



Rutland County Council

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Ladies and Gentlemen,

A **SPECIAL** meeting of the **GROWTH, INFRASTRUCTURE AND RESOURCES SCRUTINY COMMITTEE** will be held in the Council Chamber, Catmose, Oakham on **Thursday, 19th December, 2019** commencing at 7.00 pm when it is hoped you will be able to attend.

Yours faithfully

Helen Briggs
Chief Executive

Recording of Council Meetings: Any member of the public may film, audio-record, take photographs and use social media to report the proceedings of any meeting that is open to the public. A protocol on this facility is available at www.rutland.gov.uk/my-council/have-your-say/

Please note hard copies of the agenda will not be available at the meeting. If you require a hard copy of the agenda please email your request to governance@rutland.gov.uk or telephone (01572) 720991.

A G E N D A

1) APOLOGIES

2) DECLARATIONS OF INTEREST

In accordance with the Regulations, Members are invited to declare any personal or prejudicial interests they may have and the nature of those interests in respect of items on this Agenda and/or indicate if Section 106 of the Local Government Act 1992 applies to them.

3) PETITIONS, DEPUTATIONS AND QUESTIONS

To receive any petitions, deputations and questions received from Members of the Public in accordance with the provisions of Procedure Rule 216.

The total time allowed for this item shall be 30 minutes. Petitions, declarations and questions shall be dealt with in the order in which they are received. Questions may also be submitted at short notice by giving a written copy to the Committee Administrator 15 minutes before the start of the meeting.

The total time allowed for questions at short notice is 15 minutes of the total time of 30 minutes. Any petitions, deputations and questions that have been submitted with prior formal notice will take precedence over questions submitted at short notice. Any questions that are not considered within the time limit shall receive a written response after the meeting and be the subject of a report to the next meeting.

4) QUESTIONS WITH NOTICE FROM MEMBERS

To consider any questions with notice from Members received in accordance with the provisions of Procedure rule No. 218 and No. 218A.

5) RUTLAND LOCAL PLAN - SPATIAL STRATEGY

To receive Report No.190/2019 from the Strategic Director for Places.

(Pages 5 - 48)

6) EXCLUSION OF PRESS AND PUBLIC

The Committee is recommended to determine whether the public and press be excluded from the meeting in accordance with Section 100(A)(4) of the Local Government Act 1972, as amended, and in accordance with the Access to Information provisions of Procedure Rule 239, as the following item of business is likely to involve the disclosure of exempt information as defined in Paragraph 2 of Part 1 of Schedule 12A of the Act.

Paragraph 3: Information relating to the financial or business affairs of any particular person (including the authority holding that information).

7) HOUSING INFRASTRUCTURE FUND (HIF) BID

To receive Report No.191/2019 from the Chief Executive.

(Pages 49 - 62)

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TO: ELECTED MEMBERS OF THE GROWTH, INFRASTRUCTURE AND RESOURCES SCRUTINY COMMITTEE

Miss G Waller (Chairman)

Mr N Begy

Mrs J Fox

Miss M Jones

Mrs K Payne

Mr N Woodley

Mr R Coleman

OTHER MEMBERS FOR INFORMATION

Growth, Infrastructure and Resources Scrutiny Committee

19th December 2019

RUTLAND LOCAL PLAN – SPATIAL STRATEGY

Report of the Strategic Director for Places

Strategic Aim:	Sustainable Growth	
Key Decision: Yes	Forward Plan Reference: FP/081119	
Exempt Information	No	
Cabinet Member(s) Responsible:	Mr G Brown Deputy Leader and Portfolio Holder for Environment, Finance, Planning and Property.	
Contact Officer(s):	Chris Traill, Strategic Director for Places	Tel: 01572 758868 ctrail@rutland.gov.uk
	Roger Ranson, Planning Policy Manager	Tel: 01572 758238 rranson@rutland.gov.uk
Ward Councillors	N/A	

DECISION RECOMMENDATIONS

1. That the Scrutiny Committee considers the assessment of the scale of development to meet identified needs as set out in Appendix 1 and provides any comments for Cabinet to consider regarding the growth objectives for the Local Plan in terms of housing and employment land requirements.
2. That the Scrutiny Committee considers the assessment of proposals set out in Appendix 2 regarding the distribution of development including the principle of establishing a garden community in Rutland as an appropriate amendment to the Spatial Strategy and provides any comments for Cabinet to consider.
3. That the Scrutiny Committee considers the assessment of proposals to establish a garden community in Rutland as set out in Appendix 2 and provides any comments for Cabinet to consider.
4. That the Scrutiny Committee considers the Local Development Scheme as set out in Appendix 3 and provides any comments for Cabinet to consider.

1. PURPOSE OF THE REPORT

- 1.1 This report aims to provide the opportunity to comment on a report to be considered by Cabinet on progress with the preparation of the Local Plan. Following consideration by Scrutiny and Cabinet, the Pre-Submission Local Plan will be finalised for its statutory consultation in line with Regulation 19 of the Local Plan Regulations. That version of the Local Plan will need to be approved by full Council in due course, following further consideration by Scrutiny and Cabinet.

2. BACKGROUND AND MAIN CONSIDERATIONS

- 2.1 Local Planning Authorities must prepare a Local Plan that sets out the local planning policies for their authority area. Once adopted, the Local Plan will form part of the Development Plan for Rutland. Planning law requires that applications for planning permission be determined in accordance with the development plan, unless material considerations indicate otherwise. The National Planning Policy Framework must be taken into account in preparing the development plan, and is a material consideration in planning decisions. Planning policies and decisions must also reflect relevant international obligations and statutory requirements.
- 2.2 Government guidance requires that Local Plans must be positively prepared, justified, effective and consistent with national policy, in accordance with Section 20 of the Planning and Compulsory Purchase Act 2004 (as amended), the National Planning Policy Framework (NPPF) 2019 and relevant national Planning Policy Guidance.
- 2.3 Considerable consultation, as set out in Section 3 of this report, has been undertaken to date in accordance with the Council's Statement of Community Involvement (as required by Section 19(3) of the Planning and Compulsory Purchase Act 2004) to date in helping to produce the Local Plan and the details of all responses made will be taken into consideration in finalising the wording of the next version of the Local Plan – the Pre-Submission Local Plan which itself will be subject to statutory consultation under Regulation 19 of the Town and Country Planning (Local Planning) (England) Regulations 2012.
- 2.4 In advance of producing the Pre-Submission Local Plan, some key issues have been identified for Cabinet to consider. These are set out below and are supported by appropriate assessments and a robust evidence base, particularly ongoing work regarding the Sustainability Appraisal to the Local Plan. The Sustainability Appraisal has been ongoing through the preparation of the Local Plan and will be finalised and published for the Pre-Submission Local Plan. This report enables the Scrutiny Committee to consider these issues in order to provide comment for the Cabinet to consider.

Quantum of housing development

- 2.5 Appendix 1 to this report sets out the assessment of the scale of development required to meet identified needs. This concludes that the application of the Government's assessment of Local Housing Need (LHN), as set out in the NPPF, gives a minimum housing requirement for Rutland to provide an average of 127 dwellings per annum

over the Plan period. The Local Plan must therefore provide for a minimum requirement to meet this assessed need of 127 dwellings per annum, rounded to 130 dwellings per annum over the period 1st April 2018 to 31st March 2036 (18 years); i.e 2,340 dwellings over the plan period. However, it should be noted that Paragraph 60 of the NPPF (2019) states that “to determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance – unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals”.

- 2.6 There is considerable concern that limiting the housing supply to deliver just the minimum requirement will significantly restrict the housing supply and therefore raise house prices to levels which create cost barriers to local residents and workers. This approach is supported by the Strategic Housing Market Assessment (SHMA) Update 2019 which assesses a need for Rutland of 3,200 dwellings from 2016 to 2036, equating to 160 new homes per annum over this period. This evidence analyses the additional housing needs of the County’s growing population over the whole plan period in more detail than the LHN. Officers consider that the Strategic Housing Market Assessment a more detailed analysis of local housing needs, taking account of market signals and affordability. Such an approach would respond to market demand as evidenced by recent rates of housebuilding in Rutland. In terms of housing supply, it is therefore recommended that the Council proposes in this plan to provide for a buffer of around 25% to the above minimum requirement. Applying a 25% buffer to the housing requirement would lead to the Local Plan providing for 2,925 dwellings over the lifetime of the plan, equating to an average of about 162 dwellings per annum. This is recommended in order to provide choice and contingency to the market, help address affordability issues and demographic trends as identified in the SHMA, to reflect current housing market signals in Rutland and, in particular, to address the issue of affordability.

Quantum of employment development

- 2.7 An update of the employment land assessment for the Local Plan was undertaken in 2018 and is published on the Council’s website. This report sets out two scenarios for assessing future employment land requirements, with widely differing results. The short term take up scenario indicates an existing over-supply of employment land in Rutland. The alternative long term take up scenario shows that there is a requirement to provide up to an additional 25 hectares of employment land. The consultants conclude that: “Rutland County Council maintain a flexible employment land supply, which can meet the full range of needs to 2036, provide choice and flexibility in supply, allowing for likely further losses”. It is considered that the alternative long term take up scenario put forward by the Council’s consultants giving a requirement for the Local Plan to provide up to an additional 25 ha of employment land should be adopted. This would ensure that the Council maintains a flexible employment land supply, which can meet the full range of needs to 2036, provide choice and flexibility in supply, allowing for likely further losses.

Distribution of development

- 2.8 Appendix 2 to this report sets out the assessment of proposals regarding the distribution of development including the principle of establishing a garden village in Rutland

together with a robust assessment of proposals put forward for the establishment of a new settlement in Rutland. Current national Planning Policy Guidance states that all reasonable alternatives assessed for consideration within the Local Plan must be realistic and deliverable within the plan period; this is a significant consideration in the assessments of both proposals. As set out in Appendix 2 and its accompanying reports, the available evidence does not demonstrate that the proposals for Woolfox are viable and deliverable at this time. The available evidence regarding the assessment of proposals for St George's demonstrates that these would be viable and deliverable with the benefit of the Housing Investment Fund (HIF). A decision was announced by the Government to award £29.4million of HIF support to the proposed development at St. George's. In the light of this decision, the evidence available demonstrates that proposals to establish a new community of 2,215 dwellings with 14 hectares of employment land and associated public and community facilities on the St. George's site is viable and deliverable.

- 2.9 The evidence available for the St George's proposal does demonstrate that, with the benefit of the now confirmed HIF funding, this would be viable and deliverable. Appendix 2 provides an overview of the assessment of all of the evidence provided to support both options alongside the site assessments from the sustainability appraisal. Together the evidence provides justification for inclusion of the option for a new garden community on the St. George's site within the Local Plan and that this presents an appropriate strategy, taking account of reasonable alternatives. It is important to note that on its closure for operational use, the proposals for development at St George's site would take place on land which constitutes previously developed land (a brownfield site) as defined in the NPPF. It would therefore make a significant contribution to meeting the NPPF objective set out in Paragraph 117 of the NPPF that: "Strategic policies should set out a clear strategy for accommodating objectively assessed needs, in a way that makes as much use as possible of previously-developed or 'brownfield' land". Any allocation here would therefore ease pressure to release through the Local Plan further greenfield land for development elsewhere within the County.

Local Plan timetable: Local Development scheme

- 2.10 A revised timetable for the production of the Local Plan is attached as the Rutland Local Development Scheme (LDS) – Appendix 3. It is recommended that the Scrutiny Committee considers this, which establishes the timetable for the production of the Local Plan and associated development plan documents, and provides any comments for Cabinet to consider.

3 CONSULTATION

- 3.1 Three stages of consultation have already taken place on the Local Plan through the Issues and Options in 2015, the Consultation Draft in 2017 and the focussed consultations in 2018 regarding additional sites promoted for development as well a tailored consultation regarding the implications of incorporating the proposed garden village at St. George's into the Local Plan. The objective is to ensure that the Local Plan is found sound at examination. In addition to ensuring that the evidence base, particularly the Sustainability Appraisal and Habitats Regulations Assessment work which underpins the Local Plan process is undertaken

- 3.2 A summary of the consultation responses received through each of these previous consultations is provided in pdf form on the [website](#) and these will be reported to Cabinet as part of the process for considering the final Pre-Submission Local Plan text.
- 3.3 There will be a further opportunity for consultation on a full version of the Local Plan (the “Pre-Submission Local Plan”) when it is published prior to its submission to the Secretary of State.

4 ALTERNATIVE OPTIONS

- 4.1 The consideration by Cabinet of the above key issues in preparing the Local Plan will help shape the production of the Pre-Submission version which will be subject to statutory consultation. The only other option would be for the Council not to undertake the production of the Local Plan. This would not be in line with Government expectations and would be very likely to lead to direct Government intervention in the local planning process and could also lead to development proposals coming forward in an uncoordinated way with no long term strategic direction to guide growth. This is not considered to be in the best interests of the County, its communities, residents and businesses.

