and staff", or any combination of these appropriate to the use.
- For a workplace, it may be appropriate to include provision of lockers, showers and changing facilities.
- If location is shown on a drawing, insert after the word "provided": "in the location shown on drawing number ..."
- After "details" insert any specific requirements; for example in the case of a small store room it may be necessary to specify "(including arrangements as to access)", to prevent it from being simply a locked cupboard.
- If sufficient detail is shown on a drawing, replace the words in square brackets with "the details shown on drawing number ...".
- For larger developments, may need to link occupation of premises to provision of cycle parking for those premises.

5.6.2 No cycle parking identified in application:

Prior to commencement of the development, details shall be submitted to the Local Planning Authority of secure cycle parking.^{(a)(b)(d)} Development shall not be commenced until such details have been agreed in writing by the Local Planning Authority, and prior to first occupation of the development, the cycle parking shall be provided in accordance with the approved details.

Reason and variations are as above.

If no obvious solution is apparent from the submitted drawings, applicants will be asked to provide additional details, in the absence of which the application will be liable to refusal for failure to comply with policy T3.

6 Car parking

Applicable to the following (ie. all but the smallest proposals):

Residential newbuild or conversion (including multiple occupation), from single dwellings upwards.

Non-residential newbuild or conversion/change of use, from single premises upwards.

Extension of any premises increasing the number of staff and/or visitors, and/or affecting car parking arrangements.

Relevant policies:

Core Strategy especially policy CP9.

Local Plan policy T10.

Emerging Site Allocations and Development Management DPD policy DM19, DM28 and DM31(o).

Residential Design SPD.

Site-specific Masterplans.

6.1 Rationale

6.1.1 There are a number of reasons for including a chapter on car parking in an SPD relating to sustainable transport:-

- The definition of sustainable transport modes in the NPPF³⁹ includes low and ultra low emission vehicles and car sharing, all of which generate a requirement for parking.
- The NPPF does not advocate maximum standards for parking; it permits the setting of local standards based on a number of factors, only one of which is the need to reduce the use of high-emission vehicles⁴⁰. Another factor is local car ownership levels, implicitly making the point that to some extent car ownership governs the appropriate level of parking, not the reverse; that is, restricting parking provision does not necessarily reduce car ownership, and can have adverse consequences such as encouraging parking on footways. In any case, the policy objective is to reduce car use rather than ownership⁴¹.
- Another factor to be taken into account is the availability and opportunities for public transport. This reflects the fact that driving is part of an overall package of transport possibilities, and an effective way of reducing car use is to offer people other attractive choices.
- Sections 6.3 to 6.6 therefore set out a number of ways in which car parking needs to mesh with other transport modes.

³⁹ In Annex 2.

⁴⁰ At paragraph 39.

⁴¹ See paragraph 1.3.3.

6.2 Quantity

- 6.2.1 Car parking standards are set out in policy T10 and Schedules 3 and 4 of the Exeter Local Plan. The Residential Design SPD elaborates on the parking standards for dwellings, including unallocated parking, and provides detailed guidance on its location and layout.⁴² Although described as maxima in the Local Plan and RD SPD, in accordance with government policy the standards in Schedule 3 are now treated as indicative standards to assist applicants.⁴³ Schedule 4 sets out minimum requirements for parking for disabled users.
- 6.2.2 It is intended that the emerging Site Allocations and Development Management DPD will require an “appropriate” level of car parking for development, and the standards in Table 3 and Table 4 below indicate what that level is for different types of development, including minimum provision for people with disabilities⁴⁴.
- 6.2.3 The tables focus on car parking, but any additional operational requirements (such as for commercial vehicles to service the premises) need to be accommodated.

Table 3 – Car parking standards (indicative)

| | |
|--------------------------------------|---|
| Inside the pedestrian priority zone | |
| Non-residential | Operational only |
| Residential | Average of 1.5 spaces per dwelling* |
| Outside the pedestrian priority zone | |
| Food retail | 1 space per 14 m ² (gross internal area) |
| Non-food retail | 1 space per 20 m ² |
| Cinemas and conference facilities | 1 space per 5 seats |
| D2 including leisure | 1 space per 22 m ² |
| B1 including offices | 1 space per 30 m ² |
| B2 employment | 1 space per 50 m ² |
| B8 warehousing | 1 space per 200 m ² |
| Hospitals | 1 space per 4 FTEs + 1 space per 3 visitors |
| Higher and further education | 1 space per 2 FTE |
| Stadia | 1 space per 15 seats |
| Residential | 1.5 spaces per dwelling* |

⁴² RD SPD Chapter 6.

⁴³ NPPF paragraph 39 requires standards to be set taking into account a number of factors.

⁴⁴ See also paragraph 4.1.1.

*See Residential Design SPD Figure 6.2 for ratio of allocated to unallocated spaces

Table 4 - Car parking standards for disabled users (minimum)

| Car park used for | Car park size | |
|--|---|-------------------------------|
| | Up to 200 bays | Over 200 bays |
| Employment premises – employees and visitors | Individual bays for each disabled employee + 2 bays or 5% of total capacity | 6 bays + 2% of total capacity |
| Shopping, recreation, leisure | 3 bays or 6% of total capacity, whichever is greater | 4 bays + 4% of total capacity |

6.3 Car free developments

6.3.1 Where a Residents' Parking Zone (RPZ) has been designated by Devon County Council, their policy⁴⁵ is that new properties will not be eligible for a permit and developers will be required to provide sufficient spaces off-street or designate the property as car free; see further paragraph 6.3.2. For conversions, permits will be issued on a first come, first served basis, up to the number of permits previously existing for the property, or the number of new properties, whichever is the lower, provided that any of the new properties without a permit are designated car free.

