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# South Lakeland Local Plan – Annual Monitoring Report April 2017 to March 2018

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## Foreword

Welcome to South Lakeland's 2017-2018 Local Plan Annual Monitoring Report.

South Lakeland is the Local Planning Authority for South Lakeland District outside the Yorkshire Dales and Lake District National Parks. Although this only represents around a third of the area of the District, it contains about three quarters of the District's population and is the area where most development is likely to take place.

The Local Plan Monitoring Report sets out the latest information on key social, environmental and economic characteristics and trends affecting South Lakeland District. These are the issues which South Lakeland is seeking to address through the Local Plan. It tells you of our progress in preparing, adopting and implementing the documents that form part of, or support the Local Plan for South Lakeland (outside the National Parks). The report also contains the annual report of income and expenditure relating to the Community Infrastructure Levy (CIL).

Significant progress has been made in recent years and South Lakeland District Council has an adopted Local Plan including a Core Strategy and a Land Allocations document setting out where new housing and employment development can take place up to 2025. Two further Local Plan documents, containing development management policies, and a planning framework for the Arnside and Silverdale Area of Outstanding Natural Beauty are due to be adopted in February 2019. The Local Plan complements the Council Plan, which seeks to deliver 1000 affordable homes to rent and 1000 jobs by 2025.

We hope that you find the document interesting and informative; it helps to demonstrate that South Lakeland District Council is on track to making South Lakeland the best place to live, work and explore.

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 793388 or email the Development Strategy Team on [developmentplans@southlakeland.gov.uk](mailto:developmentplans@southlakeland.gov.uk)

This Annual Monitoring Report can be found on the [Local Plan page<sup>1</sup>](#) of Council's website.

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<sup>1</sup> <https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/the-local-plan/>

# Executive Summary

## Introduction

This is the fourteenth Monitoring Report for the South Lakeland Local Plan. It provides information for the year 1 April 2017 to 31 March 2018 and 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 monitoring their impact over the longer term;
- Provides an update on the preparation of our Local Plan documents;
- Sets out a framework for monitoring our adopted Local Plan policies and our Community Infrastructure Levy to tell us whether they are working and what difference they are making to the District.

## Key Characteristics and Issues in South Lakeland

Key characteristics and issues that need to be taken account of in planning for the future of the district include:

- High average house prices, and affordability issues.
- High quality natural and built environment.
- A rich local heritage and distinctive landscape and settlement character.
- Pressures in the rural areas such as lack of public transport, local facilities and services.
- A reliance on private car travel.
- Higher than average life expectancy and low levels of crime.
- A super-ageing population.
- High economic activity rate and low unemployment rate, but a reliance on lower wage service and tourism sectors.
- Increasing risks from climate change including flood risk.

## Progress on the preparation of Local Plan documents

The Council's timescale for preparing its Local Plan documents is set out in its Local Development Scheme, which was adopted in February 2018 and subsequently updated in October 2018. The Council's progress in the last year on preparing Local Plan documents is summarised below and explained fully in Section 3.

| Local Plan Document                 | Progress  |
|-------------------------------------|---|
| Development Management Policies DPD | At examination – due for adoption February 2019 |

| <b>Local Plan Document</b>                                    | <b>Progress</b>                                 |
|---|---|
| Arnside and Silverdale Area of Outstanding Natural Beauty DPD | At examination – due for adoption February 2019 |

| <b>Supplementary Planning Documents</b>                   | <b>Progress</b>     |
|---|---------------------|
| Green Dragon Farm, Burton-in-Kendal Development Brief SPD | Adopted August 2017 |
| Land East of Milnthorpe Road, Holme Development Brief SPD | Adopted April 2018  |

| <b>Neighbourhood Plans</b>           | <b>Progress</b>                 |
|--------------------------------------|---------------------------------|
| Grange-over-Sands Neighbourhood Plan | 'Made' (adopted) in August 2018 |

## Key findings and messages for 2017/18

### Employment

- An additional 1,757 square metres of employment floorspace have been created.
- Unemployment levels have slightly decreased from 2.2% to 2.0% (ONS model based).
- The proportion of working age people in employment has increased from 85.8% to 88.7%.
- 679 square metres of employment floorspace has been lost to other uses, with 365 square metres of that being lost to housing. However, there have also been gains of employment floorspace from housing, totalling 304 square metres, thereby giving a *net* loss of 61 sqm of employment floorspace to housing.
- There are 50.92 hectares of available employment land.

### Housing

- The population of the district has increased from 103,274 to 104,321.
- Permission was granted for 604 (net) dwellings in 2017/18, with 480 of these dwellings on sites allocated for housing in the Local Plan.
- Almost 70% of the dwellings granted permission in 2017/18 were in the principal service centres of Kendal and Ulverston.
- 84% of new homes permitted in 2017/18 were on greenfield sites.
- Housing affordability has worsened and in 2017 the median house price to workplace earnings ratio in South Lakeland was 9.67, compared with 9.10 in 2016.
- 291 homes were built in the district in 2017/18, which meets our locally identified housing need of 290 homes per year. 65% of these homes were in Kendal or Ulverston.
- 40% of homes built in 2017/18 were on brownfield land.
- 80 affordable homes were built in 2017/18.

## Environment and conservation

- One air quality monitoring site (Lowther St, Kendal) continues to exceed air quality objectives for nitrogen dioxide, but only by a small margin, and it is predicted to meet the objective by 2019.
- The number of heritage assets on Historic England's 'at risk' register has reduced, however Burton-in-Kendal Conservation Area has been added to the register. The Council is working with Historic England and Burton-in-Kendal Parish Council to fund a 3 year Partnership Scheme in Conservation Areas (PSiCA) which aims to see the Conservation Area removed from the 'at risk' register.

## Design

- The Council has successfully used its Development Brief Special Planning Documents (SPDs) to secure high standards of design on allocated sites, and has where necessary refused schemes with design shortcomings.
- Grange-over-Sands Town Council has developed a Design Guide as part of its Neighbourhood Plan to provide guidance for the design of new development in the parish.

## Town centres/retail

- The proportion of empty shops in town centres has reduced from 8.25% to 7.59%.
- There was a net gain of 152 square metres of 'town centre use' floorspace within town centres, and 8,408 square metres of town centre use floorspace completed outside of town centres.

## Infrastructure Delivery Plan (IDP) and Community Infrastructure Levy (CIL)

- In 2017/18, CIL Receipts amounted to £160,805.60
- £24,851.38 was paid to Parish and Town Councils.
- £0 was spent on strategic infrastructure projects.

# 1. Introduction

## 1.1 Purpose of document – what is the Monitoring Report for?

- 1.1.1 South Lakeland is the Local Planning Authority for South Lakeland District outside the Lake District and Yorkshire Dales National Park. This means that it is responsible for preparing the Local Plan and for determining planning applications within this area.
- 1.1.2 National planning guidance and legislation<sup>2</sup> require local planning authorities to prepare a monitoring report, at least annually, and to make it publicly available. This is the fourteenth Monitoring Report for the South Lakeland Local Plan. It covers the year from 1 April 2017 to 31 March 2018. The purpose of the Monitoring Report is to:
- show communities how the preparation and implementation of policies in the Local Plan is progressing and what impacts the policies are having;
  - report any activity relating to the duty to cooperate;
  - provide up-to-date information on the implementation of any neighbourhood plans that have been made;
  - report on progress in implementing and spending of the Community Infrastructure Levy (CIL) and;
  - guide the preparation of new/updated policies, including a review of the Local Plan.

### South Lakeland Local Plan

- 1.1.3 South Lakeland's adopted Local Plan currently consists of the:
- Local Plan Part 1 – the Core Strategy (adopted in October 2010);
  - Local Plan Part 2 - Land Allocations (adopted in December 2013);
  - Extant saved policies from the old South Lakeland Local Plan (adopted in 1997 and altered in 2006).<sup>3</sup>
- 1.1.4 Local Plan Part 3 – a Development Management Policies DPD – commenced preparation in 2015 and is scheduled for adoption in February 2019. A joint local plan for the Arnside and Silverdale Area of Outstanding Natural Beauty is also being prepared with Lancaster City Council and is due to be adopted in February 2019. The Council introduced a Community Infrastructure Levy with effect from 1 June 2015.
- 1.1.5 The Minerals and Waste Local Plan prepared by Cumbria County Council as Minerals and Waste planning authority is also part of the Local Plan. The Minerals and Waste plan is reported upon separately by the County Council and is not considered in this report.

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<sup>2</sup> Section 35 of the Planning and Compulsory Purchase Act 2004

<sup>3</sup> Appendix 2 of the Core Strategy DPD, and Appendix 3 of the Land Allocations DPD specify which old saved Local Plan policies were superseded by the DPDs.



Similarly for parts of the District within National Parks, the relevant National Park authority is responsible for preparing a Local Plan and monitoring it.

## 1.2 Structure of the Monitoring Report

1.2.1 The Monitoring report is split into a number of sections as outlined below:

### Section 2: South Lakeland in context

1.2.2 The AMR begins with a set of ‘contextual indicators’ from a range of sources, which help describe the key current 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.

### Section 3: Local Development Scheme – progress check

1.2.3 The timetables and milestones for preparing South Lakeland’s Local Plan documents are set out in the Local Development Scheme (LDS). The first LDS was prepared in 2005 and has been reviewed a number of times since, most recently in February 2018 and October 2018. 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

### Section 4: Monitoring policy implementation and impacts

1.2.4 Section 4 sets out a framework for monitoring the policies of the Development Plan for South Lakeland outside the National Parks prepared by South Lakeland District Council. It sets this out clearly in tables by policy topic area and uses key indicators, including those identified as being important at a Corporate, County and National level.

1.2.5 Indicators and their associated data not only demonstrate the position of the District during a given monitoring period, but also illustrate the effects of policies over time and help to identify trends and key issues in the District.

## Section 5: Monitoring Implementation of the Community Infrastructure Levy and Infrastructure Delivery Plan

- 1.2.6 Section 5 monitors and reports on the implementation of CIL (including CIL spending) and other financial contributions generated from development. It also provides an update on the delivery of infrastructure to support the Local Plan.

## Section 6: Supporting delivery and moving forward

- 1.2.7 Section 6 looks at how we will move forward in preparing, reviewing and implementing to the Local Plan. It assesses evidence base requirements, our Duty-to-Cooperate activity, considers future monitoring requirements and the adequacy of resources for Local Plan preparation and delivery.

## 2. 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 is the area for which the District Council is the planning authority. The area of both National Parks was extended on 1 August 2016. Whilst some data relates to the South Lakeland planning area, much of the 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.

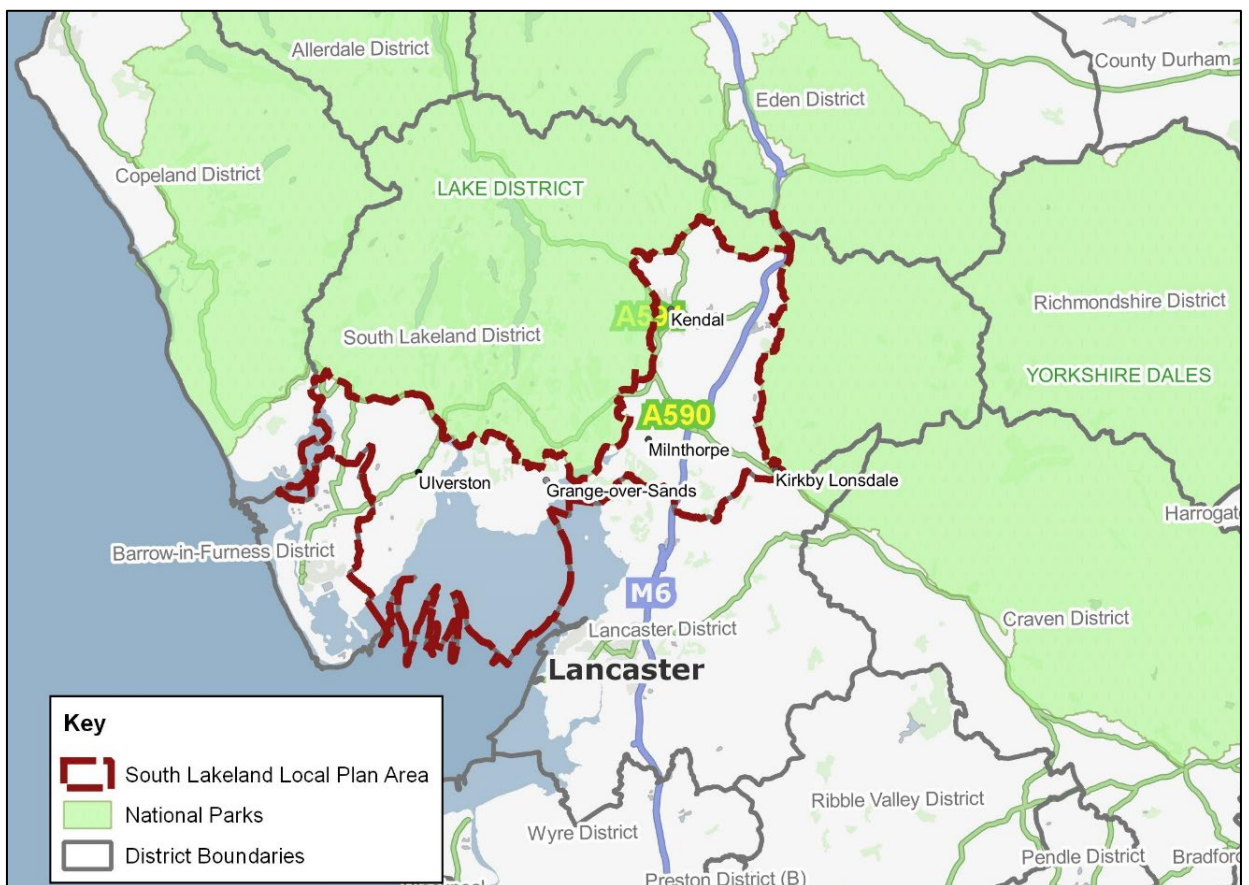


Figure 1 - Map: Location of South Lakeland

2.1.2 South Lakeland is the second largest district in the county of Cumbria, covering an area of 1,545km<sup>2</sup>. Kendal and Ulverston are the two Key Service Centres in the District (designated Principal Service Centres in the Local Plan), with populations of 33,662 and 13,296 respectively in 2017/18. 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.

- 2.1.3 Population growth has slowed in recent years and is projected to decline slightly over the next ten years, from 103,578 in 2018 to 103,111 in 2028 (2016 based projections). The number of households in the district is however projected to increase from 47,407 in 2018 to 48,339 in 2028.

## 2.2 Context

### Economy

- 2.2.1 South Lakeland has a **high economic activity rate** and a relatively **low unemployment rate** but a higher than average reliance on the low-waged service and tourism sectors. **Tourism, especially in the Lake District and Yorkshire Dales National Park areas, is a major driver of the District's economy.** In catering for visitors, the District must balance the economic benefits and the quality of the visitors' experience with ensuring that the high quality natural and cultural heritage of the area is not compromised by or for the visitors themselves.
- 2.2.2 The **east of the District in particular benefits from good accessibility** to main national transport links, meaning that larger regional centres and some major ports and airports are within reasonable driving and rail journey distance of Kendal. A fast service on the West Coast Main Line enables passengers to get to Central London from Oxenholme Station in under 2½ hours. The A590 and Furness rail line provide access for communities in the west of the District. Reasonable levels of local bus service are provided for parts of towns and larger villages but there is significantly less (and recently reduced) provision in more rural areas, and little or no evening or Sunday bus service, even in areas of the main towns.

### Housing

- 2.2.3 South Lakeland is a popular place to retire to or in which to own a second home. Average **house prices in the District are significantly higher** than the Cumbrian average and well beyond the financial reach of a large proportion of local people. The District has a **high house price to household income ratio**.

### Environment

- 2.2.4 South Lakeland has a **high quality natural and built environment**. South Lakeland contains large areas of land designated for their local, national or international biodiversity, geodiversity or landscape importance. The area supports a number of rare and protected plant and animal species and habitats. Additionally, there are currently 10 Conservation Areas and over 1,200 listed buildings and 60 scheduled monuments in the SLDC planning area.