5 FINANCIAL IMPLICATIONS

- 5.1 The estimated cost of the production of the Local Plan was included in the existing budget for 2019/20. Costs associated with the independent examination of plan will now fall in 2020/21 and additional budget will be required in that financial year to accommodate this expenditure. An estimate of additional funding needed will be made as part of the 2020/21 budget setting process. In addition, growth from proposed sites will inevitably impact upon the level of Council Tax collected by the authority, and this is already built into the Council's Medium Term Financial Plan (MTFP).

6 LEGAL AND GOVERNANCE CONSIDERATIONS

- 6.1 The Local Plan is required by statute and the Council’s constitution to be adopted by Full Council. Preparation of the plan is however a responsibility of the Cabinet. Before the draft Local Plan can be considered for adoption, the process for preparing the Local Plan must follow is set out in the Planning and Compulsory Purchase Act 2004 (as amended) and the Town and Country Planning (Local Planning) (England) Regulations 2012 (the Regulations). Local Plans are required to be reviewed on a regular basis and recognising that the Core Strategy was adopted in 2011
- 6.2 In addition, the Council must comply with any commitments it has made in the adopted Statement of Community Involvement (SCI). The Council must also publicise its intended timetable for producing the Local Plan. This information is contained in the proposed Local Development Scheme (LDS) which authorities should publish on their web site and must keep up to date. An updated LDS will be published following Cabinet consideration of this report and the Council's website updated accordingly.

7. DATA PROTECTION IMPLICATIONS

- 7.1 A data protection impact assessment has not been completed as there are no data protection implications.

8. EQUALITY IMPACT ASSESSMENT

- 8.1 An Equality Impact Assessment (EqIA) screening was prepared for the Consultation Draft Local Plan (2017) and will be updated as the Local Plan progresses to adoption by the Council. The screening report is available as a pdf alongside other evidence documents published with the Consultation Draft Local Plan at [Local Plan Review | Rutland County Council](#)

9. COMMUNITY SAFETY IMPLICATIONS

- 9.1 Strategic Objective 6 of the Consultation Draft Rutland Local Plan is: “To develop a stronger and safer community by designing out opportunities for crime and implementing measures to improve road safety to ensure that people can live, work and relax where they feel safe and enjoy a better quality of life.” This is promoted through the policies to be finalised in the Pre-Submission Local Plan.

10. HEALTH AND WELLBEING IMPLICATIONS

- 10.1 Strategic Objective 5 of the Consultation Draft Rutland Local Plan is: “To support healthy and thriving communities by protecting existing and providing new, high quality local and accessible access to health, leisure, recreation, sport, green infrastructure and cultural activities.” This is promoted through the policies to be finalised in the Pre-Submission Local Plan.

11. CONCLUSION AND SUMMARY OF REASONS FOR THE RECOMMENDATIONS

- 11.1 This report sets out the implications for the Local Plan regarding :

- The quantum of new development to be proposed in the Local Plan; and
- The distribution of development including an assessment of proposals for the creation of a potential new community in Rutland.

- 11.2 Consideration of the above issues will assist in the next stage in the process of preparing the Local Plan, which will be the publication of Pre-Submission Local Plan. It is intended that this will be published in line with the timetable set out in this report. The clear intention is to ensure that the plan is sound, positively prepared, justified, and effective, as well as being consistent with national policy and legally compliant. In this regard, it should be noted that the revised NPPF includes the tests of soundness so that the Local Plan should be 'an appropriate strategy', and not 'the most appropriate strategy' as set out in the previous NPPF.

12. BACKGROUND PAPERS

All background papers will be available to view/download by clicking on the Spatial Strategy Background papers link on the left hand side of the [Local plan webpage](#)

- 12.1 Strategic Housing Market Assessment 2019 – Justin Gardner
- 12.2 Employment Land Take-Up Update and Objectively Assessed Needs Review May 2018 – BE Group
- 12.3 Site comparison report – PTTP Consulting
- 12.4 St. George’s Advice – Bayou Bluenvironmental
- 12.5 Woolfox Advice – Bayou Bluenvironmental
- 12.6 St. George’s initial transport review - Amey
- 12.7 Woolfox initial transport review – Amey
- 12.8 Viability note for strategic sites – HDH Consulting
- 12.9 Sustainability Appraisal – AECOM :
- 12.10 Cost assessment of St. George’s and Woolfox – AECOM (EXEMPT REPORT)

13. APPENDICES

- 13.1 Appendix 1 – Spatial strategy background paper
- 13.2 Appendix 2 – Distribution of development background paper
- 13.3 Appendix 3 – Proposed Local Development Scheme

Large Print or Braille Version of this Report is available upon request – Contact 01572 722577.

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Background Paper:

Scale of development to meet identified requirements



Rutland
County Council

November 2019

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1. Introduction

- 1.1. The Council is in the process of preparing a Local Plan that will identify the land required to deliver the planned growth in the county over the period through to 2036. The National Planning Policy Framework (NPPF) requires that strategic policies set out an overall strategy for the pattern, scale and quality of development making sufficient provision for (amongst other things) housing and employment development.¹ As part of preparing the Local Plan the Council has consulted on various options for accommodating the planned housing and employment growth.
- 1.2. This paper provides more detail on how the Council's approach to the Local Plan spatial strategy to meet housing and employment requirements has evolved as preparation of the Local Plan has progressed.
- 1.3. The paper draws together relevant information from the Local Plan evidence base, the consideration of reasonable alternative options and proposals and explains the decision making process and the rationale behind the choices made.
- 1.4. The information and technical studies that are of particular relevance and which are referred to in this paper are:
 - Sustainability Appraisal/Strategic Environmental Assessment (SA/SEA)
 - Habitat Regulations Assessment (HRA)
 - South Kesteven and Rutland Strategic Housing Market Assessment (SHMA)
 - Rutland Employment Land Assessments (ELA)
 - Infrastructure Capacity and Delivery Plan
 - Whole Plan Viability Study
 - Town and village Landscape Capacity and Sensitivity Studies
 - Summary of Responses to Issues and Options Consultation
 - Summary of Consultation Responses – Consultation Draft Plan
 - Consultation on St. George's Barracks Response Summary
 - Settlement Sustainability Background Paper
 - Site Appraisals
- 1.1. These documents are available on the Local Plan Evidence pages of the Council's website.² It is important to note, however that at this stage that some of the evidence is being reviewed and updated as the final version of the plan evolves. Updated versions of the evidence reports will be taken into account in finalising the Pre-Submission Plan and published alongside it.

2. Scale of Housing Development across the County

Objectively Assessed Housing Need

- 1.1. At the time the Local Plan commenced preparation, the then NPPF required local authorities to have a clear understanding of the housing needs of their area and that this should be assessed through the preparation of a Strategic Housing Market Assessment (SHMA). The NPPF also

¹ NPPF paragraph 20

² For details of the evidence base see <https://www.rutland.gov.uk/my-services/planning-and-building-control/planning/planning-policy/local-plan-evidence-base/>

required that the assessment of housing need should be done in partnership with those neighbouring authorities that shared the same Housing Market Area (HMA).

- 1.2. Rutland is within a HMA that also includes Peterborough City, South Kesteven District and South Holland District Councils and the SHMAs prepared have reflected this housing geography, providing an Objectively Assessed Need (OAN) figure for both the HMA and the individual local authorities within it.
- 1.3. The SHMA update (2017) used as its starting point the 2014 household based projections. Taking account of 10 year migration trends and adjustments to the 2014-based headship rates provided a demographic need for housing in Rutland of 160 dwellings per annum (dpa). Adjustments were then considered to support planned economic growth. However, as this suggested a lower level of need than the demographic projections an uplift was not required. The need for adjustments to address affordability issues and respond to market signals was also considered. Although in Rutland various indicators pointed to stronger affordability pressures, as demographic projections (linked to 10-year migration trends) already substantially increased the need from the official 'start point', there was no strong case for a further uplift. Additional work has been undertaken to update the SHMA (2019) to give consideration to the 2016 household based projections. This confirms that it is reasonable for the Council to base the local plan on providing for a need for housing in Rutland of 160 dwellings per annum and provides more up to date information to inform local plan policies on housing mix and dealing with specific housing needs.
- 1.4. Using the SHMA evidence the total Objectively Assessed Need (OAN) for Rutland should be 2,880 dwellings for the period 2018 to 2036.

Local Housing Need

- 1.5. The publication of the revised NPPF in July 2018³ changed the way the Local Plan housing requirement was calculated with the introduction of the standard method for assessing local housing need (LHN).⁴ Based on household projections the standard method uses a formula which includes an uplift to reflect the affordability of an area. The national Planning Practice Guidance (PPG), which provides support for the implementation of the NPPF, sets out a step by step approach to the calculation of the LHN figure.
- 1.6. The LHN for Rutland, calculated using the 2014-based household projections, is 127 dpa.
- 1.7. The LHN will be subject to periodic change as updated affordability ratios are published and every two years new household projections are issued. In September 2018, the 2016-based household projections were published. When calculated against these projections the LHN for Rutland rose to 180 dpa. However, in October 2018 the Government published a consultation update to national planning policy and guidance. This included revising the standard method so that the 2014 household based projections would continue to provide the demographic baseline for assessing LHN. This approach was confirmed by the Government in February 2019.

³ A revised NPPF was published in February 2019.

⁴ For further information on LHN and the standardised methodology see <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

- 1.8. The NPPF states that the standard method should be used, unless exceptional circumstances would justify an alternative approach. The PPG advises that the LHN provides a minimum starting point in determining the number of homes needed in an area⁵ and there may be circumstances where a higher figure may be appropriate. These might include:
- Facilitating deliverable growth strategies;
 - Strategic infrastructure improvements driving the need for more homes locally;
 - Taking on a neighbouring authority's unmet need.
- 1.9. The PPG also indicates that when considering the appropriate level of housing need to plan for, local authorities should take into account recent assessments of need (through a SHMA) where this indicates a greater need than the outcome from the standard method.
- 2.10 The application of the Government's LHN gives a minimum housing requirement for Rutland of an average of 127 (rounded to 130) dwellings per annum. The Local Plan therefore needs to provide for a minimum requirement to meet this assessed need of 130 dwellings per annum over the period 1st April 2018 to 31st March 2036 (18 years); i.e 2,340 dwellings over the plan period. However, Paragraph 60 of the NPPF (2019) states that "to determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance – unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals".
- 2.11 In terms of housing supply, in addition to meeting this minimum requirement, the Council proposes in this plan to provide for a buffer of around 25%. This is in order to provide choice and contingency to the market, to reflect current housing market signals in Rutland and to address the issue of affordability. The Council is concerned that limiting the housing supply to deliver just the minimum requirement will significantly restrict the housing supply and therefore raise house prices to levels which create increased cost barriers to local residents and workers. Adopting this approach is supported by the Strategic Housing Market Assessment (SHMA) Updated 2019, which assesses a need for Rutland of 3,200 dwellings from 2016 to 2036. This equates to 160 new homes per annum over this period. This evidence assesses the additional housing needs of the County's growing population over the whole plan period in more detail than the LHN. The Council considers that the Strategic Housing Market Assessment provides a more detailed analysis of local housing needs, taking account of market signals and affordability. Such an approach would respond to market demand as evidenced by recent rates of housebuilding in Rutland. In addition, adding a buffer as an uplift to the Government's local housing need assessment (of 130 homes per annum) would help address affordability issues and demographic trends as identified in the SHMA where various indicators point to pressures in Rutland.
- 2.12 The Interim Sustainability Appraisal (August 2019) considers 12 options for the location of growth across the county against 18 sustainability objectives which cover environmental, economic and social factors. Each option was also considered against its ability to deliver both the minimum LHN of 130 dpa or the OAN of 160 dpa. It is important to note that all 12 options have the ability to meet the lower LHN requirement, however only half of the options would be able to meet the full OAN requirement. The interim SA report makes no recommendations

⁵ Paragraph 010 Housing and Economic Development Needs Assessments, PPG <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

about which option should be selected by the Council it is however a tool to inform decision making by identifying the potential effect of each option on the SA objectives.

2.13 Options 1 and 5 most closely meet the minimum housing need of 130 dwellings per annum, whilst options 4, 6, 7 and 11a and b most closely fit the higher housing need of 160 dwellings per annum. Options 9 and 10 significantly exceed both annual need figures.