6.3.2 Policy H2 and paragraph of the Exeter Local Plan First Review refers to a City Centre Core Area within which car free developments will be permitted. Similar considerations may apply to justify a car free development in other locations well served by public transport. In all cases this will be subject to the following:-

- parking should be provided for cycles and disabled drivers, as well as space for deliveries;
- where occupiers will not be entitled to a residents' parking permit from Devon County Council, they should be made aware of that;
- a travel plan and/or travel pack may be required in accordance with section 8.1;
- a contribution will be sought towards the enhancement of facilities for public transport, cyclists and pedestrians. A contribution to a car club is deemed to comply equally with the objectives of paragraph 4.8.⁴⁶

⁴⁵ See item 6 at http://www.devon.gov.uk/index/councildemocracy/decision_making/cma/cma_document.htm?cmadoc=agenda_exh_20101125.html.

⁴⁶ In accordance with NPPF paragraph 39 which says that if parking standards are set they should take into account, among other things, the accessibility of the development and the availability of and opportunities for public transport. For car clubs see chapter 11.

6.3.3 On car free developments, or other locations where a car club forms part of the travel plan strategy⁴⁷, parking for a car club car or cars should be provided in accordance with chapter 11.

6.4 Extensions to Controlled Parking Zones

6.4.1 Where a development is likely to encourage on-street parking to the detriment of existing residents or businesses, the applicant may be required to make a financial contribution to enable the creation or extension of Controlled Parking Zones. The contribution will need to cover the costs associated with making the necessary Order, as well as signage and road markings.

6.5 Electric vehicles

6.5.1 The Government's Plug-in Vehicle Infrastructure Strategy⁴⁸ envisages that as plug-in electric vehicles become more widespread, most charging will take place at home, with additional facilities at workplaces and locations such as shopping centres. The Residential Design SPD requires developers to plan for the future installation of charging points for all residential parking, including on-street locations. As a minimum, ducting and potential for easy connection to the electricity network should be provided.⁴⁹ Workplace and retail parking facilities should also be future-proofed in this way.

6.6 Layout and management arrangements

6.6.1 Parking areas should be well overlooked, by buildings or public spaces, to provide security for users and their vehicles.

6.6.2 Shops and offices should be designed and located so that their front entrances are directly off main streets, not involving a long walk across a car park.

6.6.3 Where parking is provided for customers of retail estates, in the interests of discouraging unnecessary vehicle movements, management arrangements for those parking areas should not preclude customers from leaving their cars parked for short periods while they visit other nearby premises. The model condition at paragraph 6.8.2 is designed to deal with this. Paths should provide easy connections in and out of the car park, to avoid pedestrians taking short cuts through planting.

6.7 Checklist for applications

- On the application form, include the number of parking spaces for different types of vehicle and user.
- On the drawings, indicate location of parking, and dimensions so that capacity can be verified.

⁴⁷ For travel plans see chapter 7.

⁴⁸ "Making the Connection", June 2011.

⁴⁹ Paragraph 6.34 of the RD SPD.

- In the Design and Access or Planning Statement, describe the rationale for the number of spaces, with reference to the indicative standards in Table 3 and Table 4, Figure 6.2 of the RD SPD, and the criteria listed in paragraph 39 of the NPPF.

6.8 Model conditions

6.8.1 Parking:

The proposed car parking shall be constructed and laid out in accordance with details to be approved by the Local Planning Authority in writing before their construction begins. For this purpose, plans and sections indicating, as appropriate, the design, layout [including allocated and unallocated spaces], levels, gradients, materials and method of construction shall be submitted to the Local Planning Authority.

Reason: To ensure that adequate information is available for the proper consideration of the detailed proposals.

Note: this may be part of a composite condition requiring approval of details of estate roads etc.⁵⁰

6.8.2 Flexible parking:

The car park shall at all times be managed in such a way that car-borne customers are not prevented from leaving the site to visit nearby premises on foot.

Reason - to encourage short journeys to be made on foot rather than by car, in accordance with Local Plan policy T3.

Note: intended particularly for retail parks; see paragraph 6.6.3.

6.9 Planning obligations

- 6.9.1 Contribution to enable the creation or extension of a Controlled Parking Zone - see [Standard Clause 04](#) – “Financial contribution”.

⁵⁰ See paragraph 10.4.3.

7 Connections between the site and its surroundings

Applicable to:

Proposals having a direct physical impact on existing infrastructure; this may include (for example) a single dwelling which would involve alterations to an access, or for example to a cycle path or bus stop.

Sites with more than one potential access.

Relevant policies:

Core Strategy policy CP9.

Local Plan policy T3.

Emerging Site Allocations and Development Management DPD policy DM27.

Residential Design SPD.

7.1 Alterations to existing infrastructure

7.1.1 Development may have a physical impact on existing infrastructure, particularly where access to the development is improved or newly created. Physical works may be necessary:-

- To avoid danger or inconvenience to existing users of the road, or to vehicles or persons entering or leaving the property; measures would include the creation of visibility splays or a priority arrangement for pedestrians and cyclists crossing the access;
- To relocate infrastructure such as a bus stop.

7.1.2 Individual proposals must respect the overall movement strategy for the wider area, both current and as proposed through the Exeter Walking and Cycle Strategies and emerging Exeter Growth Bus Strategy⁵¹, as well as any applicable Masterplan.⁵²

7.1.3 Where the required works are on the application site or within land controlled by the applicant, and off the public highway, a condition will usually suffice; otherwise they will be secured by a planning obligation.

7.2 Connections

7.2.1 Where there is more than one possible access point to the development site, Devon County Council as highway authority may wish to prevent vehicular access at one or more of those points. However, in the interests of keeping walking and cycling distances to a minimum, preferably pedestrian and cycle access should still be provided. As a general rule, this should be the case wherever a site boundary abuts an existing highway or public open space.

⁵¹ See paragraph 3.10 of this document.

⁵² See paragraph 3.7 of this document.

7.3 Checklist for applications

- On the application form, complete the section about access and rights of way.
- Provide a plan showing all access points, together with detailed drawings showing all necessary works.
- In the Design and Access Statement, set out the rationale for the access points and associated works.