## Health and Wellbeing

- 2.2.5 An overall **good quality of life** in South Lakeland may have contributed to **higher than average life expectancy**. South Lakeland has **low levels of crime** and is a comparably safe district to live in.
- 2.2.6 The District has a range of **good quality cultural, leisure and recreational facilities**, sports facilities, formal and informal publically accessible open spaces, canal and river corridors and historic parks and gardens.

## 3. Local Development Scheme – Progress Check

### 3.1 Introduction

- 3.1.1 A key role of the AMR is to review progress on the delivery of the Local Plan against the timetable and milestones set out in the Local Development Scheme (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 will produce, with a timetable for the preparation of each document. Until a single Local Plan is prepared, the Local Plan will comprise of a series of documents referred to collectively as the South Lakeland Local Plan.
- 3.1.2 Performance has been assessed against the timetable in the approved October 2018 LDS unless stated otherwise. Whilst this LDS was not approved within the 2017/18 AMR monitoring year<sup>4</sup> it is considered appropriate to give a real-time update on Local Plan preparation at the time of publishing this AMR. The LDS can be viewed on the Council's [website](#)<sup>5</sup>.

### 3.2 Progress 1 April 2017 to 31 March 2018

#### Development Management Policies DPD

- 3.2.1 Work on the Development Management Policies DPD commenced in Spring 2015 and has progressed well. Issues and Options consultation took place in November 2015 followed by Preferred Options consultation in November 2016. A pre-publication consultation took place in June/July 2017 and the plan was formally published in November 2017. The plan was submitted to the Secretary of State in February 2018 and examination hearings took place in June 2018.

| Key stages                         | 2018-21 LDS | Actual   |
|------------------------------------|-------------|--|
| Early preparation and consultation | July 2015   | Early preparation began Spring 2015<br>Issues and Options Consultation took place in November/ December 2015<br>Preferred Options/Draft Plan Consultation took place in November/December 2016 |

<sup>4</sup> Recent Local Development Schemes include the LDS 2015-21 (adopted 28 July 2018), LDS 2018-21 (adopted 27 February 2018), LDS 2018-21 (adopted 10 October 2018)

<sup>5</sup> <https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/local-development-scheme-lds/>

| Key stages                           | 2018-21 LDS   | Actual                 |
|--------------------------------------|---------------|------------------------|
| Formal publication                   | November 2017 | November 2017          |
| Submission to the Secretary of State | February 2018 | February 2018          |
| Adoption by Full Council             | February 2019 | Expected February 2019 |

- 3.2.2 Once adopted, the Development Management Policies DPD will supersede a number of extant saved old Local Plan policies. The policies that will be superseded are listed in Appendix 3 of the DM Policies DPD.

### Arnside and Silverdale Area of Outstanding Natural Beauty DPD

- 3.2.3 Work is progressing well in the joint preparation with Lancaster City Council of the Arnside and Silverdale Area of Outstanding Natural Beauty Development Plan Document (AONB DPD). Early evidence gathering, including Parish Housing Needs surveys and a call for sites, informed an Issues and Options consultation which took place in autumn 2015. Consultation on the Draft DPD took place from November 2016 to January 2017, with a further pre-publication consultation in June/July 2017 and the plan was formally published in November 2017. The plan was submitted to the Secretary of State in February 2018 and examination hearings took place in June 2018.

| Key stages                           | 2018 LDS      | Actual   |
|--------------------------------------|---------------|--|
| Early preparation and consultation   | July 2013     | Early preparation began January 2014<br>Issues and Options Consultation took place in November/ December 2015<br>Preferred Options/Draft Plan Consultation took place November/December 2016 |
| Formal publication                   | November 2017 | November 2017  |
| Submission to the Secretary of State | February 2018 | February 2018  |
| Adoption by Full Council             | February 2019 | Expected February 2019   |

## Development Briefs

- 3.2.4 Following the adoption of eight Phase 1 Briefs in 2014-2015 and three Phase 2 Briefs in 2016, Phase 3A and Phase 3B\* Briefs have now also been completed in the monitoring year 2017/18.

### Phase 3A Briefs

Green Dragon Farm, Burton in Kendal and Land North of Sycamore Close, Endmoor

| Key stages                                   | 2015-21 LDS   | Actual         |
|--|---------------|----------------|
| Preparation: Issues and Options consultation | June 2016     | June 2016      |
| Consultation on draft briefs                 | February 2017 | April/May 2017 |
| Adoption by Cabinet                          | August 2017   | August 2017    |

### Phase 3B Briefs

Land East of Milnthorpe Road, Holme

| Key stages                                   | 2018-21 LDS <sup>6</sup> | Actual           |
|--|--------------------------|------------------|
| Preparation: Issues and Options consultation | January 2017             | April/May 2017   |
| Consultation on draft briefs                 | December 2017            | Winter 2017/2018 |
| Adoption by Cabinet                          | June 2018                | April 2018       |

There are currently no plans to begin preparation of a Development Brief for Land East of Burton Road, Kendal, which was originally identified as Phase 3B development brief.

## Neighbourhood Plans

- 3.2.5 Following the designation of a Neighbourhood Area in July 2013 covering Heversham and Hincaster parishes, a Neighbourhood Plan was made in February 2017. Neighbourhood Areas have also been designated for Grange over Sands Parish (November 2014), Lower Allithwaite Parish (January 2015) and the majority of Burneside Parish (June 2016).

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<sup>6</sup> LDS 2018-21, approved February 2018. The Brief was adopted by the time the updated LDS was approved in October 2018.



## Grange over Sands Neighbourhood Plan

| Key stages                         | 2018-21 LDS   | Actual   |
|------------------------------------|---------------|--|
| Early preparation and consultation | 2016/17       | Early preparation commenced January 2015 (following work on a community led plan 2012-2014)<br>Public consultation December 2015 |
| Pre-submission consultation        | January 2016  | May/June 2017  |
| Submission to the Council          | November 2017 | Expected November 2017   |
| Examination                        | N/A           | Early 2018   |
| Referendum                         | N/A           | 26 July 2018   |
| Adoption ('made') by full Council  | July 2018     | August 2018  |

## Lower Allithwaite Neighbourhood Plan

- 3.2.6 Lower Allithwaite Neighbourhood Area was designated in February 2015 and the adopted LDS indicates that early preparation and consultation would take place in 2015-17, but does not define the timescales beyond this. Early work has been undertaken on a draft Plan but public consultation is not expected until early 2019. Further details of progress will be reported in the 2019 AMR.

## Burneside Neighbourhood Plan

- 3.2.7 Burneside Neighbourhood Area was designated in June 2016. The adopted LDS does not identify a timetable for its preparation. The Parish Council's Steering Group made progress in preparing a Neighbourhood Plan in 2016/17, including an Objectives Report and SEA/HRA Screening Report but the plan is currently on hold whilst options are considered.

## Statement of Community Involvement

- 3.2.8 The Statement of Community Involvement (SCI) sets out the Council's approach to engaging the community in the preparation of the Local Plan and in decisions on planning applications. Whilst the current Local Development Scheme did not consider a short term review of the SCI to be necessary, recent developments in the Council's Customer Connect digital transformation project together with the 2018 Neighbourhood Planning Regulations gave rise to the need for the SCI to be updated in Spring 2018. A revised SCI was adopted by the Council on 10 October 2018.

## Future Documents

- 3.2.9 Early evidence base and project planning work has begun on a single combined Local Plan, which the October 2018 LDS identifies will be adopted by December 2021.

### Single Local Plan

| Key stages                           | 2018-21 LDS             | Actual   |
|--------------------------------------|-------------------------|--|
| Early preparation and consultation   | Evidence base from 2017 | Strategic Housing Market Assessment published October 2017 (provides an objectively assessed housing need figure (OAN)).<br>Strategic Flood Risk Assessment commissioned early 2017, and expected to be finalised mid 2019 (delays due to updated flood modelling following Storm Desmond).<br>District wide Viability Study published October 2017. |
| Formal publication                   | January 2021            | Not yet commenced.   |
| Submission to the Secretary of State | May 2021                | Not yet commenced.   |
| Adoption by Full Council             | December 2021           | Not yet commenced.   |

### Housing SPD

| Key stages                          | 2018-21 LDS         | Actual                       |
|-------------------------------------|---------------------|------------------------------|
| Preparation and Issues Consultation | Commence early 2019 | Early scoping has commenced. |
| Consult on Draft SPD                | 2019                | Not yet commenced.           |
| Adoption by Cabinet                 | March 2020          | Not yet commenced.           |

## Design SPD

| Key stages                          | 2018-21 LDS         | Actual             |
|-------------------------------------|---------------------|--------------------|
| Preparation and Issues Consultation | Commence early 2019 | Not yet commenced  |
| Consult on Draft SPD                | 2019                | Not yet commenced. |
| Adoption by Cabinet                 | December 2020       | Not yet commenced. |

## Burton-in-Kendal Village Design Statement SPD

- 3.2.10 The October 2018 update to the 2018-21 Local Development Scheme introduced a new Supplementary Planning Document, which will support the current PSiCA (Partnership Scheme in Conservation Areas) project being undertaken in the Burton-in-Kendal, by providing detailed guidance on the design of new development in the Conservation Area. This SPD will be produced by a consultant on behalf of the Council, and the Council will undertake the necessary consultation and procedural steps.

| Key stages                          | 2018-21 LDS           | Actual   |
|-------------------------------------|-----------------------|--|
| Preparation and Issues Consultation | Commence October 2018 | Project is underway and consultants have been appointed. |
| Consult on Draft SPD                | March 2019            | Not yet commenced.                                       |
| Adoption by Cabinet                 | October 2019          | Not yet commenced.                                       |

## 4. Monitoring policy implementation and impacts

### 4.1 Introduction

- 4.1.1 A key role for the AMR is to identify the extent to which policies in the Local Plan (currently the Core Strategy, Saved 2006 Local Plan policies and the Land Allocations DPD) are being implemented, how successfully and what impact this is having.

### 4.2 Core Strategy and 2006 Local Plan

- 4.2.1 The monitoring of the Core Strategy focuses on its five main themes of the economy, housing, environment, accessibility and health and wellbeing. A monitoring framework is included in Appendix 1 of the Core Strategy. The indicators presented in the tables in section 4.4 of this AMR are taken from both Corporate and County Council indicator sets and reflect the Core Strategy's objectives (see pages 11-13 of the Core Strategy) as well as the Council Plan's objectives to support the development of 1,000 additional jobs and 1000 new affordable homes for rent by 2025.
- 4.2.2 A number of policies of the 2006 Local Plan remain extant. These are listed in Appendix 3 of the adopted Land Allocations DPD. It is not proposed to develop dedicated indicators to monitor these, as the remaining extant policies will be superseded by the Development Management Policies DPD and the AONB DPD. Many of the indicators used to monitor the Core Strategy are nevertheless relevant to monitoring the 2006 Local Plan.

### 4.3 Land Allocations DPD

- 4.3.1 Monitoring of the Land Allocations DPD relates primarily to the monitoring of the implementation of allocated sites, including progression of planning applications and the preparation of Development Briefs.

#### Housing sites

- 4.3.2 There are 62 sites solely allocated for residential use in the Land Allocations DPD. Progress on the implementation of these is summarised below and further information on the progress of each site can be found in the Council's Housing Land Annual Position Statement published on its website. The monitoring data in the table below covers the 2017/18 monitoring year. Progress on mixed use sites (housing/employment), is given in paragraph 4.3.9.

| Allocation Site                  | No. dwellings (Gross) | Status at end March 2018 |
|----------------------------------|-----------------------|--------------------------|
| West of High Sparrowmire, Kendal | 150                   | No Permission            |

| Allocation Site                               | No. dwellings (Gross)                      | Status at end March 2018  |
|---|--|---|
| West of High Garth, Kendal                    | 26 (LADPD estimated 23)                    | Complete  |
| North of High Sparrowmire, Kendal             | 24   | Application pending (SL/2018/0806)  |
| North of Laurel Gardens, Kendal               | 197  | Pre-application stage   |
| Eskdale House, Kendal                         | 23   | Complete  |
| East of Castle Green Road, Kendal             | 60   | No permission   |
| West of Valley Drive, Kendal                  | 60   | No permission   |
| Kendal Parks, Kendal                          | 200  | Northern part – Phase 1 (50 units) complete. Phase 2 (22 units) under construction, Phase 3 (30 units) application pending (SL/2018/0959).<br>Southern part – No permission |
| West of Oxenholme Road, Kendal                | 148  | Phase 1 (30 units) Complete. Phase 2 (69 units) Full Permission. Phase 3&4 (49 units) Outline permission.   |
| South of Natland Mill Beck Farm, Kendal       | 76   | Complete  |
| South of Lumley Road, Kendal                  | 110  | Under Construction  |
| Stainbank Green, Kendal                       | 189  | Northern part (34 units) Full permission.<br>Remainder (155 units) No permission  |
| Land at Vicarage Drive, Kendal                | 15   | Complete  |
| South of Underbarrow Road, Kendal             | 153  | Eastern part (47 units) Full permission. Western part No permission.  |
| Adjacent to Binfold Croft, Kirkby Lonsdale    | 10   | Complete  |
| Former Cedar House School, Kirkby Lonsdale    | LADPD estimate 20.<br>Current estimate 11. | Part under construction.  |
| Land South and East of Milnthorpe, Milnthorpe | 155  | No Permission   |
| Adjacent to St Anthony's Close, Milnthorpe    | 8  | Full Permission   |

| Allocation Site   | No. dwellings (Gross) | Status at end March 2018                            |
|---|-----------------------|---|
| Land opposite the Wheatsheaf, Brigsteer                         | 7                     | No Permission<br>Now in Lake District National Park |
| Land Adjacent to Hall Park, Burneside                           | 70                    | No Permission                                       |
| Village recreation (Willink) Field and Tennis Courts, Burneside | 23                    | No Permission                                       |
| East of Boon Town, Burton-in-Kendal                             | 23                    | No Permission                                       |
| East of Hutton Close, Burton-in-Kendal                          | 27                    | Under Construction                                  |
| North of Sycamore Close, Endmoor                                | 106                   | Approved subject to S106 agreement being finalised  |
| South of Bowling Green, Endmoor                                 | 25                    | No Permission                                       |
| West of Burton Road, Holme                                      | 59                    | No Permission                                       |
| East of Milnthorpe Road, Holme                                  | 73                    | No Permission                                       |
| East of Greengate Crescent, Levens                              | 49                    | Under Construction                                  |
| West of Sedgwick Road, Natland                                  | 28                    | No Permission                                       |
| Land East of Burton Road, Oxenholme                             | 17                    | Under Construction                                  |
| Land South of Fell Close, Oxenholme                             | 104                   | Approved subject to S106 agreement being finalised  |
| Opposite Low Fell Gate Farm, Grange-over-Sands                  | 46                    | No Permission                                       |
| West of Cardrona Road, Grange-over-Sands                        | 28                    | No Permission                                       |
| North of Carter Road, Grange-over-Sands                         | 42                    | Under Construction                                  |
| South of Thornfield Road, Grange-over-Sands                     | 64                    | Under Construction                                  |
| Land South of Green Lane, Allithwaite                           | 22                    | No Permission (Pre-application)                     |
| Land rear of Bankfield, Allithwaite                             | 9                     | No Permission                                       |
| Land rear of Barn Hey, Allithwaite                              | 30                    | No Permission                                       |

| Allocation Site                                   | No. dwellings (Gross)                      | Status at end March 2018   |
|---|--|--|
| Land North of Jack Hill, Allithwaite              | LADPD estimate 27.<br>Current estimate 21. | Western Part (18 units) – Under construction. Eastern part (4 units) Permission (but scheme being revised) |
| Land to rear of Almond Bank, Allithwaite          | 11   | No Permission  |
| Land at Hags Lane, Cartmel                        | 39   | Approved subject to S106 agreement being finalised   |
| Stables, Cartmel<br>Racecourse, Cartmel           | 15   | No Permission  |
| North of Allithwaite Road, Flookburgh             | 24   | No Permission  |
| East of Manorside, Flookburgh                     | 30   | No Permission  |
| Land East of Winder Lane, Flookburgh              | 17   | No Permission  |
| North Urswick Road, Ulverston                     | 48   | No Permission  |
| Stone Cross Mansion, Ulverston                    | 65   | Under Construction   |
| Croftlands East, Ulverston                        | 219  | No Permission  |
| Gascow Farm, Ulverston                            | 235  | Approved subject to S106 agreement being finalised   |
| Croftlands West – Nook Farm, Ulverston            | LADPD estimate 309.                        | Outline permission (330 units) for part of allocated site.   |
| West End Farm, Ulverston                          | 97   | No Permission  |
| West End Nursery, Ulverston                       | 86   | Approved subject to S106 agreement being finalised   |
| North of Watery Lane, Ulverston                   | 18   | Application pending for up to 30 dwellings (SL/2018/0311)  |
| South of Lund Farm, Ulverston                     | 101  | Permission   |
| Morecambe Road Scrapyrd, Ulverston                | 12   | No Permission  |
| South of Stockbridge Lane, Ulverston              | LADPD estimate 7. 6 completed.             | Largely complete (one plot remains undeveloped)  |
| Land East of Foxfield Road, Broughton-in-Furness  | 16   | No Permission  |
| Mid Town Farm, Great / Little Urswick             | 27   | No Permission  |
| Land at The Old Vicarage, Greenodd / Penny Bridge | 21   | No Permission  |

| Allocation Site   | No. dwellings (Gross)               | Status at end March 2018   |
|---|-------------------------------------|--|
| Four Lane Ends, Kirkby-in-Furness                       | 11                                  | No Permission  |
| Land adjacent Burlington CofE School, Kirkby-in-Furness | LADPD 41<br>Planning application 50 | Application pending  |
| Land off Cross-a-Moor, Swarthmoor                       | 161                                 | No Permission (previous application for 140 units disposed of. Awaiting Highways England improvements) |



