

South Lakeland Local Plan

Annual Monitoring Report

April 2012 – March 2013



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www.southlakeland.gov.uk/ldf



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FOREWORD

Welcome to the ninth Annual Monitoring Report for the planning policies in South Lakeland's Local Plan (formerly the Local Development Framework).

The Annual Monitoring Report is important because it tells you of our progress in preparing and adopting documents that will make up the Local Plan for South Lakeland (outside the National Parks).

It also paints a picture of the 'state of the District', drawing on the latest information on the area's social, environmental and economic circumstances. It is important that the Local Plan documents are based on a sound understanding of South Lakeland and includes policies that contribute to the improvement of all aspects of the quality of life of residents and visitors.

The Core Strategy, the key document of the Local Plan, which forms the cornerstone of Local Planning policy for South Lakeland was adopted in October 2010. The Council submitted the Land Allocations document to the Government in May 2012 for independent examination. The Land Allocations document seeks to meet the needs for housing and employment set out in the Core Strategy to 2025. This Annual Monitoring Report will focus on monitoring the policies of the Core Strategy as well as considering the remaining saved policies of the South Lakeland Local Plan 2006.

We hope that you find the document interesting and informative.

Development Strategy Team
South Lakeland District Council

Comments Welcome!

We welcome any comments you may have on this document and its implications, as well as any useful information or data you may hold. Although this document will not go out for public consultation, any comments or information we receive will contribute to improving future Annual Monitoring Reports. Please send your comments to the Development Strategy Team, South Lakeland District Council, South Lakeland House, Lowther Street, Kendal LA9 4DL, or telephone 01539 717490 or email the Development Strategy Team on developmentplans@southlakeland.gov.uk

This Annual Monitoring Report can be found on the Council's website www.southlakeland.gov.uk/ldf. **Alternative formats of the document are available by calling 01539 717490**

ALL LINKS IN THIS DOCUMENT HAVE BEEN DEACTIVATED.

Figure 1 – Map: South Lakeland in Sub Regional Context



EXECUTIVE SUMMARY

This is the ninth Annual Monitoring Report for the planning policies in South Lakeland's Local Plan (formerly Local Development Framework (LDF)). It provides information for the year ending 31 March 2013.

The Executive Summary provides a brief overview of the conclusions and proposals in this report.

The Annual Monitoring Report is important because it:

- Paints a picture of the District's key social, environmental and economic characteristics and issues. This helps provide a sound basis for developing and improving Local Plan policies and helps monitor their impact over the longer term;
- Informs you of our progress in preparing the Local Plan for South Lakeland (outside the National Parks);
- Sets out a framework for monitoring adopted policies in the Core Strategy and saved policies of the 2006 Local Plan to tell us whether they are working and what difference they are making to the District.

Key Characteristics and Issues in South Lakeland

Section 2 of this report provides a summary of some of the main characteristics and issues affecting South Lakeland, based around a set of 'contextual' indicators and other relevant data.

Key findings and messages:

- **Employment** – A low unemployment rate continues to mask workplace wage levels below the national average. The Land Allocations document will need to overcome the current shortage of readily available and suitable land in order to identify sufficient land to meet the District's employment and business needs.
- **Housing** – Average house prices have remained high in proportion to average incomes despite a downturn in the housing market. Buying a home is still beyond the reach of many local people on average and lower wages. The number of housing completions in the District has increased on last year's figure but remains low compared to historical rates and continues to limit the opportunity to address this problem through affordable housing provision. Contributing to addressing the issue of housing affordability through the delivery of affordable housing alongside employment opportunities will continue to be a key matter for the Local Plan documents to address. The Land Allocations document is proposing housing site allocations to meet need to 2025 – 35% of dwellings on allocated sites will need to be provided as affordable in accordance with Core Strategy policy CS6.3.
- **Tourism** – It remains difficult to assess trends in tourism in the Local Plan area as data is not available for the areas outside the National Parks alone. Making the most of the benefits tourism has for the local economy whilst ensuring that the impact of tourism on the environment is minimised is a key challenge for the Local Plan documents.
- **Environment and Conservation** – South Lakeland's built and natural environment remains of a high quality, however some aspects require close monitoring over the coming years to ensure there is no decline and to monitor

progress in managing areas of environmental and conservation importance. The Local Plan documents will need to ensure that the high quality built and natural environment of the District is not compromised in the light of proposed new developments.

- **Design** – The Local Plan will need to consider how to make the most of the significant potential of design to contribute to addressing certain key issues. For example, requiring particular design traits can improve aspects of the sustainability of developments such as how resilient they are to climate change and can help ensure that public spaces are accessible, safe and fit for purpose. These considerations require action to develop indicators to allow them to be monitored effectively.
- **Town centres/retail** – The Local Plan will need to ensure that retail unit vacancy rates continue to drop and that the vitality and viability of town centres grows. The retail offer of some lower order centres has been increased or is planned for increase with the provision of or permission for new supermarkets. There is also scope to increase competition in the principle service centres.
- **Transport / Local services and facilities** – There has been continued success in ensuring that the vast majority of residential development is being built within 30 minutes' public transport travel time of a range of key services and facilities. Access to hospitals remains significantly poorer than to other key services.
- **Energy and waste** – Recycling and composting rates continue to fluctuate and this year, have increased whilst waste collected per household has decreased. The Local Plan will need to consider ways in which planning can contribute to reducing waste and supporting sustainable waste management. Methods need to be put in place to monitor renewable energy installed as well as factors such as how well new homes are meeting sustainability requirements.

Strategic Linkages and Duty to Co-operate

Strategic Linkages

In terms of meeting development needs, the South Lakeland Local Plan area contains the whole of the Kendal Housing Market Area. It contains a small segment of the Dales Housing Market Area, most of which is in the Yorkshire Dales Housing Market Area. The other three Housing Market Areas (Rural Kendal, Grange/Cartmel and Furness) lie partially within the Local Plan area and partly within the Lake District National Park.

In economic terms the Local Plan area lies within the area of the Cumbria Local Economic Partnership which superseded the Eden and South Lakeland Delivery Board. There are significant travel to work movements in both directions between South Lakeland, Lancaster and Barrow.

In terms of retail catchment, the South Lakeland Retail Study identifies that Kendal is the main comparison shopping centre for most of the Local Plan area although Ulverston has a close relationship with Barrow and Lancaster begins to exert an influence on the Burton and Holme areas. Barrow is also significant as a convenience destination for the Ulverston and Furness area.

South Lakeland is on a major infrastructure corridor which includes the West Coast Main Line, the M6 and national electricity, gas and water infrastructure including the Thirlmere and Haweswater aqueducts.

In terms of health provision, Kendal and Westmorland General Hospital is part of the University Hospitals of Morecambe Bay NHS Trust which operates larger hospitals in

Lancaster and Barrow as well as community health resource centres at Morecambe and Ulverston. Lancaster and Barrow Hospitals provide a number of services not currently provided within the District including emergency services.

In terms of environmental linkages, the obvious key linkages are nationally important landscapes in the National Parks and Areas of Outstanding Natural Beauty and the internationally important Nature Conservation sites of Morecambe Bay, the Duddon Estuary and the River Kent and its tributaries. A draft National Park Extension Order has been published which will, if confirmed following a public inquiry, bring areas of land at Brigsteer and near Selside within the Lake District National Park and much of the Lune Valley area within the Yorkshire Dales National Park.

Strategic Policies

It is worth noting that South Lakeland, Lancaster, Eden and the Lake District National Park all have up to date Local Plan Core Strategies which make provision for development needs within these areas up until at least 2021. Yorkshire Dales National Park Authority has recently adopted a Housing Policy which allocates land to meet housing needs within their part of South Lakeland District. South Lakeland has a short boundary with Copeland District's Local Planning area and Copeland's Core Strategy has recently been published. The relationship between development in South Lakeland and the regeneration of Barrow was examined in depth at the South Lakeland Core Strategy Examination in Public and adjustments were made to the phasing of development to address concerns raised by Barrow Borough Council at that time. Although there is an adopted Area Action Plan for Barrow Marina Village, Barrow have not published a Core Strategy or put forward land allocations which could meet needs identified in South Lakeland. South Lakeland has engaged with and commented on plans produced by its neighbours where cross-border issues are raised.

Formal Arrangements for Co-operation

Some formal arrangements for co-operation include;

- The Cumbria Planning Group which is a three monthly meeting of members with responsibility for planning as well as representatives of the two national parks. Local Plan and LEP issues are a standing item on the agenda for this group. There is also a Cumbria Leaders Group on which the Council Leaders and Chief Executives are represented. At lower levels, there are officers groups representing Development Plans Officers, Development Management Officers, Conservation Officers and Monitoring Officers. All Cumbria Districts, Cumbria County Council and the Lake District and Yorkshire Dales National Park authorities are members of all of these groups. This structure has been in place from the commencement of the Local Development Framework preparation process and has informed plan preparation throughout.
- South Lakeland and Barrow Districts share a seat on the board of the Cumbria Local Enterprise Partnership. The LEP currently has an expert group examining planning and housing issues.
- The Cumbria Housing Executive is a forum with representation at member level from all local authorities and national park authorities as well as housing providers. Up until recently, it was chaired by South Lakeland's housing portfolio holder. A key function is the preparation, co-ordination and review of the Cumbria Housing Strategy which forms a co-ordinated strategic basis for

affordable and specialised housing provision across the District. The six districts and most housing associations in Cumbria have recently co-operated in the introduction of Cumbria Choice – a county-wide choice based letting system. There is also member level co-operation through the Cumbria Supporting People Commissioning Body. This is led by Cumbria County Council's Adult Social Care service.

- The Eden and South Lakeland Housing Market Partnership was established in April 2011 and comprises housing portfolio holders from both authorities, planning and housing professionals from both authorities and the two National Parks, representatives of the house-building industry, housing associations and building societies. It meets on a three-monthly basis and considers a variety of issues in relation to housing including Housing Needs studies, housing strategy and policy, affordable housing issues and planning policies relating to housing.
- The Arnside and Silverdale AONB covers parts of South Lakeland and parts of Lancaster District. South Lakeland, along with Lancaster City, the two County Councils and the Parish Councils is a member of the AONB partnership and is represented at member level on the Executive Committee and at the officer group. South Lakeland is also a member of the Morecambe Bay Partnership which promotes environmental improvements around Morecambe Bay. It is also worth noting that South Lakeland District Council is represented at member level on the two National Park Authorities.
- Finally, South Lakeland is co-operating with a number of local authorities in Cumbria and Lancashire on the National Grid North West Coast Connections initiative to upgrade the National Grid and improve connections with West Cumbria. The authorities are co-operating under a Planning Performance Agreement for the consideration of this major item of infrastructure.

In summary South Lakeland has a high degree of strategic fit with its neighbours and is actively co-operating on housing, the economy, infrastructure and the environment.

Progress on the preparation of Local Plan documents

Section 3 of the Annual Monitoring Report reviews progress in the preparation of the Local Plan documents for South Lakeland (outside the National Parks). It considers progress during the period 1 April 2012 - 31 March 2013.

South Lakeland adopted its Core Strategy on 20 October 2010. The Land Allocations Development Plan document was published in March 2012 and submitted for independent examination on 31 May 2012.

The Localism Act and National Planning Policy Framework (NPPF) require a Local Plan to be prepared. The Local Plan documents fulfil this requirement subject to their compliance with the NPPF. The Core Strategy remains the cornerstone document of Local Planning policy. It will be accompanied by the Land Allocations document and any neighbourhood plans that are prepared according to the Act. The Saved 2006 South Lakeland Local Plan policies also remain part of the development plan for the area.

The Council adopted a revised Local Development Scheme in March 2013, which sets the milestones for the remaining stages in preparing the Land Allocations document and for the preparation of other Development Plan Documents and Supplementary Planning Documents.

A Framework for Monitoring Policies

The Annual Monitoring Report sets out a comprehensive framework for monitoring the policies in the adopted Core Strategy and the saved policies in the 2006 Local Plan. The framework includes:

- The **Contextual Indicators**, describing the general characteristics of the District.
- The **Core Strategy Monitoring Framework** as established in the adopted Core Strategy.
- A selection of **Sustainability Indicators** to help measure the wider social, economic and environmental impacts of the Local Plan. These were taken from the Sustainability Appraisal Framework set of indicators. The framework and the indicators will continue to evolve as different issues become apparent and as new data becomes available.
- Some **Cumbria-wide Annual Monitoring Report indicators**, which evolved from the Core Output Indicators that were contained within guidance from central government but were removed in March 2011.

1.0 INTRODUCTION

1.1 Purpose of Document

- 1.1.1 The Annual Monitoring Report (AMR) was a statutory requirement of Section 35 of the Planning and Compulsory Purchase Act 2004. The Act required each Local Planning authority to submit an AMR to the Secretary of State each year by 31 December. There is no longer a requirement to submit an AMR to the Secretary of State, but there remains a requirement to produce a monitoring report annually.
- 1.1.2 This is the ninth AMR covering the planning policies for South Lakeland outside the two National Parks. It covers the year from 1 April 2012- 31 March 2013.
- 1.1.3 The AMR is a valuable resource for the Council, setting out an accurate picture of how policies are performing in addressing the key issues in the District and informing policy development.

As a resource for South Lakeland, the AMR will:

- Assist colleagues across the Council in identifying particular areas to which resources should be directed;
- Demonstrate the success of planning policies in helping to achieve the Council's aims;
- Put the District in context, clarifying trends in real terms;
- Set out evidence to inform policy development and assist in planning decisions;
- Show that action is taken where needed to remedy failing policies and address key issues in the District.

- 1.1.4 The purpose of this AMR is to:

- Provide an overview of the main conclusions of the data and monitoring in an Executive Summary;
- Set out a framework to monitor the policies of the adopted Core Strategy, and saved 2006 Local Plan policies;
- Monitor the key characteristics of the District as a wider context for monitoring planning policies;
- Review progress in preparing the Local Plan for South Lakeland, according to the timetable in the relevant Local Development Scheme (LDS) for the monitoring period, identifying changes to the programme if necessary;
- Assess policies of the Core Strategy to assist in quantifying the extent and success of policy implementation and assess the significant effects (or impacts) of policies on the social, environmental and economic conditions of the District;
- Provide an analysis of the information in relation to identified issues.

1.2 Methodology and Monitoring Framework

- 1.2.1 The remainder of this section explains our approach to monitoring the policies of the Local Plan, the principles we will seek to adhere to and how we will gather and use information to achieve the purposes of the AMR described above.
- 1.2.2 The gathering and analysis of data is vital but time-consuming work. To ensure an efficient approach to monitoring we will continue to:
- Share a common approach, where appropriate, with the **South Lakeland Sustainable Community Strategy** – the Local Plan documents share the vision and priorities of the Community Strategy to a large extent and form the ‘spatial expression’ of this key document;
 - Continue to work jointly with planning authorities and agencies in **Cumbria** to share data collection and ensure consistency of monitoring approaches, particularly with regard to the Cumbria-wide Annual Monitoring Report Indicators (para. 4.2). A county-wide monitoring group has been meeting regularly since January 2006;
 - Make use of existing information and indicators from national, sub-regional and local sources wherever possible.
- 1.2.3 The AMR seeks to follow a sequential approach, based on setting ‘objectives, policies, targets and indicators’.

1.3 South Lakeland in Context (Section 2)

- 1.3.1 The AMR begins with a set of ‘contextual indicators’ which help describe the main social, economic and environmental characteristics of the District. This provides a backdrop against which the more detailed assessment of policy performance and impact is considered in the remainder of the document. The contextual indicators provide a baseline position that can be updated as new data becomes available. The indicators have been drawn from a variety of existing sources.

1.4 Local Development Scheme (Section 3)

- 1.4.1 The timetables and milestones for preparing South Lakeland’s Local Plan documents are set out in the LDS. The first LDS was prepared in 2005 and was reviewed in 2006, 2007, 2008, 2010, 2012 and March 2013. Section 3 of this AMR records progress towards achieving the milestones in the latest LDS and also sets out any revisions considered necessary to the timetable and related resource issues.

1.5 Policy Monitoring (Section 4)

The Development Plan for South Lakeland

- 1.5.1 The Development Plan for South Lakeland (outside the National Parks) consists of the:
- South Lakeland Core Strategy (adopted October 2010).
 - Saved policies of the South Lakeland Local Plan as altered (adopted March 2006)

- Cumbria Minerals and Waste Development Framework
- 1.5.2 The Land Allocations document will form part of the Development Plan for South Lakeland when adopted. From 31 May 2012, when the Land Allocations document was submitted for independent examination, the Land Allocations document was declared for Land Charge purposes.
- 1.5.3 The National Planning Policy Framework (NPPF) came into effect on 27 March 2012. The policies in the Framework are material considerations in planning decisions and preparing plans. The NPPF indicates that Local Plan policies adopted since 2004 continue to have full weight for 12 months even if there is a limited degree of conflict with NPPF. In other cases and following this 12 month period, due weight should be given to relevant policies in existing plans according to their degree of consistency with the NPPF. In addition the NPPF indicates that weight can be given to relevant policies in emerging plans according to:
- The stage of preparation
 - The extent of unresolved objections to relevant policies
 - The degree of consistency with the NPPF

Status of the 2006 South Lakeland Local Plan

- 1.5.4 Under the 2004 Planning and Compulsory Purchase Act, policies in the former Local Plan adopted at the time the Act came into force (September 2004) were automatically saved for three years, or, if adopted after September 2004, were saved for three years from the date of adoption. On this basis, 1997 South Lakeland Local Plan policies were automatically saved for an initial three years until September 2007. Altered policies adopted in March 2006 were saved until March 2009.
- 1.5.5 As these policies approached their expiry date, following a request from the South Lakeland District Council, the Secretary of State confirmed that
- All saved Local Plan policies which had been adopted in 1997 were extended beyond September 2007, except for policies R3, C4, C17 and Tr6.
 - All saved 2006 Local Plan Alteration policies were extended beyond March 2009.
- 1.5.6 A number of 1997 and 2006 Local Plan policies were superseded following the adoption of the South Lakeland Core Strategy. Details of which policies were superseded and which remain in force and continue to be covered in the AMR can be found in Appendix 1 of the current Local Development Scheme, approved in March 2013.

Monitoring the Implementation of Policies

- 1.5.7 Section 4 sets out the framework for monitoring the implementation and effectiveness of the adopted Core Strategy policies, grouped by topic as set out in the key issues of the Core Strategy. A similar framework will be used to monitor the policies of forthcoming Development Plan Documents as set out in Section 3, based on the '*objectives, policies, targets, indicators*' approach.
- 1.5.8 Indicators in the housing section of the Indicator Table in Section 4 also assess progress in terms of achieving the Council's priority of delivering affordable

housing. The adopted Core Strategy sets requirements for providing affordable housing as a proportion of housing sites above specified site size thresholds.

- 1.5.9 Some data gaps remain and this means that in some cases it is still not possible to accurately assess whether policies are being implemented successfully and having the desired impact. In these instances we are working to develop ways of collecting and accessing the relevant information or to amend indicators to make them capable of being monitored. Building the evidence base over time to enable meaningful assessment of policies remains an important part of the monitoring framework.

Monitoring the Impact of Policies

- 1.5.10 A set of Sustainability Appraisal (SA) indicators (listed in Appendix A) has been developed as part of the SA process to help take account of the potential social, economic and environmental impact of emerging policies and proposals in Local Plan documents. The list was determined early in 2006 but continues to develop and change as new data becomes available and as different sustainability issues become apparent in the District.
- 1.5.11 In demonstrating the success, effects and direction of progress of policies, the use of indicators is instrumental in assessing whether policies should be retained as they are; are in need of alteration to improve their performance; should be replaced with a different policy on the same topic, or should be removed altogether.
- 1.5.12 Indicators and their associated data not only demonstrate the position of the District during a given monitoring period, but will also illustrate the effects of policies over time and will help to identify trends and key issues in the District.