- Option 4 would deliver high levels of growth in Oakham, Uppingham and the Local Service Centres with no new settlement
- Option 6 would deliver high levels of growth in the Local Service Centres and low growth in Oakham, Uppingham with a small amount of development on a new settlement
- Option 7 delivers low growth in Oakham, Uppingham and the Local Service Centres with a moderate sized garden village
- Option 11a and 11b would deliver growth through a single large new settlement

There are therefore a range of options for meeting the housing need identified by both the LHN and OAN calculation. The potential effect of each option on the SA objectives and the identification of sufficient suitable and deliverable sites to meet the need in each option will be considered separately in the background paper of distribution of development.

2. Housing Requirement and Supply

2.1. The NPPF is clear that strategic policies should as a minimum provide for the objectively assessed needs of an area unless there is a lack of physical capacity or any adverse impacts of doing so would significantly and demonstrably outweigh the benefits.

2.2. The OAN/LHN may not necessarily be the same as the Local Plan housing requirement but in setting this it is necessary to consider if there are any constraints on delivery of the OAN/LHN.

2.3. A number of Local Plan evidence documents have considered land supply (SHELAA), development viability (Whole Plan Viability Study), the social, environmental and economic effects of development (Sustainability Appraisal) and the capacity of existing or the need for new infrastructure to support the scale of planned growth (Infrastructure Capacity Study). These have identified that there are no fundamental constraints to delivering the OAN or LHN requirement in terms of land availability, viability, environmental capacity and infrastructure capacity, although there are localised issues relating to the impact of development of some sites on individual settlements. There is, therefore, considered to be no justification for setting a Local Plan housing target that does not meet Rutland's OAN/LHN in full.

2.4. Rutland's boundary with South Kesteven District runs tightly up to the edge of the town of Stamford. In 2015 South Kesteven District Council commissioned a Stamford Capacity Study to identify potential development areas on the edge of the existing settlement to meet the development needs of the town. The study identified land on the north side of Stamford as being relatively constraint free, including land on the edge of Stamford extending into Rutland. This also reflects the conclusions of the Rutland Landscape Sensitivity and Capacity Study. Informal meetings between officers and with elected members of the two authorities subsequently took place and recognised the importance of joint working through the expectations placed in the NPPF on local planning authorities in terms of the Duty to Co-operate. This will be elaborated in the Duty to Co-operate statement which will accompany the

Pre-Submission Local Plan. It was recognised that any site coming forward as an urban extension covering both local authorities would require master planning across its entirety in order to ensure a co-ordinated approach. The agreed way forward was for both Councils to make joint Local Plan allocations on either side of the boundary. In doing so, it was recognised that the Rutland element of Stamford North (Quarry Farm) would not be allocated unless it is considered to be an essential element in the comprehensive development of this wider proposed development, enabling the provision of a west to east distributor road to be provided from the Old Great North Road at Great Casterton to Ryhall Road in Stamford. The 2017 Consultative Draft Local Plan makes it clear that this site will **only** be brought forward for development in conjunction with the land in South Kesteven as a comprehensive mixed use scheme which delivers a new road connection between Ryhall Road in the east and the Great North Road to the west. A part of the Quarry Farm site is identified as a candidate wildlife site and would not normally be considered appropriate for development. However, the wider economic and social benefits arising from a comprehensive development in this location which delivers this new road connection is considered to outweigh the potential impact of development on wildlife in this instance. The candidate status of the site is due to the identification of important flora on site. The Leicestershire County ecologist service has worked with the County Council to assess the potential impact of development on the wildlife interest and how this could be mitigated. The development proposal therefore requires the creation of a new wildlife site and the translocation of the notable species.

- 2.5. Paragraph 2.8 of the Council's adopted Core Strategy recognises this possibility. It states: "The parish boundary for Little Casterton adjoins the edge of Stamford, a market town within South Kesteven District, making this a relatively sustainable location albeit outside the administrative boundary for Rutland. As such there may be scope for development within this area in order to support the sustainable growth of Stamford and to overcome infrastructure constraints. However, this will depend on the favoured preferred location for development in Stamford and will be determined as part of South Kesteven District Council's Site Allocation's Development Plan Document. If this should be regarded as a suitable location for development, it will need to be considered jointly with South Kesteven District Council and be subject to where appropriate, either a joint Site Allocations Development Plan Document or joint Area Action Plan developed in consultation with the local communities of Rutland and South Kesteven."
- 2.6. The publication of the Stamford Capacity Study also led to the respective landowners and development interests coming together through a Memorandum of Understanding to work together to deliver the Stamford North development. The site has been included in the South Kesteven Local Plan which has been submitted to the Government and has been under examination throughout 2019. The examination hearings have now concluded and the Inspector's report is awaited.
- 2.7. The preferred approach between the local authorities was that any allocations determined to be suitable for inclusion in the respective Local Plans would be followed by the preparation of a joint Development Brief, initially for consultation. This approach was referenced in the South Kesteven Local Plan public examination. A draft Development Brief is being prepared by Officers of both local authorities in collaboration with the landowners and developers of land at Stamford North. This will be finalised following an independent Design Review Panel meeting. In addition, the respective local authorities have requested that more detailed traffic modelling is undertaken of the whole development scheme. This will feed into the revised Development Brief so that it can include more detail on the nature, timing and phasing of elements of the development (including the west-to-east distributor road) within the proposed development site as well as any off site highway mitigation work which may be required. It is

intended that the Development Brief will then come to both local planning authorities to consider and approve for the purposes of public consultation only. This is now likely to be in early 2020. Following public consultation, the Development Brief will again be considered by both Councils for adoption as a Supplementary Planning Document in line with their respective Local Development Schemes.

- 2.8. A draft document has been produced setting out a Statement of Common Ground (SoCG) between Lincolnshire County Council (LCC), Rutland County Council (RCC) and South Kesteven District Council (SKDC), and is currently being updated to coincide with the publication of the Pre-Submission Local Plan. The purpose of this SoCG is to facilitate co-ordination and co-operation between the three Councils as they seek to jointly plan land to the north of Stamford extending across both Rutland and South Kesteven’s area. It also confirms the established position that the development of the land in Rutland will support the sustainable growth of Stamford, and so it is appropriate for the capacity here to contribute to South Kesteven’s housing needs. This position was set out in the Consultation draft Local Plan issued in 2017 and in the focused consultation on the implications of potential development at St Georges Barracks issued in 2018. The approach is in line with paragraph 35a) of the NPPF (2019).
- 2.9. Taking account of expected delivery from appropriate sources the residual (net) housing requirement for the remainder of the plan period is set out in Table 1 below:
Table 1: Calculation of Residual Housing Requirement, 2018-36

County Housing requirement 2018-2036 (130 x 18)	2,340
Completions 2018-2019	211
Sites with planning permission @ 01-04-2019	600
Residual requirement	1,529

(note: not all sites with planning permission will be delivered)

- 2.10. Through the Local Plan there is a need to find land for at least 1,529 additional dwellings. Government guidance indicates that Local Planning Authorities may make an allowance for windfall sites if they have compelling evidence that such sites have consistently become available. There is evidence within Rutland that windfall sites continue to make a contribution to housing delivery within the county, although it is recognised that windfall sites are finite and the opportunities for such sites to come forward are reducing. A part of the supply of sites with planning permission indicated in the table above are windfall sites and are expected to be delivered within the next three years, therefore it is appropriate to make a windfall allowance for the remainder of the plan period beyond 2022 as part of the housing supply. In light of the evidence of past delivery rates on small windfall sites in recent years it is considered appropriate to include an allowance for 20 windfall sites per annum for the period 2022-2036.

3. Neighbourhood Plans

- 3.1. Some of the housing requirement can be met through allocations made in Neighbourhood Plans. Several Neighbourhood Plans have been made or are currently being prepared across the County and the Local Plan will need to set out a housing requirement for designated neighbourhood areas, which reflect the proposed spatial strategy of the Local Plan.

- 3.2. To date only Uppingham Neighbourhood Plan has proposed to allocate sites in their Plan. It is intended therefore that the Local Plan will not make allocations in Uppingham but will propose a quantum of development to be met through an emerging Neighbourhood Plan for Uppingham. If allocations are not forthcoming in the Neighbourhood Plan, then this will need to be incorporated in any review to the Local Plan.

4. Scale of Employment Land

- 5.1 The requirement for future employment land has been considered through an Employment Land Assessment (ELA). The Employment Land Assessment Update (January 2016) assessed the supply, need and demand for employment land and premises in Rutland. Its key recommendations were:
1. that the County needs an additional 29.09 ha of land to 2036 and includes 9.85 as a five year “buffer” beyond the plan period;
 2. there is a need to protect its employment sites from non-employment uses, such as housing or retail;
 3. that the Council should designate seven key employment sites and areas to be Safeguarded for B Class Uses and other employment uses;
 4. there is an identified need for further start-up and micro-business accommodation, particularly to meet workshop and storage needs; and
 5. that the Council should review and monitor the employment land and premises position and undertake the study again in about three years, as 2036 is a long time in the future and much will happen before then.
- 5.2 A further update to this study was conducted in May 2018 to ensure that the evidence base to the Local Plan was up to date ([attached here](#)). This Employment Land Report sets out two scenarios which show widely differing results. The short term take up scenario (which the consultants recommend as the evidence to support this is more robust) indicates an existing over-supply of employment land in Rutland. However, the alternative long term take up scenario shows that there is a requirement for us to provide an additional 25 ha of employment land. The consultants also recommend that: “Rutland County Council maintain a flexible employment land supply, which can meet the full range of needs to 2036, provide choice and flexibility in supply, allowing for likely further losses”.
- 5.3 Whilst it is not the approach recommended by the consultants, Officers consider that it is an appropriate approach to make additional provision in this Local Plan in order to cater for the long term take up scenario, provide choice and flexibility in the supply to the market, and ensure that sufficient, suitable and attractive employment land is available to meet the Council’s aspirations for the local economy. This approach is supported by the Council’s own, more recent, evidence of demand for managed workspace at Ashwell Business Park and the King Centre.

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Background Paper:

Distribution of Development and summary assessment of Garden Community proposals



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1. Introduction

- 1.1. The Council is in the process of preparing a Local Plan that will identify the land required to deliver the planned growth in the County up to 2036. The National Planning Policy Framework (NPPF) requires that strategic policies set out an overall strategy for the pattern, scale and quality of development making sufficient provision for (amongst other things) housing and employment development.¹ As part of preparing the Local Plan the Council has consulted on various options for accommodating the planned housing and employment growth.
- 1.2. This paper provides more detail on how the Council's proposed approach to the distribution of development to meet housing and employment requirements has evolved as preparation of the Local Plan has progressed and in particular considers the proposal that a significant proportion of that growth could be delivered in the form of a new settlement or garden community
- 1.3. The paper draws together relevant information from the Local Plan evidence base, the consideration of reasonable alternative options and proposals and explains the decision making process and the rationale behind the choices made.
- 1.4. The information and technical studies that are of particular relevance and which are referred to in this paper are:
 - Sustainability Appraisal/Strategic Environmental Assessment (SA/SEA)
 - Habitat Regulations Assessment (HRA)
 - South Kesteven and Rutland Strategic Housing Market Assessment (SHMA)
 - Rutland Employment Land Assessments (ELA)
 - Infrastructure Capacity and Delivery Plan
 - Whole Plan Viability Study
 - Town and village Landscape Capacity and Sensitivity Studies
 - Summary of Responses to Issues and Options Consultation
 - Summary of Consultation Responses – Consultation Draft Plan
 - Consultation on St. George's Barracks Response Summary
 - Settlement Sustainability Background Paper
 - Site Appraisals
- 1.5. These documents are available on the Local Plan Evidence pages of the Council's website.²
- 1.6. Where appropriate reference is also made to site specific information provided by site promoters. It is important to note, however that at this stage that some of the evidence is in draft or relates to the early stages in the plan making process and is being reviewed and updated as the final version of the plan evolves. Final versions of evidence reports will be published alongside the Pre-Submission Local Plan.