7.4 Model conditions

7.4.1 On-site works:

*No part of the development hereby approved shall be brought into its intended use until the *[visibility splays, on-site parking, turning, loading and unloading facilities] have been provided in accordance with the requirements of this permission and retained for those purposes at all times.*

Reason: To ensure the safety and convenience of the traffic attracted to the site and other road users.

Note: *adapt to reflect the actual requirements.

7.4.2 Restriction on vehicular access:

Prior to occupation of the development, the access to [name of road] shall be closed to motor vehicles in accordance with details previously submitted to and approved in writing by the Local Planning Authority, and shall remain closed at all times thereafter.

Reason: To ensure the safety and convenience of the traffic attracted to the site and other road users.

7.4.3 Provision of pedestrian/cycle access:

Prior to occupation of the development, access for pedestrians and cyclists at the points shown marked on drawing no. [] shall be provided in accordance with details previously submitted to and approved in writing by the Local Planning Authority, and maintained at all times thereafter.

Reason - to encourage travel by sustainable means in accordance with Local Plan policy T3.

7.5 Planning obligations

- 7.5.1 See [Standard Clause 05](#) – “Highway works”.

8 Travel plans and travel packs

Applicable to:

Proposals putting additional demand on transport infrastructure or services; generally involving more than an individual dwelling or other premises.

Relevant policies:

Core Strategy especially paragraph 8.6(g) and policy CP9.

Local Plan policy T10.

Emerging Site Allocations and Development Management DPD especially policy DM27(f).

Residential Design SPD.

8.1 Requirements

8.1.1 An effective travel plan can play a significant part in encouraging sustainable travel. The NPPF says that a travel plan should be provided for all developments which generate significant amounts of movement.⁵³ Devon County Council's general requirements are as follows:-

- Residential development:-
 - basic travel plan and travel pack (see 8.1.4) – for 20 or more dwellings, or HMO/student accommodation with ten or more rooms;
 - comprehensive travel plan (see 8.1.3) and travel pack – for 50 or more dwellings, or student accommodation with 50 or more rooms;
- Workplaces:-
 - basic travel plan and travel pack – for ten or more staff;
 - comprehensive travel plan and travel pack – for 20 or more staff.

8.1.2 In all such cases, approval of and adherence to a travel plan will be secured by condition.⁵⁴ Although travel plans should be submitted to the City Council for approval, Devon County Council will be consulted, and applicants should therefore have regard to their requirements, which are included with more general travel planning advice at <http://www.devon.gov.uk/travelplanning>.

8.1.3 A comprehensive travel plan is likely to include the provision of vouchers for season tickets for new residents or staff, or towards the cost of bicycles for residents. It may provide for a car club facility in accordance with Chapter 11. It will require employment of a travel plan co-ordinator (although for smaller workplace schemes a member of staff appointed travel plan champion will suffice). A financial contribution to any or all of these measures will need to be secured through a planning obligation.

⁵³ At paragraph 36.

⁵⁴ See condition in paragraph 8.3.1.

8.1.4 A travel pack should be produced for residents of new development and for workplaces in all cases where a travel plan is required. This will include details of walking and cycling routes, as well as public transport including maps, timetables, and information about ticket offers.⁵⁵ Where applicable, it should also include information about car sharing schemes, car clubs, eco-driving and motorcycle safety. Devon County Council may be able to produce packs for developers upon payment of a financial contribution. In all cases they will need to approve the form and content of the travel pack.

8.1.5 The RD SPD requires a Home User Guide to be produced for all dwellings. In the case of major residential development, this will be secured by a planning obligation, a requirement of which will be that the content of the Guide must be approved by the Council.⁵⁶ Where a travel pack is provided, it should form part of this Guide.

8.2 Checklist for applications

- Include a draft travel plan in appropriate cases.

8.3 Model conditions

8.3.1 Travel plan:

No part of the development shall be occupied until a travel plan (including recommendations and arrangements for monitoring and review) has been submitted to and approved in writing by the Local Planning Authority^{(a)(b)}. Thereafter the recommendations of the travel plan shall be implemented, monitored and reviewed in accordance with the approved document, or any amended document subsequently approved in writing by the Local Planning Authority.^(c)

Reason: to encourage travel by sustainable means, in accordance with Local Plan policy T3.

Variations:-

(a) May need to insert after "Local Planning Authority": "(who shall consult with both the Local Highway Authority and Highways Agency acting on behalf of the Secretary of State for Transport⁵⁷)".

(b) May need to specify that "*the travel plan shall include as a minimum:-*

- *The identification of targets for trip reduction and modal shift;*
- *The methods to be employed to meet these targets;*
- *The mechanisms for monitoring and periodic review;*
- *The mechanisms for reporting;*

⁵⁵ See condition in paragraph 8.3.2.

⁵⁶ Paragraph 9.29 of the RD SPD.

⁵⁷ Where traffic on a trunk road is affected by the proposal.

- *Actions (including payment of financial contributions) in the event that targets are not met;*
- *The mechanisms for mitigation;*
- *Implementation of the travel plan to an agreed timescale or timetable and its operation thereafter;*
- *Mechanisms to secure variations to the travel plan following monitoring and review."*

(c) May need to be specific about review, eg: "A review of the targets shall be undertaken within 6 months of the occupation of the development and on a periodic basis thereafter."

8.3.2 **Travel pack:**

Prior to occupation of the development hereby permitted, a travel pack shall be provided informing all residents^(a) of [the car free status of the development, and]^(b) walking and cycling routes and facilities, public transport routes and timetables, car sharing schemes, car clubs, eco-driving, and motorcycle safety^(c), together with the location of local and central shopping and leisure facilities, as appropriate, the form and content of which have previously been approved in writing by the Local Planning Authority.

Reason: To ensure that all occupants of the development are aware of [its car free status and] the available sustainable travel options.

Variations:-

- (a) Replace "residents" with "staff" etc., as appropriate.
- (b) Include or omit words re car free status, as appropriate.
- (c) Omit those which do not apply.