## Employment Sites

- 4.3.3 Allocated Employment sites are for 'Business' land uses as defined in the Town and Country Planning (Use Classes) Order 1987 (as amended). See the definition in the Glossary. There are 15 sites allocated solely<sup>7</sup> for employment use in the Land Allocations DPD. There is also a site at Storth for local employment use, allocated in the 2006 Local Plan. This allocation will be superseded when the AONB DPD is adopted (envisaged to be February 2019). For the monitoring period 1 April 2017 – 31 March 2018, there have been no completions on allocated sites. The two allocated sites that have been completed prior to this latest monitoring period, are both in east Ulverston: a development for Trittech Ltd - 'Land at Canal Head, Ulverston' in 2013/2014 and a development for Bender UK Ltd in 2016/2017.
- 4.3.4 The table below sets out the position for employment allocated sites at the end of March 2018. The table includes the enabling allocation at Burneside, for Cropper's Ltd.

| Allocation Site  | Ha. (Gross unless otherwise stated) | Status at end March 2018  |
|--|-------------------------------------|---|
| 1. Land at Canal Head, Ulverston, Phase 1 (Development for Trittech Ltd) | 2.10                                | Completed (as at end March 2014)  |
| 2. Land East of Burton Road, Burton in Kendal                            | 6.52                                | No planning permission  |
| 3. Land at Lightburn Road, Ulverston                                     | 3.10                                | Under construction on 0.27 hectares of allocated site. Vehicle site access/ junction improvements and enabling internal allocation site road.<br><br>Under construction on 0.55 hectares of allocated site. Emergency services hub building development. Sui generis use.<br><br>Awaiting determination – SL/2017/1031<br>1.66 hectares of allocated site for employment units use classes B1/B2/B8, 2 retail foodstore units (use class A1), a veterinary practice unit and the creation of internal roads and car parking areas, hard and soft landscaping and boundary treatments. |

<sup>7</sup> Land Allocations not for mixed land use

| Allocation Site  | Ha. (Gross unless otherwise stated)        | Status at end March 2018  |
|--|--|---|
| 4. Land at Scroggs Wood, Kendal  | 11.00 (net developable area)               | No planning permission  |
| 5. Land South of K Shoes, Natland Rd., Kendal  | 1.00                                       | No planning permission  |
| 6. Land North Meadow-bank Business Park, Kendal  | 5.15                                       | No planning permission  |
| 7. Land at Shap Rd. Industrial Estate, Kendal  | 0.34                                       | No permission for business land use classes. Effectively, not currently available for business land use classes. Allocation site used for car parking as part of the Kentdale Jaguar Landrover motor dealership (sui generis use). Plus, SL/2015/1178 with permission on part of allocated site for two temporary buildings - part of dealership. |
| 8. Land adjacent to Mainline Business Park, Milnthorpe                                     | 8.07                                       | No planning permission  |
| 9. Land adjacent to Bridge End Business Park, Park Rd., Milnthorpe                         | 1.81                                       | No planning permission  |
| 10. <u>Enabling (own use)</u> allocation; Land adjacent to Cropper's Paper Mill, Burneside | 1.20                                       | No planning permission  |
| 11. Land North of Gatebeck Lane, Gatebeck  | 3.13                                       | Pending – awaiting determination of full planning application (on western part of allocation site, 1.5 hectares, SL/2018/0148).   |
| 12. Land at Milnthorpe Rd., Holme  | 2.58                                       | No planning permission  |
| 13. Land at Elmsfield Park, Holme  | 3.04                                       | No planning permission  |
| 14. Phase 1 Low Mill Tannery, Ulverston  | 0.72 allocated. Planning application 0.80. | Completed (as at 31 March 2017).  |

| Allocation Site  | Ha. (Gross unless otherwise stated) | Status at end March 2018 |
|--|-------------------------------------|--------------------------|
| 15. Land West of Foxfield Road, Broughton in Furness   | 0.47                                | No planning permission   |
| 16. Land at Storth for local employment, <u>(2006 Local Plan extant allocation)</u> . <sup>8</sup> | 1.20                                | No planning permission   |

- 4.3.5 On the Lightburn Road allocation site in west Ulverston, the 'Blue Light Hub' emergency services development for Cumbria County Council is still under construction. The main site access and junction improvements (traffic signals) have been put in. Also still under construction are enabling works. These works relate to the construction of a main internal site distributor road to serve both the hub development and other future site development.
- 4.3.6 On another part of the Lightburn Road allocation site, full planning permission (SL/2017/1031) is pending for 'the demolition of on-site structures, erection of employment units use classes B1/B2/B8, two retail foodstore units (use class A1) a veterinary practice unit and the creation of new internal roads and car parking areas, hard and soft landscaping and boundary treatments'. SL/2017/1031 covers both part of the allocated site as well as additional non-allocated land to the immediate west. Business – (non-retail and veterinary uses) covers 1.66 hectares and includes land outwith the allocation site.
- 4.3.7 In Kendal, 0.34 hectares is allocated for employment uses at Shap Road (next to Kentdale Jaguar Landrover). It is considered that this site is effectively not currently readily available for business land use classes. The allocation site is being used for car parking as part of the operational use of the Kentdale Jaguar Landrover motor dealership. Part of the allocated site also has permission (SL/2015/1178) for two temporary buildings, as part of the dealership operation.
- 4.3.8 Determination of planning permission (SL/2018/0148) is pending on the allocated employment site known as 'Land North of Gatebeck'. The full planning application relates to the western (1.5 hectares) part of the allocation site and proposes a two storey industrial unit.

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<sup>8</sup> Arnsdale and Silverdale AONB DPD Tracked Changes Version, Main Modifications, (October 2018) proposes de-allocating/superseding the existing 2006 Local Plan local employment land allocation in Storth. See the emerging DPD, Appendix 5, page 95, Saved and Extended Local Plan Policies – Policy E3 Land Allocated for Local Employment Purposes.

4.3.9 The Council is working (with relevant partners) to secure the implementation of key employment allocations. A development brief for the strategic employment site at Scroggs Wood, Kendal, was adopted in February 2015. Scroggs Wood and the Main Line site in Milnthorpe, are identified in the Cumbria Strategic Economic Plan<sup>9</sup> (2014 – 2024) (p.18) as sites to be brought forward. Development briefs have also been adopted for the following mixed use housing/employment land allocation sites:

- Land North of Kendal Road, Kirkby Lonsdale (April 2015);
- Land South of Allithwaite Road, Kents Bank (November 2016); and
- Green Dragon Farm, Burton-in-Kendal (August 2017).

4.3.10 As the above Table at Paragraph 4.3.7 shows, five years into the current Local Plan period, a significant amount of allocated employment sites are still to be delivered. As part of the review of the Local Plan, the Council will be reviewing land for employment uses (as part of the general call for new sites) as well as its existing Local Plan unimplemented or part unimplemented employment land allocations and the identified broad location for employment development at Ulverston.

4.3.11 Planning permission has been granted (Jan. 2015, SL/2013/1120) on appeal for a Sainsbury’s supermarket on the site of the Kendal Rugby Club on Shap Road. This site is not identified in the Local Plan Land Allocations DPD. Development of the supermarket has commenced. The new Rugby Club development at Millfield, off Shap Road, was granted planning consent in March 2015, (SLDC ref. SL/2015/0016) refers. The new Rugby Club development has been completed during the 2017/2018 monitoring year.

## Mixed Sites

4.3.12 There are five sites allocated for mixed residential and employment use. The housing development on part of the Berners Pool site in Grange over Sands is now completed. Progress is detailed in the table below. Data for both housing and employment sites relates to the position for the monitoring period, 1 April 2017 to 31 March 2018.

| +No. | Allocation Site   | Number of dwellings (indicative) and employment (hectares) | Status at end March 2018 |
|------|---|--|--------------------------|
| 1a   | Berners Pool, Grange over Sands ( <b>part</b> )                 | 43 dwellings and health centre                             | All Completed            |
| 1b   | Berners Pool, Grange over Sands (local employment Business use) | 0.30 ha  | No planning permission   |

<sup>9</sup> In the future to be replaced by the Cumbria Local Enterprise Partnership’s ‘Local Industrial Strategy’ (document only at consultation draft stage) Nov. 2018.

| +No. | Allocation Site  | Number of dwellings (indicative) and employment (hectares) | Status at end March 2018   |
|------|--|--|--|
| 2a   | North of Kendal Road, Kirkby Lonsdale                          | 78 dwellings   | Planning Permission (full)   |
| 2b   | North of Kendal Road, Kirkby Lonsdale (local employment)       | 1.00 ha  | Planning Permission (outline) for business (B1 use) and general industrial (B2 use) employment space |
| 3a   | Land South of Allithwaite Road, Kents Bank                     | 202 dwellings  | Pre-application stage  |
| 3b   | Land South of Allithwaite Road, Kents Bank (local employment). | 1.50 ha  | No planning permission   |
| 4a   | Land at Green Dragon Farm, Burton in Kendal                    | 86 dwellings   | No planning permission   |
| 4b   | Land at Green Dragon Farm, Burton in Kendal (local employment) | 0.75 ha  | No planning permission   |
| 5a   | Land at Guide's Lot, Grange over Sands                         | 16 dwellings   | No planning permission   |
| 5b   | Land at Guide's Lot, Grange (Local employment)                 | 0.57 ha  | No planning permission   |

## Broad locations and other uses

- 4.3.13 Three broad locations for future development are identified in the Land Allocations DPD. One of the broad locations is identified for employment use in east Ulverston, north east of Canal Head, and two broad locations identified for housing in Kendal; at Appleby Road and Burton Road.
- 4.3.14 In terms of allocations for other uses, a site is allocated for formal outdoor sports facilities in Burneside and two sites are allocated for community use; one in Levens and the other in-between Little and Great Urswick. A mixed use 'Regeneration Opportunity Area' is identified at Canal Head, Ulverston. Implementation has not yet begun (as at March 2018), for any of these sites.

## 4.4 Data

- 4.4.1 The table in this section presents the data for the District including contextual indicators and indicators to monitor the policies of the Core Strategy, Land Allocations document and remaining extant Local Plan policies. It also identifies indicators used to support the Sustainability Appraisal process. Targets are identified where applicable, although these do not exist for all indicators. Many indicators overlap and help us to monitor more than one set of policies.
- 4.4.2 In relation to the table's indicator targets, red shading in the progress column indicates a worsening position compared with the previous year's data, amber indicates a neutral position/no change and green shading, an improvement on the previous year.
- 4.4.3 There are a number of indicators previously used that can no longer be monitored due to unavailability of data and as such, these are now not included in this section.

## Key:

- CS** = Core Strategy
- LA** = Land Allocations
- OLP** = Old Local Plan
- CX** = Contextual
- SA** = Sustainability Indicator
- LPA** = Local Plan Area

### Table A - Economy

| What does it monitor? | Indicator (CCC indicator)  | Target  | Area covered by data | Data for 2017/18 unless otherwise indicated   | Comparison with previous years  | Comparison with other areas | Progress |
|-----------------------|--|---|----------------------|---|---|-----------------------------|----------|
| CS LA SA              | Total amount of additional employment floorspace by type (completed net) (sq. m)<br><br>Includes 'own use' sites (planning permissions). | Increase in the overall floorspace for all B uses | LPA                  | <b>2017/2018</b><br>B1 (a): 891.5<br>B1 (b): 0<br>B1(c): 184<br>B2: 0.0<br>B8: 682<br><br>Total:<br><b>1,757.5</b> floorspace gain<br><br>comprising 2,479.2 gain and 721.7 loss. | <b>2016/2017</b><br>B1 (a): -59.5 (net loss)<br>B1 (b): 72<br>B1(c): -336.5 (net loss)<br>B2: -160 (net loss)<br>B8: 0.0<br><br>Total:<br><b>-484.0</b> floorspace (loss)<br><br>comprising 72 gain and 556 loss. | Not relevant                | Green    |
| CS LA SA              | Total amount of B use class employment floorspace gain on Previously Developed Land  | Increase in the percentage of land developed      | LPA                  | <b>2017/18</b><br>100% (2,479.20 sq. m)   | <b>2016/2017</b><br>23% (547.50 sq. m)  | Not relevant                | Green    |

| What does it monitor? | Indicator (CCC indicator)   | Target  | Area covered by data | Data for 2017/18 unless otherwise indicated   | Comparison with previous years   | Comparison with other areas | Progress |
|-----------------------|---|---|----------------------|---|--|-----------------------------|----------|
|                       | (PDL) by type (sq. m), expressed as a percentage of all B use class completions.  | for B use classes on PDL.   |                      |   |  |                             |          |
| CS LA SA              | Amount of land developed for all B use class employment (hectares) e.g. land allocated for development; new land take-up.<br><br>Note – Includes 'own use' development completions.   | 4 hectares of employment land developed per annum 2010 – 2025, Core Strategy Policy.  | LPA                  | <b>2017/18</b><br>0.0   | <b>2016/2017</b><br>0.8  | Not relevant                | Red      |
| CS LA SA              | Total employment land available (for all B land use classes, both allocations and permissions) (hectares.)<br><br>Broken down into market sectors<br><br>Excludes sites (planning permissions and allocations) for 'own use', not readily available on the commercial market. | Core Strategy Policy CS7.1 – 'maintain a rolling provision of 5 years' worth of supply (land) for each market sector... around 20 ha. of land'. | LPA                  | <b>2017/2018</b><br>50.92<br><br>Comprising Strategic Market Sector: 11 ha. developable area at Scroggs Wood<br><br>Local Employment Market Sector: 31.12 ha.<br><br>Business Science Park Market Sector: 8.8 ha. | <b>2014/2015</b><br>54.34<br><br>Comprising Strategic Market Sector: 11 ha. developable area at Scroggs Wood<br><br>Local Employment Market Sector: 33.72 ha.<br><br>Business Science Park Sector 9.62 ha. | Not relevant                | Green    |
| CS LA OLP             | Loss of employment floorspace (use classes B1 (a), (b), (c), B2 and B8 by   | To reduce the overall total loss of   | LPA                  | <b>2017/2018</b><br>679   | <b>2016/2017</b><br>2,871  | Not relevant                | Green    |



| What does it monitor? | Indicator (CCC indicator)  | Target                                 | Area covered by data | Data for 2017/18 unless otherwise indicated                                     | Comparison with previous years   | Comparison with other areas                                       | Progress |
|-----------------------|--|--|----------------------|---|--|---|----------|
|                       | completions) to housing and other uses (sq. m)   | employment land to non-employment uses |                      |   |  |   |          |
| CS CX                 | Earnings by residence – median gross weekly full time pay (those who live in the District) | Increase                               | District             | <b>2017/18</b> £570.8   | <b>2016/17</b> £536.3<br><b>2015/16</b> £545.7<br><b>2014/15</b> £519.4  | <b>2017/18</b> NW £529.6<br><b>2016/17</b> NW £514.5              | Green    |
| CS CX                 | Earnings by workplace – median gross weekly full time pay (those who work in the District) | Increase                               | District             | <b>2017/18</b> £501.2   | <b>2016/17</b> £477.7<br><b>2015/16</b> £481.7<br><b>2014/15</b> £449.0  | <b>2017/18</b> NW £529.6<br><b>2016/17</b> NW £514.2              | Green    |
| CS LA CX SA           | Unemployment levels  | Decrease                               | District             | <b>2017/18</b><br>0.5% (claimant based) <sup>10</sup><br>2.0% (ONS model based) | <b>2016/17</b><br>0.7% (claimant based)<br>2.2% (ONS model based)<br><b>2015/16</b><br>0.6% (claimant based)<br>2.4% (ONS model based) | <b>2017/18</b> NW 2.9% (claimant based)<br>4.2% (ONS model based) | Green    |
| CS LA CX SA           | % working age - economically active  | 100%                                   | District             | <b>2017/18</b> 88.7%  | <b>2016/17</b> 85.8%<br><b>2015/16</b> 82.7%   | <b>2017/18</b> NW 76.8%   | Green    |

