

**Open**

# **Overview & Scrutiny Committee**

## **Agenda**

**6pm**  
**Thursday, 12th September 2013**  
**Council Chamber**  
**Wyre Forest House**  
**Finepoint Way**  
**Kidderminster**



## Overview & Scrutiny Committee

### Members of Committee:

**Chairman: Councillor H E Dyke**  
**Vice-Chairman: Councillor T Ingham**

**Councillor C Brewer**

**Councillor J Greener**

**Councillor D C H McCann**

**Councillor J Phillips**

**Councillor C Rogers**

**Councillor N Gale**

**Councillor V Higgs**

**Councillor T L Onslow**

**Councillor M Rayner**

**Councillor A M Sewell**

**Would Members please note that, to ensure continuity in scrutiny, substitutes should only be appointed for the Scrutiny Committee in exceptional circumstances.**

### Information for Members of the Public:

**Part I** of the Agenda includes items for discussion in public. You have the right to inspect copies of Minutes and reports on this Agenda as well as the background documents used in the preparation of these reports.

**Part II** of the Agenda (if applicable) deals with items of "Exempt Information" for which it is anticipated that the public may be excluded from the meeting and neither reports nor background papers are open to public inspection.

### **Declaration of Interests by Members – interests of members in contracts and other matters**

Declarations of Interest are a standard item on every Council and Committee agenda and each Member must provide a full record of their interests in the Public Register.

In addition, alongside the Register of Interest, the Members Code of Conduct ("the Code") requires the Declaration of Interests at meetings. Members have to decide first whether or not they have a disclosable interest in the matter under discussion.

Please see the Members' Code of Conduct as set out in Section 14 of this constitution for full details.

### **Disclosable Pecuniary Interest (DPI) / Other Disclosable Interest (ODI)**

DPI's and ODI's are interests defined in the Code of Conduct that has been adopted by the District.

If you have a DPI (as defined in the Code) in a matter being considered at a meeting of the Council (as defined in the Code), the Council's Standing Orders require you to leave the room where the meeting is held, for the duration of any discussion or voting on that matter.

If you have an ODI (as defined in the Code) you will need to consider whether you need to leave the room during the consideration of the matter.

### **Co-opted Members**

Scrutiny Committees may wish to appoint Co-Opted Members to sit on their meetings in order to add value to the scrutiny process. To appoint a Co-Opted Member, a Committee must first agree to appoint either a specific person or to approach a relevant organisation to request that they put forward a suitable representative (e.g. the local Police Authority). Co-Optees are non voting by default but Committees can decide to appoint voting rights to a Co-Optee. The Co-Option of the Member will last no longer than the remainder of the municipal year.

Scrutiny Committees can at any meeting agree to terminate the Co-Option of a Co-Opted Member with immediate effect. Where an organisation is appointed to put forward a Co-Opted Member, they are able to send a substitute in exceptional circumstances, provided that they notify Democratic Services in advance. Co-Opted Members must sign up to the Members Code of Conduct before attending their first meeting, failure to sign will mean that they are unable to participate. This also applies to substitute Co-Opted Members, who will need to allow sufficient time before a meeting in order to sign the Code of Conduct.

The following will apply:

- i) The total number of voting co-opted members on any Scrutiny Committee will not exceed 25% at any one time.
- ii) The total number of voting Co-opted Members on any Review Panel will not be limited.
- iii) Those Co-opted Members with voting rights will exercise their rights in accordance with the principles of decision making set out in the constitution.