Spatial Distribution Options

Issues and Options: Consultation, 2015:

¹ NPPF paragraph 20

² For details of the evidence base see <https://www.rutland.gov.uk/my-services/planning-and-building-control/planning/planning-policy/local-plan-evidence-base/>

- 1.7 The Council published an Issues and Options consultation document in November 2015, which presented four options for the distribution of planned growth:
- A. Continuation of the Core Strategy apportionment of growth between the towns (70%) and villages (30%)
 - B. Provide a higher proportion of growth at Oakham
 - C. Provide a higher proportion of growth at Uppingham
 - D. Provide a higher level of growth at Local Service Centres
- 1.8 The option of a new settlement as a means of accommodating some of the County's future growth was not included as a specific option at this stage, although it was referenced as a possible further 'other' option that could be considered. No site had been put forward or identified through the 'Call for Sites' process as a possible new settlement location.
- 1.9 The SA that accompanied the Issues and Options consultation did not formally assess the 'other' options but indicated that if they were assessed impacts would be scored as 'unknown' on the grounds that it would depend on what the options were and how they would be implemented.
- 1.10 Of the options assessed in the SA, Option A (current apportionment) was assessed as scoring more favourably due to Oakham and Uppingham proving to be more sustainable locations than the Local Service Centres. In terms of the distribution of growth between Oakham and Uppingham, it was noted that whilst Oakham would be able to sustainably accommodate a higher level of growth, the current apportionment of new growth between the two towns would be the more sustainable option.
- 1.11 The highest level of support expressed in consultation responses was for the continuation of the apportionment of growth between the towns and villages as set out in the Core Strategy. There was no support expressed by respondents for a new settlement and no sites were suggested as a possible location. The Ministry of Defence (MOD) did seek the inclusion of a policy relating to the use of MOD sites.
- 1.12 *Draft Consultation Plan, 2017:*
- 1.13 The Consultation Draft Plan published in July 2017 took forward the growth strategy of focusing development in the towns and to a lesser extent the larger villages and included details of potential housing allocations in accordance with the proposed spatial distribution of housing.
- 1.14 In November 2016, the MOD announced that St George's Barracks, North Luffenham was surplus to future operational requirements, with disposal programmed for 2020/2021³. At the time of preparing the Draft Consultation Plan in 2017, future uses for the site and the possible timing and quantum of any development had not been determined. As such, it was considered premature to consider the site as a potential allocation in the Local Plan and accompanying Sustainability Appraisal (SA).
- 1.15 The Draft Consultation Local Plan therefore did not include proposals to bring forward development on the St. George's site. It did include a policy (Policy RLP8) setting out the principles of development in respect of redundant military bases (and also prison sites) generally. This was qualified by the reasoned justification which made clear that any proposed new settlement or business park would need to be considered in the context of the Draft Local Plan spatial strategy, which sought to focus development within and adjoining the main towns while limiting unnecessary development in the countryside.
- 1.16 The SA of the Consultation Draft tested Policy RLP8 against likely SA effects. It was concluded that if redevelopment included employment uses there would be positive economic effects through the creation of new employment opportunities and provision of infrastructure. Likewise positive social effects would arise from residential development through adding to the housing stock and a larger scale development

³ It was subsequently announced in February 2019 that the planned closure would take place by 2022.

offered the potential for social and community services to be provided as an integral part of the development. Both the economic and social effects were assessed as likely to be significantly positive over the medium and long term. Environmental effects were assessed as likely to be negative due to the scale of development and its location within the countryside with resultant impacts on the landscape, biodiversity and higher emissions through increased car travel if sites were not sustainably located. However, this could be mitigated through the integration of employment, housing and community facilities to meet essential needs in to the development and comprehensive master planning ensuring that convenient walking and cycling routes were created to access these elements thereby reducing reliance on private car trips, which would have a positive effect.

- 1.17 The SA of the spatial strategy (RLP3) was predicted to have positive economic, social and environmental effects. The long term environmental effects were predicted to be uncertain as environmental factors such as conserving and enhancing the historic environment and biodiversity and geodiversity had not been explicitly taken into account within the policy: the mitigation of any adverse impacts would be reliant on the application of other plan policies related to the protection of the natural and built environment.
- 1.18 The HRA identified that likely significant effects (LSE) were possible due to proximity of sites to Rutland Water and its tributaries in respect of impacts on water quality. To ensure no LSE, the necessary sewerage and water resource provision should be phased in advance of development. Impacts from the recreational use of Rutland Water by occupiers of the sites could be controlled via management regimes and/or the provision of new accessible green spaces. It was noted, however, that this assessment had been taken forward from the Core Strategy and that if the St. George's site were redeveloped, an HRA of a proposal should be carried out due to its close proximity to Rutland Water.
- 1.19 Whilst the majority of consultation responses supported Policy RLP8 there were a number of responses that suggested the potential redevelopment of St. George's Barracks should be considered within the next version of the Local Plan in order to ease pressure on greenfield sites being allocated elsewhere.
- 1.20 *Focused consultation on potential development at St George's within the Local Plan, 2018:*
- 1.21 In July 2018, the Council published a focused consultation on the implications for the Local Plan of the potential development of St. George's Barracks in terms of the Plan's Vision and Objectives, distribution of housing and minerals policies. The consultation proposed that St. George's Barracks be identified for between 1,500 and 3,000 dwellings of which 1,200 would be delivered during the plan period together with employment, local retail and community facilities, education, open spaces and green infrastructure and improved highways and public transport provision. It also included a specific Policy that set out the Garden Village principles that should be incorporated into a finalised masterplan and the development requirements to be met.
- 1.21 This consultation reflected that the understanding of the redevelopment opportunities presented by the availability of the site had progressed significantly in the time following the publication of the consultation draft plan. It also addressed the comments received to the draft Local Plan in respect of the Local Plan more clearly evaluating the scope offered by redevelopment of the site in delivering the County's growth requirements.
- 1.22 The proposed changes to the Local Plan included in the consultation document had been informed by the completion of a High Level Masterplan, developed jointly by the MoD and RCC⁴ and which itself was the subject of informal consultation between May and June 2018. The High Level Masterplan identified the constraints and opportunities which might impact on the quantum of housing, employment and ancillary uses that could be accommodated on the site.

⁴ The MOD and RCC entered into a Memorandum of Understanding (MoU) to work jointly in examining the re-development potential of the site, which was signed in September 2017 <https://www.stgeorgesrutland.co.uk/partnership/>.

- 1.23 The consultation also set out revised housing requirements for the towns and villages to reflect that over a third of the requirement could be provided for on the St. George's site. It proposed to split the remaining requirement 75%/25% in favour of the two towns, which was a slight change to that put forward in the Draft Local Plan (70%/30%) to reflect the range of services and facilities available within these settlements as well as the assessment of the suitability of sites available. The distribution between Oakham and Uppingham was proposed to remain unchanged.
- 1.24 The Local Plan focused consultation was not accompanied by a SA or HRA although the consultation document recognised that both would need to be reviewed and updated if the site were to be taken forward for inclusion in the Pre-Submission Local Plan.
- 1.25 In response to this consultation an alternative/additional garden community proposal was submitted for the former Woolfox airfield and surrounding agricultural land near Clipsham and Stretton.

2. Spatial Strategy

- 2.1 The NPPF indicates⁵ that planning policies should play an active role in guiding development towards sustainable solutions, taking local circumstances into account and reflecting the character, needs and opportunities of each area and set out an overall strategy for the pattern, scale and quality of development⁶, taking account of meeting identified housing and other requirements.

Settlement Hierarchy

- 2.2 The Local Plan settlement hierarchy plays an important role in identifying sustainable locations for development in meeting identified housing and other requirements. It categorises the County's settlements according to their different roles and groups them accordingly. At the top of the hierarchy are the larger settlements that fulfil the most functions, have the best infrastructure in terms of facilities and services and are the most accessible by sustainable forms of travel. The smaller settlements with the least facilities, services and accessibility to public transport are towards the bottom of the hierarchy. A separate [Background Paper on the Sustainability of Settlements](#) has been previously published, setting out how the County's settlements have been categorised into each tier of the hierarchy. As the provision of services and facilities within settlements can change over time the assessment of settlements is being updated to provide an up to date evidence base for the Local Plan, and the background paper will be amended accordingly and published to coincide with the production of the Pre-Submission Local Plan.
- 2.3 The current Local Plan spatial strategy focuses new housing and other development in the most sustainable locations, primarily in the towns and settlements identified as local service centres, and away from areas of flooding and where development is accessible by modes of transport other than the private car. However, the promotion of sites for a potential new community means that these need to be assessed in order to determine whether one, both or neither proposal are appropriate for inclusion within the Local Plan and the impact this will have on the Local Plan spatial strategy.
- 2.4 Sustainability Appraisal (SA) is an ongoing and iterative piece of work which should consider the potential impact of options for policies and proposals against a series of objectives covering the following seven themes: Biodiversity and geodiversity; historic environment; Landscape; Soil, land and water resources; climate change; population and communities; economic and employment factors. An interim Sustainability Appraisal report has been prepared to consider a range of options for the spatial strategy and distribution of development. This considered 12 options for the distribution of development. The report also considers the potential effect of development of all sites against national, international and local designations, and environmental, social and economic criteria using a Red, Amber, Green scoring

⁵ NPPF paragraph 9

⁶ NPPF paragraph 20

matrix. The SA of sites is a technical appendix to the Interim Sustainability Appraisal, published November 2019. This is available on the website here: [Local plan webpage](#).

2.5 The appraisal of the 12 spatial strategy options against the seven SA themes ranks each option against each theme. The report does not recommend one option over the others as its purpose is to inform decision making by identifying the potential impact of options against the SA criteria and consider how or why this might be mitigated. Options 4, 6, 7 and 11 (a and b) most closely match the higher housing need requirement of 160 dwelling per annum.

- Option 4 would deliver high levels of growth in Oakham, Uppingham and the Local Service Centres with no new settlement
- Option 6 would deliver high levels of growth in the Local Service Centres and low growth in Oakham and Uppingham with a small new settlement
- Options 7 and 8 deliver lower growth in Oakham, Uppingham and the Local Service Centres with a moderate sized garden village
- Option 11a and 11b would deliver growth through a single large new settlement only

2.6 Some 207 sites have been put forward for consideration as sites for either housing, employment, or mixed use development during the course of the local plan review process. The site assessment process has been undertaken in two stages:

Stage 1: Strategic Housing and Employment Land Availability Assessment (SHELAA);

Stage 2: Detailed site assessment for those sites which have not been screened out in the SHELAA

2.7 207 sites have been submitted to the Council for consideration since the initial Call for Sites in 2015. The SHELAA process considers the broad location of sites against the spatial strategy and against national and international designations. Consideration is also given to the suitability and deliverability of development. As a result of this process some 147 sites have been screened out leaving 60 sites which have been subject to more detailed site appraisal.

2.8 The outcome of the site assessment work reveals that if the Local Plan were to retain the same distribution of development as set out in the Core Strategy (option 4), but with the higher levels of need required for the plan period to 2036, there are not be enough suitable, acceptable and deliverable site for development within or on the edge of Oakham and whilst there are sufficient suitable and deliverable sites across the Local Service Centres to cover the shortfall in Oakham (option 6) the potential impact of this scale of development on the landscape and setting of the County's villages, and on the wider sustainability objectives set out in the SA is considered unacceptable. However, in order to promote sustainable patterns of development and continue to support the vitality of our rural communities it is important to make provision for some development in the towns and Local Service Centres, but this will need to be supported by the inclusion of an alternative source of development if the plan is to deliver the appropriate levels of housing and economic growth required for the plan period. It is therefore appropriate to consider the inclusion of a new settlement option within the spatial strategy.

3. Role and assessment of a potential New Settlement (Garden Community) in Spatial Strategy

3.1. During the course of the preparation of the Local Plan the potential for a new settlement to form part of the spatial strategy and deliver a significant part of the County's housing and, to a lesser extent employment requirement, therefore arose. This section of the Background Paper considers the opportunities a new settlement could provide towards meeting development needs and the consideration of alternative new settlement sites.

- 3.2. There has been a long history of planning for large scale residential led development in the United Kingdom: from the Garden City movement at the start of the twentieth century, which sought to address problems associated with overcrowded cities and finding ways of combining the advantages of town and country living; through the New Towns programme, which started in the mid twentieth century as part of the reconstruction after the Second World War, and saw the designation of 32 new towns between 1947 and 1970; to the development of Eco-towns in the early twenty first century.
- 3.3. More recently there has been a renewed interest in Garden City style development, partly in response to the housing shortage and to meet housing needs at a national and local level. When the National Planning Policy Framework (NPPF) was first published in 2012, it was recognised that the supply of new homes could sometimes best be achieved through planning for larger scale developments such as new settlements.
- 3.4. To encourage the bringing forward of locally led large scale development, the Locally Led Garden Cities prospectus was published in April 2014. This did not set a formal definition of what a garden city was but did set out additional context to the potential role and opportunities they may offer.
- 3.5. In March 2016, the Government published a further prospectus (Locally-led Garden Villages, Towns and Cities Prospectus), which invited expressions of interest from local authorities for a programme of government support for new locally led garden villages (of between 1,500 and 10,000 homes) and towns (more than 10,000 homes). This stated that:

'Large new settlements have a role to play, not only in meeting this country's housing needs in the short - term, but also in providing a stable pipeline of housing well into the future We want to encourage more local areas to come forward with ambitious locally-led proposals for new communities that work as self-contained places, not dormitory suburbs. They should have high quality and good design hard-wired in from the outset - a new generation of garden villages, towns and cities.'