1.6 Issues and Future Monitoring Requirements (Section 5)

- 1.6.1 In Section 5 the current key issues for the District are set out and an analysis is made as to whether the latest data suggests these remain as the key issues and why this is the case. Any new key issues arising from the data are also drawn out.
- 1.6.2 Section 5 also sets out any future monitoring requirements arising due to inadequate and missing data in relation to the existing indicators as well as areas where the Council feels further or alternative indicators are required to monitor issues not adequately covered by existing indicators.

2.0 SOUTH LAKELAND IN CONTEXT

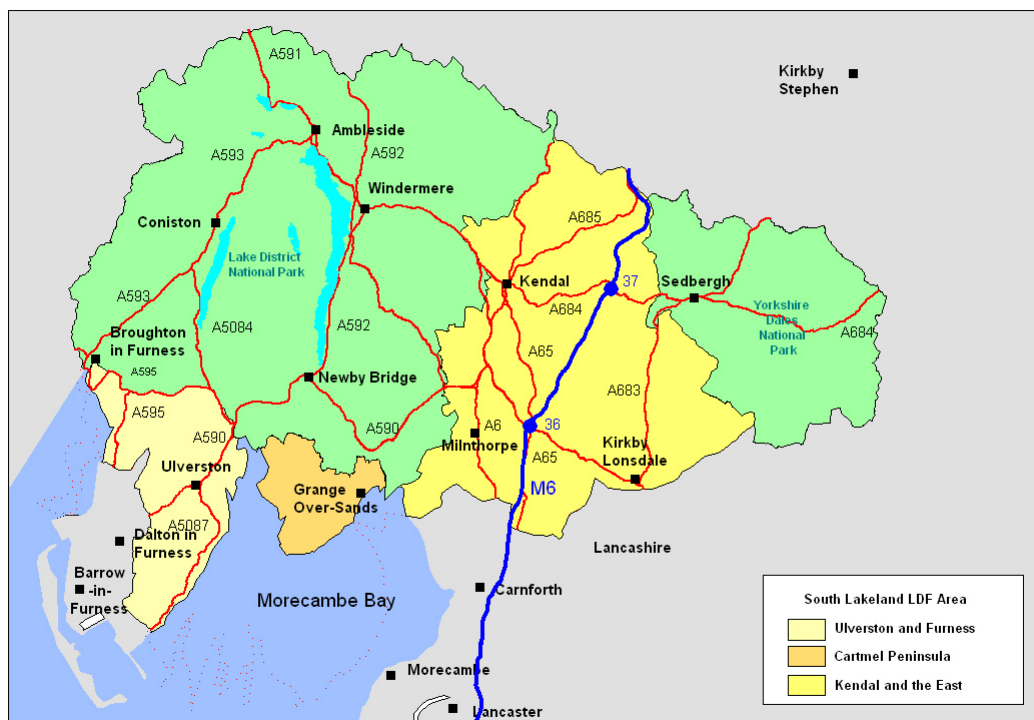
2.1 Introduction

2.1.1 South Lakeland’s key characteristics are described by a set of contextual indicators. These illustrate the current state of the District and set a baseline from which monitoring and policy making can take place. This document covers those areas of South Lakeland outside the Lake District and Yorkshire Dales National Parks. This area is the area for which the District Council is the planning authority. However, whilst some data relates to the South Lakeland planning area, other data relates to the whole of South Lakeland district, including the National Park areas. This is because much of the data required for indicators is available only at whole district level.

2.2 Location and Defining Characteristics

2.2.1 South Lakeland is in the southernmost part of Cumbria, a county in the north west of England. South Lakeland borders the districts of Lancaster, Craven and Richmondshire to the south and east, the Cumbrian district of Eden and the Cumbrian boroughs of Barrow-in-Furness, Copeland and Allerdale to the north, southwest and west. The map below indicates the extent of the District. The areas coloured green are covered by the Lake District and Yorkshire Dales National Park Authorities in respect of planning. The remaining areas of Ulverston and Furness, the Cartmel Peninsula and Kendal and the East make up the area covered by the LDF for South Lakeland.

Figure 2 – South Lakeland Local Plan Area



2.2.2 South Lakeland is the second largest district in the county of Cumbria, covering an area of 1,545km². The population for the whole District in 2011 according to the census was 103,700. Latest estimates by the Office for National Statistics (ONS) indicate that the overall population will only increase to around 104,800 by 2021. The estimated population for the South Lakeland planning area in 2010 was 78,200. Projections also show a decrease in 0-14 year olds whilst the 60+ population continues to increase.

INDICATOR (for South Lakeland District unless otherwise stated)	DATE	SL DATA	COMPARATOR	SOURCE
Population Structure				
1. Current Population & Trends				
• Census	2011	103,700	2001 102,301 1991 98,948	Cumbria Intelligence Observatory/2011 Census
<i>ONS Population projections (Revised 2012)</i>	2015	103,900		
	2021	104,800		
2. Population estimates by Urban Area				
• Kendal	2011	28,586		Cumbria Intelligence Observatory/2011 Census
• Ulverston	2011	11,678		
• Grange-over-Sands	2011	4,114		
• Kirkby Lonsdale	2011	2,504		
• Milnthorpe	2011	2,199		
• LDNPA Urban areas	2011	14,214		
• YDNPA Urban areas	2011	3,741		
• TOTAL		67,036	65%	
3. Age Structure				
• <i>Children (0-14)</i>	<i>2011 Census</i>	14.1%	SL 2009 15.9% 2011 Census Cumbria 15.5% Cumbria 2010 16% Cumbria 2009 17% 2011 Census E&W 17.6% E&W 2010 17.5%	Cumbria Intelligence Observatory / ONS website/2011 Census
• <i>Older People (males 65+ females 60+)</i>	<i>2011 Census</i>	28.4%	SL 2009 27.7% 2011 Census Cumbria 24.4% Cumbria 2010 24.3% Cumbria 2009 23.7% 2011 Census E&W 19.5% E&W 2010 19.7%	

2.2.3 Kendal and Ulverston are the two key Service Centres in the District (designated Principal Service Centres in the LDF), with populations of 28,586 and 11,678 respectively in 2011. Together with a number of smaller service centres and traditional market towns, these urban areas and town fringe settlements are home to the majority of the District’s population. The countryside of South Lakeland is diverse, ranging from inter-tidal salt marsh, through rolling drumlin fields to high fells. The District is most fortunate to accommodate a section of the coastline of Morecambe Bay, a European Marine Site, as well as areas of the Lake District and Yorkshire Dales National Parks and part of the Arnside and Silverdale AONB.

2.3 Community

2.3.1 An overall good quality of life in South Lakeland may have contributed to higher than average life expectancy. The life expectancy at birth for males in the District for the period 2008-2010 was 79.5 compared to the County average of 78.6. For females, the figure stood at 83.2 compared to 82.6 for the County. Over a quarter of the population are ‘older people’ (over 65 men, 60 women) compared to 24.4% in Cumbria and 19.5% in England and Wales. This reflects an increasing trend, resulting in lower proportions of young people and people of working age; only around 14% of South Lakeland’s population is 14 or under, compared to 15% for Cumbria and 17% for England and Wales.

2.3.2 South Lakeland has low levels of crime and is a comparably safe district to live in. During the period 2011/12 there was a rate of 40 incidents of recorded crime per 1000 of the population in the District, compared to a rate of 55 in Cumbria.

INDICATOR (for South Lakeland District unless otherwise stated)	DATE	SL DATA		SOURCE
Community Characteristics				
1. Life Expectancy				
• Male	08/10 07/09 06/08 05/07	79.5 79.3 79.4 79.4	Cumbria 78.6	Cumbria Intelligence Observatory 08/10 data ONS
• Female	08/10 07/09 06/08 05/07	83.2 82.9 82.8 83.1	Cumbria 82.6	
2. Index of Multiple Deprivation	2011	231 (Rank of av. score)	(from a total of 326 Local Authorities where 1= worst)	Cumbria Intelligence Observatory
3. Crime				
• Annual rate per 1000 population	11/12	40.3	Cumbria 54.8	Cumbria Intelligence Observatory
4. Ethnic Groups				
• White	2011	95.6%	Cumbria 96.5%	Cumbria Intelligence Observatory

<ul style="list-style-type: none"> Black or Minority Ethnic group 	2011	4.4%	Cumbria 3.5%	
5. Qualifications				
<ul style="list-style-type: none"> Working Population with NVQ4 equivalent or higher 	2012 2011 2010 2009	39.6% 37.9% 41.1% 36.8%	NW 2012 30.3% NW 2011 28.9% NW 2010 28.7% NW 2009 27.0%	NOMIS
<ul style="list-style-type: none"> % working age population with no qualifications 	2012 2011 2010 2009	5.3% 9.2% 6.6% 5.7%	NW 2012 11.1% NW 2011 12% NW 2010 12.1% NW 2009 13.8%	

2.4 Housing

2.4.1 The Core Strategy provides a framework for planning across the District and sets out a requirement for 400 new homes each year from 2003-2025 within the South Lakeland planning area. This target is based on population forecasts for the area, Strategic Housing Market Assessment Results, Housing Needs Surveys and expected changes in household composition. The Strategic Housing Market Assessment (SHMA) 2011 indicated a need to build 402 affordable homes per annum in the District outside the National Parks, between 2011/12 – 2015/16. This figure is slightly greater than the total number of homes required by the Core Strategy, including affordable homes.

INDICATOR (for South Lakeland District unless otherwise stated)	DATE	SL DATA	COMPARATOR	SOURCE
Housing				
1. Number of Households	2011 Census	46600		Council Tax returns/Census 2011
2. Average Household Size	2011	2.14	2006 2.17 1991 2.49	Council Tax returns / Census 2011
3. Housing Tenure				
<ul style="list-style-type: none"> Owner Occupier & Private Rented (%) 	2010	91.4%	SL 2001 75.2% NW 2001 69%	HFR
<ul style="list-style-type: none"> Local Authority & Registered social landlord (%) 	2010	8.6%	SL 2001 24.8% NW 2001 31%	
4. Housing Stock				
<ul style="list-style-type: none"> Total 	2012	52066 TOTAL 36843 SL Planning area	SL 2010 51932 SL 2008 51764	SLDC HIP/HSSA Returns
<ul style="list-style-type: none"> Receiving 10% Second Home Council Tax Discount 	2012	3850 (whole SL) 1416 (LDF area)	SL 2010 3611 SL 2008 3550	SLDC Council Tax Returns

<ul style="list-style-type: none"> % Household spaces unoccupied and used as a second home (% of total housing stock) 	2012	3.84% SL Planning area (7.39% across whole of SLDC)	2010 3.67% 2010 6.95% 2009 6.79% 2008 6.66%	SLDC Council Tax Returns
5. Average House Price	2012	£224,323	SL 2011 £229,249 SL 2010 £245,756 Cumbria 2012 £166,975 Cumbria 2011 £163,510	Cumbria Intelligence Observatory / BBC Survey
6. House Price: Income Ratio (based on average household annual gross income)	2012	7.8	SL 2010 7.4 SL 2008 8.1 SL 2007 9 Cumbria 2010 5.5	Cumbria Intelligence Observatory
House Price : Income Ratio (based on average individual annual gross income)	2010	9.1	NW 2010 4.9	South Lakeland District 2011 Strategic Housing Market Assessment

2.4.2 The popularity of South Lakeland as a place to retire to or in which to own a second home has been a causal factor in pushing average house prices in the District significantly higher than the Cumbrian average at £224,323 (2012) – well beyond the financial reach of a large proportion of local people. The problem is exacerbated by heavy local reliance on jobs in the low paid tourism, hospitality and other service sectors and a lack of opportunities for employment in more highly paid jobs. The District has a house price to household income ratio of 7.8 based on household income and 9.1 based on individual income, which is unfavourable in comparison to most other Cumbrian districts and Cumbria as a whole (5.5 household income). The percentage of the housing stock used as second homes in the South Lakeland planning area is believed to be 3.8% for 2012. This is a slight increase since 2010. Housing issues have knock-on effects and have contributed to other problems such as an exodus of the young from the District and increasing homelessness.

2.5 **Employment**

2.5.1 South Lakeland's economic activity rate stood at 83.2% in 2012 – an increase from earlier figures and still favourable when compared to regional and national figures. In addition, South Lakeland continues to benefit from a low unemployment rate of 1.4% (2012) which is well below the regional rate of 4.4%. Some 80.3% of the working age population are in employment however although this figure is above the regional average it hides the fact that the District has a high reliance on the low waged service sector.

2.5.2 This dependence on low paid jobs is further reflected in the 2009 Gross Value Added (GVA) figure for East Cumbria (into which South Lakeland falls), which, at £17,321 per head, is comparatively low when compared to the national average of £20,000. GVA is the technical measure of wealth creation and is the value that the economy collectively adds to goods and services that it buys in.

Despite the District’s rural setting, less than 3% of those in employment work in the agriculture, forestry, fishing and minerals sectors.

- 2.5.3 To ensure that the District’s community prospers, creating opportunities for economic growth is a priority in SLDC’s Sustainable Community Strategy and Corporate Plan. However, finding suitable, available and deliverable sites for new employment development to meet demand is a key issue in the District and one that the emerging Land Allocations document seeks to address. The issue is further exacerbated by pressure to use identified employment land for housing development.
- 2.5.4 The 2005 Employment Land and Premises Study recommended that there was an overall requirement for 60 hectares of additional employment land over the next 15 years, up to 2025. The findings were incorporated into the Core Strategy and the requirement split so that:
- 25% of the total is provided for strategic employment sites¹ (15 hectares);
 - 25% of the total is provided for business / science parks² (15 hectares); and
 - 50% of the total is provided for local employment sites³ (30 hectares).
- 2.5.5 The 2012 Employment Land Review (ELR) provides an update of the 2005 Employment Land and Premises Study. The ELR recommends a lower annual employment land target than that advocated in the 2005 study and reflected in the adopted Core Strategy (Policies CS7.1 & CS7.2 refer). The 2012 ELR recommends an annual target of 2.40 hectares per annum which equates over the 15 year plan period to an overall quantum of 36 hectares up to 2025. This recommendation compares with 4 hectares per annum and an overall quantum of 60 hectares over the plan period set out in the adopted Core Strategy. The 2012 ELR recommended percentage split of employment land between settlements (based on the percentage split in the Development Strategy Policy (CS1.2) Core Strategy) and reflecting the recommended reduced annual target and overall quantum (36 hectares) is as set out in the table below.

Location	Percentage Split	Employment Land Required (Ha)
Kendal	35%	12.60
Ulverston	20%	7.20
Key Service Centres - Milnthorpe, Kirkby Lonsdale and Grange – over - Sands	13%	4.68
Local Service Centres	21%	7.56
Small villages and hamlets	11%	3.96

Source: Employment Land Review for South Lakeland District (LDF area), February 2012

- 2.5.6 The 2012 ELR unlike the 2005 Employment Land Study, does not recommend a percentage split or apportionment of employment land by type, land use class or market sector. The 2012 study says that ‘land and premises are required to satisfy the broad range of local business and will include a mix of offices, light industrial and general industrial units and storage and distribution’.

¹ Strategic employment sites – Large sites of 8+ hectares, located close to primary road network and aimed at larger businesses.

² Business Parks – High quality employment sites aimed at office / high tech industry.

³ Local Employment Sites – Minimum of 1 hectare to suit a range of sizes and types of use.

2.5.7 The total employment land supply with planning status (either with valid planning consent or allocated in the Local Plan and unimplemented) is for the twelve month monitoring period ending 31 03 12, 15.75 hectares. These 15.75 hectares compares with a total of 16.04 hectares for the previous monitoring period ending 31 03 11. The totals exclude sites less than 0.25 ha, sites under construction and sites for ‘own use’ not generally considered available to any other occupier or developer. Other changes to Cumbria County Council’s Employment Land Availability monitoring methodology in recent years also mean that intensifications of existing developments are now recorded. During the year ending 31 03 12) there have been 1.96 hectares completed. This compares with 1.54 hectares for the previous 12 month period. There is still an issue of insufficient quantity in some market segments as well as poor quality land supply. These issues were highlighted in the 2012 ELR. These are the most recent employment land annual monitoring figures available to the Council at the time of publishing this document. The updated monitoring figures relating to the 12 month period ending 31st March 2013 will be published in Autumn2013.

INDICATOR (for South Lakeland District unless otherwise stated)	DATE	SL DATA	COMPARATOR	SOURCE	
Economy & Employment					
1. Unemployment (Sub Sectors Allowance Claimants)					
• Total	Mar 13	850		NOMIS	
	May 12	831			
• %	Mar 11	853			
	Aug 10	727			
	Mar 13	1.4%	NW Mar 2013 4.4%		
	May 12	1.3%	NW May 2012 4.5%		
• %	Mar 11	1.4%	NW Mar 2011 4.2%		
	Aug 10	1.2%	NW Aug 2010 4.0%		
	2. Gross Value Added				
	• (per head) – East Cumbria	2009	£17,321	UK 2009 £20,000	Cumbria Intelligence Observatory
2008		£17,236	UK 2008 £20442		
2007		£16374	UK 2007 £ 20430		
2006		£15450	UK 2006 £18841		
2005		£15187	UK 2005 £18205		
3. % People of Working Age in Employment	2013	80.3%	NW 2013 68.8%	NOMIS	
	2012	79.3%	NW 2012 68.2%		
	2011	77.1%	NW 2011 68.2%		
	2010	78.7%	NW 2010 68.4%		
	2009	75.5%	NW 2009 67.8%		
4. Economic Activity Rate	2013	83.2%	NW 2013 75.4%	NOMIS	
	2012	81.2%	NW 2012 74.9%		
	2011	80.3%	NW 2011 74.3%		
	2010	81.9%	NW 2010 74.6%		
	2009	79.0%	NW 2009 74.4%		
5. Employees by Sector					
• Total employee jobs	2008	46400		NOMIS (more recent data unavailable)	
	2007	47022			
	2006	47946			

• Construction	2008 2007	6.2% 5.1%	UK 2008 4.8% UK 2007 4.9%	
• Manufacturing	2008 2007	10.6% 10.9%	UK 2008 10.2% UK 2007 10.6%	
• Transport & Communications	2008 2007	3.3% 3.7%	UK 2008 5.8% UK 2007 5.9%	
• Finance/Banking/Insurance/Business	2008 2007	11.8% 12.3%	UK 2008 22.0% UK 2007 21.7%	
• Distribution/Hotels/Restaurants	2008 2007	38.3% 36.9%	UK 2008 23.4% UK 2007 23.3%	
• Public Admin, Education, Health	2008 2007	22.1% 21.1%	UK 2008 27.0% UK 2007 26.9%	
• Other Services	2008 2007	6.1% 5.8%	UK 2008 5.3% UK 2007 5.2%	
6. Income				
• Gross Weekly Pay (median earnings for full time employees living in the area)	2012 2011 2009 2008	£478.6 £460.9 £ 479.20 £465.20	NW 2012 £472.50 NW 2011 £ 460.0 NW 2009 £ 460.20 NW 2008 £451.30	NOMIS

2.6 Retail

- 2.6.1 The Core Strategy seeks to enhance local provision within centres to ensure their continued viability, seeking to rebalance the local needs offer by addressing the high levels of “leakage” as well as reducing the need to travel. The policies of the core strategy establish a hierarchy of centres. These identify Kendal as the principle shopping centre, Ulverston as a medium town centre, serving a wide rural catchment, Grange-over-Sands, Kirkby Lonsdale and Milnthorpe as smaller centres which provide for local residents and their rural catchments and a number of local service centres which act as local centres providing for basic local needs.
- 2.6.2 There remains the need to ensure that the town centres remain competitive, both in the regional context and in the local market. Improvements in the retail mix help with the retention rates while floorspace provision needs to be accompanied by measures to improve pedestrian and cycle linkages, town centre environment and street scape and appropriate town centre management.
- 2.6.3 The submitted Land Allocations DPD identifies updated town centre boundaries, Primary Shopping Areas and Primary / Secondary Frontages for the principle and key service centres and defines the preferred locations for permitted retail development and other town centre uses.