<sup>10</sup> There are two ways of measuring/reporting the local unemployment rate; Claimant based unemployed and the Office for National Statistics (ONS) Model – Based unemployed. The table gives figures for both. Both sets of figures show a fall in the District's unemployment rate between 2017 and 2018.

| What does it monitor? | Indicator (CCC indicator)   | Target  | Area covered by data | Data for 2017/18 unless otherwise indicated   | Comparison with previous years  | Comparison with other areas   | Progress |
|-----------------------|---|---|----------------------|---|---|---|----------|
| CS LA                 | % of people of working age in employment  | Increase  | District             | <b>2017/18</b> 86.1%  | <b>2016/17</b> 85.3%<br><b>2015/16</b> 80.1%  | <b>2017/18 NW</b> 73.5%   | Green    |
| CS LA CX              | Employees by sector <sup>11</sup> <ul style="list-style-type: none"> <li>• Primary Services (agriculture, forestry and mining/quarrying)</li> <li>• Energy and Water</li> <li>• Manufacturing</li> <li>• Construction</li> <li>• Services (sub-totals for services below)               <ul style="list-style-type: none"> <li>– Wholesale and retail trade, including motor trades</li> <li>– Transportation and storage</li> <li>– Accommodation and food services</li> <li>– Information and communication</li> <li>– Financial and other business services</li> <li>– Public admin, education and health</li> </ul> </li> </ul> | Improvement in the balance between sectors e.g. increased proportion in manufacturing, information & communication and financial and other business service sectors | District             | <b>2017/18</b><br>0.4%<br><br>1.0%<br>9.3%<br>4.2%<br>85.3%<br><br><i>17.7%</i><br><br><i>2.8%</i><br><br><i>22.2%</i><br><br><i>1.5%</i><br><br><i>13.2%</i><br><br><i>22.3%</i> | <b>2016/17</b><br>0.4%<br><br>1.0%<br>9.8%<br>4.8%<br>83.8%<br><br><i>18.7%</i><br><br><i>2.3%</i><br><br><i>19.3%</i><br><br><i>1.7%</i><br><br><i>12.0%</i><br><br><i>22.9%</i> | <b>2017/18 NW</b><br>0.5%<br><br>1.0%<br>16.3%<br>5.0%<br>77.9%<br><br><i>15.7%</i><br><br><i>5.0%</i><br><br><i>13.8%</i><br><br><i>1.3%</i><br><br><i>12.9%</i><br><br><i>25.4%</i> | Amber    |

<sup>11</sup> excluding farm-based agriculture, self-employed, government-supported trainees and HM Forces

| What does it monitor? | Indicator (CCC indicator)  | Target                                       | Area covered by data | Data for 2017/18 unless otherwise indicated  | Comparison with previous years  | Comparison with other areas                        | Progress |
|-----------------------|--|--|----------------------|--|---|--|----------|
|                       | – <i>Other Services</i>  |  |                      | 5.6%   | 6.9%  | 3.8%   |          |
| CX CS                 | Qualifications <ul style="list-style-type: none"> <li>% working age population with NVQ4 equivalent or higher</li> </ul>   | Increase                                     | District             | <b>2017</b> 43.3%%   | <b>2016</b> 39.5%<br><b>2015</b> 40.0%<br><b>2014</b> 34.6%   | <b>2017</b> NW 34.5%<br><b>2016</b> NW 34.0%       | Green    |
| CX CS                 | Qualifications <ul style="list-style-type: none"> <li>% working age population with no qualifications</li> </ul>   | Decrease                                     | District             | <b>2017</b> 4.9%   | <b>2016</b> 6.2%<br><b>2015</b> 5.3%  | <b>2017</b> NW 9.0%                                | Green    |
| CS LA CX OLP          | % of empty shops   | Decrease                                     | District             | <b>2017/18</b> 7.59%   | <b>2016/17</b> 8.25%<br><b>2015/16</b> 8.24%<br><b>2014</b> 7.3%  | <b>2017/18</b> NW 15.0%<br><b>2016/17</b> NW 15.1% | Green    |
| CS                    | Total completed floorspace (square metres) (net) for town centre uses<br>i) within town centre areas and<br>ii) in the local authority area outwith town centres<br><i>Main Town centre uses are defined in the Glossary</i> | Significant proportion should be town centre | LPA                  | <b>2017/2018</b><br>Within town centre areas:<br><u>Total completed floorspace gain of 152</u><br>comprising:<br>A1 loss 10<br>A2 loss 959<br>A3 gain 417<br>A4 loss 175<br>A5 gain 0<br>B1a gain 729<br>C1 gain 0 | <b>2016/2017</b><br>Within town centre areas:<br><u>Total completed floorspace loss of 950</u><br>comprising:<br>A1 loss 675.8<br>A2 gain 80<br>A3 gain 125.8<br>A4 gain 50<br>A5 0<br>B1a loss 377<br>C1 0 | Not relevant                                       | Red      |

| What does it monitor? | Indicator (CCC indicator)   | Target           | Area covered by data | Data for 2017/18 unless otherwise indicated   | Comparison with previous years   | Comparison with other areas | Progress |
|-----------------------|---|------------------|----------------------|---|--|-----------------------------|----------|
|                       |   |                  |                      | D1 loss 63<br>D2 gain 161<br>Sui generis gain 53<br><br>Town Centre Use Class completions within LPA but outside defined Local Plan Town Centre boundaries: <u>8,408</u> , comprising:<br>A1 gain 284<br>A2 gain 150<br>A3 gain 239<br>A4 gain 128<br>A5 loss 79<br>B1a gain 162<br>C1 gain 3,241<br>D1 gain 1,181<br>D2 gain 3,103<br>Sui generis gain 0 | D1 loss 153<br>D2 0<br>Sui generis gain 0<br><br>Town Centre Use Class completions within LPA but outside defined LP Town Centre boundaries: <u>Loss of 751</u> , comprising:<br>A1 loss 1,736.1<br>A2 0<br>A3 gain 80<br>A4 0<br>A5 0<br>B1a gain 317.5<br>C1 0<br>D1 0<br>D2 gain 2,090<br>Sui generis 0 |                             |          |
| CS LA                 | Number of jobs (total employee jobs - count). Source ONS (Business and Employment Survey), excludes farm based agriculture, self-employed, government supported trainees and HM Forces data | Increase of 1000 | District             | <b>2017/18</b> 49,000   | <b>2016/17</b> 52,000<br><b>2015/16</b> 50,000<br><b>2014/15</b> 48,400  | <b>2017/18</b> NW 3,280,000 | Red      |

| What does it monitor? | Indicator (CCC indicator)   | Target  | Area covered by data | Data for 2017/18 unless otherwise indicated   | Comparison with previous years   | Comparison with other areas                              | Progress |
|-----------------------|---|---|----------------------|---|--|--|----------|
| CX SA                 | Gross Value Added (per head of population)  | Increase  | District             | <b>2016</b> £25,317   | <b>2015</b> £24,277  | <b>2016</b> NW £23,804                                   | Green    |
| CX CS OLP             | Car Ownership (households)<br>% 2 or more cars<br>% 1 car<br>% 0 car  | Reducing number of cars per household   | District             | <b>2011</b><br>38.9%<br>45.8%<br>15.3%  | <b>2001</b><br>34.3%<br>48.6%<br>17.14%  | <b>NW 2011</b><br>29.5%<br>42.5%<br>28%                  | Red      |
| CX CS OLP             | % Population aged 16 to 74 who travel to work by<br>• Work at home<br>• Foot or cycle<br>• Car, van, m/cycle or taxi (inc. as passenger)<br>• Public Transport<br>• Other/not in employment | Increasing % using foot, cycle or public transport and decreasing % using private transport | District             | <b>2011</b><br>6.5%<br>14.1%<br>44.5%<br>2.3%<br>32.4%  | <b>2001</b><br>9.8%<br>12.5%<br>40.4%<br>1.3%<br>35.2%   | <b>NW 2011</b><br>2.7%<br>8.1%<br>43.7%<br>7.3%<br>37.7% | Amber    |
| CS LA SA              | % Households within 30 minutes of key services by public transport  | 95%   | LPA                  | *County Council monitoring of this indicator has ceased – we are investigating practicalities of continuing to monitor this in liaison with other authorities | <b>2012</b><br>GP (96%), Primary School (95%), Retail Centre (95%) and Employment (95%) Hospitals (68%) or Secondary Schools (93%) | See note*  | N/A      |

Sources: NOMIS, Census 2011, Office of National Statistics, The Local Data Company, Cumbria County Council ELA and Floorspace Monitoring. SLDC Planning Applications Web Pages and reports of completed development from Building Control.

Table B: Housing

| What does it monitor? | Indicator (CCC indicator)  | Target           | Area covered by data | Data for 2017/18 unless otherwise indicated                              | Comparison with previous years   | Comparison with other areas                           | Progress |
|-----------------------|--|------------------|----------------------|--|--|---|----------|
| CX                    | Population Total (ONS) <ul style="list-style-type: none"> <li>• Kendal</li> <li>• Ulverston</li> <li>• Grange-over-Sands</li> <li>• Kirkby Lonsdale (inc. Barbon &amp; Casterton)</li> <li>• Milnthorpe</li> </ul> | No target        | District             | <b>2017/18</b><br>104,321<br>33,662<br>13,296<br>4,155<br>2,380<br>2,220 | <b>2016/17</b><br>103,274<br>33,160<br>13,204<br>4,072<br>2,416<br>2,231 | <b>2017/18</b><br>NW 7,258,627<br><br>Cumbria 498,375 | N/A      |
| CX CS                 | Population estimate (ONS) <ul style="list-style-type: none"> <li>• 0-14</li> <li>• Older people (over 65)</li> </ul>   | Improved balance | District             | <b>2017/18</b><br>13.8%<br><br>27.7%                                     | <b>2016/17</b><br>13.8%<br><br>27.7%                                     | <b>2017/18</b> Cumbria<br>15.5%<br><br>23.8%          | Amber    |
| CX                    | Ethnicity <ul style="list-style-type: none"> <li>• White</li> <li>• Black or minority ethnic group</li> </ul>  | No target        | District             | <b>2011</b><br>95.6%<br>4.4%   | <b>2001</b><br>99%<br>2.45%  | <b>E&amp;W 2011</b><br>80.5%<br>19.5%                 | N/A      |
| CX CS LA              | Number of households   | No target        | District             | <b>2011</b> 46,552   | <b>2001</b> 44,129   | Not relevant  | N/A      |
| CX CS LA              | Total housing stock  | No target        | District             | <b>2017/18</b> 55,140  | <b>2016/17</b> 54,830<br><b>2015/16</b> 54,510                           | <b>2017/18</b> Cumbria<br>247,420                     | N/A      |
| CX                    | Average Household Size   | No target        | District             | <b>2011</b><br>2.2   | <b>2001</b><br>2.24  | <b>2011</b> NW & UK<br>2.3                            | N/A      |

| What does it monitor? | Indicator (CCC indicator)   | Target  | Area covered by data | Data for 2017/18 unless otherwise indicated   | Comparison with previous years                         | Comparison with other areas                              | Progress |
|-----------------------|---|---|----------------------|---|--|--|----------|
| CX CS LA              | Housing Tenure (%) <sup>12</sup> <ul style="list-style-type: none"> <li>Private housing *</li> <li>Local Authority</li> <li>Registered social landlord</li> <li>Other public sector</li> </ul> <p>* comprises owner occupied, private rented and shared ownership dwellings</p> | No target   | District             | <b>2017/18</b><br>91.46<br>0.0<br>8.51<br>0.04  | <b>2016/17</b><br>91.46<br>0.0<br>8.52<br>0.04         | <b>2017/18</b> Cumbria<br>86.57<br>1.06<br>12.33<br>0.04 | N/A      |
| CX CS LA              | % Dwellings unoccupied and used as a second home (% of total housing stock)   | Reduction   | District             | <b>2017/18</b> 6.98% (NB. with effect from 1/4/13 SLDC no longer awards a council tax discount for second homes so there is no incentive for owners to declare them as such.) | <b>2016/17</b> 7.36%<br><b>2015/16</b> 7.21%           | TBA  | Green    |
| CS LA                 | Number of net additional dwellings<br>(For housing trajectory see Appendix A, and for past  | 290 dwellings per year (OAN as calculated in 2017 Strategic Housing | LPA                  | <b>2017/18</b><br>291<br>190 PSCs<br>40 KSCs<br>30 LSCs   | <b>2016/17</b><br>245<br>170 PSCs<br>24 KSCs<br>9 LSCs | Not relevant   | Green    |

<sup>12</sup> Originally, this indicator was based on 2011 census figures, amended following stock transfer to SL Housing in 2012. However, in 2016 Government figures were simplified, combining owner occupied, private rented and shared ownership dwellings together under the term 'private housing stock'.