8.4 **Planning obligations**

Financial contribution⁵⁸ to cover travel plan measures including any or all of the following:-

- production of travel pack;
- vouchers for discounted bicycle purchase and/or season tickets;
- appointment of travel plan co-ordinator.

⁵⁸ See [Standard Clause 04](#), "Financial contribution".

9 Off-site improvements

Applicable to:

Proposals putting additional demand on transport infrastructure or services; generally involving more than an individual dwelling or other premises.

Relevant policies:

Local Plan policies especially T3, T5, T6 and T7.

Core Strategy policies CP9 and CP18.

Emerging Site Allocations and Development Management DPD policies DM19, DM27 and DM28(d).

Residential Design SPD.

Planning Obligations SPD.

Site-specific Masterplans.

9.1 Identification of requirements

- 9.1.1 Where improvements to transport networks are necessary to accommodate journeys generated by the development, and to enable and encourage use of sustainable modes for those journeys, the development will be expected to make a financial contribution towards those improvements.
- 9.1.2 The nature and extent of these contributions will be identified through the Transport Assessment process and pre-application discussions, particularly with Devon County Council. DCC generally follows DfT thresholds⁵⁹ as to when a Transport Assessment is required, although a simple assessment may be required in additional cases to illustrate the impact from a development.
- 9.1.3 Exeter City Council is working towards adopting a CIL Schedule which will indicate what is intended to be funded from the Community Infrastructure Levy. In the meantime, planning obligations fulfil this role, and will continue to play a part in relation to site-specific requirements.
- 9.1.4 Although planning obligations must be directly related to the proposed development, a degree of flexibility will sometimes be necessary as to how transport contributions are spent. This is particularly the case where infrastructure or services are required to support multiple developments, from which contributions will be pooled. It may not be possible to predict the sequence in which those developments will come forward, and that sequence may determine which transport measures should properly be funded by each of the developments.

⁵⁹ See paragraph 2.3.1.

9.2 Potential need for contributions

9.2.1 Roads – contributions may be required towards the following:-

- Local improvements to mitigate congestion and therefore emissions which would otherwise be exacerbated by traffic from the development.
- Measures to encourage drivers to take one route rather than another, for example using signage or traffic calming, or to compel them to do so by restrictions on particular movements.
- Extensions to Controlled Parking Zones in the circumstances described in paragraph 6.4.1.
- The strategic links referred to in section 12.4.

9.2.2 Park and ride – contributions may be required towards the sites referred to in paragraph 12.2.2. This may be appropriate for development in the city centre and therefore served by park and ride, or where park and ride can play a role in reducing traffic congestion on a radial route which the development will exacerbate.

9.2.3 Rail – contributions may be required towards the following, particularly where the development is in a location close to an existing or proposed station:-

- The new stations and other elements of the Devon Metro proposals referred to in section 12.1.
- Measures which encourage occupiers to travel by train, such as better waiting or information systems.

9.2.4 Bus – contributions may be required towards the following:-

- To enhance bring a service within walking distance of development, or increase the frequency of an existing service.
- To provide shelters, seats, static or electronic information displays, raised kerbs to assist access by wheelchairs and pushchairs, and/or crossing facilities, all of which have the capacity to make bus travel more attractive.
- To provide bus priority measures which benefit the development

9.2.5 Walking and cycling – contributions may be required towards improving facilities for pedestrians and cyclists in the vicinity of the site, including the creation of links to reduce walking and cycling distances to public transport and other local facilities; also directional signage, lighting, crossing facilities and public cycle parking.

9.2.6 **Community transport** – a contribution may be required, particularly in an area not served by current community transport services⁶⁰, which therefore need to be extended.

9.3 Checklist for applications

- In the Transport Assessment, indicate how the site relates to transport networks, and identify improvements which would enable and encourage use of sustainable modes.

9.4 Planning obligations

9.4.1 See [Standard Clause 04](#) - “Financial contribution”.

⁶⁰ See paragraph 4.1.3.

10 On-site movement networks

Applicable to the following

Developments large enough to have roads and/or paths within the site.

Relevant policies:

Core Strategy especially policy CP9, CP16, CP17 and CP19.

Local Plan policy T2, T3 and T5.

Emerging Site Allocations and Development Management DPD policy DM27.

10.1 Hierarchy of streets

10.1.1 This document adopts the hierarchy used in the Monkerton Masterplan⁶¹, namely primary, secondary, tertiary and green streets.

- Primary streets will be through routes for all vehicles, therefore carriageway widths will need to take account of large vehicles, including buses, while maintaining a safe and attractive pedestrian and cycle environment.⁶²
- Secondary streets will not be designed to encourage through traffic, although they will need to accommodate buses on local services.
- Tertiary streets are not generally through routes, and should be designed as places that prioritise people rather than vehicles.
- Green streets are footpaths and cycleways with no access for motorised traffic.

10.2 The movement framework

10.2.1 The combined effect of the model conditions in section 10.4 is to require a movement framework to be drawn up, including bus routes (where applicable) and a pedestrian and cycle network. Ideally this should be an integral part of the application, with as little detail as possible left to be secured by conditions.

10.2.2 Devon County Council will be able to advise as to whether a single or multiple vehicular accesses should be provided, and whether any roads on site need to be primary or secondary streets.

10.2.3 In the case of accesses to the site:-

- DCC will be able to advise whether or not vehicular accesses need to be signal controlled.

⁶¹ See link at paragraph 3.7.1 of this document; page 54 of the Masterplan.

⁶² Paragraph 5.11 of the RD SPD.

- If so, push button facilities should usually be provided for pedestrians, which should include toucan facilities for cyclists where cycleways are present. Inconvenience to users of existing pedestrian and cycle routes should be minimised, and existing and potential desire lines should be catered for.
- Wherever the site boundary abuts an existing highway or public open space, pedestrian and cycle access should be provided, even if there is no vehicular access. Where an adjoining site may be developed in future, footpath/cycleways should be built up to the boundary to enable a connection to be made in at a later date.