The prospectus sets out that new garden villages should have the backing of the local authorities in which they are situated. It is expected that expressions of interest to demonstrate a strong local commitment to delivery. They should also set how the local community is being, or will be, engaged at an early stage, and strategies for community involvement to help ensure local support. An application submitted by Rutland County Council in response to this prospectus regarding the proposed establishment of a Garden Village on the site of St. George's Barracks was approved by the Government in July 2019

- 3.6. Paragraph 72 of the NPPF (2019) states: "The supply of large numbers of new homes can often be best achieved through planning for larger scale development, such as new settlements or significant extensions to existing villages and towns, provided they are well located and designed, and supported by the necessary infrastructure and facilities. Working with the support of their communities, and with other authorities if appropriate, strategic policy-making authorities should identify suitable locations for such development where this can help to meet identified needs in a sustainable way. In doing so, they should: a) consider the opportunities presented by existing or planned investment in infrastructure, the area's economic potential and the scope for net environmental gains; b) ensure that their size and location will support a sustainable community, with sufficient access to services and employment opportunities within the development itself (without expecting an unrealistic level of self-containment), or in larger towns to which there is good access; c) set clear expectations for the quality of the development and how this can be maintained (such as by following Garden City principles), and ensure that a variety of homes to meet the needs of different groups in the community will be provided; d) make a realistic assessment of likely rates of delivery, given the lead-in times for large scale sites, and identify opportunities for supporting rapid implementation (such as through joint ventures or locally-led development corporations)³⁵; and e) consider whether it is appropriate to establish Green Belt around or adjoining new developments of significant size."

New Settlement Key Opportunities

- 3.7. Planning for a new settlement can offer a number of positive benefits, specifically it can provide the opportunity to:
- Ensure the necessary infrastructure is planned from the start;
 - Create a well planned community with a mix of uses including recreation and greenspace;
 - Ensure that all key facilities are planned in convenient and accessible locations;
 - Place green infrastructure at the heart and throughout the development;
 - Create a strong sense of place that provides a new focus for growth within the plan period and beyond;
 - Plan positively for more walking and cycling;
 - Provide support for/enhance existing public transport provision;
 - Create a place that is attractive to live (and work) in;
 - Implement a strong co-ordinated approach to design;
 - Deal with any negative impacts on the environment in a holistic way with avoidance, mitigation and enhancement considered and integrated from the outset; and
 - Foster strong community engagement and leadership.

Alternative Sites

- 3.8. During the course of preparing the Local Plan, two sites have come forward that have the potential to deliver large scale growth over the plan period and the associated facilities to support that growth.
- 3.9. An overview of the sites, in terms of when they were submitted to the Council and the information provided to support this, is set out below.

St. George's Barracks, North Luffenham

- 3.10. As detailed above, the site was not formally been submitted to the Council through the Call for Sites process or during earlier consultation stages of the Local Plan. However, it has been declared surplus to operational requirements by the MOD by 2022 and the MOD have submitted the site to be considered for allocation in the Local Plan. An initial High Level Masterplan has been prepared for the site by the MoD in conjunction with RCC through a joint Memorandum of Understanding.
- 3.11. The site is located to the south east of Edith Weston (a Local Service Centre in the emerging Local Plan settlement hierarchy). It comprises the St. George's Barracks, which can be sub-divided into three areas:
- Military Barracks – comprises a mixture of residential blocks, functional buildings, military hangars and outside training areas and occupies the north western part of the site.
 - Former airfield – covers the majority of the central and eastern part of site. There are several distinct parcels within this sub-area including the former runways, large scale commercial buildings (to the north of the runways), paddocks and the historic structures associated with the Thor missiles.
 - (former) North Luffenham Golf Course - occupied part of the site between the barracks and airfield areas running in a north/south direction.

3.12 The preparation of the masterplan has been informed by the completion of a number of technical studies including, Ecological appraisal; Heritage assessment; Archaeological desk based assessment; Minerals survey report; Transport assessment. A detailed set of evidence reports and studies has been prepared over the last two years to support the allocation of the site and as part of the submission of a bid to Homes England's Housing and Infrastructure Fund (HIF). Even if such a bid is successful, the site has to be assessed and considered in accordance with the legal and policy requirements relating to Local Plans along with other sites.

Woolfox Depot

- 3.13 This site was submitted on behalf of the landowner in response to the focused Local Plan consultation (September 2018). It comprises the area occupied by the former Woolfox Lodge airfield (in the southern part of site), which is now primarily used as arable farmland, with areas of woodland and further arable land to the north. The site lies to the east of and adjacent to the A1, 14.5km east of Oakham and 11km north of Stamford.

- 3.14 The initial proposal was supported by a concept masterplan. Further supporting information in the form of landowner, transport and minerals position statements were submitted to the Council in January 2019 and a number of supporting evidence papers including highways, landscape, ecology, heritage and infrastructure were submitted in April 2019 with an Initial Transport Assessment submitted in August 2019.
- 3.15 The Council has not, as yet, undertaken consultation about the Woolfox proposal, and it is recognised that should the site be selected as a preferred option for inclusion within the Local Plan additional community engagement and consultation will need to be undertaken. The site promoters held a public information event on Friday 12th April in Oakham, and people were invited to provide feedback until Friday 26th April. The output of this consultation has not been made available.

Assessment Methodology

- 3.16 The process of assessing the suitability of each site must include a review of the local plan evidence and the specialist evidence provided in support of each proposal. The suitability of each site has been assessed independently against some 41 criteria. In addition evidence reviews have been provided by the Council's technical experts on highways, landscape, infrastructure and viability. The details of these assessments will be placed on the Council's website for the public. The purpose of this assessment was to determine whether either, neither or both are realistic and viable, and so suitable for consideration for allocation in the Local Plan.
- 3.17 It is important to note that the SA/SEA and Habitats Regulation Assessment (HRA), Infrastructure Delivery Plan and Whole Plan Viability Assessment will all need to be reviewed and updated to support the next stage of producing the Local Plan. This work will be undertaken to support the preparation of the final draft plan.
- 3.18 The assessment criteria used to assess the sites have been developed from those used in the assessment of all sites submitted and considered for inclusion in the Local Plan. Whilst many of the criteria are common for all sites, additional criteria have been developed to reflect the principles of a garden village development and the matters the NPPF indicates should be considered in identifying suitable locations.
- 3.19 Planning consultants PTP Consultants were appointed to undertake an independent assessment of each strategic site proposal, based upon the assessment criteria set out above. 41 issues were identified against which the evidence underpinning the respective sites have been assessed. These issues are largely based on key strategic policy areas identified in the NPPF 2019 (Paragraph 20) and other issues that are frequently explored as part of the examination of the soundness of a Local Plan. The assessment process is structured to ensure that a common approach to identifying and reviewing the planning issues was applied to each of the New Settlement options.
- 3.21 The assessment of available evidence was mainly desk-based together with visits to both sites as part of the process, enabling short and long distance views of the sites in order to understand the sites' contexts and to aid understanding of the submitted Landscape evidence.
- 3.22 Face to face meetings were held with the Local Education Authority, Local Highway Authority and East Leicestershire & Rutland Clinical Commissioning Group. Telephone discussions were held with Western Power and Anglian Water enable a greater understanding of the provision of utilities.
- 3.23 The evidence that has been assessed includes that produced by both site promoters (including their agents). Woolfox evidence is largely available on the 'Woolfoxgardenvillage' website set up by the site promoters in support of this option. Further evidence relating to viability was made available to assist the author in producing the report and was treated in confidence. Some evidence based studies for St George's were available on the 'StGeorgesRutland' website. Other evidence relating to the key issues was made available by the agents of the site promoter and has been treated in confidence.

3.24 Some evidence which was not 'site specific' to the two options was considered sufficiently proportionate and robust to allow a consideration of whether the options were 'justifiable' and 'effective'. Examples include the potential for fluvial flooding (addressed in the Strategic Flood Risk Assessment carried out for the LPA and Environment Agency flooding data) and Agricultural Land Classification data. The report identifies where further detailed studies are required or whether independent verification would assist in considering whether the sites are 'justified' and 'effective'.

3.25 The criteria against which the sites are assessed include:

Capacity and Deliverability

1. Potential to deliver the outstanding requirement for development - Overall site capacity (Housing & employment) – including Start date & Trajectory
2. Viability
3. Ownership constraints and identified developer partner
4. Legal constraints

Environmental

5. Flooding
6. Landscape
7. Ecology (habitats and species)
8. National / European designations
9. Minerals
10. Trees and woodlands
11. Air quality, noise and other pollutants
12. Land stability and contamination
13. Topography
14. Heritage (Designated and non-designated heritage assets and their settings)
15. Best & Most Versatile Agricultural Land.
16. Re-use of Previously Developed land
17. Urban Design / Garden village principles

Infrastructure

18. Provision of Schools
19. Provision of Health Care (primary and acute needs)
20. Utilities (including water, power and telecommunications)
21. Retail facilities
22. Community facilities
23. Parks and Open Spaces

24. Strategic Green Infrastructure

Transport

25. Impacts of development traffic
26. Availability of public transport
27. Access to cycling networks
28. Access to public footpath networks
29. Impact on public rights of way
30. Potential to incorporate new technologies
31. Major transport infrastructure constraints

Economy

32. Employment Land provision
33. Construction and longer term economic benefits

Policy and strategic principles

34. Consistency with National Policy
35. Larger scale development
36. Healthy lifestyles
37. Creating a strong economy
38. Boosting the supply of housing
39. Provision of affordable housing
40. Maintaining Strategic gaps between settlements and protecting local character
41. Scale in comparison with host settlement

3.26 PTPP were not instructed to identify a 'preferred site', only to consider whether each of the sites would represent "an appropriate strategy, taking into account the reasonable alternatives, and based on proportionate evidence" in accordance with the NPPF.

3.27 The main aim of the report is to identify whether the sites would potentially meet the tests of soundness (as defined in paragraph 35 of the National Planning Policy Framework 2019) if they were to be submitted for examination.

3.28 The report concludes that there are a large number of areas where it is considered that a proportionate evidence base has been submitted for both sites, or is available from independent sources.

3.29 The report has, however, identified that there are some key areas where the evidence does not conclusively demonstrate that that the site options would be 'justified' (in terms of current evidence) or 'effective' (in terms of evidence supporting the proposition that they are likely to be delivered during the plan period). The report recommends that additional evidence, or independent assessment of submitted evidence, is required in the following key areas:

Viability

- 3.30 Both site options have submitted some viability evidence. The evidence submitted by the Woolfox promoters is insufficiently detailed and does not conclusively support the site as a 'justified' or 'effective' option. In particular this assessment does not include a range of significant infrastructure costs which would normally be expected for a development of this scale. The estimated return to developer is low when benchmarked against normal custom and practice (15 – 20%) and the contribution costs per unit appear low in light of the significant infrastructure requirements. Some independent 'benchmarking' evidence is recommended.
- 3.31 The costings and viability evidence submitted for the St George's site is more comprehensive but is not currently 'self-contained' or accessible in one document. A HIF bid has been submitted which has been subject to detailed scrutiny by Homes England – this includes benchmarking of costs and infrastructure provision against other "similar" schemes. If successful the HIF is expected to have a positive impact on viability. **A decision on this bid was announced by the Government on 1st November 2019.**
- 3.32 An independent assessment of submitted viability evidence for both sites was recommended and the Council has commissioned a suitably qualified and experienced person to independently scrutinise the submitted evidence.
- 3.33 The Council has commissioned HDH Planning to review the development costs and viability evidence submitted by both proposals. HDH have prepared the Whole Plan Viability evidence for the emerging local plan and will be updating this evidence as part of the preparation of the Pre-submission local plan.
- 3.34 HDH Planning concluded that” when tested with strategic infrastructure costs in excess of £25,000/unit .. these potential housing sites are not shown as viable. Further the fact that the St Georges Barracks (which is already in public ownership) is seeking HIF funding to enable its delivery supports and is consistent with these findings. We recommend the Council is cautious with regard to including either of these sites in the Plan pending the outcome of the HIF process. If the HIF bid on the St George's Barracks site is successful the Council will then be able to demonstrate that this site is deliverable and will come forward (but not the Woolfox Airfield site)..”
- 3.35 In light of this evidence it must be concluded that:
- * an allocation for the Woolfox proposal in the Local Plan at this time cannot be supported as a viable and deliverable allocation in the context of the NPPF; and
 - *an allocation for the St George's proposal can only be considered viable and deliverable if it successfully secures sufficient Housing Infrastructure Funding (HIF) to address the viability issues identified. This decision to award £29.4 million HIF has now been announced by the Government on 1st November.