- 2.6.4 The 2012 South Lakeland Retail Study (SLRS), continues to identify high levels of leakage in the district. Overall the five principle and key services centres retain just over half of all comparison expenditure generated from their immediate surroundings. However there are significant disparities between centres. In terms of comparison shopping Kendal performs well with a retention rate of retail expenditure of 87.4 %, however Ulverston retains only 25.8%, Grange-over-Sands, 19%, Milnthorpe 9.8% and Kirkby Lonsdale 2.1%. Both Kirkby Lonsdale and Ulverston demonstrate high levels of leakage to destinations outside the district.
- 2.6.5 In terms of convenience spend Kendal retains a healthy 94% of spend generated in the local area; however 72.6% is directed to the competing out of town convenience stores. Ulverston retains 62.8% of convenience retail expenditure generated within Ulverston, however this falls to 57.7% when the surrounding rural area is considered. The majority of this is directed towards the out of town convenience store. A significant proportion of convenience spend is not retained in the key service centres of Grange-over-Sands, Milnthorpe and Kirkby Lonsdale. Retention levels are 30.5%, 20.9% and 10.3% respectively. The SLRS 2012 identified two “food deserts” – areas which are under provided for in terms of foodstore provision and based on travel distances which are considered to be reasonable and sustainable for a main food shop. Qualitative deficiencies in food store provisions were identified in Grange-over-Sands and in terms of main food shop only, the Milnthorpe / Arnside area of the district.
- 2.6.6 The Core Strategy promotes retail development of a scale appropriate to centres and catchments populations intended to be served. This is on the basis of a sustainable distribution of expenditure, with the overall aim of increasing the health of town centres. A number of retail schemes in a variety of centres have enhanced the retail offer across the district. This includes the development of a Booths supermarket and spar / petrol station in Milnthorpe, the extension of planning permission for a 929 sq. m net convenience store in Grange-over-Sands and the resolution of the availability of the site in conjunction with the Lake District National Park Authority. These developments will in particular help claw back leaked expenditure and help retain expenditure in these localities, contributing to their vitality and viability and address the identified food deserts. In addition there remain a number of smaller developments which include a retail element in Kendal which have planning permission or are currently being built.
- 2.6.7 The pressures for edge of centre and out of centre supermarket growth remain in the district. In Kendal an appeal against an out of town development comprising 5,109 sq. m (gross) foodstore and 5,573 sq. m non food retail has been again dismissed with the inspector taking the view that overall the appeal proposal failed to satisfy the sequential test. The economic and employment benefits of the Canal Head regeneration site and associated potential for a large supermarket were seen to out way the benefits to the sporting community in Kendal. In Ulverston an application for a 1,900 sq. m net supermarket on the old Brewery site has been approved and an application for out of town retail allocation refused.
- 2.6.8 The retail offer, particularly in Kendal has been increased with a number of new national multiples obtaining suitable town centre premises (TKMaxx, Topshop, Phase Eight). These, along with some new independent stores will continue to enhance the retail provision and help retain retail expenditure locally.

2.6.9 Vacancy rates in Kendal in the first quarter of 2012 show a slight decline on the 2011/2012 average of 12.3% and currently stands at 11.3%. Ulverston's first quarter vacancy rate currently stands at 8.9%, a slight increase in the first quarter over the 2011/12 average of 7.16%. Although there are fluctuations and some long term vacancies in both centres the rates are showing a slight worsening in terms of Kendal and a slight improvement for Ulverston when compared to the 2008/9 Health Checks where the vacancy rates were 9.44% for Kendal and 8.6% for Ulverston. For comparison the national average as reported in the 2011 Goad centre reports for the district was 13.6%. There is also evidence of shorter term tenancies and increased occupancy turn over in the districts centres.

2.7 Tourism

2.7.1 Tourism is a major driver of the District's economy, with many local people employed in related services and supporting industries. South Lakeland (including the National Parks) attracted 15.8 million visitors and over £982.9 million in visitor expenditure in 2011. Conversely, high visitor numbers put increased pressure on the infrastructure, services and facilities in the District as well as on the environment. Increased traffic for example has implications for the environment and the quality of life for residents due to congestion and pollution.

2.7.2 In catering for visitors, the District must balance the economic benefits and the quality of the visitor's experience with ensuring that the natural and cultural heritage of the area is not compromised by or for the visitors themselves.

INDICATOR (for South Lakeland District unless otherwise stated)	DATE	SL DATA	COMPARATOR	SOURCE
Tourism				
1. Number of Visitors to South Lakeland (million)	2011 2010	15.8m 15.6m	None - Data not available for South Lakeland planning area	Cumbria Tourism
2. Visitor Expenditure per Annum in South Lakeland	2011 2010	£982.9 £919.9m	None - Data not available for South Lakeland planning area	

2.8 Environment and Conservation

2.8.1 As well as being adjacent to areas of two national parks, South Lakeland planning area is fortunate to contain 16,116 hectares of land designated as SSSI (92.3% of which is in a favourable or recovering condition), an AONB and all or part of 6 Natura 2000 sites of international importance. These are:

- Morecambe Bay
- Morecambe Bay Pavements
- The Duddon Estuary
- Duddon Mosses
- The River Kent and its tributaries
- Roudsea Wood and Mosses

2.8.2 There are a number of geologically important sites in the District, such as extensive limestone pavement, and a number of main rivers flow through the District. The River Basin Management Plan (2009) for the Kent/Leven catchment assessed 42% of rivers and lakes as having good ecological status or potential. Indeed, much of the natural landscape of South Lakeland is aesthetically impressive and rich in wildlife. South Lakeland supports a number of rare and protected plant and animal species and habitats. These include species such as large yellow sedge, freshwater pearl mussels, white-clawed crayfish and otters and habitats such as Ancient Broadleaved Woodland and Lowland Wet Grassland. These are all assets that contribute to the character of the area and make the District particularly attractive to visitors.

2.8.3 The built environment of South Lakeland is also distinctive and important. There are currently 10 Conservation Areas in South Lakeland outside the National Parks. A recent review programme of these areas is now complete and whilst work has begun on preparing a management plan for Ulverston Conservation Area, opportunities for local civic societies (where these exist) to play a key role in developing management plans for their settlements are being investigated. There are around 1,600 listed buildings in the South Lakeland planning area (2,834 in the whole of South Lakeland District) and around 60 scheduled monuments including early industrial sites such as watermills, iron furnaces and limekilns. These contribute greatly towards the character and economic vitality of the area and therefore require protection, sympathetic maintenance, enhancement and management.

2.8.4 South Lakeland shares in the global challenge of being at risk from the effects of climate change and needs to take action to mitigate against and adapt to them. Recently, the issues of flooding and flood risk are perhaps most evident in the District. 1.2% of the District’s total housing stock falls within an area that has a 1% (1 in 100 year) flood risk in relation to river flooding. A lesser, yet still significant number are at risk from tidal flooding and flooding from minor watercourses. Flood depths and flood frequency are expected to increase as a result of climate change. Other impacts of climate change in the District may include effects on biodiversity, agriculture, lifestyles and homes due to changes in weather patterns and weather extremes.

2.8.5 Also relating to climate change are renewable energy installations, waste generation and car journeys. Small domestic energy installations are proving very difficult to monitor as many installations are included under permitted development rights, however some require building control assessment and may be monitored through that process. With regard to waste production and car usage, South Lakeland has higher than the UK average.

INDICATOR (for South Lakeland District unless otherwise stated)	DATE	SL DATA	COMPARATOR	SOURCE
Environment				
1. Sites of Special Scientific Interest (SSSIs)				
<ul style="list-style-type: none"> Area designated (ha) 	2013	16,116.82		Natural England
<ul style="list-style-type: none"> % In recovering or favourable condition 	2013	92.3%		
	2011	92.7%		
	2010	91.6%		
2. River Basin Management – Kent /Leven Catchment				

• % at good ecological status or potential	2009	42%		Environment Agency
3. % Household Waste Re-used Recycled or Composted	2011/2012	44.1%	2010/11 43.8% 2009/10 45.22% 2008/09 47.95%	SLDC Community Services
4. Renewable Energy Installed (MW)	2007/08	0.021MW	SL 2006/07 0.031MW	SLDC Monitoring

2.9 Leisure and Recreation

2.9.1 The District has a range of good quality cultural, leisure and recreational facilities, including Cumbria's largest tennis centre, canal and river corridors and a number of historic parks and gardens. The South Lakeland Open Space and Sports Facilities Assessment provides an assessment of the level of provision, quality and accessibility of public open space, sport and recreation facilities in the LDF area, helps identify surpluses and deficiencies in quality and quantity and sets standards for new open space and play area provision.

2.9.2 In 2007 49.6% of the population lived within 20 minutes' travel time (urban - walking, rural - by car) of a range of three different sports facility types, of which at least one is quality assured. Park Road Gardens in Grange-over-Sands achieved Green Flag Award status for 2010 and 2011 and there are more than 10 other parks and gardens in the South Lakeland planning area are maintained to an equally high standard.

2.10 Transport

2.10.1 The east of the District in particular benefits from good accessibility to main national transport links, meaning that larger regional centres such as Manchester and Liverpool are within relatively easy driving and rail journey distance of Kendal. The A590 and Furness rail line provide access for communities in the west of the District, but these are considered to be in need of improvement. Transport links mean that major ports and airports such as Liverpool and Manchester, Newcastle and Hull are not more than 3½ hours' drive from South Lakeland's main centres. The west coast main line runs through the east of the District, providing direct access to cities in the North West such as Preston and Manchester and Carlisle, to Manchester Airport, to Glasgow and to cities in the south of England, including a service that enables passengers to get to Central London from Oxenholme Station in 2½ hours.

2.10.2 Reasonable levels of bus service are provided for parts of towns and larger villages but there is significantly less (and recently reduced) provision in more rural areas, making access to jobs, services and education difficult, particularly for elderly and young residents. There is little or no evening public transport, particularly in rural areas and many places, even areas close to the main towns, have no Sunday bus service.

2.10.3 In 2004, 4,459 of the District's residents worked outside Cumbria – about 10% of total employed residents at the time. However, South Lakeland has a lower than average percentage of residents travelling more than 20km to work.

Transport				
1. Car Ownership (households)				
• % 2 or more cars	2011	38.9%	NW 29.5%	Census 2011
• % 1 car	2011	45.8%	NW 42.5%	
• % 0 car	2011	15.3%	NW 28.2%	
2. % Population aged 16 to 74 who travel to work by:				
• Work at home	2011	12.4 %		Census 2011
• Foot or cycle	2011	12.1 %	2001 19.2 %	
• Car, van, m/cycle or taxi (inc. as passenger)	2011	41.2 %	2001 61%	
• Public Transport	2011	2.1 %	2001 2.9%	
• Other/not in employment	2011	32.2%		
3. Employed Residents who work outside Cumbria				
• %	2004	9%		One-off study - possibly unavailable in future

3.0 LOCAL DEVELOPMENT SCHEME – PROGRESS CHECK

3.1 Introduction

3.1.1 A key aspect of the AMR is to review progress on the delivery of Local Plan against the timetable and milestones set out in the LDS. The LDS is the project plan for the preparation of the South Lakeland Local Plan. It details the documents that the Council has produced or proposes to produce, with a timetable for the preparation of each document that will make up the Local Plan. Until one single composite Local Plan is prepared, the Local Plan will compose of a series of documents (formerly LDF documents, now referred to as the South Lakeland Local Plan).

3.1.2 This chapter of the AMR reviews progress in the preparation of the Local Plan for the monitoring period to which this AMR relates (1 April 2012 – 31 March 2013). The published March 2013 LDS forms the basis for assessing progress in this chapter.

Performance has been compared with the timetable in the approved March 2013 LDS. The 2013 LDS as well as previous LDSs can be viewed on the [Council's website](#) or can be obtained from the Development Strategy team at South Lakeland House, Kendal.

3.2 Performance for 1 April 2012 to 31 March 2013

3.2.1 For the period 1 April 2012 to 31 March 2013, the published March 2013 LDS indicates work in relation to the following Local Plan documents:

- Local Plan - Land Allocations
- Community Infrastructure Levy Charging Schedule (CIL)
- Neighbourhood Plan (Heversham and Hincaster)

3.2.2 The Statement of Community Involvement (SCI) was adopted in September 2006 and an addendum was approved in November 2007, the Cumbria Wind Energy Supplementary Planning Document was adopted in December 2007 and the Core Strategy was adopted in October 2010. These documents can be viewed on the [Council's website](#).

3.2.3 The tables below provide an update on progress against the timetable in the 2013 LDS.

LDS Progress Table 1 Local Plan - Land Allocations and Proposals Map ⁴

Role and Content of Document	Identifies or 'allocates' land for housing and employment, defines settlement boundaries, shopping frontages and green gaps and sets out development requirements for major and complex sites	
Progress	Under examination	
Key points in the 2013 LDS timetable	2013 LDS	
Early Preparation and Consultation	January 2008	
Formal publication	Completed February 2011	
Submission to Secretary of State	Completed April 2012	
Adoption by Full Council	November 2013	
Build into single Local Plan in 2021	Yes	

⁴ This was formerly entitled Site Specific Allocations DPD in the 2005 LDS and 2006 LDS.

- 3.2.4 The first time table milestone achieved for the Local Plan - Land Allocations document was the publication of the Sustainability Appraisal Scoping Report. This was produced in October 2008. Shortly afterwards, public consultation was undertaken through an informal discussion paper between November 2008 and February 2009. Large amounts of evidence were collated to inform the site-selection process, most notably the completion of the Strategic Housing Land Availability Assessment and the Employment and Housing Land Search Study.
- 3.2.5 Following the Core Strategy Examination in Public in March 2010, resources were reassigned to the progressing the Land Allocations document. Following extensive site assessment in Summer 2010, on 8 December 2010 Council Cabinet gave approval to undertake pre-publication consultation for 12 weeks from 14 January 2011. Further issues and alternative sites consultation was undertaken between July and September 2011 and Cabinet approved the document for publication in December 2011. The document was published on 2 March 2012 for 6½ weeks until 17 April 2012. The document was submitted on 31 May 2012. An independent Planning Inspector, Mr Simon Berkeley BA MA MRTPI, was appointed by the Secretary of State to hold a Public Examination into the soundness of the Land Allocations Development Plan Document (DPD). The hearings commenced 23 October 2012 but were suspended on the 19 November 2012 at SLDC's request whilst they undertook further work. The examination hearings will reconvene on 11 June 2013.

LDS Progress Table 2 Community Infrastructure Levy Charging Schedule

Role and Content of Document	The Community Infrastructure Levy (CIL) will fund community infrastructure essential to secure the delivery of the Core Strategy	
Progress		
Key points in the 2013 LDS time table	2013 LDS	
Early preparation and consultation	Started January 2013	
Formal publication	January 2014	
Submission to the Secretary of State	March 2014	
Adoption by the full Council	July 2014	
Build into single Local Plan in 2021	Will be reviewed as part of Single Local Plan process	

LDS Progress Table 3 Neighbourhood Plan (Heversham and Hincaster)

Role and Content of Document	Identifies or 'allocates' land within the parish{s} and sets out community priorities and considerations	
Progress		
Key points in the 2013 LDS time table	2013 LDS	
Early preparation and consultation	January 2013	
Formal publication	Times to be set by the neighbourhoods	
Submission to the Secretary of State	Times to be set by the neighbourhoods	
Adoption by the full Council	Times to be set by the neighbourhoods	
Build into single Local Plan in 2021	Separate document	

3.2.6 The updated 2013 LDS includes a commitment to the following development plan documents (DPD's) which will commence post March 2013, but pre. 2014. These are: a Statement of Community Involvement (SCI), an Arnside and Silverdale Area of Outstanding Natural Beauty (AONB) DPD and Supplementary Planning Documents (SPD's); Phase 1 Development Briefs.

3.3 Research

3.3.1 A number of studies form the part of the evidence base for the Local Plan. The table below sets out the various studies undertaken and relevant completion dates.

Document Name	Date	Prepared By	Review Date
Spatial Strategy			
Research – Key Service Centres' Roles and Functions – Cumbria and North Lancashire, Final Report	September 2006	Land Use Consultants, Rural Innovation and Jacqui Blenkinship for NWRA (now 4NW)	N/A
South Lakeland Employment and Housing Land Search Study and Addendum	March 2009	Gillespies LLP and Scott-Wilson Ltd for SLDC	N/A
Housing			
Employment and Housing Land Search Study and Addendum	Feb 2009	Gillespies (Main Report) Scott Wilson (Addendum)	As required
Strategic Housing Land Availability Assessment (SHLAA)	May 2009	Roger Tym & Partners for SLDC	Annually
South Lakeland Strategic Housing Market Assessment	October 2011	arc4	Every 5 years
Strategic Housing Market Assessment (SHMA)	December 2009	Cumbria Sub Regional Housing Group	Every 5 years
Housing Land Position Statements	2009, 2010, 2011 & , 2012, 2013	SLDC Development Plans Team	Annually
Review of Housing and Employment Land Supply Statement March 2013	May 2013	SLDC Development Plans Team	As required
South Lakeland Housing Needs & Market Assessment Study, Final Report	June 2006	David Cumberland Housing Regeneration Ltd. For SLDC	Every 5 years
Viability Impact Study	March 2009 / August 2009	NPS	As required
Urban Potential Study	2004 and partial review 2006	SLDC Development Plans Team	As required
Cumbria Housing Strategy 2011-2015	October 2011	Cumbria Housing Group	2015

Document Name	Date	Prepared By	Review Date
Older People – Planning4Care Report	Nov 2009	Care Equation & Oxford Consultants for Social Inclusion	As required
South Lakeland Older Persons Housing Strategy 2007-2009	2007	SLDC	As required
Gypsies and Travellers			
Cumbria Gypsy and Traveller Accommodation Needs Assessment, Final Report and Appleby Fair Report	May 2008	University of Salford (Salford Housing & Urban Studies Unit) for Cumbrian Local Planning Authorities	As required
South Lakeland Gypsy and Traveller Further Study (Accommodation Report)	November 2011	Home Space Sustainable Accommodation CIC	As required
The Economy – Jobs, Skills and Regeneration			
South Lakeland Employment Land & Premises Study, Final Report (ELPS)	December 2005	Ove Arup & Partners Ltd with Carigiet Cowen for SLDC	2011
South Lakeland Employment Land Review	February 2012	Lambert Smith Hampton	As required
South Lakeland Employment Land Position Report, as at 31st March 2008	July 2009	Development Plans Team	Annually
Employment Land Position Report	March 2011	SLDC Development Plans Team	Annually
Composite Employment Land Position Report, March 2012	May 2013	SLDC Development Plans Team	Annually
Review of Housing and Employment Land Supply Statement March 2013	May 2013	SLDC Development Plans Team	As required
Proposed Existing Employment Areas / Premises to Protect as of Winter 2009 / Spring 2010.	March 2013	SLDC Development Plans Team	As required
South Lakeland: Knowledge-Based Employment Land Search & Assessment, Final Report	August 2007	Knight Frank, Ove Arup and Carigiet Cowen for NWDA	N/A
Cumbria Sub Regional Action Plan 2009 – 12	February 2009	Cumbria Vision	2012, superseded Dec. 2012 by Cumbria's Economic Ambition (Economic strategy)
Cumbria's Economic Ambition – Cumbria County Council's Role in Delivering a Thriving Economy 2011 - 2014	December 2012	Cumbria County Council	2014