| What does it monitor? | Indicator (CCC indicator)  | Target   | Area covered by data | Data for 2017/18 unless otherwise indicated   | Comparison with previous years   | Comparison with other areas | Progress |
|-----------------------|--|--|----------------------|---|--|-----------------------------|----------|
|                       | delivery record see Appendix B)  | Market Assessment)   |                      | 31 Rural  | 42 Rural   |                             |          |
| CS LA SA              | Gross affordable housing completions <ul style="list-style-type: none"> <li>• as a number</li> <li>• as a % of total (gross) housing completions</li> <li>• and as a % of housing completions on 'large' sites (i.e. of 9 or more dwellings in PSCs/KSCs or of 3 or more elsewhere)</li> </ul> | 35% on schemes of 9 or more dwellings in PSCs / KSCs and of 3 or more elsewhere<br><br>1,000 affordable homes for rent by 2025 | LPA                  | <b>2017/18</b> <ul style="list-style-type: none"> <li>• 80</li> <li>• 26%</li> <li>• 39%</li> </ul> | <b>2016/17</b> <ul style="list-style-type: none"> <li>• 50</li> <li>• 19%</li> <li>• 31%</li> </ul> <b>2015/16</b> <ul style="list-style-type: none"> <li>• 119</li> <li>• 31%</li> <li>• 41%</li> </ul> | Not relevant                | Green    |
| CS LA SA              | New and converted dwellings on previously developed land   | At least 28%   | LPA                  | <b>2017/18</b><br>116 (40%): 95 PSCs;<br>4 KSCs; 4 LSCs;<br>13 Rural                                | <b>2016/17</b><br>120 (49%): 90 PSCs;<br>8 KSCs; 5 LSCs;<br>0 Rural  | TBA                         | Green    |
| CS LA SA              | Average density per hectare for all housing developments   | Average of at least 30 dwellings per hectare (dph) on sites of 10+ dwellings   | LPA                  | <b>2017/18</b><br>58.5 dph comprising:<br>10 (43%) on sites <30 dph;<br>13 (57%) on sites >30 dph   | <b>2016/17</b><br>33.9 dph comprising:<br>15 (42%) on sites <30 dph;<br>20 (58%) on sites >30 dph  | Not relevant                | Green    |



| What does it monitor? | Indicator (CCC indicator)   | Target  | Area covered by data | Data for 2017/18 unless otherwise indicated | Comparison with previous years                              | Comparison with other areas             | Progress |
|-----------------------|---|---|----------------------|---|---|---|----------|
| CX CS LA              | Average (median) House Price  | Improved ratio to incomes – see also below                | District             | <b>2017/18</b><br>£225,000                  | <b>2016/17</b> £218,000<br><b>2015/16</b> £207,750          | <b>2017/18</b><br>Cumbria<br>£157,000   | Red      |
| CX CS LA SA           | House Price: Income Ratio (median annual gross income by workplace, and by residence)                                 | Decrease  | District             | <b>2017/18</b><br><br>9.67<br>8.03          | <b>2016</b><br><br>9.10<br>7.36                             | <b>2017</b> Cumbria<br><br>5.66<br>5.51 | Red      |
| CS                    | Net additional Gypsy & Traveller pitches  | To match identified needs                                 | LPA                  | <b>2017/18</b> 0                            | <b>2016/17</b> 0<br><b>2015/16</b> 0                        | N/A                                     | N/A      |
| CS LA                 | Extra Care Housing Delivery   | To match identified needs                                 | LPA                  | <b>2017/18</b> 0                            | <b>2016/17</b> 0<br><b>2015/16</b> 60 assisted living flats | N/A                                     | N/A      |
| CS                    | Number of entries on self-build register.<br><br>Number of entries added to self-build register in monitoring period. | No target   |                      | <b>At 31/03/2018</b><br>35<br><br>7         | <b>At 31/03/2017</b><br>28<br><br>18                        | Not relevant                            | N/A      |
| CS                    | Number of plots permitted for self-build/custom build housing   | Sufficient permission for self-build plots to meet demand | LPA                  | <b>2017/18</b> 30                           | <b>2016/17</b> 22<br><b>2015/16</b> 21                      | Not relevant                            | Green    |

| What does it monitor? | Indicator (CCC indicator)                      | Target | Area covered by data | Data for 2017/18 unless otherwise indicated | Comparison with previous years       | Comparison with other areas | Progress |
|-----------------------|--|--------|----------------------|---|--------------------------------------|-----------------------------|----------|
| CS                    | Number of self-build/custom build completions. |        | LPA                  | <b>2017/18</b> 2                            | <b>2016/17</b> 1<br><b>2015/16</b> 0 | Not relevant                | N/A      |

Sources: NOMIS, Census 2011, Office of National Statistics, Cumbria Intelligence Observatory, SLDC

Table C: Environment

| What does it monitor? | Indicator (CCC indicator)  | Target                   | Area covered by data | Data for 2017/18 unless otherwise indicated | Comparison with previous years   | Comparison with other areas | Progress |
|-----------------------|--|--------------------------|----------------------|---|--|-----------------------------|----------|
| CX SA OLP             | Area designated as SSSI (ha)   | No change or an increase | LPA                  | <b>2017/18</b><br>22,370                    | <b>2016/17</b><br>21,551.67 <sup>13</sup><br><br><b>2015/16</b><br>22,708.11<br><br><b>2014/15</b> 22,708.11 | Not relevant                | Green    |
| CX SA OLP             | % SSSI in recovering or favourable condition                               | Increase                 | LPA                  | <b>2017</b> 98.5%                           | <b>2016</b> 98.5%<br><b>2015</b> 99.0%<br><b>2014</b> 94.4%  | Not relevant                | Amber    |
| CX CS SA              | River Quality<br>% at good ecological status or potential                  | Increase                 | District             | <b>2016</b> 61%                             | <b>2015</b> 61%<br><b>2013</b> 50%   | Not relevant                | Amber    |
| CX CS SA OLP          | % Household Waste Recycled or Composted                                    | Increase                 | District             | <b>2017/18</b><br>44.4%                     | <b>2016/17</b> 42.4%<br><b>2015/16</b> 41.90%  | TBA                         | Green    |
| CX CS SA OLP          | Volume of Household waste collected per person per year (kg per household) | Decrease                 | District             | <b>2017/18</b><br>468                       | <b>2016/17</b> 511<br><b>2015/16</b> 502   | TBA                         | Green    |

<sup>13</sup> There have been no changes to the District's SSSIs, so this lower figure is probably due to extensions to the Lake District and Yorkshire Dales National Parks causing a reduction in the Local Planning Authority's area and lack of precision in the new boundaries.

| What does it monitor? | Indicator (CCC indicator)  | Target   | Area covered by data | Data for 2017/18 unless otherwise indicated  | Comparison with previous years   | Comparison with other areas | Progress |
|-----------------------|--|----------|----------------------|--|--|-----------------------------|----------|
| CX CS SA OLP          | Renewable Energy given planning permission (MW)  | Increase | LPA                  | <b>2017/18</b> 0.004MW   | <b>2016/17</b> 0.272MW<br><b>2015/16</b> 6.660MW   | Not relevant                | Red      |
| SA CS LA OLP          | Number of planning permissions granted contrary to Environment Agency advice on flooding and water quality grounds | Zero     | LPA                  | <b>2017/18</b> 0 (for both flood risk and water quality)   | <b>2016/17</b> 0 (for both flood risk and water quality)<br><b>2015/16</b> 0<br><b>2014/15</b> 1 (flood risk - SL/2014/0679) | Not relevant                | Green    |
| SA CS OLP             | Heritage Assets at Risk (Historic England Register)  | Decrease | LPA                  | <b>2018</b><br>Listed Buildings at Risk: 2<br>Scheduled Monuments at Risk: 13<br>Conservation Areas at Risk: 1 (Burton-in-Kendal)<br>Total: 16 | <b>2017</b><br>Listed Buildings at Risk: 2<br>Scheduled Monuments at Risk: 16<br>Conservation Areas at Risk: 0<br>Total: 18  | N/A                         | Amber    |
| CS LA SA              | % air quality monitoring sites recording NO <sub>2</sub> above 40 ug/m <sup>3</sup>                                | Zero     | LPA                  | <b>2016/17</b><br>3% (1 site)  | <b>2016/17</b> 3% (1 site)<br><b>2015/16</b> 3% (1 site)   | Not relevant                | Amber    |

Sources: Natural England, Environment Agency, Historic England, SLDC monitoring.

Table D: Health and Wellbeing

| What does it monitor? | Indicator (CCC indicator)  | Target                                      | Area covered by data | Data for 2017/18 unless otherwise indicated | Comparison with previous years | Comparison with other areas  | Progress |
|-----------------------|--|---|----------------------|---|--------------------------------|--|----------|
| CX SA                 | Life expectancy <ul style="list-style-type: none"> <li>• Male</li> <li>• Female</li> </ul>   | Favourable compared to wider local averages | District             | <b>2015-17</b><br>82.2<br>85.0              | <b>2014-16</b><br>81.5<br>84.6 | <b>2015-17</b><br><b>Eng</b><br>79.6<br>83.1<br><b>Cumbria</b><br>79.4<br>82.8 | Green    |
| CX                    | Index of Multiple Deprivation (Rank of Av. Score)  | Increase (towards 326)                      | District             | <b>2015</b><br>258                          | <b>2010</b><br>231             | Highest in Cumbria   | Green    |
| CX SA                 | Annual crime rate per 1000 population  | Decrease                                    | District             | <b>2017/18</b> Aug17-Jul-18<br>44.9         | <b>2016/17</b><br>52.5         | <b>2017/18</b><br>Cumbria 67.2;<br>Eden 40.4;<br>Barrow 82.1                   | Green    |
| SA                    | % people whose day-to-day activities are limited by a long term health problem or disability | Decrease                                    | District             | <b>2011</b> 18.8                            | <b>2001</b> 18.5               | <b>2011</b> Cumbria<br>20.3<br>NW 20.2   | Red      |

Sources: ONS, Cumbria Intelligence Observatory, Census

## 4.5 Data Assessment

### Economy

#### 4.5.1 **Earnings, people of working age in employment, empty shops and unemployment rate: Positive messages**

- gross weekly earnings (median value) by workplace – those that work in the District, have increased (from £477.7 in 2017 to £501.2 in 2018);
- gross weekly earnings by residence (median value) – those that live in the District, are higher, increasing from £536.3 in 2017 to £570.8 for 2018;
- there has been an increase in the percentage of people of working age in employment in the District (from 85.5% in 2016/17 to 88.7% in 2017/2018);
- the number of empty shops in the District in 2017/2018 (7.59%) decreased by 0.66% on the comparable figure for 2016/2017 (8.25%); and
- the unemployment rate for the District also fell in 2017/18 by 0.2% (2017/2018 claimant based count of 0.5%).

#### 4.5.2 **Employees by job sector:**

Looking at employment within the District by job sector, key points for 2017/2018 are:

- there have been no significant changes in the balance between various employment sectors, with the vast majority (85.3%) of those in employment working in the service industry, an increase of 1.5% on the previous year.
- employment in manufacturing decreased; from 9.8% in 2016/2017 down to 9.3% in 2017/2018, and the percentage of District employees employed in the construction sector also decreased, from 4.8% in 2016/2017 down to 4.2% in 2017/2018.

#### 4.5.3 **Number of jobs:**

4.5.4 From 2016 to 2017 there was a reduction in the total number of employee jobs in the District from 52,000 in 2016 down to 49,000 in 2017, a decrease of 3,000 employee jobs. This decrease in the total number of employee jobs, breaks the upward trend which started in 2013.

4.5.5 There still remains a need for an increased number of jobs, but it will also be key to ensure that these are more highly skilled and paid jobs and also that the local skills base matches these to enable local people, especially young people, to take up these jobs. This is a key issue locally and also in the Cumbria wide economy.

#### 4.5.6 **Skills and training: Positive messages:**

- 43.3% – an increase of 3.8% on the previous year for the percentage of working population with NVQ4 equivalent or higher qualifications; and

- 4.9% – a decrease of 1.3% on the previous year for the percentage of working age population with no qualifications.
- 4.5.7 The Cumbria Local Economic Partnership (LEP) has published a ‘Skills Investment Plan’ in collaboration with employers and others, which seeks to: increase apprenticeships within the County; increase the number of working age people with HND qualifications; and increase the number of people in employment and workforce development support and targeted training for sectors with skills gaps.
- 4.5.8 The review of the Local Plan will consider issues such as education and skills in the context of the local economy and the updated strategic policy approach.
- 4.5.9 **Tourism and the local economy:**
- 4.5.10 The District economy is highly dependent on tourism and its value to the local economy continues to grow. The data below is taken from STEAM<sup>14</sup>:
- 4.5.11 Positive messages:
- in 2017 the economic impact of the industry on South Lakeland was £1.24 billion, an increase of 3.6% on 2016;
  - 18.35 million visitors came to the District in 2017, an increase of 1.8%;
  - tourism provides the District with 15,932 full time equivalent jobs, up 2.1% on 2016; and
  - medium term trends – for the District – taken overall, between 2009 and 2017, tourism revenue has increased by 37%, with increases in visitor numbers of 14 – 16%.
- 4.5.12 The significance to the local economy and the sectors continued growth has implications for land use planning policy and the review of Local Plan planning policy relating to tourism; the strategy for tourism/ tourism related development (visitor attractions and accommodation) and its management.
- 4.5.13 **Retail and other town centre land uses:**
- 4.5.14 Local Plan policy relating to town centre uses (Local Plan – Land Allocations Policy LA1.2) seeks to ensure the vitality, viability and sustainability of town centres, by advising that town centres will be the preferred location for leisure, entertainment, food and drink, arts, tourism and office uses.
- 4.5.15 Monitoring of the proportion of town centre land use class completions (net) within the defined town centre boundaries and elsewhere, has been undertaken since 2014/2015. Before that it was monitored up to 2006/2007.

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<sup>14</sup> STEAM (Scarborough Tourism Economic Activity Monitor) a research model used by Cumbria Tourism to estimate the volume and value of tourism in South Lakeland. STEAM (South Lakeland) report summary for 2017.

- 4.5.16 Nationally the nature of the high street is changing. There is a general trend for an increase in service types uses; for example, food and drink, hair & beauty and leisure uses. The review of the Local Plan, informed by evidence, will identify issues facing local retail centres and appropriate land use planning policy approaches. The following paragraphs look in more detail at change in town centres within South Lakeland's local planning authority area (LPA), over the past two monitoring years.
- 4.5.17 For the monitoring period 2017/2018 the total amount of completed net floorspace for town centre uses<sup>15</sup> within town centre areas<sup>16</sup> within the LPA, was a gain of 152 square metres. Most of this floorspace gain was in the use classes A3 (417 square metres) and B1a (offices) (729 square metres). There was a small reduction of retail floorspace in town centres.
- 4.5.18 For the 2017/2018 monitoring period, outside defined Local Plan town centre boundaries, the total completed net gain of town centre uses floorspace was 8,408 square metres. This net floorspace total was comprised of a variety of land use completions including: retail, office, leisure and assembly uses and 3,241 square metres of hotel floorspace. This is a substantial amount of town centre uses developed outwith town centres compared with previous years.
- 4.5.19 Monitoring this indicator in future AMRs will allow progress (completions) to be monitored to see if trends are emerging concerning town centre uses: in particular, the change of use from B1 (a) office use to dwellings; and from A1 – retail use to A3 – cafes and restaurants, A4 – drinking establishments and D2 – leisure uses.
- 4.5.20 **Employment land and floorspace:** For the monitoring year 2017/2018, there has been an increase (a positive local economic indicator) in the total amount of net additional employment (land use classes B1 (a), (b), (c), B2 and B8) floorspace completed in the LPA. The figure for 2017/2018 is a net gain of 1,757.5 square metres of completed floorspace. The comparable figure for the previous year, 2016/2017, was a net loss of 484 square metres.
- 4.5.21 Another positive is the increase in the amount of employment floorspace (gain) on previously developed land (brownfield sites) in the LPA. In the monitoring year 2016/2017, 23% (547.5 square metres) of all 'B use land classes' were completed on previously developed land. In 2017/2018 the percentage of employment floorspace completions increased to 100% (2,479.20 square metres).
- 4.5.22 In the 2017/2018 monitoring period, there was no new land take up for any employment uses in the LPA, compared with 0.80 hectares in 2016/2017 year.
- 4.5.23 The gross loss of employment floorspace (completed development) to other non-employment uses, such as to housing, in the LPA has reduced over the monitoring periods 2016/2017 to 2017/2018. The figure for 2017/2018 was 679 square metres, of

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<sup>15</sup> The terms 'main town centre uses' and 'town centre' are defined in the glossary

<sup>16</sup> Town centre areas – areas within the defined boundaries of Kendal, Ulverston, Kirkby Lonsdale, Milnthorpe and Grange-over-Sands. South Lakeland Local Plan – Land Allocations Development Plan Document, 2013.



which 365 square metres were lost to housing, compared with 2016/2017 when there was a loss of 2,871 square metres of employment floorspace, of which 2,375 square metres were lost to housing. The loss of employment floorspace to housing is even smaller when looking at net figures: 304 square metres of employment floorspace were gained from housing during 2017/18, making the net loss just 61 square metres.

- 4.5.24 Employment land available (B use class) in the LPA stands at 50.92 hectares, comprising 11 hectares for strategic employment use, 31.12 hectares of local employment land and 8.8 hectares of business/science park land.