**For Further information:**

**If you have any queries about this Agenda or require any details of background papers, further documents or information, you should contact Louisa Bright, Committee and Member Services Officer, Wyre Forest House, Finepoint Way, Kidderminster, DY11 7WF. Telephone: 01562 732763 or email [louisa.bright@wyreforestdc.gov.uk](mailto:louisa.bright@wyreforestdc.gov.uk)**

Wyre Forest District Council

Overview & Scrutiny Committee

Thursday, 12th September 2013

Council Chamber, Wyre Forest House, Finepoint Way, Kidderminster

Part 1 - Open to the press and public

<b>Agenda item</b>	<b>Subject</b>	<b>Page Number</b>
<b>1.</b>	<b>Apologies for Absence</b>	
<b>2.</b>	<b>Appointment of Substitute Members</b>  To receive the name of any Councillor who is to act as a substitute, notice of which has been given to the Solicitor of the Council, together with the name of the Councillor for whom he/she is acting.	
<b>3.</b>	<b>Declarations of Interests by Members</b>  In accordance with the Code of Conduct, to invite Members to declare the existence and nature of any Disclosable Pecuniary Interests (DPI's) and / or Other Disclosable Interests (ODI's) in the following agenda items and indicate the action that they will be taking when the item is considered.  Please see the Members' Code of Conduct as set out in Section 14 of the Council's Constitution for full details.	
<b>4.</b>	<b>Minutes</b>  To confirm as a correct record the Minutes of the meeting held on the 4th July 2013.	6
<b>5.</b>	<b>Affordable Housing Supplementary Planning Document (SPD) – Early Engagement</b>  To consider a report from the Senior Forward Planning Officer on the plans for preparing an Affordable Housing SPD.	11
<b>6.</b>	<b>West Midlands Safari and Leisure Park (WMSLP) – Planning Brief and Masterplan</b>  To consider a report from the Principal Planning Policy Officer which updates Members on the masterplanning work being undertaken by WMSLP.	18
<b>7.</b>	<b>Recommendations from the Treasury Management Review Panel: Consideration of Annual Report on Treasury Management Service and Actual Prudential Indicators 2012/13</b>  To consider a report from the Chief Financial Officer which provides a review of the treasury management activities for 2012/13 and to seek approval for the actual 2012/13 prudential and treasury indicators.	99

<b>8.</b>	<b>How Are We Doing? Performance Update</b>  To consider a report from the Business Improvement Officer which updates Members on the performance of the Council for Quarter 1 (from 1 <sup>st</sup> April to 30 <sup>th</sup> June 2013).	118
<b>9.</b>	<b>Feedback from Cabinet</b>  To note the content of the Cabinet action list, following consideration of the recommendations from the meeting on 16 <sup>th</sup> July 2013.	200
<b>10.</b>	<b>Work Programme</b>  To review the work programme for the current municipal year with regard to the Sustainable Community Strategy Theme, Corporate Plan Priority, Annual Priorities and the Forward Plan.	201
<b>11.</b>	<b>Press Involvement</b>  To consider any future items for scrutiny that might require publicity.	
<b>12.</b>	<b>To consider any other business, details of which have been communicated to the Solicitor of the Council before the commencement of the meeting, which the Chairman by reason of special circumstances considers to be of so urgent a nature that it cannot wait until the next meeting.</b>	
<b>13.</b>	<b>Exclusion of the Press and Public</b>  To consider passing the following resolution:  “That under Section 100A(4) of the Local Government Act 1972 the press and public be excluded from the meeting during the consideration of the following item of business on the grounds that it involves the likely disclosure of “exempt information” as defined in paragraph 3 of Part 1 of Schedule 12A to the Act”.	

Part 2 - Not open to the Press and Public

<b>14.</b>	<b>To consider any other business, details of which have been communicated to the Solicitor of the Council before the commencement of the meeting, which the Chairman by reason of special circumstances considers to be of so urgent a nature that it cannot wait until the next meeting.</b>	
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**WYRE FOREST DISTRICT COUNCIL**

**OVERVIEW & SCRUTINY COMMITTEE**

**COUNCIL CHAMBER, WYRE FOREST HOUSE, FINEPOINT WAY, KIDDERMINSTER**

**THURSDAY, 4TH JULY 2013 (6.00PM)**

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**Present:**

Councillors: H E Dyke (Chairman), T Ingham (Vice-Chairman), C Brewer, N Gale, J Greener, V Higgs, D C H McCann, T L Onslow, J Phillips, M Rayner and A M Sewell.