Document Name	Date	Prepared By	Review Date
Cumbria Local Enterprise Partnership – Business Plan – Key Priorities	January 2013	Cumbria Local Enterprise Partnership	As required
Eden and South Lakeland Business Needs Survey Report	June 2010	CN Research	Ad hoc
Employment and Housing Land Search Study and Addendum	February 2009	Gillespies for SLDC – main report, Scott-Wilson for SLDC – Addendum	As required
Regeneration			
Kendal Economic Regeneration Action Plan Final Report	June 2007	Douglas Wheeler Associates for SLDC	Ad hoc
Grange-over-Sands Regeneration Study, Final Report	December 2007	Douglas Wheeler Associates with Willie Miller Urban Design and Carigiet Cowen for SLDC	N/A
Advisory Ulverston Canal Head and Corridor Master Plan	July 2005	Ulverston and Low Furness Partnership et al	
England's Smaller Seaside Towns Report - A benchmarking study (this refers to Grange-over-Sands)	March 2011	Department for Communities and Local Government	
Retail			
South Lakeland Retail Study Quantitative Assessment, Final Report (main report and appendices)	October 2007	Martin Tonks of MT Town Planning for SLDC	Before 2012
Town Centre Retail Health Checks	March 2009	SLDC Development Plans Team	Annually
Land Allocations – Retail Topic Paper, January 2011	December 2011	SLDC Development Plans Team	As required
South Lakeland Retail Study 2012	February 2012	Nathaniel Lichfield and Partners	As required
Kendal Rugby Club Appeal Decision	March 2010	Inspector S.R.G Baird	N/A
Kendal Rugby Club Appeal Decision	June 2012	Inspector M. Pike	N/A
Environment			
Core Strategy Appropriate Assessment (AA) Screening Report	March 2008	Treweek Environmental Consultants	As required
Core Strategy Appropriate Assessment (AA) Final Report	July 2009	Treweek Environmental Consultants	As required
Land Allocations Appropriate Assessment (AA) Screening Report and Supplement	February 2010/January 2012	Treweek Environmental Consultants	As required

Document Name	Date	Prepared By	Review Date
Land Allocations Appropriate Assessment (AA) Report	February 2012	Treweek Environmental Consultants	As required
The Cumbria Biodiversity Evidence Base & Report	June 2008	Cumbria Biological Data Network (CBDN) in consultation with local experts (led by Cumbria County Council)	6-monthly or more often as required
Biodiversity Data for Assessed Sites	January 2012	Development Strategy team using data from the Cumbria Biodiversity Evidence Base & Report	As required
Air Quality in South Lakeland, Progress Report 2011	June 2011	SLDC (Environmental Protection Group)	Annual
Air Quality Updating and Screening Assessment, July 2009	On-going	SLDC (Environmental Protection Group)	Annual
South Lakeland District Strategic Flood Risk Assessment (SFRA)	October 2007	Jacobs for SLDC	Annual
South Lakeland District Council: Open Space, Sport & Recreation Assessment	February 2008	Knight Kavanagh and Page for SLDC	2013
Cumbria Landscape Character Guidance and Toolkit	March 2011	Cumbria County Council in conjunction with the Districts	As required
Cumbria Landscape Technical Paper 5	2006	Cumbria County Council	N/A
Landscape Mitigation Advice on proposed Site Allocations in South Lakeland District	December 2011	Woolerton Dodwell	As required
North West and North Wales Shoreline Management Plan	February 2011	Halcrow Group	Expected Approx. every 10 years
Cumbria Renewable Energy Capacity Study	August 2011	SQ.W / LUC	As required
The Scope for Renewable Energy in Cumbria	August 2009	Cumbria Vision	
Arnsdale & Silverdale AONB Management Plan 2009	March 2009	Arnsdale & Silverdale AONB Unit	Every 5 years
Morecambe Bay Limestones and Wetlands NIA Synopsis and Map	2012	NIA partnership	As required
Sustainability Assessment Update Report	April 2013	SLDC Development Plans Team	As required
Infrastructure			
Kendal Transport Assessment Final Report	June 2009	Atkins	NA

Document Name	Date	Prepared By	Review Date
Kendal Car Parking Study Final Report	June 2009	Atkins	NA
Kendal Transport Study Initial Modelling Results	October 2011	Cumbria County Council	As required
Kendal Transport Study Revised Modelling Results	January 2012	Cumbria County Council	As required
Kendal Transport Improvements Study	September 2012	Cumbria County Council	As required
Traffic Study to Inform Land Allocations DPD for Ulverston and Swarthmoor	February 2012	KR Synergy	As required
Infrastructure Position Statement	February 2012	SLDC Development Plans Team	As required
Infrastructure Delivery Plan	April 2013	SLDC	As required
Further Highways Study (comprising a Main report, a Cartmel Peninsula and Crooklands Bridge study)	Mar 2013	AECOM for SLDC	As required
Viability Study and Appendices	April 2013	HDH Planning and Development for SLDC	As required

3.4 Summary of Progress

- 3.4.1 The Core Strategy was successfully adopted on 20 October 2010. The 6 week legal challenge period expired on 2 December 2010.
- 3.4.2 The Land Allocations document has made substantive progress; public consultation on emerging options was carried out in the Spring and Summer of 2011, prior to publication on 2 March 2012. The document was submitted to the Secretary of State on 31 May 2012. The Land Allocations document which is currently under examination (May 2013), will identify or 'allocate' land to meet these needs for specific types of development such as housing and employment. It is expected to be adopted by November 2013.
- 3.4.3 The Canal Head Area Action Plan has been held in abeyance pending the outcome of an appeal relating to a proposal for an out-of-centre retail development at Kendal Rugby Club. In dismissing the appeal on 21st June, the Inspector drew conclusions about the availability, suitability and deliverability of a retail based scheme on Canal Head. The implications of this decision for the scope and timetable of the Action Plan are being considered by the Council and a revised timetable will be issued in a future Local Development Scheme.

4.0 POLICY ANALYSIS – SOUTH LAKELAND CORE STRATEGY

4.1 Introduction

4.1.1 The AMR is required to identify the extent to which policies in the Local Plan (currently the Core Strategy and the Saved 2006 Local Plan policies) are being implemented, how successfully and what impact this is having.

4.1.2 The first table in this section presents the analysis of the monitoring framework as follows:

- Policies/Objectives are grouped by the relevant priority themes/strategic objectives of the Core Strategy.
- Targets are identified where applicable, although these do not exist for all indicators.
- The baseline column identifies data for the period 2012-13 (or if not, the most up to date available) and this will act as a baseline for comparison of performance and identification of trends in later years.

4.1.3 The second table presents data collected against Cumbria-wide Annual Monitoring Report indicators. These indicators are based upon the core output indicators that local authorities were previously required to report against by central government. This requirement was removed in March 2011. The Cumbria Monitoring officers group decided that to retain historic trend data and to enable comparison across geographic areas the indicators would continue to be used in AMRs. In addition, some of the indicators, notably in relation to biodiversity, have been widened and the collection of data for these has presented further issues.

4.1.4 Difficulties in obtaining data and an on-going heavy workload involved with the Land Allocations DPD mean it has not been possible to report against every indicator. It is planned to undertake a comprehensive review of the AMR following the completion of work on the Land Allocations document.

4.2 Indicator Table

Monitoring Framework

THE ECONOMY

To deliver a step change in the local economy and contribute towards the enhancement of the wider Cumbrian economy.

THE ECONOMY			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>Making provision for a range of types and sizes of employment land to meet local need and promote new business creation across the plan area.</i>	Total amount of additional employment floorspace by type	4 hectares of employment land is allocated per annum between 2010 and 2025, of which 30% should be high quality B1 employment use. Maintain a rolling five-year supply of unconstrained land for each employment land market sector at any one time.	Employment Land Availability (ELA) 2011/12 reported 18.4 ha available. Land Allocations proposes 66 ha 4ha per annum for 2010-2025 is 60ha in total.
	New business creation rates / vat registrations	Annual increase in number of new businesses created between 2010 and 2025.	2007 – 380 new businesses 2008 – 505 new businesses (NOMIS)
	Business survival rates - vat registrations and deregistrations	Annual increase in business survival rates between 2010 and 2025.	2007 – new registrations 380, deregistrations 295 Survival rate 85 (22%) (NOMIS)
	Loss of allocated employment land	No loss of good quality unallocated sites which are currently in employment use.	None reported in ELA 2011/12
<i>Working with stakeholders and partners to create a cluster of knowledge-based industries to strengthen the</i>	Total amount of additional employment floorspace by type	Provision of 15 hectares of business / science parks in Ulverston and Kendal between 2010 and 2025.	ELA 2011/12 reported 2.2ha business park (Kendal), Land allocations proposes 9.6ha.(Kendal & Ulverston)

THE ECONOMY			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>local economy and meet sub-regional economic needs in Kendal.</i>			
<i>Ensuring that economic development in areas close to the National Parks benefit not only local residents but also communities within the parks</i>	Average weekly resident based income (District- wide, so as to incorporate the National Park areas)	Annual increase in average weekly resident based income across South Lakeland District.	2009 £ 479.20 2011 £460.9 2012 £ 478.6 (NOMIS)
	Unemployment levels (District wide, so as to incorporate the National Park areas)	Less than 1% unemployment across South Lakeland.	May 2012 - 1.3% Mar 2013 – 1.4% (NOMIS)
	Gross Value Added (GVA) per head (District wide, so as to incorporate the National Park areas)	Annual increase in GVA per head across South Lakeland District.	2007 £ 16374 2008 £ 17236 2009 £ 17,321 Data for East Cumbria (includes South Lakeland & Eden District) (ONS)
<i>Enabling opportunities for economic development and regeneration to be brought forward in the Furness Peninsula and develop the area’s potential for tourism.</i>	Total amount of additional employment floorspace by type	Accommodation of 12 hectares of employment land in Ulverston between 2010 and 2025	ELA 2012 reports 2.8 ha Land allocations 10.22 ha
	Development of Ulverston Canal Head and Corridor Area	Production of further planning guidance for Ulverston Canal Head and Corridor area by 2014.	Ulverston Canal Head and Corridor area proposed for allocation in Land Allocations document (to include Development Brief)
	Number of visitors to LDF area	Annual increase in the number of visits to the Furness	Data not available at sub-district level.

THE ECONOMY			
OBJECTIVE	INDICATOR	TARGET	BASELINE
		Peninsula.	
<i>Supporting diversification of the agricultural and wider rural economy, including allowing small-scale economic development in rural settlements outside Service Centres.</i>	Total amount of additional employment floorspace by type	Provision of 12 hectares of local employment sites in the network of Local Service Centres, and 6 hectares of land across the other rural settlements.	ELA LSC local = 0.54 ha ELA Rural local = 0 ha Land Allocations; LSC = 11.17 ha Rural = 0
	Unemployment levels	Less than 1% unemployment across South Lakeland.	March 2012 - 1.3% Mar 2013 – 1.4% (NOMIS)
<i>Promoting the vitality and viability of town and local centres, through addressing obstacles to growth (such as town centre congestion in Kendal) and working with partners to reduce vacancy levels.</i>	Amount of new floorspace located in identified town centres	At least 80% of new A1 floorspace to be located in identified town centres by 2025.	Not currently available
	Amount of vacant floorspace in the primary shopping areas (ground floor)	Vacancies to be maintained at less than 10% by 2025 across the network of town centres.	Not currently available
<i>Supporting the development of further and higher education in the District, in particular the University of Cumbria (when it opens a campus in the District) and Kendal College and the provision of training and life-long learning.</i>	Number of courses offered	Increase in the number of courses offered between 2010 and 2025.	Kendal College 2012 82 full time, 71 part time, 120 other (Kendal College)
	Number of full time/part time students	Increase in the number of full and part time students at further and higher education establishments Between 2010 and 2025 to.	Kendal College 2011/12 – 3383 enrolments
	Percentage of working population with qualifications and % at	Increase in the proportion of local residents with qualifications	2012 39.6% have a qualification at NVQ 4

THE ECONOMY			
OBJECTIVE	INDICATOR	TARGET	BASELINE
	NVQ4 equivalent or above	between 2010 and 2025.	equivalent or above 5.3% have no qualifications 2011 37.9% & 9.2% (NOMIS)
<i>Developing stronger relationships between local businesses and local education establishments.</i>	Number of vocational courses offered	Increase in the number of vocational courses offered between 2010 and 2025.	Kendal college 2011/12 : 75 NVQ courses
<i>Using developer contributions to support sustainable employee travel to and from work and also to provide recruitment and training to ensure that the benefits of economic development are targeted at local residents.</i>	Number of Workplace Travel Plans as a percentage of number of new employment applications or as a percentage of total no. employers in the area	Increase the proportion of employers with Work Travel Plans between 2010 and 2025.	Not currently monitored
	Percentage of employment applications subject to developer contributions/CIL	Consistent achievement of development contributions on major schemes.	Not currently monitored
<i>Supporting the development of the low carbon economy.</i>	Amount of energy generated from renewable sources	Annual increase in the amount of energy generated from renewable sources.	Not currently monitored

HOUSING

To achieve a balanced housing market by:

HOUSING			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>Securing the provision of a range of housing types and sizes to meet the needs of all sectors of the community;</i>	Net additional dwellings broken down in accordance with the settlement hierarchy in CS1.2	400 per annum, broken down by settlement hierarchy in accordance with CS1.2.	Refer to Table 1A Land Allocations DPD
	Net additional pitches (Gypsies and Travellers)	8 additional pitches required by 2016	0
	Housing Quality	Achieved in line with national targets for Lifetime Homes Standards	Not currently monitored
<i>Ensuring that the scale and type of housing in the Furness Peninsula helps to support regeneration in Barrow in Furness;</i>	Net additional dwellings broken down in accordance with the settlement hierarchy in CS1 .2	400 per annum, broken down by settlement hierarchy in accordance with CS1 .2.	Refer to Table 1A Land Allocations DPD
<i>Ensuring that housing developments are required to make provision for an element of affordable housing;</i>	Gross affordable housing completions (and as a % of total housing completions)	Affordable housing delivered in accordance with targets in CS policy CS6.3 i.e. 35% on schemes of 9 or more dwellings in PSC / KSCs and of 3 or more elsewhere	Policy in place requiring a percentage of new housing developments to be made up of affordable homes 2009/10 123 2010/11 48 2011/12 30 2012/13 46
<i>Continuing to work with partners to maximise the provision of publicly-funded</i>	Number of rural exception sites	Increase in the number of rural exception sites delivered annually between 2010 and 2025.	Not currently monitored

HOUSING			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>affordable housing;</i>			
<i>Optimising the sustainability of the housing stock;</i>	New and converted dwellings on previously developed land	At least 28% of new dwellings to be built on previously developed land and buildings.	2010/11 65% 2011/12 85% 2012/13 79%
	Density of dwellings per hectare for all housing developments	On average, at least 30 dwellings per hectares to be delivered on housing schemes.	2012/13 206 net completions 46 (22%) at less than 30 dph 160 (78%) at more than 30 dph
	Number of Code for Sustainable Homes certificates Issued and as a % of total housing completions	Continually increasing proportion of housing developments receiving certificates	Certificates issued since Q1 2008 Design = 30 Construction = 49
<i>Requiring new developments to respect and be sympathetic to the character of the locality, enhance the existing built environment and create a “sense of place”.</i>	Number of design guidance and development briefs produced	Design guidance and / or development briefs to be produced in relation to major development schemes.	Refer to Land Allocations DPD
	Number of new major developments built according to Building for Life Standards and as a % of all major developments and % of these that achieved ‘very good’ standard	Major developments assessed against Building for Life standards to achieve ‘very good’ standard.	Not currently monitored

PROTECTING THE ENVIRONMENT

To protect the unique character of the District by:

PROTECTING THE ENVIRONMENT			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>Helping to mitigate against and adapt to the cause and impacts of climate change;</i>	Number of Code for Sustainable Homes certificates Issued and as a % of total housing completions	Continually increasing proportion of housing developments receiving certificates	Certificates issued since Q1 2008 Design = 30 Construction = 49
	Number and proportion of new commercial buildings built before 2013 to BREEAM 'very good' standard and number and proportion of new commercial buildings built in or after 2013 to 'excellent' BREEAM standard	100% of new commercial buildings of more than 1000sq.m to meet a very good BREEAM standard rising to an excellent standard by 2013.	Not currently monitored
	Amount of energy generated from renewable sources	Annual increase in the amount of energy generated from renewable sources.	Not currently monitored
<i>Promoting prudent use of resources, minimising the generation of waste, promoting recycling and mitigating against the effects of air, water and soil pollution, noise, smells and fumes, and making adequate provision for contamination mitigation;</i>	Permissions granted contrary to Environment Agency advice	Zero.	6 objections but all overcome 2011/12 (EA)
	Volume of household waste collected and recycled/composted	Annual increase in proportion of household waste recycled/composted and decrease in amount collected.	Collected per household 2010/11 491kg 2011/12 468kg Recycled/composted 2010/11 43.8% 2011/12 44.1%

PROTECTING THE ENVIRONMENT			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>Minimising the risk of flooding;</i>	Permissions granted contrary to Environment Agency advice	Zero.	6 objections but all overcome 2011/12(EA)
<i>Reviewing green gaps between individual settlements in order to ensure that they are kept distinct and maintain their individual character;</i>	Extent of green gap coverage	Zero reduction in extent of green gaps allocated in the Land Allocations DPD.	To be monitored once Local Plan Land Allocations adopted
<i>Limiting development in rural settlements outside Service Centres.</i>	Net additional dwellings broken down in accordance with the settlement hierarchy in CS1 .2	400 per annum, broken down by settlement hierarchy in accordance with CS1 .2.	Refer to Table 1A Local Plan Land Allocations DPD
<i>Providing a coordinated network of green infrastructure;</i>	Total area designated Sites of Special Scientific Interest (SSSI)	No reduction in the area designated as SSSI.	2011 16116.82 ha 2013 16116.82 ha
	Amount of open space, sport and recreation provision	Achievement of open space quantity standards in CS8.3a and CS8.3b.	Not currently monitored
	Quality of open space, sport and recreation provision	Increase in the proportion of sites achieving the quality benchmark (as assessed through the open space study).	Not currently monitored
	Ecological classification of rivers and lakes	“Good” or better.	42% of rivers and lakes in good ecological status or potential 2009

PROTECTING THE ENVIRONMENT			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>Ensuring that new development both safeguards and enhances the natural and built environment, notably the international designations within the area such as Morecambe Bay;</i>	Permissions granted contrary to the advice of the statutory environment bodies	Zero.	6 objections but all overcome 2010/11 (EA)
<i>Protect the historic environment from harmful change, including listed buildings, buildings of local importance, conservation areas, scheduled ancient monuments and historic parks and gardens;</i>	Whether or not a list of buildings and features of local architectural and historical importance has been produced.	Production of a list of buildings and features of local architectural and historical importance.	Not produced 17/7/12
	Number of conservation Areas with a finalised Management Plans	Continually increasing number of Conservation Areas with finalised Management Plans.	All conservation areas have current appraisals.
<i>Increase the resilience of ecosystem services by protecting against harm to biodiversity and taking opportunities to enhance and create ecologically-diverse habitats in all locations.</i>	Change in areas of biodiversity importance	Annual increase	Not currently monitored

ACCESSING SERVICES

To improve accessibility to services by:

ACCESSING SERVICES			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>Concentrating development in the Principal Service Centres of Kendal and Ulverston, then in the other Key Service Centres of Grange-over-Sands, Kirkby Lonsdale and Milnthorpe, followed by a number of designated Local Service Centres throughout the rural hinterland;</i>	Net additional dwellings broken down in accordance with the settlement hierarchy in CS 1.2 & % built in PSCs, KSCs, LSCs and rural locations	400 per annum, broken down by settlement hierarchy in accordance with CS1 .2 Greatest proportion to be in PSCs, then KSCs, then LSCs then elsewhere	Refer to Table 1A Land Allocations DPD
<i>Working with partners to improve sustainable rural transport and maintain rural services, including between Local Service Centres and their rural hinterland and also links to nearby centres outside the District, such as Barrow and Carnforth;</i>	Number and frequency of rural bus services	Annual increase in number and frequency of services.	Not currently monitored
<i>Focusing the majority of new development in locations that are accessible by a variety of modes of transport, particularly public transport,</i>	%of new residential development within 30 mins. public transport time of Key Services	95%.	The target is met for GP (96%), Primary School (95%), Retail Centre (95%) and Employment (95%) but not for Hospitals (68%) or Secondary Schools (93%) 2012

ACCESSING SERVICES			
OBJECTIVE	INDICATOR	TARGET	BASELINE
walking and cycling;	%of new residential development within 2km walking distance and 5km (30mins.) cycling distance of Key Services	70%.	For walking the target is met for GP (77%) and Primary School (90%) but not for hospitals (15%), Secondary School (63%), Retail Centre (67%) or Employment (69%) 2012 For cycling the target is met for GP (95%), Primary School (98%), Secondary School (85%), Retail Centre (84%) and Employment (92%) but not for Hospitals (48%) 2012
Improving access across the District by supporting the development and enhancement of an integrated transport network, including footpaths and cycleways;	Extent of cycling and walking routes	Annual increase.	Not currently monitored
Supporting improvements to rural accessibility and lobbying to improve broadband access in rural areas;	Number and frequency of demand responsive rural bus services	Annual increase in number and frequency of services.	Not currently monitored
Supporting essential road infrastructure improvements to accommodate development, most notably the A590 between the Principal Service Centres	Number of road accidents (Killed or seriously injured)	Annual decrease in number of road accidents.	2009 – 70 2010 – 54 2011 – 57 (Total number)

ACCESSING SERVICES			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>of Kendal and Ulverston;</i>			
<i>Considering the development of park-and-ride / park-and-stride sites and provision of improved coach parking in Kendal;</i>	Project implementation	Implementation of schemes in Kendal by 2015.	TBA
<i>Working with local communities to improve local services - supporting emerging Local Area Partnerships in order to deliver more tailored services at the neighbourhood level;</i>	Establishment of Local Area Partnerships	Implementation of Local Area Partnerships across SLDC by 2012.	Not currently monitored
<i>Delivering an Access to Services Programme in partnership with other organisations.</i>	Programme implementation	Implementation of a Programme by 2012.	Not currently monitored

HEALTH AND WELLBEING

To improve health and wellbeing for all by:

HEALTH AND WELLBEING			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>Ensuring that all development is sustainable and makes prudent use of resources, so as not to compromise the wellbeing of future generations;</i>	Number of Code for Sustainable Homes certificates Issued and as a % of total housing completions	Continually increasing proportion of housing developments receiving certificates	Certificates issued since Q1 2008 Design = 30 Construction = 49
	Number and proportion of new commercial buildings built before 2013 to BREEAM ‘very good’ standard and number and proportion of new commercial buildings built in or after 2013 to ‘excellent’ BREEAM standard	100% of new commercial buildings of more than 1000sq.m to meet a very good BREEAM standard rising to an excellent standard by 2013.	Not currently monitored
	Amount of energy generated from renewable sources	Annual increase in the amount of energy generated from renewable sources.	Not currently monitored
<i>Providing incentives for young people who have left the area to return - namely skilled jobs, training opportunities and a good spread of housing that meets their needs;</i>	Average weekly resident based income (District- wide, so as to incorporate the National Park areas)	Annual increase in average weekly resident based income across South Lakeland District.	2009 £ 479.20 2011 £460.9 2012 £ 478.6 (NOMIS)
	Percentage of working population with qualifications and % at NVQ4 equivalent or above	Increase in the proportion of local residents with qualifications between 2010 and 2025.	2012 39.6% have a qualification at NVQ 4 equivalent or above 5.3% have no qualifications 2011 37.9% & 9.2% (NOMIS)
	Net additional dwellings broken down in accordance with the settlement hierarchy in CS1 .2	400 per annum broken down by settlement hierarchy in accordance with CS1 .2.	Refer to Table 1A Land Allocations DPD

HEALTH AND WELLBEING			
OBJECTIVE	INDICATOR	TARGET	BASELINE
	Young people as a percentage of total population	Increased proportion of young people by end of plan period.	2011 Census 14.1% 2010 (ONS) 15.9%
<i>Protecting and enhancing existing social and community infrastructure - such as education, health, cultural and leisure facilities to improve community wellbeing in line with an understanding of predicted future needs and current gaps in infrastructure;</i>	Satisfaction surveys / overall & general satisfaction with the area Loss/gain of facilities	Increasing levels of satisfaction with the area. Net gain of facilities	Not currently monitored
<i>Working with partners to deliver sport and recreation schemes, developing community facilities such as multi use games areas for young people and creating opportunities for healthier lifestyles;</i>	Number of sport and recreation facilities within the plan area	Net increase number of local sport facilities per 1000 population.	Not currently monitored
<i>Supporting the Kendal Sports Village Project and the development of local sport facilities as a legacy of the 2012 Olympics;</i>	Current situation unclear	Current situation unclear	Current situation unclear
<i>Working with partners to develop and deliver health and wellbeing initiatives, including</i>	Not yet set	Not yet set	Not yet set

HEALTH AND WELLBEING			
OBJECTIVE	INDICATOR	TARGET	BASELINE
<i>working with the PCT to identify new sites for integrated health facilities;</i>			
<i>Working with partners to reduce the perception of anti-social behaviour and supporting projects including Together We Can / Street Safe;</i>	Levels of fear of crime	Reduction in fear of crime.	Not currently monitored
<i>Support independent living for older and disabled people, including giving grants and assistance to adapt people's homes;</i>	No. homes provided broken down by type	Provision of a range of types of housing to meet the needs of all sectors of the community	Not currently monitored
	% houses built to meet Lifetime Homes standards	Refer to national target for Lifetime Homes standards	Not currently monitored
<i>Enhancing green infrastructure and providing a comprehensive network of high quality open spaces such as parks and gardens, natural green spaces and allotments.</i>	% completed developments making contribution to open space, sport and recreation provision or quality	Achievement of open space quantity standards in CS8.3a and CS8.3b.	Not currently monitored
	Quality of open space, sport and recreation provision	Increase in the proportion of sites achieving the quality benchmark (as assessed through the open space study).	Not currently monitored

CUMBRIA-wide Annual Monitoring Report Indicators

Indicator No	Title	Purpose	Outcome
CBD1	Total amount of additional employment floorspace – by type	To show the amount and type of completed employment floorspace (gross and net).	Gross / Net sq. m B1a 316 / 116 B1b 376 / 376 B1c 465 / 405 B2 799 / -541 B8 0 / 0 Total 2011/12: 1976 / 356 Total 2010/11 : 4343 / 3381 Total 2009 /10: 15145 / 12685
CBD3	Employment land available – by type	To show the amount and type of employment land available.	B1a 0.82 ha B1c 0.62 ha B2 0.05 ha B8 0 ha Mixed 16.91 ha Total 2011/12 18.4 ha Total 2010/11 19.18ha Total 2009/10 17.96 ha
CBD4	Total amount of floorspace for ‘town centre uses’	To show the amount of completed floorspace (gross and net) for town centre uses A1 A2 B1a D2 within (i) town centre areas and (ii) the local authority area.	Not available
CH1	Plan period and housing targets	To show the planned housing period and provision.	2003 to 2025 8,000 dwellings
CH2(a)	Net additional dwellings – in previous years	To show recent levels of housing delivery	03/04 221 04/05 232 05/06 303 06/07 238 07/08 156 08/09 155 09/10 282 10/11 103 11/12 148
CH2(b)	Net additional dwellings – for the reporting year	To show levels of housing delivery for the reporting year	12/13 206

Indicator No	Title	Purpose	Outcome
CH2(c)	Net additional dwellings – in future years	To show likely future levels of housing delivery	Please refer to Appendix B
CH3	New and converted dwellings – on previously developed land	To show the number of gross new dwellings being built upon previously developed land (PDL).	2012/13 79% 2011/12 85% 2010/11 65% 2009/10 83%
CH4	Net additional pitches (Gypsy and Traveller)	To show the number of Gypsy and Traveller pitches delivered.	2012/13 0 2011/12 0 2010/11 0 2009/10 0
CH5	Gross affordable housing completions (new and converted dwellings)	To show affordable housing delivery.	2012/13 46 2011/12 30 2010/11 48 2009/10 123
CH6	Housing Quality – Building for Life Assessments	To show the level of quality in new housing development.	Not currently monitored
CH7	Extra Care Housing Delivery	To show extra care housing delivery.	Not currently monitored
CE1	Number of planning permissions granted contrary to Environment Agency advice on flooding and water quality grounds	To show numbers of developments which are potentially located where (i) they would be at risk of flooding or increase the risk of flooding elsewhere and, (ii) adversely affect water quality.	2010/11 0 2009/10 0
CE2	Change in areas of biodiversity importance	To show losses or additions to biodiversity habitat.	Not currently monitored
CE3	Renewable energy generation	To show the amount of renewable energy generation by installed capacity and type.	Not currently monitored
CE4	Loss of area (ha) of UK Priority Habitat	To show losses of area (ha) of UK Priority Habitat	Not currently monitored
CE5	Loss of area (ha) of Designated Sites SSSI's CWS	To show losses of area (ha) of Designated Sites SSSI's CWS	2011/12 16116.82 ha 2010/11 16116.82 ha 2009/10 16116.85 ha
CE6	Loss of area (ha) of Additional Wildlife Habitats	To show losses of area (ha) of Additional Wildlife Habitats	Not currently monitored
CE7	Planning permission on sites over 0.5ha that include measures to promote biodiversity	To show the number of schemes that includes measure to promote biodiversity.	Not currently monitored
CE8	Planning permissions through which	To show the number of schemes that will result in the	Not currently monitored

Indicator No	Title	Purpose	Outcome
	there will be loss of hedgerows	loss of hedgerows	
CE9	No. of planning applications approved with specific measures for protection of protected species and priority species	Identify the number of planning applications approved with specific measures for protection of protected species and priority species.	Not currently monitored
CE10	No. of planning applications approved with Management Agreements (biodiversity)	Identify the number of planning applications approved with Management Agreements (biodiversity)	Not currently monitored

5.0 ISSUES AND FUTURE MONITORING REQUIREMENTS

5.1 Introduction

5.1.1 In this section, each of the key issues identified in the adopted Local Plan Core Strategy is assessed in the light of the indicator data presented in this document. This assessment will help to determine:

- the level of progress achieved towards resolving these issues;
- whether there are other issues in the District that should be addressed in the Local Plan and
- what future monitoring requirements need to be met in order to track progress in addressing the key issues more successfully.

5.1.2 The key planning issues for the District identified in the Core Strategy and which formed the basis for the strategic objectives are:

1. To deliver a step change in the local economy and contribute towards the enhancement of the wider Cumbrian economy
2. To achieve a balanced housing market
3. To protect the unique character of the District
4. To improve accessibility to services
5. To improve health and wellbeing for all

5.2 Issues

5.2.1 **To deliver a step change in the local economy and contribute towards the enhancement of the wider Cumbrian economy.**

5.2.1.1 The South Lakeland Sustainable Community Strategy identifies making South Lakeland a successful, attractive and competitive place to work and invest in as a key aim in improving jobs, skills and regeneration. The contextual indicators show evidence of a low value economy in South Lakeland, reflected in a low Gross Value Added figure. However, this figure is rising more rapidly than the equivalent national figure. Average weekly earnings have decreased slightly and are now in line with the equivalent figures for the North West. This suggests that higher paid jobs are lacking in South Lakeland and residents must travel out of the District for these.

5.2.1.2 Seeking to provide an adequate supply of employment land for a variety of business uses, in the most appropriate locations, remains important to stimulate new enterprises and help ensure that existing businesses can expand. Land needs to be made available during the fifteen year plan period, up to 2025; to satisfy economic demands and the situation must be monitored closely. Increasing the amount, quality and availability of employment land within the Council's Local Plan area remains a key issue, identified in the Council's adopted Core Strategy (Policies CS7.1 and CS7.2 refer) and addressed by the submitted (May 2012) Local Plan - Land Allocations document.

5.2.1.3 The Employment Land Review (ELR) published in February 2012 provides an update of the earlier 2005 Employment Land and Premises Study. One of the key issues raised in the 2005 study, was the insufficient quantity and poor quality / availability of sites with planning status / commitments. This situation has not improved.

5.2.1.4 The 2012 ELR has confirmed that the current supply/quantity of employment land within the South Lakeland planning area (monitored commitments on sites as at 31 March 2011 with

valid planning permission or allocated in the existing adopted 2006 Local Plan) is insufficient to meet needs. As at the 12 months ending 31 March 2011, Cumbria County Council's 'Employment Land Availability Monitoring Schedules' show that a total of only 16.04 ha of land on twelve sites within the development plan area is committed. This total excludes sites of less than 0.25 hectares in size, sites under construction and sites for 'own' use. That is, sites for businesses' future use that are not considered to be available to any other developer or occupier. This 16.04 hectares compares with a total of 14.95 hectares for the previous annual monitoring period ending 31 March 2010.

5.2.1.5 These annual employment land monitoring figures have been updated as of the 12 months ending 31st March 2012. For March 2012, the total employment land supply with planning status for the 'Local Plan' (formerly LDF) area, either with valid planning consent or allocated in the existing 2006 South Lakeland Local Plan and unimplemented, is 15.75 hectares. Please see the following link [Ex081](#) to the 'Composite Employment Position Statement, May 2013 for further details of monitored commitments.

5.2.1.6 As in 2005, the 2012 ELR identifies that there is also a qualitative issue with the current employment land commitments. The 2012 ELR found that 'most of the current existing employment land commitments are small in size and will serve only local employment requirements or in rural settlements, where levels of local demand will be limited'. The 2012 ELR stated that; 'although a number of sites are allocated in the existing 2006 Local Plan, there appears to be some reluctance to actively offer them on the open market'. Furthermore, the study states that 'it is considered that there are virtually no industrial sites in Kendal which are available for immediate purchase and development'. Readily available sites either allocated in the 2006 Local Plan or with valid planning consent in Ulverston are also limited. The 2012 ELR considered 'that there is no site capable of attracting or accommodating major employment development (over 1 hectare) in the LDF area'. For further commentary please refer to the [2012 ELR](#) which can be viewed on the Council's website.

5.2.1.7 The characteristics of the District dictate that the requirement for adequate land provision is split into two – the Furness area and the east of the District. In Furness (which includes Ulverston), the east (which includes Kendal), Grange-over-Sands, Milnthorpe and Kirkby Lonsdale, committed sites that are readily available and without significant constraints, are limited. The current / existing sites with planning status do not meet the employment land requirements set out in the adopted Local Plan Core Strategy Policies CS7.1 and CS7.2. The 2012 ELR concluded that 'the supply of committed employment sites is offering an increasingly limited range and mix of employment opportunities, particularly in Kendal'. The Council should advance the emerging Land Allocations document as a priority'. The 2012 ELR also includes an appraisal of potential employment sites and recommends a 'favoured portfolio of potential sites that merit serious consideration for employment use allocation in the emerging Land Allocations document'.

5.2.1.8 The 2012 ELR recommends a lower annual employment land target than that advocated in the 2005 study and reflected in the adopted Local Plan Core Strategy (Policies CS7.1 & CS7.2). The 2012 ELR recommends an annual target of 2.40 hectares per annum which equates over the 15 year plan period to an overall quantum of 36 hectares up to 2025. This recommendation compares with 4 hectares per annum and overall, 60 hectares over the plan period, set out in the adopted Core Strategy.

5.2.1.9 The 'Composite Employment Position Statement', May 2013, land allocation examination library reference [Ex081](#) provides justification, at Section 1.2, for the overall local plan employment land allocation requirement.

5.2.1.10 The provision of new opportunities for training, skills development and employment is strongly linked to the provision of employment land and is a priority theme in the South Lakeland

Sustainable Community Strategy. Indicators relating to income and employee jobs by sector confirm that the range of employment opportunities needs to be broadened to help reduce the currently heavy reliance on low paid service industries and to further increase GVA per head. The establishment of new enterprises in South Lakeland will need to draw on a workforce with appropriate skills. In addressing the issues of the local economy, there is a need to make links with the education sector in order to help facilitate education and training opportunities and the development of a wider skills base. A high proportion of people have NVQ4 level qualification or above, although this figure has recently decreased slightly. Monitoring of courses available locally has commenced.

5.2.1.11 Ensuring the provision of employment land and facilities in which to provide training opportunities, encouraging new businesses and enabling existing businesses to expand are key issues for the South Lakeland Local Plan - Core Strategy and Land Allocations development plan documents (DPD's) to address. In addition, the provision of affordable housing to accommodate the workforce is one of the priorities in the South Lakeland Sustainable Community Strategy.

5.2.1.12 There is evidence that retail vacancy rates are increasing in Kendal. However, in Ulverston the number of vacancies has reduced slightly by 4. The vacancy rate for Kendal is just above the national average (11.2%) but below the higher north west regional average (16%). However, there is evidence of an increase in temporary lets and that pressure is mounting on the retail sector with a number of prominent shop closures in Kendal. Townscape improvements continue to improve the public realm and help to offset the wider national assumption that consumer spending is declining as retailing goes through a modal shift.

5.2.1.13 The 2012 Retail Study continues to identify qualitative improvements in provision in the lower order retail centres and quantitative capacity for additional convenience and comparison retail floor space in the higher order centres. The Local Plan Land Allocations document identifies updated town centre boundaries and the primary shopping areas and defines the preferred locations for permitted retail development and other town centre uses. The primary shopping frontages as defined in the proposals map will need to be maintained as the predominant location for retail use.

5.2.1.14 The Booths store in Milnthorpe is now operational and planning permission has been granted for the proposed store in Grange-over-Sands.

5.2.2 To achieve a balanced housing market

5.2.2.1 The results of the 2011 South Lakeland Housing Market Assessment Study⁵ indicate the continuing high need for affordable housing in the District. The study identified a shortfall of 402 affordable dwellings per annum in the South Lakeland planning area for the period from 2011/12 – 2015/16. The contextual indicators show that average house prices have declined slightly in the last year to 2012 but still remain disproportionate to average incomes, making the purchase of a home difficult to afford. This issue is clearly linked with the aforementioned issue of the low value economy in South Lakeland.

5.2.2.2 Linked to the delivery of affordable housing is the provision of adequate and available development land, to meet the annual target of 400 dwellings in the adopted Local Plan Core Strategy, through the submitted Land Allocations document. This will have implications for the extension of settlement boundaries and the need to develop some green field land to meet the overall plan requirement. Consequently, although the data currently shows a high level of residential development on previously developed land, this is likely to change in the future.

⁵ The Study covers the South Lakeland Planning Areas area plus the areas of the two National Parks.

5.2.2.3 Wider residential monitoring has shown a clear decrease in the number of residential planning applications in recent years, especially for developments of more than 2-3 dwellings. There has, however, been another significant increase in housing completions in 2012/13 (206 dwellings) compared to 148 dwellings in 2011/12 and just 103 dwellings in 2010/11.

5.2.2.4 While work has recently started or is due to start soon on some larger housing schemes in the Kendal area (some providing 50% affordable dwellings), factors which continue to limit housing development, include:

- the need to confirm an adequate long term supply of housing land in the Land Allocations document;
- the current housing market, with continued low building rates regionally and nationally.