## Housing

- 4.5.25 There have been 291 net additional dwellings built in the monitoring period. The Council commissioned a new Strategic Housing Market Assessment in 2017 that has calculated an objectively assessed need (OAN) for 290 dwellings per year over the period 2016-2036. The completions in the 2017/18 monitoring year therefore exceed the Council's local assessment of housing need. 26% of the total completions were affordable homes, and 39% of completions on large sites (over 9 units in principal/key service centres and over 3 elsewhere) were affordable, 40% were built on brownfield land and 57% of sites (over 10 units) were built above 30 dwellings per hectare. The Council is on target to deliver 1000 new affordable homes for rent between 2014 and 2025, which is a key target in the Council Plan.
- 4.5.26 The number of households grew between the 2001 and 2011 censuses and the average household size reduced slightly. Greater proportions of households are renting their home. There has been a reduction in the proportion of dwellings that are unoccupied or being used as a second home in this monitoring period, falling from 7.36% in 2017 to 6.98% in 2018. The ratio of median house prices to household incomes has increased from 9.10 in 2017 to 9.67 in 2018 and remains significantly above the Cumbrian average of 5.66.
- 4.5.27 Current issues that need to be taken account of in planning for housing include the district's ageing population and the need for more suitable homes for older people, an increasing number of smaller households, continuing affordability pressures, and the issue of second homes/ holiday homes in some areas of the district.
- 4.5.28 Following legislative and policy changes at a national level the Council now has duties to promote self-build and custom build housing and to support the provision of Starter Homes. [The Housing and Planning Act 2016](#) introduced a duty on local authorities to "give suitable development permission in respect of enough serviced plots of land to meet the demand for self-build and custom housebuilding in the authority's area arising in each base period", and Councils are therefore now required to monitor self-build interest and activity. Because self-build homes are exempt from paying the Community Infrastructure Levy (CIL), the Council uses its CIL software to monitor self-build activity. As CIL only came into effect on 1<sup>st</sup> June 2015 the Council's self-build monitoring has commenced from that date. In the period 1<sup>st</sup> April 2017-31<sup>st</sup> March 2018 there were 30

self-build units permitted that were granted CIL exemptions. There were 7 entries added to the self-build register in the period, with the total number at 31<sup>st</sup> March 2018 being 35.

## Environment

- 4.5.29 It is important that planning policies guide development in such ways that it does not harm the ability of the environment to provide services such as fresh, clean water and air, and where possible, contributes to the improvement of our natural and built environment.
- 4.5.30 No planning applications were granted contrary to the advice of the Environment Agency on flood risk or water quality grounds during the monitoring period. The Environment Agency is currently designing a flood defence scheme for the River Kent, and recently completed a £9.5 million scheme at Town Beck in Ulverston. Flood risk and climate change remain a major challenge for the area.
- 4.5.31 The percentage of waste recycled or composted has increased since last year, and the volume of household waste collected per household has decreased. Whilst planning policy has arguably only limited scope to impact on waste generation and recycling/composting rates, the design and layout of homes and influencing lifestyles can contribute to improvements.
- 4.5.32 The number of air quality monitoring sites breaching the air quality standards has remained low and static at 1 site (Lowther St, Kendal), and it is expected that the target will be met in 2019. There remains one air quality management area (AGMA) in the district, in Kendal town centre.
- 4.5.33 22,448 hectares of the South Lakeland planning authority area are designated as a Site of Special Scientific Interest (SSSI) and almost all of these areas are in favourable or recovering condition.
- 4.5.34 There has been a marked reduction in the amount of renewable energy (MW) permitted in recent years, partly due to changes in national government policy to restrict onshore wind energy.
- 4.5.35 In 2017 there were 18 designated heritage assets in South Lakeland planning area on Historic England's national risk register, comprising 2 listed buildings and 16 scheduled monuments. In 2018 there was a reduction to 16 heritage assets at risk. Four scheduled monuments have been taken off the 'at risk' register, and 1 scheduled monument has been added. In 2018 Burton-in-Kendal Conservation Area was designated 'at risk' and a Partnership in Conservation Areas (PSiCA) project has been commenced to secure a three year vision and investment plan that will deliver enhancements and restoration in the Conservation Area.
- 4.5.36 There is a need to make progress on preparing management plans for our conservation areas as well as to consider how planning policies can better support buildings at risk in order to help ensure that the District's high quality built and natural environment is maintained and enhanced.

- 4.5.37 It would be beneficial to consider additional indicators to monitor environmental impacts of new development. This will be addressed alongside the development of new indicators to monitor the Development Management Policies document, which will include policies on aspects such as design that could be monitored qualitatively.

## Transport, services and facilities

- 4.5.38 Car ownership remains higher than figures for the North West. A fluctuating number of people are working from home and the number travelling to work on foot or by bicycle increased since the 2001 census as shown in the 2011 census figures, and is about 8% higher than the NW average; however, there is also a marked increase in the proportion of people using private transport to get to work but a decrease in those using public transport. The vast majority of new homes built in the last year were built in Principal or Key Services centres where most services and facilities are located.
- 4.5.39 There is a need to find ways of enabling and encouraging more people to travel by sustainable and active means of transport through good design and policy as well as wider Council initiatives. There is an over-reliance on Census data for monitoring this topic area, which means updates are only available every 10 years. Similarly, key data on the percentage of households within set travel times or distances of key services and facilities is no longer available. New ways of monitoring this area would be beneficial.

## Health and wellbeing

- 4.5.40 Life expectancy remains higher than the national and Cumbrian figures, although local figures have been affected in line with the national picture during 2015, which saw over 28,000 more people dying than in 2014, the biggest year on year rise since 1967/68. This was enough to slightly reduce national life expectancies and was thought to be at least in part due to a flu vaccine that proved less effective than usual coupled with increasing prevalence of dementia and related deaths. There have been no updates at local authority level since 2015.
- 4.5.41 The District has moved up the table 27 places in terms of the Index of Multiple Deprivation (with the most positive situation being 326 and the most negative being 1). There are no updates since 2015. Crime rates remain low compared to the Cumbrian averages and there has been a fall in levels in South Lakeland since 2016/17.
- 4.5.42 There has been a slight increase in the number of people with a limiting illness or disability between the 2001 and 2011 Censuses. It will be important to ensure that new development, through aspects such as design and layout, reinforces and enhances the area's high level of safety and good quality of life and that negative changes do not become trends.
- 4.5.43 There are several areas that it might be beneficial to monitor to help build a broader picture of health and wellbeing issues, such as green infrastructure provision but there are currently no mechanisms in place to monitor these.

## 5. Monitoring implementation of the Infrastructure Delivery Plan and Community Infrastructure Levy

### 5.1 Monitoring Infrastructure Delivery

- 5.1.1 In order to measure progress of the effective delivery of the Land Allocations DPD, it is essential that the Council has a mechanism in place to monitor and review the delivery of the infrastructure required to enable the DPD's implementation.
- 5.1.2 The South Lakeland Infrastructure Delivery Plan (IDP) was updated in August 2017 and approved by SLDC's Cabinet in September together with agreeing principles for assessing potential strategic infrastructure schemes to be funded from the growing CIL fund. It identifies the essential infrastructure required to enable the implementation of the Local 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. The document will continue be updated regularly to take account of changing circumstances and new requirements. These updates will be informed by the outcomes of close cooperation and engagement with infrastructure/ service providers, and also consultation with Town and Parish Councils.
- 5.1.3 The IDP explains where progress has already been made on delivering strategic infrastructure and relevant funding sources. In particular it sets out progress on the following types of infrastructure, as detailed in the tables below:
- Kendal Highways Improvements Package of Measures - £3.4 million Local Growth Deal
  - A590 junction improvements in Ulverston including access to Lightburn Road Employment Site allocation - £4.6 million Local Growth Deal

This infrastructure will support the delivery of site allocations in Kendal, Burneside, Natland, Oxenholme and Ulverston.

### Highways

- 5.1.4 A package of highway improvements in Kendal Town Centre is identified in the Kendal Transport Improvements Study, to which funding has already been allocated from the Cumbria Local Growth Fund.

## Kendal junction improvements

| Location  | Delivered / Underway |
|---|----------------------|
| A5284 Sandes Avenue/Blackhall Road                        | On Hold              |
| A6 Wildman Street/Ann Street and A6 Longpool/Station Road | On Hold              |
| A6 Highgate/Lowther Street                                | Delivered            |
| A6 Milnthorpe Road/Romney Road                            | Delivered            |
| Parkside Road/Valley Drive                                | Delivered            |
| A684 Sedbergh Road/Sandylands Road                        | Delivered            |

## Kendal sustainable transport improvements

| Location  | Delivered, Underway or In-Pipeline |
|---|------------------------------------|
| Pedestrian crossing improvements, Kendal Parks Road   | Delivered                          |
| Pedestrian crossing improvements including pedestrian refuge, Heron Hill junction with Esthwaite Avenue | Delivered                          |
| Traffic calming incorporating speed cushions, Stainbank Road/Underwood                                  | On Hold                            |
| Pedestrian refuge at junction of Vicarage Drive and Milnthorpe Road                                     | Delivered                          |
| Improved surface for pedestrians. Garth Heads Lane  | Delivered                          |
| North Kendal Cycle Route (Canal Head to Queen Katherine School)   | On Hold                            |
| A65 Burton Road Cycle Route (Kirkbie Kendal School to Oxenholme)  | Delivered                          |
| Pedestrian improvements incorporating footway widening, Spital Park/Appleby Road                        | On Hold                            |
| Traffic calming incorporating speed cushions, Valley Drive  | On Hold                            |
| Pedestrian improvements incorporating footway widening, Parkside Road/Castle Rise                       | Delivered                          |

## Ulverston – strategic access improvements to employment and housing

5.1.5 Funding allocated through Local Growth Deal unless specified.

| Scheme  | Delivered, Underway or In-Pipeline | Funding source   |
|---|------------------------------------|--|
| A590/ North Lonsdale Terrace – junction improvements and traffic management improvements on North Lonsdale Terrace  | On Hold                            | N/A  |
| A590/Daltongate improvements (access improvements to Lightburn Road employment site)                                | Underway                           | Local Growth Fund  |
| A590 / A5087 Quebec Street improvement (signalised junction)  | Delivered                          | Local Growth Fund  |
| A590 / Ellers Roundabout improvements – signal improvements to improve the efficiency of the junction               | On Hold                            | N/A  |
| A590 / Prince’s Street junction – improvements to the signalised junction to improve the efficiency of the junction | On Hold                            | N/A  |
| Sustainable Transport Improvements  |                                    | Funded through developer contributions – site specific measures (although it may be possible for CIL eligible schemes to be identified in the IDP) |

### Cross-a-Moor, Swarthmoor junction improvements

- 5.1.6 In addition to the above, it has been identified that improvements are needed to the Cross-a-Moor junction in Swarthmoor in order to enable the delivery of significant housing development at Croftlands and Cross-a-Moor. A roundabout was identified as the most appropriate solution for this junction and an application was made to Highways England Housing and Growth Fund for 60% of the funding with the remainder to come through developer contributions and South Lakeland District Council (£300,000). In December 2017 Highways England announced that the application for funding was successful. The roundabout will support the delivery of more than 1,000 new houses.
- 5.1.7 No progress has taken place regarding access improvements for the sites at Land adjacent to Mainline Business Park, Milnthorpe, Scroggs Wood, Kendal, Land at Burton Road, Kendal, or A590 / Canal Head junction improvements, Ulverston, Canal Head Business Park and Employment Regeneration Area, Ulverston. A planning application

has been approved on part of the employment land allocation land north of Gatebeck Lane, which includes appropriate site access into the site.

### Public realm/historic environment and heritage projects

- 5.1.8 In addition to the above, a number of infrastructure schemes have also been delivered or are being progressed, mainly in relation to public realm and open space projects. In the last year public realm improvement works have been completed at Kendal Market place to improve the paving, seating and lighting. Temporary landscaping work has taken place at New Road common land in Kendal whilst the long term future for the land is determined. Cartmel townscape initiative works are underway in the village. Improvements to Grange-over-Sands promenade are phased to take place over the next five years.

### Open space projects

- 5.1.9 Improvements to a number of public open spaces and play areas have taken place in the last year. These include landscaping, drainage and pathways work at Nobles Rest in Kendal, and improved paths, tree planting and interpretation boards at the Castle Park in Kendal.

## 5.2 Community Infrastructure Levy

- 5.2.1 The Council introduced a Community Infrastructure Levy with effect from 1 June 2015 to help deliver the infrastructure required (as set out in the IDP) to facilitate development. In accordance with Regulation 62 of the CIL Regulations (as amended) SLDC as Charging Authority is required to report the following information in the financial year to 31 March 2018. The requirement for this information to be made public on the Council website will be met when this AMR is published on the Council's website and also the publication on the web of a separate CIL annual report.

### Annual report of CIL income and expenditure in 2017/18

- a. CIL receipts - £160,805.60
- b. CIL expenditure:
  - i. Strategic Infrastructure Projects - £0
  - ii. Neighbourhood CIL payments to Parish and Town Councils - £24,851.39
- c. Summary of CIL expenditure (including items which CIL has been applied and amount of CIL expenditure on each item) - £0
- d. Total amount of CIL receipts for this reported year retained at the end of the reported year:
  - i. Retained for strategic infrastructure - £129,341.75
  - ii. Retained for CIL administration (5%) - £8,040.28
  - iii. Neighbourhood CIL retained for parishes with Parish Meetings - £0.0

- iv. Total retained - £137,382.03
- e. Total amount of CIL receipts from previous years retained at the end of the reported year
  - i. Retained for strategic infrastructure - £280,226.11
  - ii. Retained for CIL administration (5%) - £17,426.39
  - iii. Neighbourhood CIL retained for Hincaster Parish Meeting - £3,470.32

## Payments of 'Neighbourhood' CIL to Parish and Town Councils in 2017/18

| Parish / Town Council               | Payment amount    |
|-------------------------------------|-------------------|
| Burton-in-Kendal Parish Council     | £5,526.97         |
| Casterton Parish Council            | £3,751.88         |
| Grange over Sands Town Council      | £1,398.30         |
| Kendal Town Council                 | £3,387.79         |
| Kirkby Lonsdale Town Council        | £5,422.85         |
| Lower Allithwaite Parish Council    | £2,276.10         |
| Lower Holker Parish Council         | £120.21           |
| Natland Parish Council              | £1,791.74         |
| Skelsmergh & Scalthwaiterigg Parish | £30.50            |
| Ulverston Town Council              | £642.80           |
| Urswick Parish Council              | £502.25           |
| <b>Total</b>                        | <b>£24,851.39</b> |

## Retained 'Neighbourhood' CIL for areas with Parish Meetings in 2017/18

- 5.2.2 No CIL retained for areas with Parish Meetings in 2017/18.



## 6. Supporting delivery and moving forward

### 6.1 Evidence base

- 6.1.1 A substantial evidence base underpins the Council's Local Plan and is continually being reviewed to ensure it remains up to date. New evidence was prepared to support the Arnside and Silverdale AONB and Development Management DPDs, including a new district wide viability study. A new Strategic Housing Market Assessment was published in October 2017 to provide an up to date assessment of housing need.
- 6.1.2 Work is commencing on the new Local Plan and this will involve significant updates to the evidence base. The table below sets out key elements of the current evidence base that the Council plans to review soon and identifies when each was prepared or last reviewed and when we plan to update it. A fuller list of the evidence base supporting the Local Plan can be found on the Council's Local Plan webpages.