Landscape

- 3.36 Comprehensive Landscape Assessment and Landscape Visual Impact Assessments (LVIAs) have been submitted by both site promoters. Both reports broadly indicate that development could be satisfactorily assimilated into the landscape and that the potential impacts are capable of being mitigated. However, it was recommended that the Council commission independent evidence from a suitably qualified and experienced professional to confirm whether the findings of the submitted reports are robust.
- 3.37 The Council has commissioned Bayou Bluenvironment who have prepared the landscape evidence for the Local Plan to review the site specific evidence submitted. This review has concluded that:
- 3.38 *Woolfox:* The review notes that the submitted LVIA assesses the landscape sensitivity of the character of the Phase 2 landscape as medium. The magnitude of change on the character of the Phase 2 landscape is assessed as low in the LVIA, with overall minor effect. However, in accordance with assessment criteria the magnitude of change on landscape character of Phase 2 would be at least medium with an overall major adverse effect. It is considered that the proposed Phase 2 development will introduce notable if

not major new elements into a more sensitive landscape and notable if not major change to the scale, landform, land cover or pattern of the Phase 2 landscape. It is considered that the LVIA generally understates the magnitude of change to landscape character at the representative viewpoints which leads to assessment of landscape effects generally lower than they are likely to be.

- 3.39 In the opinion of the Council's independent consultants, the landscape and visual effects of the Woolfox site location post plan period (as illustrated on the LVIA Fig 3 Phasing Plan) would be significant. Mitigation is unlikely to reduce effects. There may be scope to include land north of Woolfox Wood and south of Osbonall Wood within a local plan allocation centred around the disused airfield due to the screening effect of the woodland including Greetham Wood Far immediately to the west. A masterplan should outline how the land would be sensitively developed including treatment of the eastern boundary in particular. Development principles should also be set out along similar lines to those in the SGB study.
- 3.40 In their opinion the positive advantage of the Woolfox site as seen by the proposers in that it can be extended beyond the plan period (to include the Phase 2 land) should not be seen as a reason for allocating the entire (Phase 1 and Phase 2) site because of the potential significant landscape and visual effects of the Phase 2 development. This independent appraisal has been shared with the site promoters who have been invited to address the concerns outlined, however no further landscape work has been received from the site promoter at the time of writing this report.
- 3.41 *St George's*: The report identifies that the LVA was prepared to inform the masterplan process rather than inform the assessment of the sites suitability for allocation in the local plan, and there are some issues raised about the methodology used. The independent appraisal has been shared with the MOD's consultants who have added further clarification in a revised version of the LVA. Bayou Bluenvironment have confirmed that these changes would address the concerns outlined in their review. The review does however conclude that LVA is helpful to informing a decision on whether the site should be allocated in the local plan, in terms of landscape and visual considerations. Overall the LVA provides an understanding of the landscape and visual baseline of the study area as required by GLVIA3. Further detailed LVIA would be required of the effects of any specific development proposal on the site. The acceptability of any detailed development proposal will depend upon detailed LVIA (for example to accompany a planning application as part of an EIA within an ES). The independent assessment sets out a number of development principles which would be necessary should the site be allocated in the local plan, however it has not identified any significant concerns regarding the impact of the proposed development upon the landscape.

Sustainable Transport

- 3.42 The Woolfox evidence initially submitted and considered by PTTP Planning is a very high level 'Initial Transport Appraisal' and identifies that a full Transport Assessment (TA) is required. PTTP recommended that a full Transport Assessment would be required to be prepared for the site in advance of determining the suitability of the site as an allocation and that the TA will need to be considered in an independent manner by the Local Highway Authority and the impacts of the Woolfox proposal on the A1 trunk road will need to be considered in detail by Highways England. Since PTTP prepared their report, the site promoters have submitted an Initial Transport Assessment which has been forwarded to both Highways England and RCC's highway consultants for review.
- 3.43 The transport evidence produced for *St George's* is more comprehensive and appears proportionate when benchmarked. However, it was recommended by PTTP Planning that an independent assessment of the submitted transport evidence for both sites needs to be undertaken by suitably qualified and experienced person. Amey were thus commissioned by the Council to assess whether the submitted TAs provide a robust and proportionate evidence base in each case. As a result of these assessments, the results of which are now summarised, the Council have commissioned additional advice on traffic considerations.

- 3.44 *Woolfox*: Amey has been commissioned by Rutland County Council to review an Initial Transport Assessment produced in August 2019 by RPS group carried out on behalf of developers of the proposed development at Woolfox in the county of Rutland. The Initial Transport Appraisal has been prepared for the proposed development of Woolfox Garden Village in Rutland, with an estimated 10,000 dwellings along with associated schools. Amey have concluded that no evidence has been provided in this document in terms of the sustainable features of the proposed development and how the location would be an ideal one for a new sustainable settlement. The transport and travel proposals also cannot be completely assessed without more information and a detailed Transport Assessment.
- 3.45 The Council are also in receipt of the comments made by Highways England regarding the initial Transport Assessment submitted by the site promoters. This concludes that more information is required to enable the impact of the proposal on the Strategic Road Network to be assessed.
- 3.46 *St. George's*: For this site, Amey conclude that for the purpose of allocation in the Local Plan, the submitted TAs are detailed and provide a robust reassurance that any issues would be able to be addressed in a more detailed TA at the time of planning application. Trip generations and the growth factors used appear to be reasonable within the context of the stated purpose of the TAs. They consider that it is likely that the development impacts have been overestimated in the approach taken, for a number of reasons. A breakdown by vehicle type would however be of assistance as HGV movements may potentially be high with this development. The wide area and large number of junctions assessed provides a good level of assurance around the likely impacts of the development on the surrounding network.

Ecology (habitats and species) and Habitats Regulation Assessment

- 3.47 Both site options have submitted phase 1 Habitat Surveys. Both reports identify that survey work has been undertaken at 'sub-optimal' times of the year. The 'Preliminary Ecological Appraisal' for Woolfox indicates that 'Further survey effort for birds will be undertaken'. It is important that this takes place during the appropriate survey season. Additional survey work has been carried out in relation to the St George's site including winter bird survey, breeding bird survey and reptile survey which were undertaken during the summer. Much of this detailed survey information is relevant for the preparation of a detailed masterplan and planning application for the development of the site and will necessitate the retention, enhancement and creation of appropriate habitat areas and corridors to support existing species found on site and in the locality. This can be covered through policy requirements set out in the Local Plan. Natural England and the Leicestershire and Rutland Ecology Service would need to confirm that they are satisfied that the submitted evidence is proportionate and robust and that any detailed proposal satisfactorily addresses biodiversity issues. The Local Plan will need to be supported by a Habitat Regulation Assessment which will also need to address potential impacts on Rutland Water arising from either the options.

Mineral Safeguarding

- 3.48 Evidence considering the potential impacts on economically workable minerals has been submitted for both sites.
- 3.49 Northamptonshire County Council act as agents for the Mineral Planning Authority and have confirmed:
Further work is required in relation to Woolfox where borehole testing would be required in order to establish the extent of Clipsham Stone. Details of the implications of this on the masterplan and phasing of proposed development in relation to proposed residential development is sought. Confirmation will be required from the Minerals Planning Authority's agents (Northamptonshire County Council) that the evidence submitted is robust and that development options will not unacceptably sterilise economically workable mineral reserves. Without this detailed information the proposal cannot be considered "justified". Without this information it would be difficult to conclude that the proposal is consistent with national policy in that respect (NPPF paragraph 204c);

Borehole testing and chemical analysis has been carried out for St George's and the extent of workable minerals is identified in the St George's masterplan. The area for extraction is located to the north east of the St George's site. This is away from the proposed development area shown on the masterplan and substantial landscape buffers have been incorporated to protect residents from the potential effects of extraction. Northamptonshire County Council (agents for the Mineral Planning Authority) have confirmed that they have considered the St George's minerals report including the Chemical analysis. No 'in-principle' objection has been received in relation to the submitted evidence at St George's and based on minerals issues, the site would appear to be suitable for allocation.

Infrastructure

Education facilities

- 3.50 Both proposals identify a commitment to delivering the necessary education infrastructure. No insurmountable constraints have been identified in discussion with the Local Education Authority in terms of delivery, however the viability implications need to be fully and independently assessed.

Evidence submitted in relation to the St George's site indicates that there is agreement in principle from an existing Academy to deliver primary education and that there is capacity in local schools to deliver the secondary places for the scale of development proposed.

Further work is required in relation to Woolfox to justify the proposed provision of primary and secondary education identified in the masterplan (3 x 2FE primary schools). Yield rates of 21 primary pupils per 100 houses would require substantially more primary education provision than that indicated in the masterplan. Evidence of 'support in principle' of the Local Education Authority (and ideally an Academy) would provide more certainty.

Healthcare provision

- 3.51 Both proposals identify a commitment to delivering health infrastructure. No insurmountable constraints have been identified in discussion with East Leicestershire and Rutland Clinical Commissioning Group.
- 3.52 In terms of delivery, the viability implications need to be fully and independently assessed. These have been prepared for St George's and included within the viability work for the site, however they have not been included in the Woolfox work

Utilities (including water, power and telecommunications)

- 3.53 No insurmountable technical constraints have been identified following discussions with utilities providers (Power and Water companies). However the viability implications of providing new, and relocating existing, infrastructure need to be fully and independently assessed. There are potentially substantial costs of meeting future infrastructure requirements for electricity (as a result of the phasing out of gas and increase in charging points for electric vehicles). The viability assessment for St George's indicates that some £18.8 million are proposed for utility upgrades. This has been included as part of the case made for Housing Fund Investment support. Further evidence would be required in relation to Woolfox to give certainty that utilities can be adequately provided.

Review of infrastructure and development costs

- 3.54 The Council has used consultants AECOM to prepare its Infrastructure Delivery Plan to support the evolving Local Plan. Therefore AECOM have been asked to review the development costs included in the evidence for both proposals to assess whether they are proportionate and to undertake a benchmarking process. Their conclusions are summarized below:
- 3.55 *Woolfox*: The details provided by the promoter were unclear in respect of a calculation of the master developer cost. As such, we have made our own assessment of these for the site preparation, on and off site highways, on and off site utilities and landscaping. However, for the social infrastructure we have

included the promoters' costs which also include CIL / S106 on the basis that this should cover all the necessary requirements. The overall total indicative infrastructure cost for the proposal is £464,000,000 which is at an average of £46,400 per unit. This is split as £227,000,000 for Phase 1, which comprises 2,500 units (£90,800 per unit), and £237,000,000 for Phase 2, which comprises the remaining 7,500 units (£31,600 per unit). All prices are at July 2019 excluding inflation and VAT.

- 3.56 *St George's*: The review notes that the scheme is the subject of a HIF bid (now approved by Government) which is itself subject to benchmarking and scrutiny by Homes England as part of their evaluation process and AECOM have therefore generally included the costs as provided by the promoter, albeit with exclusions for those items which are part of the separate financial model analysis. As such, they have included the same amount as the promoter for site preparation, utilities, transport, landscaping and social infrastructure costs. For the miscellaneous costs, we have excluded the fees associated with delivering planning on the assumption that this is covered by the separate financial model analysis. We have also omitted the LSDP Site Holding & Security Costs and Northern Access Roads - CPO / Land Acquisition / Capital Works, as again it is assumed that these are covered by the separate financial model analysis.

Our assessment therefore of the overall total indicative infrastructure cost is £107,126,891 for the indicative 2,215 units giving a unit cost of £48,364 at July 2019 prices. This excludes VAT and inflation.

- 3.57 These indicative costs have been used as part of the viability appraisal considered above.

Sustainability Appraisal (SA/SEA)

- 3.58 Sustainability Appraisal is an ongoing and iterative piece of work which should consider the potential impact of options for policies and proposals against a series of objectives covering the following seven themes: Biodiversity and geodiversity; historic environment; Landscape; Soil, land and water resources; climate change; population and communities; economic and employment factors.
- 3.59 The consideration of both the *St George's Barracks* and the *Woolfox* proposal as options within the Local Plan have been included in the SA work commissioned to explore further options for the spatial strategy for the County. These options include the delivery of a potential garden settlement at *St George's Barracks* or *Woolfox* as a means of informing the work on the emerging local plan. A summary of the 12 options is provided in the appendix 1 to this paper. The *Woolfox* proposal is included within options 8, 10 and 11a and the *St George's* proposal is included in options 5-7, 9 and 11b. It is important to recognize that the SA/SEA process does not make recommendations about which option should be selected, rather, it should be used to help inform decision making by considering the potential effect of an option on an objective.
- 3.60 The SA Interim Report includes a Technical Appendix which provides an assessment of the each site promoted for consideration within the Local Plan. As such the appendix includes an SA sheet for both *St George's* and *Woolfox* (see extracts at appendix 2). This appraisal is wholly desk based and reflects map based information only. A detailed site appraisal for each site has been undertaken as discussed above.