10.2.4 DCC's Transport Co-ordination Service will also be able to advise which primary or secondary streets (if any) need to accommodate buses:-

- A new service will inevitably require pump-priming through developer contributions, and a diversion from or extension to an existing route is likely to be more cost effective than a completely new service.
- DCC will also be able to advise as to the location of the bus stops which (together with lay-bys, shelters, seats and information systems where appropriate) will need to be provided by the developer.
- If shelters are sourced from the Councils' usual supplier and included in its city-wide contract, it should be possible for the developer to be relieved of maintenance responsibility on payment of a commuted sum.

10.2.5 Phasing is important on a larger development site. Areas nearest to existing transport infrastructure should be developed first⁶³, so that, for example, the new dwellings or workplaces (depending on the type of development) can be served by existing bus services. Only when occupancy of the development reaches a certain critical mass will it become worth diverting a bus service through the site, and even then it will require a pump-priming contribution from the developer. Developing a site from the "wrong" end can make it difficult or impossible to provide public transport.

10.2.6 With access points defined and the primary and secondary streets identified, a pedestrian and cycle network should be devised across the whole site, to minimise walking and cycling distances:-

- All roads should provide safe and attractive routes for pedestrians and cyclists; therefore primary and secondary streets should include segregated footways and cycleways, plus safe and convenient crossing points.
- Subject to the need to accommodate buses and other large vehicles, junction radii should be minimised in order to slow down turning vehicles, and pedestrians and cyclists should be given priority across side turnings where possible.

⁶³ This is consistent with NPPF paragraph 17 – Core Planning Principles, the penultimate of which is to actively manage patterns of growth in this way; also paragraph 30.

- On quiet residential roads, pedestrians and cyclists should be accommodated on the carriageway,⁶⁴ and the RD SPD advocates use of Home Zones wherever possible⁶⁵.
- Culs de sac are discouraged as inhibiting connectivity,⁶⁶ but if they are included, there should be through routes for pedestrians and cyclists which are overlooked and therefore secure.⁶⁷

10.2.7 Public spaces must include paths which support desire lines between key destinations.⁶⁸

- Green streets are particularly appropriate for key walking and cycling routes and links, where there is no direct connection by road.
 - They (and all footpath links) should always be designed to accommodate not just pedestrians, but also cyclists, pushchairs, wheelchairs and buggies.
 - They should be at least 3 metres wide, step-free (including drop kerbs on desire lines), and free from obstructions such as barriers or railings. Where there is a need to slow users, this should be achieved by other design features (such as alignment) wherever possible.⁶⁹

10.2.8 If they do not become part of the highway network, arrangements need to be put in place to ensure that they are maintained to a high standard, including keeping adjoining plant growth under control.⁷⁰

10.2.9 Use of signs and bollards purely to demarcate different transport modes should be avoided;⁷¹ however:-

- Directional signage should be used to maximise use of strategic pedestrian and cycle routes.
- Signs should be consistent with other pedestrian and cycle signage in the area, and designed so as to preserve or enhance the townscape.

10.2.10 Routes should generally be well and consistently lit using light sources with a good colour rendering ability (e.g. white light sources).⁷² In some cases it may

⁶⁴ Paragraph 10.16 of the RD SPD.

⁶⁵ Paragraph 6.26 of the RD SPD.

⁶⁶ Paragraph 5.8 of the RD SPD.

⁶⁷ This will assist compliance with the accessibility criteria in Local Plan policy T2, and NPPF paragraph 38 which says that key facilities should be located within walking distance of most properties.

⁶⁸ Paragraph 10.16 of the RD SPD.

⁶⁹ Paragraph 10.52 of the RD SPD.

⁷⁰ For appropriate planning obligation see [Standard Clause 08](#), "Management Company"; see also model condition at 10.4.1.

⁷¹ Paragraph 10.16 of the RD SPD.

not be appropriate for a route to be lit (such as where, for example, a route has a rural character), but in such cases an alternative signed route, which is well lit and overlooked, should be created to provide a safe and convenient alternative during hours of darkness.

10.2.11 Although much of the above is taken from the RD SPD, for the most part it is equally relevant to uses other than residential development. In the past, employment estates have been developed in a piecemeal manner, with little thought to the possibility of access by any means other than the car. Even where retail units occur within such estates, they tend to be designed in small self-contained areas, with little thought as to how people might walk between one and another, or to a bus stop or railway station. And yet provision of safe and pleasant facilities for pedestrians and cyclists is particularly important in an environment dominated by heavy goods vehicles.

10.3 Checklist for applications

- Include a drawing showing movement hierarchy including bus routes and comprehensive pedestrian and cycle networks.
- Include a phasing plan where the size of the development justifies it.
- In the Design and Access Statement, explain the rationale behind these networks and phasing.

10.4 Model conditions

10.4.1 Pedestrian and cycle routes:

[Prior to commencement of the development][As part of the first application for approval of reserved matters], a detailed scheme for the pedestrian and cycle network shall be submitted to and approved in writing by the Local Planning Authority. The scheme shall include:-

(a) details of routes, road crossings, [bridges,] surface treatments, lighting, street furniture and signage;

(b) a programme for implementation synchronised with the progressive occupation of the development; and

(c) such temporary measures as are necessary (such as ramps where routes cross unfinished roads) to ensure the routes are fully usable during the construction period.

The approved scheme shall be adhered to at all times, including (where applicable) any amendments subsequently agreed in writing by the Local Planning Authority. The routes provided in accordance with this condition shall be maintained at all times thereafter, including keeping them free from vegetation, unless or until they become maintainable at public expense.

Reason - to ensure that the pedestrian and cycle routes are provided, to encourage travel by sustainable means in accordance with policy T3.

⁷² Paragraph 10.18, 10.59 of the RD SPD.