5.2.3 To protect the unique character of the District

5.2.3.1 A quality environment is a priority theme in the South Lakeland Sustainable Community Strategy. Section 2 of this report highlights the importance and diversity of the natural and historic heritage of South Lakeland. The natural and built environments are important resources for the District and it is imperative that the Local Plan Core Strategy and proposed submitted Land Allocations DPD's continue to protect and enhance them as well as enabling residents and visitors to enjoy and understand them.

5.2.3.2 The South Lakeland Local Plan DPDs will need to seek to protect and enhance areas designated for their biodiversity importance as well as recognising the value of non-designated sites that offer benefits to biodiversity and the wider health of the environment.

5.2.3.3 Indicators show that work has been completed in terms of appraising conservation areas. This work will inform the application of existing conservation policies. Work has also been completed on assessing one new area for possible designation and public consultation on this will take place in the summer of 2013. Work is nearing completion on a management plan for Ulverston Conservation Area and work has begun with two local civic societies on preparing management plans for their settlements, which will be completed in 2014. Opportunities could be also be explored to reduce the number of listed buildings/scheduled monuments at risk and prevent further additional buildings being added to the register, as well as creating a list of locally important historic buildings and heritage features.

5.2.3.4 The conservation of architecturally, historically and culturally important buildings and features of the natural environment is particularly important in view of current development pressures in South Lakeland. This will present a key challenge for the Local Plan in order to maintain, and where possible enhance, the unique intrinsic character and historic fabric of settlements and the area as a whole.

5.2.3.5 There has been no known change in the area designated as SSSI recently and the health of water bodies in the District is good based on recent data, with room for further improvement. Flood risk continues to be an issue, and although data shows that the number of planning applications permitted against the advice of the Environment Agency remains at zero, the issue of flooding and flood risk in the District is an important factor which continues to require close monitoring.

5.2.3.6 Recycling and composting rates in the District have been fluctuating in recent years following a number of years on the increase. Despite this, recycling/composting rates remain high, unfortunately however, success in increasing recycling and composting rates masks the fact that the total amount of household waste collected per head remains high, although there has been a slight decrease in recent years. Therefore, reducing waste production and continuing to increase recycling and composting are still key issues to monitor.

- 5.2.3.7 Resource use will remain and increase as a key issue for the District, particularly in the light of climate change and sustainability and efforts should be made to establish a mechanism for monitoring efforts to ensure new developments meet sustainability requirements.
- 5.2.3.8 Although there is no comprehensive mechanism through which to monitor the amount of energy produced through renewable resources or the amount of renewable energy generating capacity installed, it is known from planning permissions and from the increased presence of small scale renewable energy installations in the local area (many of which do not require planning permission) that there has been an increase in the amount of renewable energy generated in the District. It is expected that the development of micro and larger scale renewable energy projects will remain and increase as a key issue for the Local Plan because of the importance of renewable energy and sustainable resource use in terms of reducing CO₂ emissions and thus helping to mitigate against climate change, ensuring energy security and reducing reliance on fossil fuels.
- 5.2.3.9 South Lakeland is recognised in the Cumbria Renewable Energy Capacity Study as having a high wind and hydro resource and opportunities should be taken to capitalise on this. The Council adopted the Cumbria Wind Energy SPD in December 2007. This document seeks to guide wind energy development in Cumbria in order to ensure that a positive contribution to the region's renewable energy generation can be made in a sensitive and appropriate way. It will be important that the Local Plan recognises that, whilst wind is likely to remain the main renewable energy generator in the District for the immediate future, the potential of other types of renewables should be actively explored and encouraged.
- 5.2.3.10 The Council has undertaken an assessment of its own buildings and activities in recent years to establish levels of energy use and is exploring ways to reduce energy use and CO₂ emissions and mitigate against climate change through a Council-wide carbon reduction programme. Building Regulations and the Code for Sustainable Homes aim to ensure that new developments, including redevelopments of existing buildings, achieve high levels of energy efficiency and reduced water use. Whilst planning cannot directly influence the public's energy and water use, ensuring that new developments are energy and water efficient will help to reduce resource usage. Planning policy will rely on support from other Council departments to promote energy efficiency and water use reduction in new and existing buildings. The wider Council Plan 2013-2017 specifically seeks to drive this agenda forward, setting it out as a Council priority.

5.2.4 To improve accessibility to services

- 5.2.4.1 Sustaining local services, open spaces and facilities is closely related to accessibility. Ensuring accessible services through public and sustainable transport is identified as a priority in the South Lakeland Sustainable Community Strategy.
- 5.2.4.2 Due to its rural nature and the multiplicity of settlements of varying sizes across the District, sustaining local services and facilities that meet local needs remains a key issue for the District. This is exacerbated by a range of other influences such as high levels of second home ownership, an ageing population and outward migration of the young and skilled.
- 5.2.4.3 Outside the main towns of the District, access to services can be especially difficult for those without access to private transport, particularly the elderly and the young, as public transport serving rural areas is limited. Some traditional bus services have recently been cut or are due to cease operation. There are plans to replace some of these with on-demand services; however, improving rural transport services and monitoring rural accessibility in particular remains a key issue.

5.2.4.4 South Lakeland has a high level of dependency on the private car and it is often difficult to make comprehensive public transport services and community transport schemes viable, even where they appear to have a lot of public support. The LDF, in conjunction with transport providers and the County Council Highways team, will need to contribute to overcoming this problem by focusing development in areas that already have good public/sustainable transport links and access to services or that have strong potential for good accessibility through the introduction of new infrastructure. In addition, wider public and sustainable transport improvements are also desirable.

5.2.4.5 The local indicator (previously Core indicator 3b) related to accessibility shows that the vast majority of new residential development continues to be located where key services are accessible within 30 minutes by public transport. This is a positive step towards helping to increase accessibility, sustain local services and encouraging people to use more sustainable modes of transport than the private car. Access to hospitals via public transport, although high, remains significantly poorer than to other key services, suggesting that public transport services between residential areas and hospitals may require particular attention. However, continued efforts are required to ensure that this positive position is sustained and improved and that residents of existing as well as new dwellings have a high level of access to key services and facilities via a range of modes of transport, including walking and cycling. The Land Allocations document will seek to ensure that new residential and employment development will be located where people will have a choice of sustainable means of transport to access services, facilities and employment. Circumstances around accessibility are ever changing as new facilities and services begin to operate and others cease operation, adding further importance to the need for close monitoring of accessibility.

5.2.4.6 An update to the quality of open space sites in the area is not possible without a full assessment of all sites. The SA indicator relating to access to 'quality mark' sports facilities show high levels of accessibility. Measures will have to be put in place in order to effectively monitor quantity, quality and accessibility of open spaces and sports facilities.

5.2.4.7 Ensuring adequate infrastructure and services to support new development is a key issue in the Core Strategy and for the site proposals in the emerging Land Allocations document. An Infrastructure Delivery Plan sets out what new infrastructure will be required and where to support the new development set out in the Land Allocations document. The Council has also commenced investigations into the provision of a Community Infrastructure Levy (CIL) which will consider the need and viability of seeking contributions from new development towards key infrastructure and service requirements arising from new development. Equally important is the need to deliver sustainable transport improvement measures as a means of mitigating against projected increased levels of traffic likely to be generated for new development within Kendal and to a lesser extent Ulverston.

5.2.5 To improve health and wellbeing for all

5.2.5.1 High quality design is an integral part of achieving local regeneration and sustainability and protecting and enhancing local distinctiveness and character. Although ensuring high quality design in developments is not specified under a particular priority in the South Lakeland Sustainable Community Strategy, many of the benefits sought through high quality design, such as ensuring community safety, social inclusion and promoting energy efficiency are identified as actions or priorities.

5.2.5.2 It has not been possible yet to begin monitoring of Indicators relating to provision, quantity and quality of open space or design matters. As schemes start to go through the planning process under the Local Plan - Core Strategy and Land Allocations DPDs, mechanisms will be put in place to monitor schemes to ensure that new open spaces are being provided, existing spaces improved and design requirements achieved in accordance with the Core Strategy policies.

5.3 Other issues emerging from the data

5.3.1 Tourism

5.3.1.1 Tourism is particularly important in South Lakeland; it underpins and is underpinned by several of the priority topics such as accessing services, a quality environment, jobs, skills and regeneration. These actions include public transport improvements, regenerating town centres and promoting and supporting local festivals and events.

5.3.1.2 It has been difficult to monitor tourism, as data for the Local Plan area alone is no longer available, so data covering the whole District, including the National Parks, has been reported. Whilst this gives some indication of local trends, it does not provide an accurate picture of the area covered by the Local Plan and thus it will be difficult to assess the impact the Local Plan is having on tourism.

5.3.1.3 Balancing the economic benefits of tourism with environmental considerations will continue to be an issue that will need to be addressed by the Local Plan. The District's distinct built, cultural and natural environments are the key drivers for the area's tourism industry and their protection and value must be incorporated into efforts to strengthen and diversify the economy in conjunction with attracting new industries to the area.

5.4 Future Monitoring Requirements

5.4.1 This report develops the framework set out by previous AMRs for the long term monitoring of planning policy contained in the Local Plan - Core Strategy and submitted Land Allocations documents and for policies in the existing adopted 2006 Local Plan in the short term. The Council will continue to work to improve the efficiency and effectiveness of monitoring systems and to further develop the evidence base for the Local Plan. The District works with Cumbria County Council and the other Cumbrian Districts on a number of monitoring topics to improve monitoring practices as well as developing its own practices in-house. There are still some gaps in data and a lack of an established trend and comparator data for some topics. This is the result of the fact that some data is simply not available, because some data is not available for the Local Plan area rather than the whole District and because data sources and methods of collecting data change, making it difficult to access data or identify trends.

5.4.2 The monitoring framework presents up-to-date data for as many indicators as possible; there remain areas where a lack of accessible, accurate, up-to-date data limits the comprehensive monitoring of all areas of policy.

5.4.3 Particular areas that require action to ensure they can be effectively monitored in future AMRs include:

- **Tourism** – Monitoring tourism has been challenging as the data required is only available for the whole District. The Council is reluctant to use data for tourism that includes the National Park areas as this dramatically skews the data. As tourism is an important element of South Lakeland's economy, the development of further indicators will be valuable in assessing how tourism is influenced by the policies of the Local Plan and the Council will continue to seek to develop appropriate indicators and data in order that tourism policies of the Core Strategy can be monitored effectively.
- **Standards for new development** – Design standards can be instrumental in helping to achieve sustainability (e.g. in energy generation, energy and water conservation, waste management, social inclusiveness, safety and accessibility) and regeneration as well as in protecting the local characteristics of settlements and wider areas. The development of

indicators and establishment of data sources will be essential in measuring the progress of efforts to achieve certain required standards and address particular issues through design. Monitoring the number of new properties meeting Code for Sustainable Homes and Lifetime Homes criteria is one way in which the Council plan to do this.

- **Renewable Energy Development** – To ensure that South Lakeland is contributing to the production of renewable energy, it will be important to monitor the amount of energy generated through renewable resources and the amount of installed capacity. Much renewable energy development in the last few years has been small-scale although a new commercial wind farm of 5 turbines near Old Hutton recently began generating electricity. It has not been possible to monitor of small-scale renewable energy installations comprehensively due to changes to permitted development rights as many installations will go ahead without requiring planning permission. Establishing methods of monitoring would help to assess how policies are influencing renewable energy development and what might be required to promote renewable energy in the District.
- **Biodiversity** – As part of the Cumbria Biodiversity Network and the Local Sites Partnership, the Council is working to develop and utilise a more comprehensive biodiversity evidence base. Data from this evidence base will be used to inform the selection of indicators to expand the monitoring of how the Local Plan documents influence biodiversity.
- **Climate change** – Climate change is a theme which runs through all other issues in the Local Plan documents. South Lakeland will need to find ways of both mitigating against the effects of climate change as well as adapting to them, action will need to be wide ranging, affecting all sectors of society from ensuring new and existing building stock is energy and water efficient to enabling and promoting economic diversification. There are currently few indicators that help to assess the impact of climate change or the District's progress with regards mitigating and adapting to it. Appropriate indicators will need to be developed so that future AMRs can monitor progress towards meeting the challenges that climate change presents. Some existing indicators, such as that for renewable energy, can act as a starting point for this but further indicators will need to be developed.
- **Air quality** – there is a need to include and align targets and indicators in the latest Air Quality Action Plan (Appendix D of the 2012 Air Quality Updating and Screening Assessment) with those in the Annual Monitoring Report to ensure that the impacts of new development on air quality and the effects of mitigation measures and improvement efforts are monitored.
- **Transport** – There is a lack of indicators assessing transport issues. Whilst existing accessibility indicators give some idea of how transport systems are performing, investigation is needed to establish further indicators. For example, South Lakeland is known to have a high level of car ownership compared to the National average. This is something that could be monitored in relation to reducing reliance on the private car and focusing new development close to existing services and facilities to reduce the need to travel. An additional indicator to complement the existing accessibility indicator could assess the percentage of new households within a determined distance of key transport links such a daily bus service, railway station and a formal cycle/foot path. A further possible additional indicator could be the measurement of the number of Travel Plans introduced by existing and new development. Other indicators will be identified in relation to the amount of transport infrastructure items delivered which are essential to delivery of the Land Allocations Development Plan Document i.e. specific sustainable transport improvement schemes in Kendal.

- **Employment Land** – The monitoring of employment land with planning status by Cumbria County Council, includes the take up of new land, intensifications and change of use in existing employment areas within the South Lakeland planning authority area. This gives a more holistic picture of employment land supply change. It is also important to monitor loss of employment land through changes of use and to ensure that important employment areas are protected. In some cases, however, the redevelopment of existing employment sites would be appropriate where the employment use is unsuitable for the area. The Local Plan DPD's, through the adopted South Lakeland Core Strategy, set s out policies relating to 'The Development Strategy', 'Sub Area Spatial Strategies 'and one of the 'core' policy areas; employment . These polices inform the location and type of new employment development in order to make the most effective and efficient use of employment land. The emerging Local Plan Land Allocations document (submission edition, May 2012), sets out the proposed planning policy relating to retaining existing employment areas and proposing new employment land allocations (sites).
- **Retail** – The 'South Lakeland Retail Study' was updated in 2012 and provides a robust retail evidence base to inform the preparation of the Local Plan (formerly the LDF). It provides up to date evidence on market demand and capacity for additional convenience and comparison retail floor space in the District up to 2025. It also advises on the potential options to meet any identified quantitative and qualitative capacity for new convenience and comparison retail floor space up to 2025. The proposed submitted Local Plan Land Allocations document proposes up to date town centre boundaries and retail frontages.

6.0 MONITORING AND REVIEW OF THE IMPLEMENTATION OF THE INFRASTRUCTURE DELIVERY PLAN

6.1 Monitoring Infrastructure Delivery

6.1.1 In order to measure progress of the effective delivery of the Land Allocations DPD, it is essential the Council has a mechanism in place to monitor and review the delivery of the infrastructure required to enable the plan's implementation. The Annual Monitoring Report will provide a framework for reviewing and monitoring the implementation of the required infrastructure.

6.1.2 The South Lakeland Infrastructure Delivery Plan (IDP) April 2013 identifies the essential infrastructure required to enable the implementation of the plan. It includes an Infrastructure Schedule identifying different types of infrastructure at a district and settlement level. The IDP is a 'live' document which will continue to evolve. It is planned to update the document annually, taking into account changing circumstances and new requirements. These updates will be informed by the outcomes of close cooperation and engagement with infrastructure/service providers.

6.1.3 The current Annual Monitoring Report will therefore be reviewed in order to identify specific targets and indicators for measuring progress of infrastructure delivery based on the overall key objective:

To ensure the provision of infrastructure in line with levels and allocations for new development identified in the Land Allocations Development Plan Document.

6.1.4 These targets and indicators will relate to specific types of infrastructure such as Highways, Sewerage Infrastructure and Education and will be used to monitor issues such as:

- Number of projects/items identified in the South Lakeland Infrastructure Delivery Plan that are delivered.
- Amount of development contributions received towards identified essential infrastructure.

6.1.5 The review will take place in tandem with the preparation of the Community Infrastructure Levy. The timetable for the Community Infrastructure Levy is set out in the Local Development Scheme 2013. This review will take place prior to the formal publication of the CIL timetabled for January 2014. The benefits of undertaking the review at the same time as the preparation of the Community Infrastructure Levy are as follows:

- Ensures the review is based on the most up to date position at the time reflecting the position as set out in the Infrastructure Delivery Plan at the time.
- Enables the council to engage two-fold with infrastructure/service providers firstly with respect to refining and reviewing infrastructure requirements through annual review of the IDP and secondly to ensure the identification of targets and indicators is aligned with infrastructure/service providers own monitoring mechanisms.

6.2 Duty to Cooperate

- 6.2.1 The reviewed Annual Monitoring Report will also include a section and an indicator relating to the provisions of the 2011 Localism Act with regard to the ‘Duty to Cooperate’. The Localism Act sets out the legislative basis for local authorities and other public bodies to have ‘the duty to co-operate’ in the preparation of planning documents. The duty is to ‘engage constructively, actively and on an on-going basis’ over matters that would have a significant impact on at least two planning areas, or in connection with infrastructure that is strategic.
- 6.2.2 It will provide a means for the Council to report on progress of such cooperation in terms of the preparation of various planning documents including updates to the Infrastructure Delivery Plan. The Council will require a yearly meeting with all key service/infrastructure delivery partners and meet on other occasions where necessary. The programmed review of the Council’s Statement of Community Involvement as set out in the Local Development Scheme will enable the Council to identify a formal framework/methodology for on-going cooperation with the relevant bodies.

6.3 Local Plan Review

- 6.3.1 Longer term the start of the Local Plan Review in 2017 as timetabled in the Local Development Scheme will provide opportunity to plan for new infrastructure requirements resulting from circumstances at the time in order to enable future development.

6.4 Community Infrastructure Levy

- 6.4.1 Once adopted, in accordance with Regulation 62 of the CIL Regulations (as amended 2013) requires a Charging Authority to:

“Prepare a report for any financial year (“the reported year”) detailing–

- a) CIL receipts in the reported year
 - b) CIL expenditure in the reported year
 - c) Summary of CIL expenditure during reported year including items which CIL has been applied and amount of CIL expenditure on each item
 - d) Total amount of CIL receipts for the reported year retained at the end of the reported year
 - e) Total amount of CIL receipts from previous years retained at the end of the reported year.
 - f) Make public such information on the Council website.
- 6.4.2 This report will supplement future Annual Monitoring Reports which will need to make a distinction between targets and indicators relating to delivery of CIL and non-CIL related infrastructure.