4. Consultation

- 4.1 Three stages of consultation have already taken place on the Local Plan through the Issues and Options in 2015, the Consultation Draft in 2017 and the focused consultations in 2018 regarding the implications of incorporating the proposed garden village at *St. George's* into the Local Plan. A key element of the plan making process is to ensure appropriate and timely community engagement in the evolution of the policies and proposals within the plan. A [summary of the consultation responses](#) received through each of these previous consultations is provided on the website and the detail of these will be reported to the Council as part of the process for considering the final Pre-Submission Local Plan text.

- 4.2 Neither the proposal for a new settlement, nor the potential of either St George’s Barracks or Woolfox to deliver a new settlement featured in the first two consultation documents published in 2015 or 2017. The 2018 consultation was solely about St Geroge’s as Woolfox had not been presented to the Council as an option at that time. If Woolfox were to be a proposed allocation in the Local Plan a further round of Regulation 18 consultation would be required to consider the implications of that site.
- 4.3 A summary of the consultation responses received about the focused consultation in 2018 indicate that the majority of the respondents (51%) live in those villages in close proximity to the St George’s site (Edith Weston, North Luffenham and Manton and Normanton), some 18% were from outside of the county and 14% were from Oakham and Uppingham.
- 4.4 An overview of the responses received to the consultation about St George’s is set out below:

Main Issues raised
Sustainability
Need to define what is meant by sustainable growth
Isolated location – unsustainable and unsuitable for development including employment uses
Concern with scale of development (should be limited to 500 dwellings) and disagree with the term ‘garden village’
Lack of alternative sites for a garden village considered or alternative uses for this site
Mixed views on whether the proposal should be included within the settlement hierarchy
Query Brownfield definition/Previously Developed Land for the site
Minerals
Concern about mineral extraction and its impact on new residents
Infrastructure
Highways concerns/impact on surrounding roads and villages and concern that lack of infrastructure in place to support scale of development proposed
Housing Figures
Developers disagree with the reduction in housing number to LSC’s
Lack of evidence to justify the housing need for this site
Deliverability
Developers concerned with delivery rates – too ambitious and over reliant on one site - will need to allocate reserve sites for flexibility
General
General support from government agencies

5. Conclusion

- 5.1 The two new settlement options of Woolfox and St George’s Barracks have been assessed in detail. The assessment has been undertaken in the following ways:
- Independent assessment of evidence against 41 criteria to determine whether the proposals are justified and effective in the context of the Local Plan tests of Soundness and the NPPF
 - Independent review of technical evidence covering: landscape, transport, infrastructure costs, viability
 - Sustainability Appraisal (SA/SEA)
- 5.2 If it is determined to include a new garden community within the spatial strategy for the Local Plan, then as a result of the above appraisals for each site, the following conclusion has been reached:
- 5.3 Woolfox

The site is not appropriate for allocation in the Local Plan at this time as it is not considered to be justified and deliverable within the plan period for a number of reasons. The conclusions from the viability review indicate that the scheme is unlikely to be viable ~~38~~ whole (10,000 homes). It is also challenging to

accommodate this scale of development into the quantum of need identified for Rutland. In addition to this, the landscape assessment raises a major issue as to whether Phase 2 is appropriate for development. This has significant implications for masterplanning, viability and deliverability of the garden village proposal, particularly as a new A1 junction is required to serve the development beyond the first 500 homes being completed on the site, based on the initial appraisal provided by the site developers (although it is recognised much more information is required to fully assess the traffic impact). It is highly unlikely that development not extending into the proposed Phase 2 of the scheme would make for a viable development which could fund the necessary works to provide a new junction to the A1. In the absence of a minerals resource assessment, uncertainties remain about the nature, extent and chemical composition of the mineral reserves underlying the site and so it is not possible to determine whether the minerals reserves are a barrier to development and what the impact of this would be on masterplan, phasing, delivery trajectories, noise, dust etc. Infrastructure provision (particularly school provision) for the whole proposal seems inadequate and development costs have not been fully considered. These will also have a significant impact on the ability to assess viability and therefore deliverability.

5.4 St George's

The viability assessment relating to the delivery of the site highlights that it should only be considered suitable for allocation if the HIF bid is successful, which is now the case. With full HIF funding the St George's new settlement proposal is considered a justified and effective allocation for inclusion in the Rutland Local Plan. Any allocation should be made through the development of a set of detailed planning policies establishing development principles recommended through the evidence prepared both the site promoter and the Council to ensure that the development accords with all recommendations relating to the principles of developing a Garden Village. Any potential allocation should be based on a realistic rate of development, taking account of the date when the base has been announced to close for MOD use.

Overall, it is concluded that the proposed development of the site is viable and deliverable with HIF, with no significant constraints to development (allowing for appropriate mitigation), and there is sufficient and appropriate evidence to support LP allocation. It is important to note that, on its closure for operational use, the whole of the curtilage of the St George's site would constitute previously developed land (a brownfield site) as defined in the NPPF and would therefore make a significant contribution to meeting the NPPF objective set out in Paragraph 117 of the NPPF that: "Strategic policies should set out a clear strategy for accommodating objectively assessed needs, in a way that makes as much use as possible of previously-developed or 'brownfield' land". It should not be assumed that the whole of the curtilage should be developed. Any allocation here would therefore ease pressure to release greenfield land for development elsewhere. Further work required to support detailed proposals coming forward, particularly regarding traffic and landscape impacts – can be addressed through development principles attached to any allocation.

6 Recommendation

- 6.1 Current national Planning Policy Guidance states that any reasonable alternative must be realistic and deliverable within the plan period. This factor is a significant consideration in the assessments of both proposals. Based on the available evidence, the proposals for Woolfox have been assessed as unviable and not deliverable. Proposals for St George's are viable and would be deliverable with the benefit of the Housing Investment Funding (HIF). On this basis, it is recommended that the proposals for Woolfox are not taken forward for consideration within this review of the Local Plan as the evidence available does not demonstrate that the proposals for this site are deliverable and viable. Officers consider that the available evidence and assessment demonstrate that, given the positive decision on HIF, it is appropriate to consider the proposals for St. Georges to be deliverable and so would form an appropriate location for a new settlement if this is agreed as an appropriate amendment to the spatial strategy. The assessment

of the two proposals also indicates that St. George's is a preferable location to Woolfox for a new garden community in terms of landscape impact.

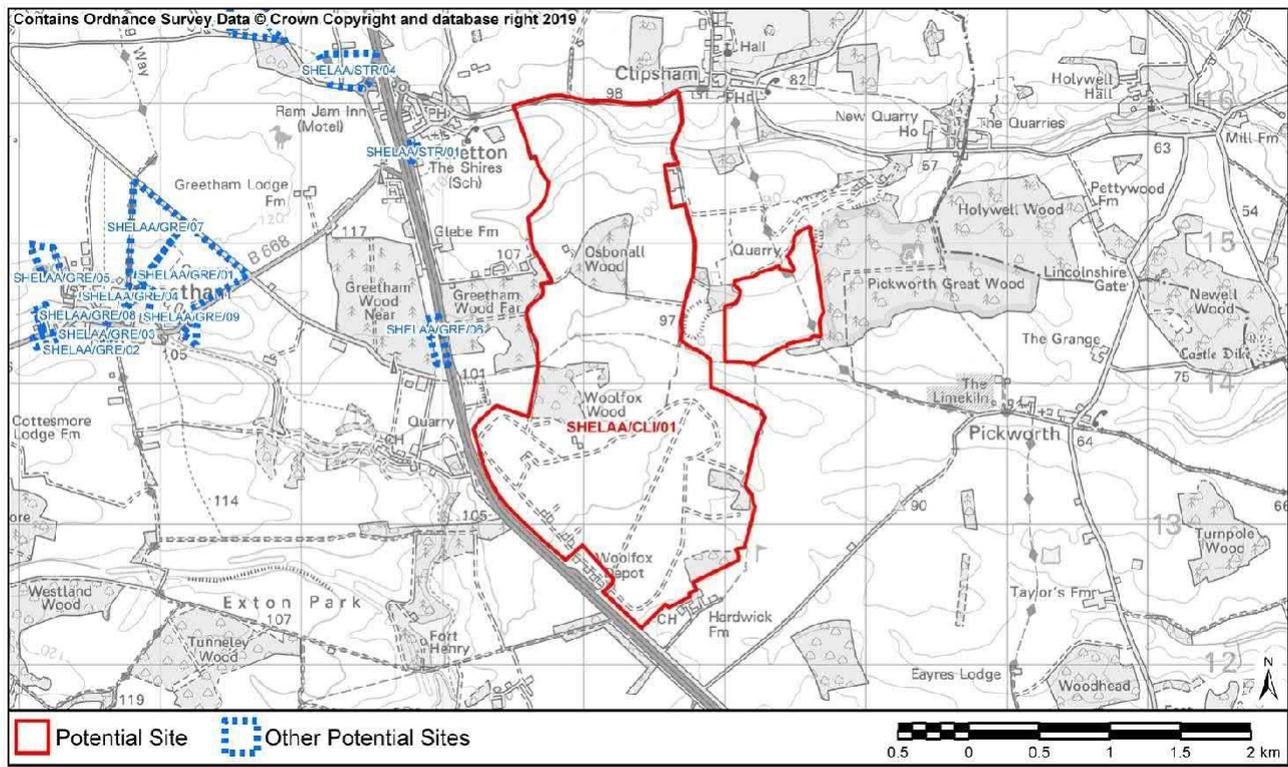
Table 5.1: Key variables considered through the spatial strategy options

Growth location	Rationale
Oakham	<p>Higher growth (532 homes): The Council's higher scoring sites for development, as evaluated through the Strategic Housing and Economic Land Availability Assessment (SHELAA) and informed by the SA site assessment (equating to 393 homes), plus reserve SHELAA sites (equating to a further 139 potential new homes).</p> <p>Lower growth (393 homes): The Council's preferred sites for development only in Oakham.</p>
Uppingham	<p>Higher growth (312 homes): Based on remaining neighbourhood plan allocations without planning permission, and a further 137 potential new homes on further sites.</p> <p>Lower growth (200 homes): Based on remaining neighbourhood plan allocations without planning permission. This is the figure that the Council has indicated could be delivered through the Neighbourhood Plan.</p>
Local Service Centres	<p>Higher growth (775 homes): The Council's higher scoring sites in the Local Service Centres (equating to 223 new homes in total) plus reserve sites (equating to a further 552 potential new homes).</p> <p>Intermediate growth (378 homes): A figure previously consulted on in July 2018, and considered achievable.</p> <p>Lower growth (223 homes): The Council's higher scoring sites for development only.</p>
St George's Barracks	<p>Higher growth (1,200 homes): This reflects the level of growth which will need to be delivered in the plan period at the site to ensure the delivery of community facilities which will benefit a Local Service Centre (as identified through the Settlement Hierarchy¹ work undertaken by the Council). The viability work undertaken with respect to St George's indicates that 2,215 new homes are needed to produce a 'viable' scheme in this respect; however, it is expected that only 1,200 homes could be reasonably delivered during the plan period (between 2024-2036).</p> <p>Lower growth (350 homes): Development which reflects the development of a smaller Service Centre (as identified through the Settlement Hierarchy work undertaken by the Council). The viability work undertaken with respect to St George's indicates that 350 homes is the maximum number that could be accommodated given the existing infrastructure capacity. This scale of development would not deliver any additional social or community infrastructure. Not viable</p>
Woolfox	<p>1,750 homes: Whilst current proposals suggest the delivery of 10,000 homes over the longer term, 1,750 homes is considered to be a realistic estimate of what could be delivered at Woolfox during the plan period.</p>

Appendix 2 - Extract from SA/SEA Technical Annex - site assessment for Woolfox and St George's Baracks