Note: Alternative introductory versions are for detailed and outline applications respectively. Where routes and certain other details are already adequately shown on a drawing, replace the initial paragraph with the following:-

"Prior to occupation of the development hereby permitted, the pedestrian and cycle routes shown on drawing number ... shall be provided in accordance with details previously submitted to and approved in writing by the Local Planning Authority. Those details shall include:-"

Continue with (a), (b) etc as above, omitting reference to details already shown.

10.4.2 **Bus routes and facilities**

[Prior to commencement of the development][As part of the first application for approval of reserved matters], a scheme for on-site bus routes shall be submitted to and approved in writing by the Local Planning Authority. The scheme shall include:-

*(a) details of routes, *[turning arrangements, and stops (including bays, shelters, seats, and static and electronic signage)];*

(b) a programme for implementation synchronised with the progressive occupation of the development, road adoption programme, and/or applicable funding;

(c) any temporary arrangements during the construction period.

The approved scheme shall be adhered to at all times, including (where applicable) any amendments subsequently agreed in writing by the Local Planning Authority. The facilities provided in accordance with this condition shall be maintained at all times thereafter, unless or until they become maintainable by or on behalf of a public authority.

**delete any elements which are not applicable.*

Reason - to ensure that suitable bus routes and stops are provided, to enable and encourage use of public transport in accordance with policy T3.

Note: Alternative introductory versions are for detailed and outline applications respectively.

10.4.3 **Roads and other infrastructure:**

The proposed estate roads, footways, footpaths, verges, junctions, street lighting, sewers, drains, retaining walls, service routes, surface water outfall, road maintenance/vehicle overhang margins, embankments, visibility splays, accesses, car parking and street furniture shall be constructed and laid out in accordance with details, complying with the Highway Authority's standards for adoption and approved by the Local Planning Authority in writing before their construction begins. For this purpose, plans and sections indicating, as appropriate, the design, layout, levels, gradients, materials and method of construction shall be submitted to the Local Planning Authority.

Reason: To ensure that adequate information is available for the proper consideration of the detailed proposals.

10.4.4 **Phasing:**

[Prior to commencement of the development][As part of the first application for approval of reserved matters], a detailed phasing plan shall be submitted to, and approved in writing by, the Local Planning Authority, and the development shall be carried out in accordance with the approved plan. The phasing plan shall specify the proposed timing for the delivery of the areas of public open space/green infrastructure as well as the construction programme for the housing and other built elements of the development.

Reason: To ensure that the development proceeds in accordance with an agreed programme of delivery, that areas closest to existing transport services are developed first, and that within individual phases the open space associated with the development is co-ordinated with the construction of the houses which it will serve.

Note: Alternative introductory versions are for detailed and outline applications respectively.

10.5 Planning obligations

10.5.1 A planning obligation may be required to secure financial contributions:-

- To pump-prime a bus service.
- For provision and maintenance of bus shelters.

See [Standard Clause 04](#), "Financial contribution".

10.5.2 A planning obligation may also be required to ensure the formation of a management company to maintain unadopted paths. See [Standard Clause 08](#), "Management Company".

11 Car clubs

Applicable to the following

Car free developments.

Larger developments, as part of a package of travel plan measures to reduce car use.

Relevant policies:

Core Strategy especially policy CP9.

Local Plan policy T3 and H2.

Emerging Site Allocations and Development Management DPD policy DM27(f) and DM28(d).

11.1 Rationale

11.1.1 Policy H2 of the Exeter Local Plan First Review refers to a City Centre Core Area (where shopping, employment and other facilities are within easy walking distance), within which car free developments will be permitted (with disabled persons' and cycle parking and space for deliveries). Paragraph 4.8 states that such schemes will be considered on their merits, occupiers will be excluded from residents' parking schemes, and a contribution will be sought towards the enhancement of facilities for public transport, cyclists and pedestrians. A contribution to a car club is deemed to comply equally with the objectives of paragraph 4.8.⁷³

11.1.2 Similar considerations may apply to justify a car free development in other locations well served by public transport. In addition, car clubs also have a role to play as part of the overall package of transport measures required for the larger development areas such as Newcourt, Monkerton/Hill Barton, and Alphington/Marsh Barton, even though these will not be car free developments.

11.1.3 A car club may also be an element of a workplace travel plan, with an employer making a financial contribution to set up or expand a car club, so that employees can take out corporate membership for work-related journeys. Well-placed car club vehicles may cater for work use during weekdays, and domestic use during evenings and at weekends.

11.2 Requirements

11.2.1 Larger car club schemes are likely to be more successful since they can offer a choice of vehicle types and better availability; therefore the preferred approach is as follows:-

⁷³ Consistent with NPPF paragraph 39 which says that if parking standards are set they should take into account, among other things, the accessibility of the development and the availability.

- A financial contribution enables extension of an existing car club.
- Parking for car club cars is provided on the highway, to raise their profile and so they are not seen as “exclusive” to a particular development. A key safe other suitable security arrangement will need to be put in place.

11.2.2 The financial contribution may be part of a larger, flexible contribution to sustainable transport measures. However, it should include:-

- a capital contribution to fund one or more vehicles;
- a year’s introductory membership for each household;
- the cost of the traffic order, signing and lining associated with the parking space.

11.2.3 The first two elements should be calculated in accordance with Table 5. All payments will be index linked to the RPI from April 2012 to the date of actual payment. Payments will be required before the occupation of 25% of the dwellings.

11.2.4 Details of the location will need to be submitted to and agreed in writing by the Council. In the case of off street parking, approval will also be required in respect of the dimensions, surfacing, lighting, signing, any CCTV and key safe or smart card arrangement. Spaces should be within five minutes (500 metres) walk of the property. Design of car parking facilities should take account of the needs of persons with disabilities. The ownership of off street spaces should pass to the Council to lease to the nominated car club provider.