#### Key evidence base documents that are currently being prepared or updated or for which there are plans to update

| Evidence  | Date prepared or last reviewed | Date proposed to review  |
|---|--------------------------------|--|
| Strategic Housing Market Assessment and review of Objectively Assessed Need | 2017                           | A new SHMA was published in October 2017 and provides an up to date assessment of housing need. The Council awaits the conclusion of the national consultation on the standard method at the time of preparing this AMR. |
| District Wide Viability Study   | 2017                           | A new district wide viability study was published in September 2017 to support the Arnside and Silverdale AONB and DM Policies DPDs.   |
| Strategic Housing Land Availability Assessment                              | 2009                           | A consultation on the methodology for a new SHLAA, alongside a call for sites, will take place in early 2019.  |
| Employment Land and Premises Review   | 2012                           | A new employment land review will be commissioned in early 2019.   |
| Gypsy and Traveller Accommodation Assessment (GTAA)                         | 2013                           | An update to the GTAA will be commissioned in 2019.  |
| Strategic Flood Risk Assessment (SFRA)                                      | 2007                           | A new level 1 SFRA is underway – jointly with Allerdale, Copeland and the Lake District National Park. South Lakeland's part of the  |

| Evidence                            | Date prepared or last reviewed | Date proposed to review  |
|-------------------------------------|--------------------------------|--|
|                                     |                                | study is currently on hold, awaiting updated flood model outlines from the Environment Agency. |
| Retail and Leisure Study            | 2012                           | To be commenced in 2019.   |
| Green Infrastructure and Open Space | 2008                           | To be commenced in 2019.   |

## 6.2 Duty to Cooperate

- 6.2.1 The South Lakeland Local Plan area is bordered by parts of South Lakeland that fall within National Parks and are covered by Local Plans for the Lake District and Yorkshire Dales National Parks. South Lakeland District as a whole borders Barrow and Copeland Boroughs to the west, Lancaster District to the south, Allerdale Borough and Eden District to the north and Richmondshire and Craven Districts to the east. Appendix C provides an up-to-date position on the status of key Local plan documents adopted or in production by neighbouring Local Authorities.
- 6.2.2 The Localism Act sets out the legislative basis for local authorities and other public bodies to have a '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.
- 6.2.3 This section provides a means for the Council to report on progress of such co-operation in terms of the preparation of various planning documents including updates to the Infrastructure Delivery Plan (IDP). The Council consults annually with key service/infrastructure delivery partners to inform updates to the IDP, and meets providers on other occasions where necessary. In addition, meetings have been held or are planned with neighbouring authorities and the Duty to Co-operate bodies as required. For example neighbouring authorities and statutory bodies have been consulted on CIL, Development Briefs and the AONB and Development Management Policies DPDs.
- 6.2.4 Key cross boundary issues requiring cooperative working include:
- **Housing Market Areas:** the South Lakeland Local Plan area contains the whole of the Kendal Housing Market Area, a small segment of the Dales Housing Market Area, and parts of Rural Kendal, Grange/Cartmel and Furness Housing Market Areas. The Council has recently engaged with the Lake District and Yorkshire Dales National Parks in preparing the 2017 Strategic Housing Market Assessment.
  - **Economy:** the Local Plan area lies within the area of the Cumbria Local Economic Partnership (LEP). There are significant travel to work movements in both directions between South Lakeland, Lancaster and Barrow. At a Cabinet meeting in July 2017 the Council approved the principle of working jointly with partners at Barrow-in-Furness and Lancaster City Councils on economic development issues and

supported the principle of signing of a 'joint statement of intent of collaborative working'.

- **Retail:** the South Lakeland Retail Study identifies Kendal as the main comparison shopping centre for most of the Local Plan area. Ulverston and Furness have a close relationship with Barrow. Lancaster and Carnforth exert some influence on the Burton and Holme areas.
- **Infrastructure:** 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. A 'West of M6 Strategic Connectivity Study' was commissioned by the Cumbria Local Enterprise Partnership and Highways England in 2016 to examine the issues and constraints associated with the strategic road connectivity across the County to the west of the M6.
- **Health:** Westmorland General Hospital in Kendal 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.
- **Environment:** Two National Parks and one Area of Outstanding Natural Beauty as well as several national and international biodiversity designations create linkages as they fall on or adjacent the District's boundaries. A National Park Extension Order took effect on 1 August 2016, taking areas of land at Brigsteer/The Lyth valley and near Selside into the Lake District National Park and much of the Lune Valley area, including the villages of Casterton and Barbon into the Yorkshire Dales National Park.
- **Climate change:** South Lakeland District, Lancaster City Council and Barrow Borough Council all have coastline around Morecambe Bay. There is a need to manage coastal change (flooding/erosion) across local authority and land/sea boundaries to ensure the effective alignment of terrestrial and marine planning. Within South Lakeland District, there are a number of coastal settlements e.g. Ulverston, Grange-over-Sands, Arnside, Greenodd, Kirkby-in-Furness and the southern part of Flookburgh. There is also key coastal strategic infrastructure on or close to the coast, including the Furness Railway and parts of the A590 and the Furness coastal road.
- **Strategic Policies:** Lancaster, Eden and the Lake District National Park all have adopted Local Plan Core Strategies which make provision for development needs within these areas up until at least 2021. Eden's Local Plan has very recently been adopted. The Lake District National Park also has an adopted Land Allocations document and has commenced work on a new single Local Plan. The Yorkshire Dales National Park Authority adopted its new single Local Plan in December 2016 (which covers the 'pre-August 2016' National Park area). Copeland's Core Strategy and Development Management Policies document was adopted in December 2013

and a Site Allocations document is being progressed. Barrow submitted its Local plan in 2018 and is currently subject to main modifications consultation following hearings in the Summer.

6.2.5 Some key formal arrangements for co-operation include;

- **Arnside and Silverdale AONB Partnership:** covers parts of both South Lakeland and Lancaster Districts. South Lakeland, along with Lancaster City, the two County Councils and the Parish Councils is a member of the Partnership and is represented at member level on the Executive Committee and at the officer group. SLDC is working with Lancaster City Council to prepare an Arnside and Silverdale AONB DPD.
- **Cumbria Local Enterprise Partnership:** South Lakeland and Barrow share a seat on the board of the LEP. SLDC's Leader alternates with the Leader of Barrow on an annual basis. On the same basis Carlisle and Eden and Copeland and Allerdale also alternate. LDNP and CCC have individual, permanent representation.
- **Cumbria Local Enterprise Partnership Technical Officers Group:** A group on which all districts, including LDNP and CCC but excepting YDNP, are represented and which advises the Local Enterprise Partnership executive.
- **Cumbria Housing Group:** a forum with representation at member level from all local authorities and national park authorities. It has two sub-groups: Housing Supply and Housing & Wellbeing which includes housing providers. A key function is the preparation, co-ordination and review of the Cumbria Housing Statement which forms a co-ordinated strategic basis for District housing strategies. The six districts and most housing associations in Cumbria co-operate in the implementation of Cumbria Choice – a county-wide choice based letting system.

## 6.3 Future monitoring requirements

- 6.3.1 The Council will continue to monitor progress on the implementation of the Local Plan Core Strategy, Land Allocations and Community Infrastructure Levy. There will also be a need in the future to monitor progress in preparing and implementing new Local Plan documents including the Development Management Policies DPD, the AONB DPD, various Neighbourhood Plans, and the new single Local Plan.
- 6.3.2 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 remain gaps in data and a lack of an established trend and comparator data for some topics. Some data is simply not available, and others are not available for the Local Plan area rather than the whole District.

- 6.3.3 The monitoring framework presents current data for as many indicators as possible; but there remain areas where a lack of accessible, up-to-date data limits the comprehensive monitoring of all policy areas.
- 6.3.4 Additionally future monitoring requirements may arise due to new government requirements, with a recent example being the need to monitor self-build activity.
- 6.3.5 Through the Council's digital transformation process we will strive to develop more efficient and digital ways of monitoring and will closely follow national developments in digital planning, for example those being led by [Future Cities Catapult](#)<sup>17</sup>.

## 6.4 Resources

- 6.4.1 At 31 March 2018 the Development Plans Team consisted of the following roles (full-time unless otherwise stated):
- Development Plans Manager
  - Principal Development Plans Officer
  - Senior Policy Planner
  - Development Strategy Delivery Officer
  - Development Plans Officer
  - Conservation Officer
  - Development Strategy Technician
  - Support Assistant (1x permanent, 1x temporary)

Since March 2018, the Development Strategy Delivery Officer and a support assistant have left the Council and not been replaced.

- 6.4.2 The team reports to a Development Strategy and Housing Manager who also manages the Housing Strategy Team.
- 6.4.3 The Council is currently undergoing a major transformation (Customer Connect) which will see significant changes to the organisational structure and role descriptions.

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<sup>17</sup> <https://futurecities.catapult.org.uk/project/future-of-planning/>

# Appendix A: Five Year Land Supply and Housing Trajectory

## Five Year Land Supply

The Council's five year housing land supply assessment is set out in the [Housing Land Annual Position Statement](#), published January 2019<sup>18</sup>. Measured against an objective assessment of housing need (OAN) of 290 dwellings per year in the 2017 Strategic Housing Market Assessment, the Council has 8.25 years of deliverable housing land.

|    | <b>Five year housing land supply calculation</b>   | <b>Calculation</b> | <b>Figure</b> |
|----|--|--------------------|---------------|
| a) | Housing Requirement 1 April 2016 - 31 March 2036   | 290 x 20           | 5800          |
| b) | Plus 10% buffer over plan period   | 5800*1.1           | 6380          |
| c) | Net completions 1 April 2016 - 31 March 2018   | 245+291            | 536           |
| d) | Remaining requirement  | b-c                | 5844          |
| e) | Target Completions 1 April 2016 - 31 March* 2018   | 290 x 2            | 580           |
| f) | Current undersupply to date  | e-c                | 44            |
| g) | Annual requirement   | d/18               | 324.67        |
| h) | 5 year requirement   | gx5                | 1623.3        |
| i) | 5 year requirement plus undersupply  | h+f                | 1667.3        |
| j) | Annualised 5 year requirement  | i/5                | 333.47        |
| k) | Deliverable land supply:<br><i>Sites 10+ under construction (315 units)</i><br><i>Sites 10+ with full permission (387 units)</i><br><i>Sites 10+ with outline permission (49 units)</i><br><i>Deliverable Section 106 Sites (0 units)</i><br><i>Small permitted sites &lt;10 units (326 units)</i><br><i>Additional windfall allowance (369 units)</i><br><i>Unconsented deliverable allocations (1,306 units)</i> |                    | 2752          |
|    | Land supply in years   | k/j                | <b>8.25</b>   |

<sup>18</sup> An earlier draft was published in May 2018, and updated following the revised NPPF publication.

## Housing Trajectory 2018/19 to 2022/23

### A) Planning Permissions – Large Sites (10+ dwellings)

#### *Sites under construction*

| Site Name  | Outstanding units<br>at 31 March 2018 | 2018/19    | 2019/20   | 2020/21 | 2021/22 | 2022/23 | 5 year Total |
|--|---------------------------------------|------------|-----------|---------|---------|---------|--------------|
| Land at Kendal Parks Farm (North) Phase 1, Kendal    | 1                                     | 1          | 0         | 0       | 0       | 0       | 1            |
| Martindale's Yard, Entry Lane Woolpack Yard, Kendal  | 13                                    | 13         | 0         | 0       | 0       | 0       | 13           |
| NHS Offices, Tenterfield, Brigsteer Road, Kendal     | 7                                     | 7          | 0         | 0       | 0       | 0       | 7            |
| Auction Mart, Kendal                                 | 6                                     | 6          | 0         | 0       | 0       | 0       | 6            |
| North East Sandylands (Cragg Close), Kendal          | 6                                     | 6          | 0         | 0       | 0       | 0       | 6            |
| Stone Cross Mansion, Ulverston                       | 65                                    | 33         | 32        | 0       | 0       | 0       | 65           |
| Fair View, Daltongate, Ulverston                     | 13                                    | 3          | 10        | 0       | 0       | 0       | 13           |
| Carter Road, Grange over Sands                       | 4                                     | 4          | 0         | 0       | 0       | 0       | 4            |
| Thornfield Road, Grange over Sands                   | 43                                    | 30         | 13        | 0       | 0       | 0       | 43           |
| East of Hutton Close (Church Bank), Burton-in-Kendal | 20                                    | 20         | 0         | 0       | 0       | 0       | 20           |
| Land East of Burton Road, Oxenholme                  | 14                                    | 14         | 0         | 0       | 0       | 0       | 14           |
| Land North of Jack Hill – West, Allithwaite          | 9                                     | 9          | 0         | 0       | 0       | 0       | 9            |
| Green Lane, Flookburgh                               | 6                                     | 3          | 3         | 0       | 0       | 0       | 6            |
| Greenside Farm, Hincaster                            | 16                                    | 8          | 8         | 0       | 0       | 0       | 16           |
| Land East of Greengate Crescent, Levens              | 48                                    | 25         | 23        | 0       | 0       | 0       | 48           |
| The Loft Nightclub, Kent Street, Kendal              | 20                                    | 20         | 0         | 0       | 0       | 0       | 20           |
| Land to South of Natland Mill Beck, Kendal           | 8                                     | 8          | 0         | 0       | 0       | 0       | 8            |
| Land at Kendal Parks Farm (North) Phase 2, Kendal    | 16                                    | 16         | 0         | 0       | 0       | 0       | 22           |
| <b>Sub Total</b>                                     | <b>315</b>                            | <b>226</b> | <b>89</b> | 0       | 0       | 0       | <b>315</b>   |

### Sites with full planning permission

| Site Name  | Outstanding units at 31 March 2018 | 2018/19   | 2019/20   | 2020/21    | 2021/22   | 2022/23   | 5 year Total |
|--|------------------------------------|-----------|-----------|------------|-----------|-----------|--------------|
| South of Underbarrow Road – East, Kendal                     | 47                                 |           | 7         | 20         | 20        |           | <b>47</b>    |
| West of Oxenholme Road (Strawberry Fields) - Phase 2, Kendal | 69                                 | 24        | 24        | 21         |           |           | <b>69</b>    |
| South of Lumley Road, Kendal                                 | 110                                |           | 20        | 30         | 30        | 30        | <b>110</b>   |
| Land at Brigsteer Road (Stainbank Green Allocation), Kendal  | 34                                 |           | 4         | 30         |           |           | <b>34</b>    |
| Land North of Kendal Road, Kirkby Lonsdale                   | 78                                 |           | 18        | 20         | 20        | 20        | <b>78</b>    |
| Former Cedar House School                                    | 20                                 | 2         | 6         | 12         |           |           | <b>20</b>    |
| Ulverston Town Hall  | 17                                 |           | 17        |            |           |           | <b>17</b>    |
| Sawyers Arms, Stricklandgate, Kendal                         | 12                                 | 12        |           |            |           |           | <b>12</b>    |
| Busher Walk, Kendal  | 16                                 |           |           |            |           |           | <b>0</b>     |
| <b>Sub Total</b>   | <b>403</b>                         | <b>38</b> | <b>96</b> | <b>133</b> | <b>70</b> | <b>50</b> | <b>387</b>   |



### Outline Permission

| Site Name                                  | Outstanding units at 31 March 2018 | 2018/19  | 2019/20  | 2020/21  | 2021/22   | 2022/23   | 5 year Total |
|--|------------------------------------|----------|----------|----------|-----------|-----------|--------------|
| West of Oxenholme Road - Phase 3+4, Kendal | 49                                 |          |          |          | 24        | 25        | <b>49</b>    |
| Nook Farm, Ulverston                       | 330                                |          |          |          |           |           | <b>0</b>     |
| <b>Sub Total</b>                           | <b>379</b>                         | <b>0</b> | <b>0</b> | <b>0</b> | <b>24</b> | <b>25</b> | <b>49</b>    |

### B) Large Windfall Sites (10+ dwellings) Approved subject to Section 106

#### Outline permission subject to Section 106

| Site Name                            | Outstanding units at 31 March 2018 | 2018/19  | 2019/20  | 2020/21  | 2021/22  | 2022/23  | 5 year Total |
|--------------------------------------|------------------------------------|----------|----------|----------|----------|----------|--------------|
| Depot on north side of Parkside Road | 43                                 |          |          |          |          |          | <b>0</b>     |
| <b>Sub Total</b>                     | <b>43</b>                          | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>445</b>   |