Site Address: Woolfox, south of Clipsham

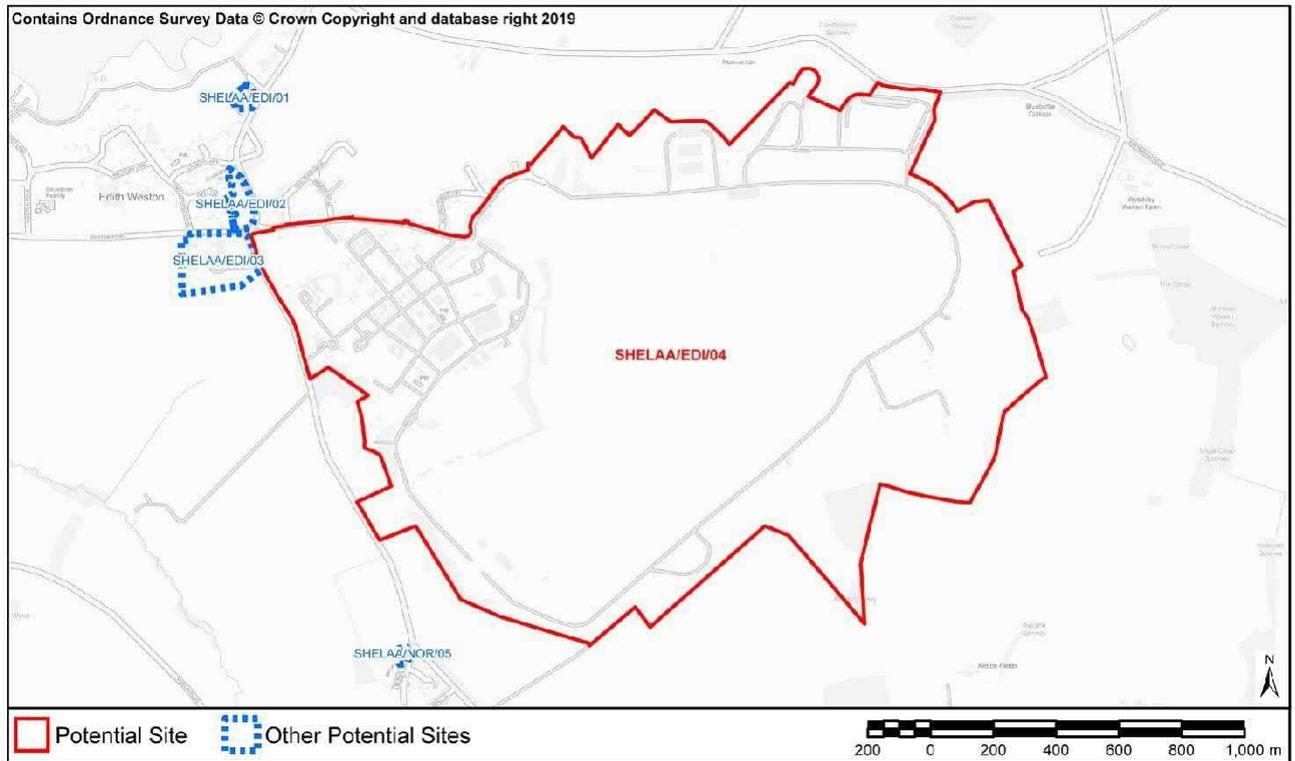
Site Area: 494.84ha



Previously Developed Land	Mixed
SSSI Impact Risk Zones	Within an SSSI IRZ for all developments
Local Wildlife Site	0m (Osbonall Wood)
BAP Priority Habitat	0m (Deciduous woodland)
Landscape Sensitivity	No Overlap
Conservation Area	0m (Clipsham)
Registered Park or Garden	50m (Exton Park)
Scheduled Monument	1033m (Horn Deserted Medieval Village And Moated Site)
Listed Building	235m (Home Farmhouse)
Agricultural Land Classification	Grade 3 Agricultural Land
Fluvial Flood Risk	< 50% of Site Intersects with Flood Risk Zone 2 or 3
Surface Water Flood Risk	Areas of High or Medium Surface Water Flood Risk are Present on Site
Groundwater Source Protection Zones	Within a Zone 2 or 3 SPZ
Loss of Local Open Space	No Loss of Public Open Space
Minerals	Site Intersects with an MSA
Employment Site	No Loss of Employment Site
Settlement Hierarchy	Open Countryside or adjoining Small Villages
Proximity Town or Local Centre	10km - 15km
Proximity to Schools	4km - 5km (Empingham C of E Primary, Name not provided)
Proximity to Doctor or Health Centre	4km - 5km (Name not provided, Empingham Medical Centre)
Proximity to Railway Station	9km - 10km (Stamford Station)
Proximity to Bus Stop	400m - 500m
Proximity to Public Right of Way	0m - 50m
Proximity to Regional Cycle Route	25km +

Site Address: St George's Barracks, EdithWeston

Site Area: 286.97ha



Previously Developed Land	Brownfield
SSSI Impact Risk Zones	Not within an SSSI IRZ
Local Wildlife Site	273m (Normanton/Edith Weston Verge N of Bluebottle Cottage (north side))
BAP Priority Habitat	0m (Deciduous woodland)
Landscape Sensitivity	No Overlap
Conservation Area	3m (Edith Weston)
Registered Park or Garden	4804m (Exton Park)
Scheduled Monument	238m (Village Cross At Junction Of Well Cross And King Edward'S Way)
Listed Building	0m (Thor Missile Site At Former Raf North Luffenham)
Agricultural Land Classification	Grade 3 Agricultural Land
Fluvial Flood Risk	Flood Zone 1
Surface Water Flood Risk	No Areas of High or Medium Surface Water Flood Risk are Present on Site
Groundwater Source Protection Zones	Within a Zone 2 or 3 SPZ
Loss of Local Open Space	No Loss of Public Open Space
Minerals	Site Intersects with an MSA
Employment Site	No Loss of Employment Site
Settlement Hierarchy	Adjoining Uppingham, Oakham or Local Service Centres
Proximity Town or Local Centre	9km - 10km
Proximity to Schools	800m - 900m (Edith Weston Primary, Name not provided)
Proximity to Doctor or Health Centre	3km - 4km (Name not provided, Empingham Medical Centre)
Proximity to Railway Station	9km - 10km (Stamford Station and Oakham Station)
Proximity to Bus Stop	0m - 50m
Proximity to Public Right of Way	300m - 400m
Proximity to Regional Cycle Route	15km - 20km

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**GROWTH, INFRASTRUCTURE AND RESOURCES SCRUTINY
COMMITTEE**

19 December 2019

HOUSING INFRASTRUCTURE FUND BID

Report of the Chief Executive

Strategic Aim:	All	
Key Decision: No	Forward Plan Reference: FP19/0718	
Exempt Information	Yes - Appendix A of this report contains exempt information and is not for publication in accordance with Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972.	
Cabinet Member(s) Responsible:	Mr O Hemsley, Leader and Portfolio Holder for Rutland One Public Estate & Growth, Tourism & Economic Development, Resources (other than Finance)	
Contact Officer(s):	Helen Briggs, Chief Executive	01572 758201 hbriggs@rutland.gov.uk
Ward Councillors	Normanton - Mr K Bool and Miss G Waller	

RECOMMENDATIONS

1. That the Growth, Infrastructure and Resources Scrutiny Committee considers this report before submission to Cabinet for their support in principle to recommend to Council acceptance of the £29.4m Housing Infrastructure Fund grant.

1 PURPOSE OF THE REPORT

- 1.1 The purpose of this report is to update the Growth, Infrastructure and Resources Scrutiny Committee on progress in relation to the Housing Infrastructure Funding (HIF) (Forward Funding) for the St George's project.
- 1.2 This report also informs the Committee of the intention to seek Cabinet's approval in principle to recommend to Council, acceptance of the £29.4m Housing Infrastructure Fund grant subject to satisfactory progress of the on-going work in relation to associated terms and conditions and contract negotiations with Homes England and the Ministry of Defence.

2 BACKGROUND AND MAIN CONSIDERATIONS

2.1 Cabinet on 19th November was advised that the Council had received a letter from MHCLG on 1st November 2019 that we had been successful in being awarded £29.4m HIF (Forward Funding) and MHCLG advised as follows:

“We will work with you and your team over the coming weeks and months to progress this scheme through further due diligence and into contract. As part of the contract, you will need to agree to a set of funding conditions. These include both standard conditions for all Forward Funding schemes, and bespoke conditions for each project. In addition, you will need to sign up to an Assurance Framework, which will be proportionate for the size and complexity of this scheme. A list of the conditions for your scheme will be sent by my team.

2.2 The draft conditions were provided to RCC by MHCLG on 26th November 2019.

2.3 Since that date Council Officers have therefore been working closely with Homes England and the MOD to progress the draft Heads of Terms and other contractual documentation to a point where all parties are clear about the risks, obligations, requirements and conditions.

2.4 Homes England are keen to progress HIF and are working closely with Council Officers to achieve this including:

a. Site visit

b. Weekly teleconferences – progress update

c. all day meeting with RCC and DIO to progress to the next draft of the conditions.

2.5 However, this work is not concluded.

2.6 Attached **Exempt Appendix A** is the current draft of this documentation. This document is exempt due to the commercial nature of information and due to its status i.e. DRAFT. Appendix A also acts as a tracker on progress against each of the conditions. It highlights risk, implications, the responsibility and a RAG degree of confidence of deliverability of the condition. The final column indicates if the recommendation to Cabinet is to accept the condition.

2.7 The vast majority of conditions place specific onus on the ‘developer’ (the MOD) rather than the Council itself. The issue of responsibility is therefore an important one and is reflected in the involvement of Council Officers, the Portfolio Holder (Deputy Leader) and our MOD partners in the development of **Appendix A**. Legal and Financial advice has been sought on all aspects of the agreement. Further advice will be sought throughout this process.

2.8 At this point the assessment from our advisors and partners is that there is nothing preventing us accepting the funding (no ‘showstoppers’) and complying with the contractual requirements. However there remains significant work to be done. Hence at this point Cabinet is requested to support in principle the direction of travel and the continuation of the due diligence work.

- 2.9 Cabinet will receive regular updates on progress. The decision to accept HIF or not is a Council one. Following this Cabinet meeting work will continue and once concluded the decision will be presented to the next Council Meeting. If the meeting programme allows it, it will prior to that be taken to Cabinet for a directional steer from Cabinet.

3 CONSULTATION

- 3.1 The St George's Project Board and the relevant Portfolio Holders have been briefed and consulted.

4 ALTERNATIVE OPTIONS

- 4.1 Not relevant.

5 FINANCIAL IMPLICATIONS

- 5.1 The acceptance of the terms and conditions does not directly have a financial implication. There is no match funding requirement or anything of that nature.
- 5.2 However, one of the conditions refers to the possibility of overspends on infrastructure and requires confirmation from the Council or its partners as to how such overspends will be funded. This issue is being discussed with the DIO (is referenced in the Exempt Appendix) and an update will be provided to Council.
- 5.3 By accepting the terms and conditions, the Council will have to put in place arrangements to oversee the delivery of HIF conditions and any actions for which it is responsible in respect of the development of STGB. The Council has employed a Project Manager (funded from approved budget) but does not envisage having to fund any other additional resource.

6 LEGAL AND GOVERNANCE CONSIDERATIONS

- 6.1 As previously advised the Constitution requires that the acceptance of Grants above £1 million are a matter for Council.
- 6.2 The objective of the negotiations for the Council will be to ensure that any agreement negotiated ensures that where a liability rests with the Council this is clear. This process will ensure that the Council will be able to effectively manage any risks associated with acceptance of the funding and balance its consideration of these against the benefits of the funding being available and the broader risks that this would create. In particular the Council will be ensuring that risk is shared with partners based on the elements of the project that each has responsibility for.

7 DATA PROTECTION IMPLICATIONS

- 7.1 A data protection impact assessment has not been completed as there are no data protection implications.

8 EQUALITY IMPACT ASSESSMENT

8.1 Not relevant.

9 COMMUNITY SAFETY IMPLICATIONS

9.1 None.

10 HEALTH AND WELLBEING IMPLICATIONS

10.1 None.

11 CONCLUSION AND SUMMARY OF REASONS FOR THE RECOMMENDATIONS

11.1 The purpose of this report is to update the Committee on progress in relation to the Housing Infrastructure Funding (HIF) (Forward Funding) for the St George's project. The report will be considered by Cabinet at their meeting on 23 December 2019.

11.2 Cabinet will be asked to support the continuation of 'due diligence' work under the guidance of Cllr Brown the Portfolio Holder. Cabinet will be updated weekly and the report for Council will progress when sufficient work has been completed to allow a recommendation to be made to Council.

11.3 The report to Cabinet seeks approval **in principle** for support to recommend to Council acceptance of the £29.4m Housing Infrastructure Fund grant subject to satisfactory progress of the on-going work in relation to associated terms and conditions and contract negotiations with Homes England and the Ministry of Defence. Ideally this work will be concluded in time for the Council meeting on 20th January, as per the Forward plan. If not further progress reports will be presented to Cabinet until the time is right to present to Council for a decision to be made.

12 BACKGROUND PAPERS

12.1 None.

13 APPENDICES

13.1 Appendix A – EXEMPT - Appendix A is marked as "Not For Publication" because it contains exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972, namely information which is commercially sensitive.

A Large Print or Braille Version of this Report is available upon request – Contact 01572 722577.

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

Document is Restricted

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