Table 5 – Calculation of car club contributions

| | Car free city centre site of up to 45 dwellings | Major development area, per 250 dwellings |
|---|---|---|
| Capital cost | | 7,590 ⁷⁴ |
| Purchase / installation of in-car telematics | | 1,570 |
| Contribution to the car club operator’s costs (assume £2,530 in first year decreasing by 25% a year as scheme becomes viable) | | 6,325 |
| Subtotal | | 15,485 |
| Cost per dwelling | /45 344 | /250 62 |

⁷⁴ Figures increased by RPI factor of 1.265 from those in Car Clubs SPG, and rounded.

| | | |
|--|---|---|
| Add introductory subscription (£60 per person p.a.) | (household membership per dwelling, for one year) 60 | (household membership per dwelling, for one year) 60 |
| Total per dwelling | 404 | 122 |
| Plus: | | |
| Cost of Traffic Regulation Order: from £1500 per order | | |
| Cost of road markings and signage: from £1500 per vehicle | | |

11.2.5 The number of members per car is assumed at between 12 and 20 based upon national research.

11.2.6 1.75 potential members per dwelling is assumed based upon the 2001 Census population per dwelling aged 21 or more years (younger persons are unlikely to be eligible). Take up rates of 20-25% are normal. 30-45 dwellings might therefore support a car. For a car free development, a rate of one car per 45 dwellings is assumed for financial contributions.

11.2.7 A rate of one car per 250 dwellings is assumed for major development areas which are not car free.

11.3 Checklist for applications

- Include details in draft travel plan.

11.4 Planning obligations

11.4.1 See [Standard Clause 06](#) - "Reserved Car Scheme".

12 Significant transport proposals

Relevant policies:

Core Strategy policies CP9, CP18 and CP19.

Local Plan policy T6, T7, T14, KP3, KP6 and KP8.

Emerging Site Allocations and Development Management DPD policy DM20, DM26 and DM27.

12.1 Rail proposals

- 12.1.1 Devon County Council's "Devon Metro" proposals⁷⁵ include new stations at Newcourt and Marsh Barton, as well as longer trains, particularly in the peaks.
- 12.1.2 In the longer term a station is proposed at Hill Barton to serve the Monkerton area, and increased frequencies, although these will require additional investment in passing facilities and signalling.

12.2 Park and Ride

- 12.2.1 Exeter benefits from a successful park and ride network, although there is an imbalance in provision, with no sites on the western side, and the Matford site is operating at capacity.
- 12.2.2 To address this, a planning application has been made for a new site at the Alphington/Ide interchange on the A30. Possibilities for supplementing or replacing the Matford site, probably in Teignbridge District, are being considered as part of emerging strategic allocations to the south west of the city.

12.3 Buses

- 12.3.1 Proposals are being worked up for redevelopment of the area including the bus and coach station and bus depot. These proposals will need to include the provision on site of a replacement bus and coach station, of sufficient capacity to meet Exeter's current and future needs, and well located and accessible in relation to the city centre and other public transport services. A replacement bus depot site off site will also need to be provided as part of these proposals.
- 12.3.2 The emerging Exeter Growth Bus Strategy identifies additional and extended services and additional frequencies that will be required to serve new housing and employment growth. These include a high quality service (labelled "enhanced public transport") between Cranbrook, Monkerton, the city centre and Matford with priority measures to assist speed and timekeeping.

⁷⁵ See <http://www.devon.gov.uk/eldf-devonmetroappraisal.pdf>.

12.4 Roads

12.4.1 Three routes are proposed to be safeguarded for roads through the emerging Site Allocations and Development Management DPD⁷⁶.

12.4.2 The first is a link with an improved crossing of the M5 at Tithebarn Lane, westwards to Cumberland Way (with the potential for future provision of a bus lane on the approach to the junction), and onward to provide a bus-only link to Pinhoe Road. This will form part of the enhanced public transport route referred to in paragraph 12.3.2.

12.4.3 The second is a link northwards from Exhibition Way, Pinhoe, to provide an additional railway crossing and connection to the former Ibstock Brickworks site and beyond.

12.4.4 The third is a link road through the Water Lane area of Haven Banks/Marsh Barton, which may be required in the longer term, in particular to serve the Matford leg of the enhanced public transport route.

⁷⁶ See draft policy DM26.

Appendix A - Glossary of Acronyms

| | |
|--------|---|
| AQMA | Air Quality Management Area |
| CIL | Community Infrastructure Levy – a statutory levy on development, to provide for infrastructure |
| DCC | Devon County Council |
| DfT | Department for Transport |
| DPD | Development Plan Document – a component of the LDF |
| GI | Green Infrastructure |
| LDF | Local Development Framework – a suite of local planning policy documents, to replace the Local Plan |
| LTP3 | Local Transport Plan adopted by DCC in 2011 |
| NPPF | National Planning Policy Framework |
| RD SPD | Residential Design Supplementary Planning Document (produced by Exeter City Council) |
| RPZ | Residents' Parking Zone |
| SPD | Supplementary Planning Document – a component of the LDF |
| SPG | Supplementary Planning Guidance – amplifies policies in the Local Plan |

EXETER CITY COUNCIL

EXECUTIVE
2 OCTOBER 2012

COUNCIL
16 OCTOBER 2012

ASSETS OF COMMUNITY VALUE (THE “COMMUNITY RIGHT TO BID”)

1. PURPOSE OF REPORT

- 1.1. This report advises Members of the implementation of the part of the Localism Act relating to assets of community value, and seeks authority for setting up the list of assets and related processes.

2. INTRODUCTION

- 2.1 The Localism Act allows community organisations to nominate buildings or other land for inclusion on a list of assets of community value, if they are considered to be of importance to a community’s social wellbeing. If added to the list, an asset must not be sold without the Council being notified. This triggers a moratorium during which community organisations have the opportunity to put together a bid to buy the asset. This scheme is also therefore known as the “Community Right to Bid”.
- 2.2 Note that organisations are not given a right of first refusal, nor are they entitled to buy the asset at a discount.
- 2.3 The relevant statutory provisions are expected to come into force on 12 October 2012.