**Observers**

Councillors: M B Kelly, F M Oborski and M Price.

**OS.11      Apologies for Absence**

There were no apologies for absence.

**OS.12      Appointment of Substitutes**

No substitutes were appointed.

The Chairman welcomed Marina Banner (Executive Director), Yvonne Leishman (Managing Director), Gill Smith (Resident Involvement Manager) and several tenants of The Community Housing Group (TCHG) to the meeting.

**OS.13      Declarations of Interests by Members**

Councillor H E Dyke declared a Disclosable Pecuniary Interest (DPI) in agenda item 5 – Housing Review Panel Recommendations 31<sup>st</sup> July 2012 – Proposed Tenant Services Committee, as her husband works for The Community Housing Group.

Councillor N Gale declared a DPI in agenda item 5 – Housing Review Panel Recommendations 31<sup>st</sup> July 2012 – Proposed Tenant Services Committee, as she is a Board Member of The Community Housing Group.

Councillor J Greener declared a DPI in agenda item 5 – Housing Review Panel Recommendations 31<sup>st</sup> July 2012 – Proposed Tenant Services Committee, as she is a Board Member of The Community Housing Group.

Councillor M Rayner declared a DPI in agenda item 5 – Housing Review Panel Recommendations 31<sup>st</sup> July 2012 – Proposed Tenant Services Committee, as she is a Board Member of The Community Housing Group.

Councillor J Phillips declared a DPI in agenda item 5 – Housing Review Panel Recommendations 31<sup>st</sup> July 2012 – Proposed Tenant Services Committee, as he is a shared ownership tenant of a Community Housing Group property.

Councillor F M Oborski declared a DPI in agenda item 5 – Housing Review Panel Recommendations 31<sup>st</sup> July 2012 – Proposed Tenant Services Committee, as she is a Board Member of The Community Housing Group.

**OS.14 Minutes**

**Decision: The minutes of the meeting held on 6th June 2013 be confirmed as a correct record and signed by the Chairman.**

Councillors H E Dyke, N Gale, J Greener, M Rayner, J Phillips and F M Oborski left the meeting at this point, (6.04pm). Councillor Ingham took the chair.

**OS.15 Housing Review Panel Recommendations 31st July 2012 - Proposed Tenant Services Committee**

The Strategic Housing Services Manager introduced the agenda item and advised an update would be given by TCHG on the first set of recommendations which came from the Housing Review Panel.

Marina Banner addressed the Committee and outlined the work which had been undertaken with the interim Tenant Services Committee Members. The discussions had included agreeing the terms of reference, working on proposals for what the Tenants wanted to achieve from the new Committee and the level of support expected from Officers.

Councillor A M Sewell entered the meeting at this point, (6.07pm).

It was reported the process had taken longer than anticipated as TCHG felt it was important for the different Tenant groups to settle into their new roles and agree working relationships and protocols.

Marina Banner confirmed the election process had commenced. A special edition of the Tenants newsletter 'Streets Ahead' was due to be distributed which outlined the election, how to apply for the vacancies and indicated the support network available to Tenants. In addition, Neighbourhood Officers and Wardens had been asked to encourage Tenants within their areas to participate in the election.

Members expressed concern over the delay in the process and whether the timescale for the election and appointment of the new Tenant Services Committee Members was achievable.

Assurance was given by both Directors from TCHG that the process would be delivered on time and be open to all Tenants. It was acknowledged a vast amount of change had taken place within TCHG such as the new Governance Structure and Resident Involvement Structure as well as the Welfare Reform changes, and Tenants would be guided and supported through the changes, as a priority.

A representative from the Central Tenants Forum advised the Committee that Tenants and representatives from TCHG had worked together and was pleased with the progress made to date.