APPENDIX A: SUSTAINABILITY APPRAISAL (SA) INDICATORS

Sustainability Appraisal Objectives	Indicator
Social progress which recognises the needs of everyone	
SP1: To increase the level of participation in democratic processes	% Community groups responding to SLDC LDF document
	Election turn-out
SP2: To improve access to services and facilities, the countryside and open spaces	% Households within 30 minutes of key service centres by public transport
	% Rural households within set distances (either 4km or 2km) of key services
	The % of the population within 20 minutes travel time (urban – walking, rural by car) of different sports facility types
SP3: To provide everyone with a decent home	Number of affordable homes completed (both by registered social land lords and planning obligation)
	House price/earnings ratio based on household income
	% Residents who think that for their area over the last 3 years affordable, decent housing has got better/stayed the same
SP4: To improve the level of skills, education and training	% 15-year-old pupils in schools maintained by the local authority achieving five or more GCSE's at grades A* – C or equivalent
SP5: To improve the health and sense of well-being of people	Incidences of crime per 1,000 population per year
	Life expectancy at birth (male & female in years)
	% Households with 1 or more person with a limiting long term illness
	% Residents feeling 'safe' or 'fairly safe' outside in the local area after dark
SP6: To create vibrant, active, inclusive and open-minded communities with a strong sense of local history	The number (per 100,000 population) of racial incidents reported to SLDC and subsequently recorded
	% Residents who think that for their area over the last 3 years race relations have got better/stayed the same
	% Residents who think that for their area over the past 3 years community activities have got better/stayed same
	Children's play spaces
Effective protection of the environment	
EN1: To protect and enhance biodiversity	% SSSIs in favourable or recovering condition (ha)
	Total area designated as SSSIs (ha)
	Habitats and species – progress in achieving priority BAP targets (NW specific)
	Population of Breeding Woodland Birds
EN2: To preserve and enhance landscape quality and character for future generations	% Dwellings built on Greenfield land
	Number of Tree Preservation Orders made
	Number of Stewardship Schemes
	Number of woodland grant schemes
EN3: To improve the quality of the built environment and <u>promote energy efficiency</u>	% Listed buildings at risk (all grades)
	% Grade I, II* and scheduled monuments at risk
	Number of Conservation Areas reviewed or under review

	Number of Conservation Area environmental improvement schemes per annum (financial year)
	Number of planning permissions refused on the basis of design as a % of all planning applications
	Measure of Green Space created on schemes over x houses
Sustainable use and management of natural resources	
NR1: To improve local air quality, reduce greenhouse gas emissions, <u>promote renewable energy and reduce the need to travel</u>	Nitrogen Dioxide NO ₂ (the annual average concentration levels (ug/m3) for both Kendal & Ulverston)
	CO ₂ Emissions (excluding aviation)
	Renewable Energy Capacity Installed by type (MW)
	Number of businesses gaining energy efficiency standards awards
	Number of businesses working towards bronze, silver or gold of the CBEN awards scheme
NR2: To improve and manage water quality and water resources and services	Number of planning applications permitted, contrary to the advice of the Environment Agency, where the objection was made on flood defence and water quality grounds
	% Main river water quality classified as good (chemical & biological)
	Daily Domestic Water Use (per capita consumption)
	Number and % of homes and/or businesses with water saving measures
NR3: To restore and protect land and soil	% New and converted dwellings on previously developed land (PDL)
	Net density of dwellings completed on major sites by size
NR4: To manage mineral resources sustainably, minimise waste <u>and encourage recycling</u>	Volume of Household waste collected per person per year (kg per head)
	% Household waste collected which is recycled or composted
Building a sustainable economy in which all can prosper	
EC1: To retain existing jobs and create new employment opportunities	Amount of land (hectares) supply available for employment use classes B1, B2 & B8 (of the Town & Country Planning Use Classes Order 1987), by market sectors
	Amount (hectares) of employment land use classes B1, B2 & B8 (Town & Country Planning Use Classes Order 1987) lost to residential development per financial year (12 months ending 31 st March)
EC2: To improve access to jobs	Unemployment rate: % of the working age population that are JSA claimants
	The % of the resident population travelling over 20 km to work
	Number and % of employed residents that work outside Cumbria
EC3: To diversify and strengthen the local economy	Economic Activity rate % (male & female) based on working age population 16 to 59/64 years, expressed as a % of all working age people
	Amount of land (hectares) developed for employment, (use classes B1, B2 & B8 – of the Town & Country Planning Use Classes Order 1987) by market sectors
	Amount of floorspace developed (m ²) for employment by type
	Number of Rural Diversification Schemes
	GVA £ per head

APPENDIX B: HOUSING TRAJECTORY FIGURES

(Information on assessment of 5-Year Land Supply in sections A to D of the table below are taken from the South Lakeland Housing Position Report, March 2013)

South Lakeland Projected Dwellings 2012/13 to 2017/18							
Sites	Dwellings outstanding at 31. 3. 13	5-year supply					5 Year Total
		2013/14	2014/15	2015/16	2016/17	2017/18	
A - Planning Permissions							
1) Sites of 10+ dwellings							
North East Sandylands, Kendal	94	0	30	30	30	4	94
Auction Mart, Kendal	94	0	30	30	30	4	94
K Village, Kendal	58	58					58
Webb's Garden Centre, Kendal	51		25	26			51
Fair View, Ulverston	40						0
Tram Lane, Kirkby Lonsdale	36		36				36
Oaklands, Ulverston	25	0	25				25
Biggins Road, Kirkby Lonsdale	16	16					16
Green Lane, Flookburgh	12	12					12
Fox Rock, Grange over Sands	11	0	11				11
Sub Total	437	169	240	169	143	91	397
2) Small Sites of less than 10 dwellings							
305 small sites, 462 units							
Under construction	233	47	47	47	47	47	233
Not Started (80% of 230)	230	37	37	37	37	37	184
Total Permissions	900	169	240	169	143	91	814
B - Sites Allocated South Lakeland Local Plan							
Roundhill School, Kendal	33						0
Union Street, Kendal	9						0
Winton House Phase II, Ulverston	12						0
Middleshaw Bridge, Old Hutton	8						0
North Stainton Hall Farm, Stainton with Adgarley	13						0
Total Allocated Sites	75						0

C – Proposed Land Allocations (Submitted Land Allocations DPD)							
5 year supply sites	1993	399	399	399	399	399	1993
D – Strategic Housing Land Availability Assessment							
Small Sites / SHLAA (as at 31/3/13)	277	55	55	55	55	55	277
E – Additional Windfall							
Windfall – service centres (734 over 5 years, discounted by 20% for non completion and less SHLAA sites to avoid double counting)	327	65	65	65	65	65	327
Windfall – small villages, hamlets & open countryside	170	34	34	34	34	34	170
TOTAL	3742	723	794	723	697	645	3581

Variance between the cumulative Core Strategy housing requirement 2003 to 2025, and actual and expected housing completions

Year	Cumulative Requirement	Completions	Cumulative Completions	Variance
2003/4	400	221	221	179
2004/5	800	232	453	347
2005/6	1200	303	756	444
2006/7	1600	238	994	606
2007/8	2000	156	1150	850
2008/9	2400	155	1305	1095
2009/10	2800	282	1587	1213
2010/11	3200	103	1690	1510
2011/12	3600	148	1838	1762
2012/13	4000	206	2044	1956
2013/14	4400	723	2767	1633
2014/15	4800	794	3561	1239
2015/16	5200	723	4284	916
2016/17	5600	697	4981	619
2017/18	6000	645	5626	374
2018/19	6400	453	6079	321
2019/20	6800	453	6533	267
2020/21	7200	453	6986	214
2021/22	7600	453	7440	160
2022/23	8000	453	7893	107
2023/24	8400	453	8347	53
2024/25	8800	453	8800	0

APPENDIX C: Saved and extended Local Plan (2006) Policies.

(As per the published March 2013 Local Development Scheme (LDS))

Saved and extended Local Plan Policy (<i>Altered policies in italics</i>)	Status	Explanation
Housing		
H1 Provision of Housing Land	Superseded by Core Strategy policies CS 1.1 and CS1.2	CS 1.2 and supporting text explains how Service Centres are identified in the Core Strategy. CS1.1 sets out the sustainable development principles to govern future development
H2 Sites allocated for new residential development		Unimplemented and de-allocated sites to be reviewed through Land Allocations DPD
Church Road, Allithwaite	Implemented	
<i>Carling Steps, Burneside</i>	<i>De-allocated 2006</i>	
Morewood Drive, Burton	Implemented	
Land off A65. Endmoor	Implemented	
Green Lane, Flookburgh	Implemented	
Graythwaite Manor, Grange	Implemented	
<i>Grange Fell Road, Grange</i>	<i>De-allocated 2006</i>	
<i>Berry Bank, Grange</i>	<i>De-allocated 2006</i>	
Cart Lane. Grange	Unimplemented	
Church Road, Great Urswick	Implemented	
Paddock Lodge, Holme	Implemented	
Brigsteer Road, Kendal	Implemented	
Chiltern Reach, Valley Drive, Kendal	Implemented	
Kirkbie Kendal Lower School, Kendal	Implemented	
<i>North Sandylands, Kendal</i>	<i>De-allocated 2006</i>	
<i>North East Sandylands, Kendal</i>	<i>De-allocated 2006</i>	
Oxenholme Road, Kendal	Implemented	
Roundhill School, Kendal	Unimplemented	
Sparrowmire, Kendal	Implemented	
Union Street, Kendal	Unimplemented	
South West Kirkby Lonsdale	Partially Implemented	
Lowgate, Levens	Implemented	
Post Office Row, Little Urswick	Implemented	
Grisleymires Lane, Milnthorpe	Implemented	
Ackenthwaite Road, Milnthorpe	Implemented	
Natland Road (north), Natland	Implemented	
Robby Lea Drive, Natland	Implemented	
Middleshaw Bridge, Old Hutton	Unimplemented	

Saved and extended Local Plan Policy <i>(Altered policies in italics)</i>	Status	Explanation
North Stainton Farm, Stainton	Unimplemented	
Ulverston Road, Swarthmoor	Implemented	
<i>Daltongate Car Park, Ulverston</i>	<i>De-allocated 2006</i>	
Daltongate/Queen Street, Ulverston	Implemented	
Kings Road, Ulverston	Partially Implemented	
Lund Farm, Ulverston	Implemented	
Union Lane, Ulverston	Permission Granted	
Urswick Road, Ulverston	Implemented	
Winton House Phase 2, Ulverston	Unimplemented	
H3 Phasing of Development on sites allocated for residential use (North Sandylands and Lund Farm) replaced in 2006 by H3 Priorities for site location	Superseded by Core Strategy policies CS 1.1, CS1.2 and CS6.1	CS1.1 sets out sustainable development principles, CS1.2 sets out the Development Strategy for the District and CS6.1 sets out the approach to meeting housing requirements. Together these provide an updated basis for allocating housing sites and the consideration of proposals on unallocated sites. The phasing of development on major sites will be addressed in the Land Allocations document.
H4 Small scale Housing Development in Kendal and Ulverston	To be superseded by Allocations DPD	
H5 Settlements suitable for growth	Partially superseded by Core Strategy Policy CS1.2 Development Boundaries to be reviewed through Land Allocations DPD	CS1.2 sets out a settlement hierarchy and related levels of development. Development Boundaries of Principal, Key and Local Service Centres to be reviewed through Land Allocations DPD. Development boundaries of small villages and hamlets superseded by Core Strategy Policy
H6 Development outside settlements suitable for growth	Superseded by Core Strategy Policy CS1.2	CS1.2 sets out the approach to development in areas outside identified Service Centres

Saved and extended Local Plan Policy <i>(Altered policies in italics)</i>	Status	Explanation
H7 Housing for local need	Superseded by Core Strategy Policy CS6.4	CS6.4 sets out criteria for the consideration of affordable housing on exceptions sites.
H8 Affordable housing	Superseded by Core Strategy Policy CS6.3	CS6.3 sets out general policy requirements for affordable housing
H8a Construction and adaptation of dwellings for people with special needs	Superseded by Core Strategy Policy CS 6.2	CS6.2 sets out policy in regard to providing dwellings suitable for the elderly, infirmed and disabled
H9 Agricultural and Forestry Dwellings in the Countryside	To be superseded by future Development Management DPD	
H10 Removal of Occupancy Conditions		
H11 Conversion of buildings within Development Boundaries		
H12 Conversion of buildings outside Development Boundaries		
H13 Conversion of Village Shops		
H14 Dwellings Constructed from Temporary Materials		
Employment		
E1 Land Allocated for Business Parks	To be superseded by Land Allocations DPD and Canal Head AAP	Employment allocations to be reviewed through Allocations document process. Parkside Road site is within Canal Head Action Area
Shenstone	Unimplemented	
Parkside Road	Implemented	
E2 Land Allocated for Strategic Employment Uses (south-east of Milnthorpe station)	To be superseded by Land Allocations DPD	Employment allocations to be reviewed through Allocations document process.
E3 Land Allocated for Local Employment uses	To be superseded by Land Allocations DPD	
Shap Road, Kendal	Implemented	
Low Mill Tannery, Ulverston	Implemented	
West End Lane, Ulverston	Unimplemented	
Fall Beck, Gatebeck	Unimplemented	
Crakeside, Greenodd	Unimplemented	
Allithwaite Road, Grange-over-Sands	Unimplemented	
Kirkby Motors, Kirkby Lonsdale	Implemented	
Tram Lane, Kirkby Lonsdale	Implemented	

Saved and extended Local Plan Policy <i>(Altered policies in italics)</i>	Status	Explanation
Grisleymires Lane, Milnthorpe	Implemented	
Quarry Lane, Storth	Unimplemented	
E4 New Development and Extensions to Property	To be superseded by future Development Management DPD	
E5 Redevelopment		
E6 Loss of Employment Sites and Premises		
E7 New employment development in rural areas	Superseded by Core Strategy Policy CS7.4	CS7.4 sets the approach to employment development in rural areas;
E8 Conversion and re-use of buildings <i>(for employment purposes)</i>	Superseded by Core Strategy Policy CS7.4	CS7.4 sets the approach to building conversions for employment use in rural areas;
E9 Homeworking	To be superseded by future Development Management DPD	
E10 Farm Diversification	To be superseded by future Development Management DPD	
Retail		
R1 Retail Development, Kendal Town Centre	To be superseded by Land Allocations DPD and future Development Management DPD	Town Centre and Primary Shopping Area boundary to be reviewed through Land Allocations DPD Policy criteria to be superseded by future Development Management DPD
R1A Retail Allocation, Kendal Town Centre	Implemented	
R2 Retail Development outside Kendal Town Centre	To be superseded by future Development Management DPD	
R3 New Retail Development, Ulverston Town Centre	NOT SAVED BY SECRETARY OF STATE	
R4 Conversion and Extension of Retail Premises, Ulverston Town Centre	To be superseded by future Development Management DPD	Town Centre and Primary Shopping Area boundary to be reviewed through Land Allocations DPD Policy criteria to be

Saved and extended Local Plan Policy (<i>Altered policies in italics</i>)	Status	Explanation
		superseded by future Development Management DPD
R5 Retail Development outside Ulverston Town Centre	To be superseded by future Development Management DPD	
R6 Retail Development in minor shopping centres	Superseded by Core Strategy Policy CS7.5: Town Centre and Retail Strategy	CS7.5 sets out criteria to assess retail proposals in minor shopping centres
R7 Retail Development outside shopping centres	To be superseded by Land Allocations DPD and future Development Management DPD	Town Centre, Primary and Secondary Shopping Area boundaries to be reviewed through Land Allocations DPD
R8 Protection of Retail Frontages in the Primary Shopping Areas of Kendal And Ulverston Town Centres		Policy criteria to be superseded by future Development Management DPD
R9 Non-Retail Uses In Minor Shopping Areas		
R10 Hot Food Takeaways In Primary Shopping Areas		
R11 Hot Food Takeaways In Secondary Shopping Areas		
R12 Hot Food Takeaways In Residential Areas		
R13 Amusement Centres		
Tourism		
T1 Hotel development within development boundaries	Superseded by Core Strategy Policy CS7.6	CS7.6 sets out approach to tourism development
T2 Conversion of Buildings to Hotels And Serviced Accommodation	To be superseded by future Development Management DPD	
T2a Retention of Holiday Accommodation In Grange-Over-Sands		CS7.6 sets out approach to tourism development
T3 Self-catering accommodation within development boundaries	Superseded by Core Strategy Policy CS7.6	CS7.6 sets out approach to tourism development
T4 Self-catering accommodation outside development boundaries	To be superseded by future Development Management DPD	
T5 Caravan Site Development within the Arnside-Silverdale AONB		

Saved and extended Local Plan Policy (<i>Altered policies in italics</i>)	Status	Explanation
T5 Caravan Site Development outside the Arnside-Silverdale AONB		
T7 Extensions to Caravan Park Developments' Open Season		
T8 Tented Camping Sites		
T9 Camping Barns		
T10 Visitor facilities and attractions	Superseded by Core Strategy Policies CS1.2, and CS7.6	Policy CS1.2 sets the strategic framework for new visitor facilities and attractions. Policy CS7.6 sets out detailed approach to tourism development
Environment and Conservation		
C1 Arnside-Silverdale Area of Outstanding Natural Beauty	Superseded by Core Strategy Policies CS5, and CS8.2	Policy CS8.2 sets out the approach to protecting and enhancing landscape and settlement character, including provisions for the AONB. Policy CS5 sets out the vision and objectives for the rural south of the District.
C2 "Green gaps"	Partially superseded by Core Strategy policy Core Strategy CS8.2. Green gap allocations reviewed through Land Allocations DPD	Policy CS8.2 sets out the approach to protecting and enhancing landscape and settlement character. Location and extent of Green gaps to be reviewed through the Allocations of Land DPD
C3 Agricultural Land	To be superseded by future Development Management DPD	
C4 Farm Holdings	NOT SAVED BY SECRETARY OF STATE	
C5 External Lighting	To be superseded by future Development Management DPD	
C6 Sites of International Nature Conservation Importance		
C7 National Sites		
C8 Sites of regional or local nature conservation importance	Superseded by Core Strategy Policy CS8.4	CS8.4 sets out policy for biodiversity and geodiversity and effect on regional or local sites

Saved and extended Local Plan Policy <i>(Altered policies in italics)</i>	Status	Explanation
C9 Landscape features of major nature conservation importance	Superseded by Core Strategy Policy CS8.2	CS8.2 sets out policy for protecting and enhancing of landscape and settlement character
C10 Protected species	Superseded by Core Strategy Policy CS8.4	CS8.4 sets out policy for biodiversity and geodiversity and effect on regional or local sites
C11 Tree Preservation Orders	To be superseded by future Development Management DPD	
C12 Coastal development	Superseded by Core Strategy Policy CS8.5	CS8.5 establishes the approach towards coastal areas
C13 Buildings of historic interest	Superseded by Core Strategy Policy CS8.6	CS8.6 sets out the approach towards the historic environment
C14 “Heritage” properties viewed by the public		
C15 Listed Buildings and their Settings	To be superseded by future Development Management DPD	
C16 Control of Development affecting Conservation Areas		
C17 Article 4 Directions	NOT SAVED BY SECRETARY OF STATE	
C18 Satellite Dishes	To be superseded by future Development Management DPD	
C19 Sites of Archaeological Interest		
C20 Historic Landscapes		
C21 Derelict Land		
C22 Flood risk	Superseded by Core Strategy Policy CS8.8	CS8.8 sets out a policy framework for flood risk
C23 Tidal and River Defences	To be superseded by future Development Management DPD	
C24 Watercourses and Coastal Margins		
C25 Renewable energy	Superseded by Core Strategy Policy CS8.7	CS8.7 sets out a policy framework for renewable energy
C26 Wind Energy <i>* C27 missed due to numbering error</i>	To be superseded by future Development Management DPD	
C28 Hydro Electricity		
C29 Slurry		

Saved and extended Local Plan Policy <i>(Altered policies in italics)</i>	Status	Explanation
C30 Solar Power		
C31 Cumulative Impact of Renewable Energy projects		
Leisure and Recreation		
L1 Playing fields and recreational facilities	Superseded by Policy Framework set out in Core Strategy Policies CS8.3a, CS8.3b	CS8.3a and CS8.3b sets out a policy framework for open space, sport and recreation facilities Sites to be identified in Land Allocations DPD
L2 Allotments		
L3 Provision of new facilities		
L4 New Leisure Schemes		Leisure allocations to be reviewed through Land Allocations DPD
Between Kendal Leisure Centre and Parkside Road, Kendal	Implemented	
East of Appleby Road, Kendal	Unimplemented	
North of Mayfield Avenue, Holme	Unimplemented	
L5 Village Halls	To be superseded by future Development Management DPD	
L6 Golf Courses and Driving Ranges within the AONB		
L7 Golf Courses and Driving Ranges elsewhere.		
L8 Provision of Club Houses and Car Parking		
L9 Equestrian Development		
L10 Rights of Way		
L11 Disused Railway Lines		
L12 Lancaster Canal		
Transport		
Tr1 Development likely to impact on trunk roads	Superseded by Core Strategy Policies CS10.1, and CS10.2	CS10.1 and CS10.2 set out a strategic framework for improving accessibility and managing the transport impact of new development
Tr2 Safeguarding Land for Transport Infrastructure Improvements	Review need for transport reservations through Land Allocations DPD and Canal Head AAP	No reservations at present time
Tr3 Traffic management	Superseded by Core	CS10.1 and CS10.2 set out