3 MAINTAINING THE LIST

- 3.1 It is proposed that the list of assets will be maintained within City Development. There is no prescribed form, but the list must be available for public inspection without charge. The Council must also maintain a list of unsuccessful nominations.
- 3.2 Nominations for inclusion on the list must be made by a voluntary or community body with a local connection. The Regulations contain comprehensive definitions, but examples include a neighbourhood forum, an association of at least 21 members registered to vote locally and whose surplus funds (if any) are applied for the benefit of the area, or a charity which operates in the local area. Certain information must be included in the nomination, and we are preparing a form to help applicants complete this process correctly.
- 3.3 Certain land and buildings are prevented from being assets of community value, namely buildings wholly used as residences and connected land, caravan sites, and operational land (such as that belonging to the former utilities or a rail operator). Subject to that, the asset should be listed if in the opinion of the Council:-
 - an actual current use of the asset (that is not an ancillary use) furthers the social wellbeing or social interests (cultural, recreational and/or sporting) of the local community, and

- it is realistic to think that there can continue to be non-ancillary use of the asset which will further (whether or not in the same way) the social wellbeing or social interests of the local community.
- 3.4 Alternatively, an asset can qualify if it had such a use in the recent past, and it is realistic to think that there is a time in the next five years when it could do so again (whether or not in the same way as before).
- 3.5 Examples could be pubs, shops, libraries and community facilities, although not every example of these facilities will qualify. For example, a shop in Exeter High Street would not be considered to further the community's social wellbeing or interests in the same way as a single shop in a small village.
- 3.6 It is recommended that the technical issues such as eligibility of the organisation, completeness of the information supplied, and fact that the asset is not in an excluded category should be decided by the Projects and Business Manager in City Development. The value judgement as to whether the asset is of community value should be made by him in consultation with the Portfolio Holder for Housing and Community Involvement.

4 EFFECT OF LISTING

- 4.1 Notice of the decision will be given to the organisation, together with reasons if the listing is unsuccessful. If successful, notice will also be given to the owner and occupier, and the listing will be registered as a local land charge and at the Land Registry.
- 4.2 Following the listing of an asset, nothing will happen until an owner wants to dispose of the freehold or a long leasehold interest in it. In those circumstances, notice of the intended disposal should be given to the Council. There are exceptions to this, including gifts of land, transmission of assets on death, transfer of the asset between family members, or transfer of a business as a going concern. The owner is explicitly allowed to dispose of the land to a community interest group.
- 4.3 The Council must in turn pass on the owner's notice to the group who made the original nomination, and publicise within its area the fact that it has received notice of the intended disposal of a listed asset.
- 4.4 Notice from an owner of an intended disposal is the starting date for the following periods:-
- The "interim moratorium period" of six weeks, during which a defined "community interest group" can submit a written request to be treated as a potential bidder for the land, which the Council must pass on to the owner.
 - The "full moratorium period" of six months, which is triggered if such a request is received, and during which the community interest group can put a bid together to purchase the property.
 - The "protected period" of eighteen months, during which the owner is free to sell the asset without further delay, if no community interest group has submitted a request and/or pursued it through to completion of a purchase within the relevant moratorium periods.
- 4.5 An owner may be entitled to claim compensation for loss incurred as a result of the listing. A possible scenario is where the asset loses value while a sale is delayed. Based on experience with the Scottish "Community Right to Buy" scheme, the Government estimates that such compensation payable nationally may amount to an average of £255,000 a year across England and Wales, although it is difficult to give a

realistic estimate of the cost to any particular local authority as this will depend partly on the number of claims in their area. For example, the Government estimates that there will be up to 22 successful compensation claims a year, on which basis many local authorities would not see a successful claim during the course of any given year.

- 4.6 It will also be possible to claim compensation for expenses incurred during a sale as a result of the listing. Here the Government estimates an average of £2000 per claim.
- 4.7 A decision on compensation claims will be a technical exercise based on the information supplied, and it is envisaged that this will be carried out by the Projects and Business Manager, calling on the expertise of other relevant professionals, for example in Estates Services, where appropriate.

5 REVIEWS

- 5.1 There are two situations in which an owner can ask for a review of the Council's decision:-

- a "listing review", that is a review of the decision to include an asset on the list;
- a "compensation review", that is a review of a decision whether or not to award compensation, or the amount.

Reviews have to be carried out by an officer of "appropriate seniority" who did not take any part in making the original decision.

- 5.2 It is recommended that the review function is delegated to the Corporate Manager Policy/Communications/Community Engagement, in view of his oversight of the localism agenda generally coupled with the fact that he will not be involved in the day to day decision-making processes set out in this report.
- 5.3 There is a further right of review in either case to a Tribunal, which can award reasonable legal costs against the Council.

6 RESOURCE IMPLICATIONS

- 6.1 There will be minor miscellaneous disbursements such as fees for registering assets at the Land Registry (£40 per registered title), which can be met from existing resources. There is also a potential liability to pay compensation as set out in paragraphs 4.5 and 4.6, which is not being funded by the Government.
- 6.2 At present it is anticipated that this scheme can be accommodated using existing staff resources. However, the collective workload generated by initiatives under the Localism Act is still something of an unknown quantity, and this may need to be reviewed in the light of experience.

7 RECOMMENDATION

- 7.1 It is recommended to Council that:-

- (a) Authority be delegated to the Projects and Business Manager (or in his absence another officer nominated by the Assistant Director City Development):-
- (i) To maintain the list of assets of community value, and to consider and decide the technical correctness of nominations for inclusion of assets on the list;

- (ii) In consultation with the Portfolio Holder for Housing and Community Involvement, to consider and decide the merits of nominations for inclusion of assets on the list.
- (b) Authority be delegated to the Corporate Manager Policy/Communications/Community Engagement to conduct listing reviews and compensation reviews in respect of assets of community value.

and the Scheme of Delegation to Officers be amended accordingly.

**ROSS HUSSEY
PROJECTS AND BUSINESS MANAGER**

CITY DEVELOPMENT

Local Government Act 1972 (as amended)

Background papers used in compiling this report:-

None.

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

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