### C) Planning Permissions – Small Sites (less than 10 dwellings)

| Planning Permissions                                  | Outstanding units at 31 March 2018 | 2018/19   | 2019/20   | 2020/21   | 2021/22   | 2022/23   | 5 year Total |
|---|------------------------------------|-----------|-----------|-----------|-----------|-----------|--------------|
| 283 small sites, 450 units (gross)<br>411 units (net) |                                    |           |           |           |           |           |              |
| Under construction: 167 net                           | 167                                | 33        | 33        | 33        | 33        | 35        | 167          |
| Not started: 244 net with 35% discount = 159          | 244                                | 32        | 32        | 32        | 32        | 31        | 159          |
| <b>Sub Total</b>                                      | <b>411</b>                         | <b>65</b> | <b>65</b> | <b>65</b> | <b>65</b> | <b>66</b> | <b>326</b>   |

#### D) Unconsented Land Allocations

| Site Name                             | Outstanding units at 31 March 2018 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 5 year Total |
|---------------------------------------|------------------------------------|---------|---------|---------|---------|---------|--------------|
| Land Rear of Barn Hey, Allithwaite    | 30                                 |         |         |         | 15      | 15      | <b>30</b>    |
| Land South of Green Lane, Allithwaite | 22                                 |         |         | 10      | 10      | 2       | <b>22</b>    |
| Land adjacent to Hall Park, Burneside | 70                                 |         |         |         | 35      | 35      | <b>70</b>    |
| East of Boon Town, Burton-in-Kendal   | 23                                 |         |         | 3       | 10      | 10      | <b>23</b>    |
| Green Dragon Farm, Burton-in-Kendal   | 86                                 |         |         |         | 20      | 20      | <b>40</b>    |
| Land at Hags Lane                     | 39                                 |         | 12      | 12      | 15      |         | <b>39</b>    |

| Site Name  | Outstanding units at 31 March 2018 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 5 year Total |
|--|------------------------------------|---------|---------|---------|---------|---------|--------------|
| North of Sycamore Close                                      | 106                                |         |         | 30      | 30      | 30      | <b>90</b>    |
| East of Manorside, Flookburgh                                | 30                                 |         |         |         | 15      | 15      | <b>30</b>    |
| Guide's Lot, Grange-over-Sands                               | 16                                 |         |         |         | 16      |         | <b>16</b>    |
| Opposite Low Fell Gate Farm, Grange-over-Sands               | 46                                 |         |         |         | 26      | 20      | <b>46</b>    |
| South of Allithwaite Road, Kents Bank, Grange-over-Sands     | 202                                |         |         |         | 30      | 30      | <b>60</b>    |
| East of Milnthorpe Road, Holme                               | 73                                 |         |         |         | 10      | 15      | <b>25</b>    |
| Land at Kendal Parks Farm (North) Phase 3                    | 33                                 |         |         |         | 20      | 13      | <b>33</b>    |
| North of High Sparrowmire, Kendal                            | 24                                 |         | 24      |         |         |         | <b>24</b>    |
| North of Laurel Gardens, Kendal                              | 197                                |         |         | 30      | 30      | 30      | <b>90</b>    |
| South of Underbarrow Road – West, Kendal                     | 80                                 |         |         | 20      | 30      | 30      | <b>80</b>    |
| West of High Sparrowmire, Kendal                             | 150                                |         |         | 30      | 30      | 30      | <b>90</b>    |
| West of Valley Drive, Kendal                                 | 60                                 |         |         |         | 30      | 30      | <b>60</b>    |
| Land Adjacent to Burlington C of E School, Kirkby-in-Furness | 41                                 |         |         |         | 15      | 15      | <b>30</b>    |
| Adjacent to St Anthony's Close, Milnthorpe                   | 8                                  |         | 8       |         |         |         | <b>8</b>     |
| Land South of Fell Close                                     | 104                                | 24      | 80      |         |         |         | <b>104</b>   |
| Gascow Farm  | 235                                |         |         | 40      | 40      | 40      | <b>120</b>   |
| North of Watery Lane, Ulverston                              | 18                                 |         |         | 18      |         |         | <b>18</b>    |

| Site Name                         | Outstanding units at 31 March 2018 | 2018/19   | 2019/20    | 2020/21    | 2021/22    | 2022/23    | 5 year Total |
|-----------------------------------|------------------------------------|-----------|------------|------------|------------|------------|--------------|
| South of Lund Farm, Ulverston     | 101                                |           |            | 24         | 24         | 24         | 72           |
| West End Nursery                  | 86                                 |           | 14         | 24         | 24         | 24         | 86           |
| Developable allocations (Year 6+) | 2022                               |           |            |            |            |            | 0            |
| <b>Sub Total</b>                  | <b>3328</b>                        | <b>24</b> | <b>138</b> | <b>241</b> | <b>475</b> | <b>428</b> | <b>1306</b>  |

### E) Additional Windfall

| Small / Large Windfall        | Outstanding units at 31 March 2018 | 2018/19   | 2019/20   | 2020/21    | 2021/22    | 2022/23    | 5 year Total |
|-------------------------------|------------------------------------|-----------|-----------|------------|------------|------------|--------------|
| Small Site Windfall Allowance | 114                                | 23        | 23        | 23         | 23         | 22         | 114          |
| Large Site Windfall Allowance | 255                                | 0         | 0         | 85         | 85         | 85         | 255          |
| <b>Sub Total</b>              | <b>369</b>                         | <b>23</b> | <b>23</b> | <b>108</b> | <b>108</b> | <b>107</b> | <b>369</b>   |

### Total

|              |             |            |            |            |            |            |             |
|--------------|-------------|------------|------------|------------|------------|------------|-------------|
| <b>Total</b> | <b>4879</b> | <b>376</b> | <b>411</b> | <b>547</b> | <b>742</b> | <b>676</b> | <b>2752</b> |
|--------------|-------------|------------|------------|------------|------------|------------|-------------|

## Appendix B: Housing Delivery Record

### Core Strategy Target 2003-16

| 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                   | 112         | 2156                   | 2244     |
| 2014/15 | 4800                   | 256         | 2412                   | 2388     |
| 2015/16 | 5200                   | 370         | 2782                   | 2418     |

### 2016 onwards – delivery against local housing need as calculated in 2017 Strategic Housing Market Assessment

| Year    | Cumulative Requirement | Completions | Cumulative Completions | Variance |
|---------|------------------------|-------------|------------------------|----------|
| 2016/17 | 290                    | 245         | 245                    | 45       |
| 2017/18 | 580                    | 291         | 536                    | 44       |

Note: The target of 400 dwellings per annum (2003-25) in the adopted Core Strategy is considered to be out of date given that it is based on the now revoked Regional Spatial Strategy. It should be noted that the latest Strategic Housing Market Assessment (SHMA, published in October 2017) identifies an objectively assessed housing need of 290 dwellings per annum for the period 2016-36. The SHMA was endorsed by the Council's Cabinet on 29 November 2017. This is taken into account in the assessment of 5 year housing land supply and in the delivery information presented in the AMR.

## Appendix C: Plan Status of Neighbouring Local Authorities

### Lake District National Park Authority

| Plan  | Status   |
|---|--|
| Local Plan Part One - Core Strategy                 | Adopted - October 2010   |
| Local Plan Part Two - Allocations of Land           | Adopted - November 2013  |
| Local Plan Part Three - Minerals Safeguarding Areas | Adopted - November 2013  |
| Local Plan 1998 - Saved Policies                    | Adopted - May 2008; consolidated document produced Nov 2013 (Many policies superseded)   |
| Local Plan Review                                   | Consultation between 8 May and 29 June 2018. Publication consultation expected April/May 2019 and planned submission is July 2019. |
| Matterdale Neighbourhood Development Plan           | Adopted December 2015  |
| Coniston Neighbourhood Development Plan             | Adopted February 2016  |

### The Yorkshire Dales National Park Authority

| Plan  | Status                  |
|---|-------------------------|
| Yorkshire Dales National Park Local Plan 2015 - 2030<br>(supersedes the Local Plan 2006, M&W Local Plan 1998 and the Housing Development Plan 2012) | Adopted – December 2016 |

### Eden District Council

| Plan                          | Status  |
|-------------------------------|---|
| Eden Local Plan 2014-2032     | Adopted 11 October 2018, replaced Core Strategy and 'saved' policies. |
| Upper Eden Neighbourhood Plan | Adopted - April 2013  |

## Barrow-in-Furness Borough Council

| Plan  | Status  |
|---|---|
| Barrow in Furness Borough Local Plan Review 1996-2006 (saved policies) and Housing Chapter Alteration | Adopted - August 2001; alteration adopted June 2006 (most policies saved)                           |
| Barrow Port Area Action Plan  | Adopted - July 2010   |
| Barrow Borough Local Plan   | Submission February 2018, Main Mods consultation Sept/Oct 2018 and now awaiting Inspector's report. |

## Lancaster City Council

| Plan  | Status  |
|---|---|
| Lancaster District Local Plan 2004                                  | Adopted - April 2004 ('Strike through' version showing saved policies published 2008)   |
| Lancaster District Core Strategy 2003-2021                          | Adopted - July 2008   |
| Lancaster Development Management DPD                                | Adopted - December 2014<br>Updated DPD submitted to Planning Inspectorate on 15 <sup>th</sup> May 2018.                                   |
| Morecambe Area Action Plan  | Adopted - December 2014   |
| Bailrigg Garden Village Area Action Plan                            | Issues and Options consultation held between 24 May and 11 July 2018.   |
| Strategic Policies & Land Allocations DPD                           | Submitted to Planning Inspectorate on 15 <sup>th</sup> May 2018.  |
| Arnside & Silverdale AONB DPD                                       | Under examination, Inspector's report expected January 2019 for adoption in April 2019.   |
| Gypsy and Traveller, and Travelling Showpeople Site Allocations DPD | Call for sites ended 22 June 2018, consultation expected late 2018, publication early 2019, submission April 2019 and adoption late 2019. |

## Copeland Borough Council

| Plan  | Status                  |
|---|-------------------------|
| Copeland Local Plan 2013-2028 Core Strategy and Development Management Policies | Adopted - December 2013 |

| Plan  | Status   |
|---|--|
| Copeland Local Plan 2013-2028<br>Proposals Map and Copeland Local Plan 2001-2016 – Saved Policies | The proposals map reflects the adoption of the CS & DM DPD 2013-2028.<br>CS & DM DPD replaced most policies, but the Council continues to have regard to 'saved' policies. |

## Cumbria County Council

| Plan  | Status                      |
|---|-----------------------------|
| Cumbria Minerals and Waste Local Plan 2015-2030 | Adopted on 6 September 2017 |

## Lancashire County Council

| Plan   | Status  |
|--|---|
| Joint Lancashire Minerals and Waste Core Strategy  | Adopted - February 2009   |
| Joint Lancashire Minerals and Waste Local Plan: Site Allocations and Development Management Policies | Adopted - Sept 2013   |
| Local Plan Review  | Consultation on draft revised Local Plan between 28 September and 28 November 2018. |



## Appendix D: Glossary

**Affordable Housing:** Housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following directions:

- a) **Affordable housing for rent:** meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent or Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent Scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent Schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).
- b) **Starter homes:** is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute and any such secondary legislation at the time of plan preparation or decision making. Where secondary legislation has the effect of limiting a household's eligibility to purchase a starter home to those with a particular maximum level of household income, those restrictions should be used.
- c) **Discounted market sales housing:** is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.
- d) **Other affordable routes to home ownership:** is housing provided for sale that provides a route to ownership for those that could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low cost homes for sale (at a price equivalent to at least 20% below local market value) and rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to Government or the relevant authority specified in the funding agreement.

**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 (DPDs) are being implemented successfully.

**AONB DPD:** 'Area of Outstanding Natural Beauty Development Plan Document' - will identify sites on which new housing and employment development can take place and

provide policies for managing development in a way that properly reflects the purposes of AONB designation.

**Area Action Plan:** A document that forms part of the Local Plan and is specific to areas of significant change or conservation.

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

**Biodiversity:** The variety of life on Earth. It is the variety within and between all species of plants, animals and micro-organisms and the ecosystems within which they live and interact.

**Brownfield Land (also 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 was last occupied by agricultural or forestry buildings; land that has been developed for minerals extraction or waste disposal by landfill, where provision for restoration has been made through development management procedures; land in built up areas such as 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.

**Community Infrastructure Levy:** CIL is a charge placed on development. Its purpose is to help fund the infrastructure to support development proposed in the Local Plan.

**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 that sets out the vision, strategy and core policies for the spatial development of the District.

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

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

**Development Management Policies DPD:** Will set out the policy criteria against which planning applications will be considered including design and environmental standards.

**Development Plan:** This includes adopted Development Plan Documents including adopted Local Plans and Neighbourhood Plans that have been made and published spatial

development strategies. Neighbourhood plans that have been approved at referendum are also part of the development plan, unless the local planning authority decides that the neighbourhood plan should not be made. It 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.

**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.

**Evidence Base:** Information gathered by the local 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 including land that is or was last occupied by agricultural or forestry buildings; land that has been developed for minerals extraction or waste disposal by landfill, where provision for restoration has been made through development management procedures; land in built up areas such as 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. Greenfield land includes 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.

**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 Needs Survey / 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.

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

**Infrastructure:** The range of physical structures, facilities and services required to support communities, including roads, public transport water supply, sewage disposal, schools, health services and green infrastructure such as parks, sports facilities and open spaces.

**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 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. They are business led partnerships between local authorities and local private sector businesses. They play a central role in determining local economic priorities and undertaking activities to drive economic growth and job creation, improve infrastructure and raise workforce skills.

**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 (July 2018) 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.

**Main Town Centre Uses:** Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and

arts; culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

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

**Neighbourhood Development Plan:** A plan prepared by a Parish Council or Neighbourhood Forum for a particular (designated) 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.

**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:** see 'Brownfield Land'

**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.

**Policies Map:** The adopted policies map illustrates on a base map all the relevant policies set out in DPDs, together with any saved policies. It must be revised as each new DPD is adopted.

**Regulations:** Secondary legislation passed by the UK Government setting out how Acts (primary legislation) should be implemented. Regulations relevant to plan making include: 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, The Town and Country Planning (Local Planning) (England) Regulations 2012, the Neighbourhood Planning (General) Regulations 2012 and the amended Regulations 2015 .

**Renewable and Low Carbon Energy:** Includes energy for heating and cooling as well as for 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).

**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.

**Self-Build and Custom Build Housing:** Housing built by an individual, a group of individuals, or persons working with or for them, to be occupied by that individual. Such housing can be either market or affordable housing. A legal definition, for the purpose of applying the Self-build and Custom Housebuilding Act 2015 (as amended), in section 1 (A1) and (A2) of that Act.

**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.

**Starter Homes:** Introduced through the Housing and Planning Act 2016. A starter home is a new dwelling that is available to qualifying first time buyers only (is at least 23 years old but has not yet reached the age of 40), is to be sold at least 20% discount of the market value, is to be sold for less than a price cap and is subject to any restrictions on sale or letting as specified in Regulations. Regulations on the Starter Homes initiative are awaited.

**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. It also sets out the protocol – what assistance a neighbourhood plan forum or parish council can expect from the Council when preparing a neighbourhood plan.

**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:** The purpose of the planning system is to contribute to the achievement of sustainable development. At a very high level, the objective of sustainable development can be summarised as meeting the needs of the present 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 policies map, including the primary shopping area and areas pre-dominantly 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 the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

**Use Classes Order (UCO):** The Town and Country Planning (Use Classes) Order 1987 (as amended) 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 split into three sub-classes:
  - B1 (a) – as an **office** other than a use within class A2 (financial and professional services);
  - B1 (b) – **for research and development** of products or processes; and
  - B1 (c) – for any **industrial process**, being a use that can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.
- UCO B2 – General Industrial – use for the carrying out of an industrial process.
- UCO B8 – Storage or Distribution
- UCO C1 – Hotels
- UCO C2 – Residential Institutions
  - UCO C2A – Secure residential institution
- UCO C3 – Dwelling Houses
- UCO C4 – Houses in multiple occupation
- UCO D1 – Non-residential Institutions
- UCO D2 – Assembly and Leisure
- Sui Generis – No class specified in the schedule. Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: betting offices/shops, pay day loan shops, theatres, larger houses in multiple occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses and casinos