Saved and extended Local Plan Policy <i>(Altered policies in italics)</i>	Status	Explanation
Tr4 Traffic calming	Strategy Policies CS10.1, and CS10.2	a strategic framework for improving accessibility and managing the transport impact of new development
Tr5 Town Centre Car Parking	To be superseded by future Development Management DPD	
Tr6 Car Park, Kirkby Lonsdale	NOT SAVED BY SECRETARY OF STATE	
Tr7 Opportunities for pedestrians	Superseded by Core Strategy Policies CS10.1, and CS10.2	CS10.1 and CS10.2 set out a strategic framework for improving accessibility and managing the transport impact of new development
Tr8 Opportunities for cyclists		
Tr9 Better ways to School	To be superseded by future Development Management DPD	
Tr10 Travel plans	Superseded by Core Strategy Policies CS10.1, and CS10.2	CS10.1 and CS10.2 set out a strategic framework for improving accessibility and managing the transport impact of new development
Standards for New Development		
S1 Planning obligations and planning briefs	Superseded by Core Strategy Policy CS9.2	CS9.2 covers developer contributions
S2 South Lakeland Design Code	To be superseded by future Development Management DPD	
S3 Landscaping		
S4 Important Open Space	Open Spaces to be identified in Land Allocations document. Policy approach to be set out in Development Management DPD	
S5 Open space	Superseded by Core Strategy Policies CS8.3a, CS8.3b	CS8.3a and CS8.3b sets out a policy framework for open space, sport and recreation facilities
S6 Children's play space		
S7 Road provision and design	Superseded by Core Strategy Policy	CS10.1 and CS10.2 set out a strategic framework for
S8 Footpath provision and design		

Saved and extended Local Plan Policy <i>(Altered policies in italics)</i>	Status	Explanation
S9 Cycleways	CS10.1, CS10.2	improving accessibility and managing the transport impact of new development
S10 Parking Provision in new Development	To be superseded by future Development Management DPD	
S11 Provision for disabled people	Superseded by Core Strategy Policy CS10.1, CS10.2	CS10.1 and CS10.2 set out a strategic framework for improving accessibility and managing the transport impact of new development
12 Crime and Design	To be superseded by future Development Management DPD	
S13 Security Measures in Town Centres		
S14 Shop Fronts		
S15 External Blinds		
S16 External Cashpoint Machines		
S17 Energy conservation	Superseded by Core Strategy Policy CS8.7	CS8.7 sets out a policy framework for renewable energy
S18 Trees Close to Buildings	To be superseded by future Development Management DPD	
S19 Percent for Art		
S20 Control over Advertisements		
S21 Areas of Special Control of Advertisements		
S22 Advance Directional Signs		
S23 Agricultural Buildings		
S24 Temporary Buildings		
S25 Kirkbie Kendal Lower School	Implemented	
S26 Sewage Treatment and Disposal	To be superseded by future Development Management DPD	
S27 Overhead Lines		
S28 Telecommunication Masts and Equipment		
S29 Waste Recycling Facilities		

APPENDIX D: GLOSSARY

The Act: The Planning and Compulsory Purchase Act 2004

Affordable housing: Social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market. Eligibility is determined with regard to local incomes and local house prices. Affordable housing should include provisions to remain at an affordable price for future eligible households or for the subsidy to be recycled for alternative affordable housing provision.

Social rented housing: is owned by local authorities and private registered providers (as defined in section 80 of the Housing and Regeneration Act 2008), for which guideline target rents are determined through the national rent regime. It may also be owned by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Homes and Communities Agency.

Affordable rented housing: is let by local authorities or private registered providers of social housing to households who are eligible for social rented housing.

Affordable Rent: is subject to rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable). Intermediate housing is homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition above. These can include shared equity (shared ownership and equity loans), other low cost homes for sale and intermediate rent, but not affordable rented housing.

Homes that do not meet the above definition of affordable housing, such as “low cost market” housing, may not be considered as affordable housing for planning purposes.

Annual Monitoring Report: Annual publication that is part of the South Lakeland Local Plan and which assesses progress in implementing the Local Development Scheme and the extent to which policies in Local Plan development plan documents (DPD's) are being implemented successfully.

Area Action Plan: Part of a Local Plan - a planning document for specific areas of significant change or conservation.

Article 4 direction: A direction which withdraws automatic planning permission granted by the General Permitted Development Order.

Best and most versatile agricultural land: Land in grades 1, 2 and 3a of the Agricultural Land Classification.

Biodiversity: The whole variety of life, including all genetic, species and ecosystem variations.

Birds and Habitats Directives: European Directives to conserve natural habitats and wild fauna and flora.

Brownfield: Land which is or has previously been occupied by a permanent structure (excluding agriculture or forestry buildings) and associated fixed surface infrastructure and curtilage of the development. Also known as Previously Developed Land or PDL.

Community Infrastructure Levy: A levy allowing local authorities to raise funds from owners or developers of land undertaking new building projects in their area.

Community Right to Build Order: An Order made by the local planning authority (under the Town and Country Planning Act 1990) that grants planning permission for a site-specific development proposal or classes of development.

Community Strategy: Local authorities are required by the Local Government Act 2000 to prepare these, with the aim of improving the social, environmental and economic wellbeing of their areas. Through the Community Strategy, authorities are expected to co-ordinate the actions of local public, private, voluntary and community sectors. The South Lakeland Local Strategic Partnership (which includes local authority representatives) is responsible for the South Lakeland Community Plan, 2004-2024.

Conservation (for heritage policy): The process of maintaining and managing change to a heritage asset in a way that sustains and, where appropriate, enhances its significance.

Conservation Area: Areas of special architectural or historic interest, designated under Section 69 of the Planning (Listed Buildings and Conservation Areas) Act 1990.

Contextual Indicators: Measures of change in the wider social, economic and environmental background against which policies operate. As such, they help to relate policy outputs to the local area.

Core Strategy: Part of the Local Plan. A Development Plan Document (DPD) that sets out the vision, strategy and core policies for the spatial development of the District.

Development: Construction, engineering and other operations associated with land and/or the change of use of buildings or land.

Development plan: This includes adopted Local Plans (existing 2006 South Lakeland Composite Local Plan (including adopted Local Plan Development Plan Documents) and neighbourhood plans, forms the basis for development and land use decisions in the District and is defined in section 38 of the Planning and Compulsory Purchase Act 2004. (Regional strategies remain part of the development plan until they are abolished by Order using powers taken in the Localism Act. It is the government's clear policy intention to revoke the regional strategies outside of London, subject to the outcome of the environmental assessments that are currently being undertaken). Update Note - On 20th May 2013, the Regional Spatial Strategy (RSS) for the North West was revoked by Central Government. Since that date, the RSS no longer forms part of the South Lakeland Local Planning Authority Area's Development Plan.

Development Plan Documents (DPDs): Form part of a Local Plan. Planning documents that have 'development plan' status in the determination of planning applications and carry considerable weight within the 'plan-led' system. DPDs are subject to independent examination.

Dwelling: A self-contained unit of accommodation such as a house, flat, maisonette or bungalow.

Economic development: Development, including those within the B Use Classes, public and community uses and main town centre uses (but excluding housing development).

European site: This includes candidate Special Areas of Conservation, Sites of Community Importance, Special Areas of Conservation and Special Protection Areas, and is defined in regulation 8 of the Conservation of Habitats and Species Regulations 2010.

Evidence Base: Information gathered by the planning authority to support preparation of local plan development plan documents. Includes quantitative and qualitative data.

Geodiversity: The range of rocks, minerals, fossils, soils and landforms.

Greenfield: Land which has not previously been subject to development (other than agricultural buildings) including undeveloped parks and open spaces within towns and settlements.

Green infrastructure: A network of multi-functional green space, urban and rural, which is capable of delivering a wide range of environmental and quality of life benefits for local communities.

Heritage asset: A building, monument, site, place, area or landscape identified as having a degree of significance meriting consideration in planning decisions, because of its heritage interest. Heritage asset includes designated heritage assets and assets identified by the local planning authority (including local listing).

Heritage Coast: Areas of undeveloped coastline which are managed to conserve their natural beauty and, where appropriate, to improve accessibility for visitors.

Historic environment: All aspects of the environment resulting from the interaction between people and places through time, including all surviving physical remains of past human activity, whether visible, buried or submerged, and landscaped and planted or managed flora.

Housing Density: The definition and method for calculating the average number of houses built per hectare on a site-by-site basis.

Housing Needs Assessment: A survey which estimates, using the results of detailed research, the number of households within an area that are in need of affordable housing and/or housing that meets their specific requirements.

Housing Trajectory: A means of showing past and future housing performance by identifying the predicted requirement and provision of housing over the lifespan of the Local Plan

Infrastructure: Roads, water supply, sewage disposal, schools and other community facilities needed to support residents and business activity.

International, national and locally designated sites of importance for biodiversity: All international sites (Special Areas of Conservation, Special Protection Areas, and Ramsar sites), national sites (Sites of Special Scientific Interest) and locally designated sites including Local Wildlife Sites.

Listed Buildings: Buildings and structures that have been identified as being of special architectural or historic interest and whose protection and maintenance, including that of their curtilage and setting, is the subject of special legislation. Listed Building Consent is required before any works can be carried out on a listed building.

Local Development Documents (LDDs): A generic term for Development Plan Documents, Supplementary Planning Documents and the Statement of Community Involvement. Where the more general phrase 'Local Plan Documents' is used, it means LDDs.

Local Development Framework (LDF): The previous name for the portfolio of Local Development Documents, consisting of Development Plan Documents, Supplementary Planning Documents, the Statement of Community Involvement, the Local Development Scheme and Annual Monitoring Reports. Together these documents provide the framework for delivering the spatial planning strategy for a local authority area. The new National Planning Policy Framework (March 2012) uses the term 'Local Plan' to refer to the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. The LDF is now referred to as The Local Plan.

Local Development Order: An Order made by a local planning authority (under the Town and Country Planning Act 1990) that grants planning permission for a specific development proposal or classes of development.

Local Development Scheme (LDS): The project plan setting out the programme and timetable for preparing the Local Plan and Local Development Plan Documents.

Local Enterprise Partnership: A body, designated by the Secretary of State for Communities and Local Government, established for the purpose of creating or improving the conditions for economic growth in an area.

Local Nature Partnership: A body, designated by the Secretary of State for Environment, Food and Rural Affairs, established for the purpose of protecting and improving the natural environment in an area and the benefits derived from it.

Local planning authority: The public authority whose duty it is to carry out specific planning functions for a particular area.

Local Plan: In this document, the term 'Local Plan' refers to the existing adopted 2006 South Lakeland Local Plan. Also, however, the new National Planning Policy Framework uses this term to refer to the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community (in this document, the adopted Local Plan – Core Strategy and the Local Plan submitted Land Allocations Development Plan Documents) . In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan

documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

Monitoring: The regular and systematic collection and analysis of information to measure policy implementation.

Neighbourhood Development Order: An Order made by a local planning authority (under the Town and Country Planning Act 1990) through which Parish Councils and neighbourhood forums can grant planning permission for a specific development proposal or classes of development.

Neighbourhood plans: A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

Open space: All open space of public value, including not just land, but also areas of water (such as rivers, canals, lakes and reservoirs) which offer important opportunities for sport and recreation and can act as a visual amenity.

Outcomes: Macro-level, real world changes which are influenced to some degree by local plan outputs.

Outputs: The direct effects of a policy such as the number of affordable housing completions, amount of employment floor space developed.

Output Indicators: Measure the direct effects of a policy. Used to assess whether policy targets are being achieved in reality using available information.

Parish Plans: a Parish Plan is a statement of how a community sees itself now and how it will develop over the next few years. It:

- Reflects the views of all sections of the community;
- Identifies which features and local characteristics people value;
- Identifies local problems and opportunities;
- Spells out how residents want the community to develop in the future;
- Prepares a plan of action to achieve this vision.

Plan, Monitor and Manage: Means of measuring and reviewing policy, involving the adjustment of policy, if necessary, through monitoring outcomes.

Planning condition: A condition imposed on a grant of planning permission (in accordance with the Town and Country Planning Act 1990) or a condition included in a Local Development Order or Neighbourhood Development Order.

Planning obligation: A legally enforceable obligation entered into under section 106 of the Town and Country Planning Act 1990 to mitigate the impacts of a development proposal.

Playing field: The whole of a site which encompasses at least one playing pitch as defined in the Town and Country Planning (Development Management Procedure) (England) Order 2010.

Policy Implementation: Assessment of the effectiveness of policies in terms of achieving their targets. Measured by use of output and contextual indicators.

Previously developed land: Land which is or was occupied by a permanent structure, including the curtilage of the developed land (although it should not be assumed that the whole of the curtilage should be developed) and any associated fixed surface infrastructure. This excludes: land that is or has been occupied by agricultural or forestry buildings; land that has been developed for minerals extraction or waste disposal by landfill purposes where provision for restoration has been made through development control procedures; land in built-up areas such as private residential gardens, parks, recreation grounds and allotments; and land that was previously-developed but where the remains of the permanent structure or fixed surface structure have blended into the landscape in the process of time.

Primary shopping area: Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

Primary and secondary frontages: Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

Priority habitats and species: Species and Habitats of Principle Importance included in the England Biodiversity List published by the Secretary of State under section 41 of the Natural Environment and Rural Communities Act 2006.

Proposals Map – the adopted proposals map illustrates on a base map all the policies outlined in DPDs, together with any saved policies. It must be revised as each new DPD is adopted.

Ramsar sites: Wetlands of international importance, designated under the 1971 Ramsar Convention.

Regional Spatial Strategy (RSS): the statutory regional plan, produced by the Regional Planning Body (North West Regional Assembly). The RSS was revoked by Central Government on 20th May 2013 using powers in the Localism Act. Since 20th May 2013, the RSS for the North West no longer forms part of the development plan.

Regulations: the Town and Country Planning (Local Development) (England) Regulations 2004, the Town and Country Planning (Transitional Arrangements) Regulations 2004, the Town and Country Planning (Local Development) (England) Amendments 2008 and The Town and Country Planning (Local Planning) (England) Regulations 2012.

Renewable and low carbon energy: Includes energy for heating and cooling as well as generating electricity. Renewable energy covers those energy flows that occur naturally and repeatedly in the environment – from the wind, the fall of water, the movement of the oceans, from the sun and also from biomass and deep geothermal heat. Low carbon technologies are those that can help reduce emissions (compared to conventional use of fossil fuels).

Rural exception sites: Small sites used for affordable housing in perpetuity where sites would not normally be used for housing. Rural exception sites seek to address the needs of the local community by accommodating households who are either current residents or have an existing family or employment connection. Small numbers of market homes may be allowed at the local authority's discretion, for example where essential to enable the delivery of affordable units without grant funding.

Saved Policies or Plans: Existing adopted development plans are saved for three years from the commencement of the Act. Policies in old style development plans adopted after commencement of the Act will become saved policies for three years from their adoption and approval.

Scheduled Monument: A feature of national historical or archaeological importance, either above or below the ground, which is included in the schedule of monuments as identified by the Secretary of State.

Setting of a heritage asset: The surroundings in which a heritage asset is experienced. Its extent is not fixed and may change as the asset and its surroundings evolve. Elements of a setting may make a positive or negative contribution to the significance of an asset, may affect the ability to appreciate that significance or may be neutral.

Shoreline Management Plans: A plan providing a large-scale assessment of the risk to people and to the developed, historic and natural environment associated with coastal processes.

Significance (for heritage policy): The value of a heritage asset to this and future generations because of its heritage interest. That interest may be archaeological, architectural, artistic or historic. Significance derives not only from a heritage asset's physical presence, but also from its setting.

Site of Special Scientific Interest (SSSI): Nationally important areas of land designated under the Wildlife and Countryside Act 1981 as being of special interest for nature and/or geological conservation.

Spatial Planning: This system brings together policies for the development and use of land with other policies and programmes that influence the nature of processes and how they function. It includes policies that impact on the use of land but which are not capable of being delivered through the granting of planning permission.

Special Areas of Conservation: Areas given special protection under the European Union's Habitats Directive, which is transposed into UK law by the Habitats and Conservation of Species Regulations 2010.

Special Protection Areas: Areas which have been identified as being of international importance for the breeding, feeding, wintering or the migration of rare and vulnerable species of birds found within European Union countries. They are European designated sites, classified under the Birds Directive.

Site of Special Scientific Interest: Sites designated by Natural England under the Wildlife and Countryside Act 1981.

Statement of Community Involvement (SCI): Sets out how the Development Plans Team proposes to engage with stakeholders and the community in the plan-making process for Local Development Documents and in considering planning applications.

Strategic Environmental Assessment (SEA) and Sustainability Appraisal (SA): The European Union requires formal SEA of plans and programmes likely to have a significant effect on the environment. The UK Government incorporates this requirement for Development Plans Documents in a wider Sustainability Appraisal of all LDDs (except the SCI). Sustainability appraisal involves the appraisal of social, economic and environmental effects of policies. This helps inform the council of the potential implications of different alternative policies.

Strategic Flood Risk Assessment (SFRA): The NPPF requires that Local Planning Authorities undertake an assessment of flood risk in their area to inform the emerging Local Plan Development Plan Documents (formerly known as the LDF). This includes identifying sources of flooding, the probability of flooding, appropriate land uses within areas likely to be affected by flooding and potential mitigation solutions.

Supplementary planning documents: Documents which add further detail to the policies in the Local Plan (formerly known as the LDF). They can be used to provide further guidance for development on specific sites, or on particular issues, such as design. Supplementary planning documents are capable of being a material consideration in planning decisions but are not part of the development plan.

Sustainable Development: Environmentally responsible development, commonly defined as “development that meets the needs of the present generation, without compromising the ability of future generations to meet their own needs”.

Targets: Thresholds that identify the scale of change to be derived from policies over a specific time period (e.g. number of affordable homes to be built by a set date).

Town centre: Area defined on the local authority’s proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, District centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in existing adopted Local Plans and emerging Local Plan Development Plan Documents (formerly known as LDF documents), existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

Transport assessment: A comprehensive and systematic process that sets out transport issues relating to a proposed development. It identifies what measures will be required to improve accessibility and safety for all modes of travel, particularly for alternatives to the car such as walking, cycling and public transport and what measures will need to be taken to deal with the anticipated transport impacts of the development.

Transport statement: A simplified version of a transport assessment where it is agreed the transport issues arising out of development proposals are limited and a full transport assessment is not required.

Travel plan: A long-term management strategy for an organisation or site that seeks to deliver sustainable transport objectives through action and is articulated in a document that is regularly reviewed.

Use Classes Order (UCO): The Town and Country Planning (Use Classes) Order 2005 specifies sixteen classes of land use. These are:

- UCO A1 – Shops
- UCO A2 – Financial and Professional Services
- UCO A3 – Restaurants and Cafés
- UCO A4 – Drinking Establishments
- UCO A5 – Hot Food Takeaways
- UCO B1 – Business
- UCO B2 – General Industry
- UCO B8 – Storage and Distribution
- UCO C1 – Hotels
- UCO C2 – Residential Institutions
- UCO C3 – Dwelling Houses
- UCO D1 – Non-residential Institutions
- UCO D2 – Assembly and Leisure

Windfall sites: Sites which have not been specifically identified as available in the Local Plan process. They often comprise previously-developed sites that have unexpectedly become available but can include green field sites such as large gardens that it was not known would become available.