The Chairman of the Housing Review Panel, Councillor M Price, asked Marina Banner for a further progress report as it would be useful for Members to be updated on the election as the process continues.

**Agreed: The update be noted and further progress reports to be provided by TCHG as the election process continues.**

Councillors H E Dyke, N Gale, J Greener, M Rayner, J Phillips and F M Oborski re-entered the meeting at this point and Councillor Dyke resumed the chair, (6.38pm).

**OS.16**

**Wyre Forest District Site Allocations and Policies Local Plan and Kidderminster Central Area Action Plan – Adoption**

The Committee considered a report which presented the findings of the Inspector's Report into the Site Allocations and Policies Local Plan (SALPP) and the Kidderminster Central Area Action Plan (KCAAP) following their Independent Examination during January / February 2013.

The Planning Policy Manager and Principal Planning Policy Officer led Members through the report. The Committee were reminded that the Local Development Framework Review Panel had fully considered all of the detailed policies at each stage of their development.

In relation to the Inspector's modification which relates to the additional undertaking in the SALPP to produce a separate Local Plan relating to the provision of gypsy and traveller sites following an up-to-date Gypsy and Traveller Accommodation Assessment, Members were advised this related to site allocations for the post 2017 period and would not alter the policies within the SALPP. These were developed following detailed consideration by the LDF Panel and Overview and Scrutiny Committee in late 2011 and early 2012. A Member commented on the need for mediation amongst the different communities when work commenced on the plan.

**Agreed:**

- a) The content of the Inspector's report, including the proposed main modifications as attached to the report at Appendix 1 be endorsed.**
- b) Recommend to Cabinet that both the Site Allocations and Policies Local Plan and the Kidderminster Central Area Action Plan (incorporating the modifications as recommended by the Inspector) are presented to July's Full Council meeting for adoption, to be used to determine planning applications from the 24th July 2013.**
- c) The accompanying Policies Maps set out at Appendix 3 of the report be endorsed.**
- d) Note that upon Adoption of the Plans, the list of remaining 2004 Adopted Local Plan Saved Policies (as set out at Appendix 4 to the report), will now be fully replaced by those incorporated within the Adopted Core Strategy, the Site Allocations and Policies Local Plan and the Kidderminster Central Area Action Plan.**
- e) Recommend to Cabinet that delegated authority be given to the Director of Economic Prosperity and Place to make the necessary presentational amendments, including the minor amendments as set out at Appendix 2 to the report, to the Site Allocations and Policies Local Plan, Kidderminster Central Area Action Plan and the accompanying Policies Map.**



**OS.17 Scoping of Scrutiny Exercise**

The Committee considered the preliminary information regarding a scrutiny exercise to evaluate the parking enforcement within the Wyre Forest District.

**Agreed: The Democratic Services Officer to contact Group Leaders asking for nominations for the Parking Enforcement Review Panel.**

**OS.18 Wyre Forest House - Update on Project and Achievement of Savings**

The Committee received a report from the Chief Executive which updated Members on the project including the achievement of savings, funding, finalisation of the project including dealing with unresolved items on the “snagging list” and the future plans.

Councillors F M Oborski and M Price left the meeting at this point, (7.10pm) and Councillor M B Kelly left at 7.11pm.

Members discussed the report and were encouraged that the reported savings would go towards the protection of key services within the Council.

The Chief Executive agreed to follow up responses to several issues raised namely; hearing loop facility in meeting rooms, number / percentage of staff designated as homeworkers and the allowances the Council paid them and what borrowing was undertaken by the Council due to the project.

**Agreed:**

- **The Chief Executive to arrange for responses to the several issues raised to be circulated to Members.**
- **The progress with the project and achievement of savings be noted.**

**OS.19 Feedback from Cabinet**

**Agreed: The content of the Cabinet action list following consideration of the recommendations from the meeting on 18<sup>th</sup> June 2013, be noted.**

**OS.20 Work Programme**

The Committee considered and noted the work programme. Members were advised the Treasury Management Review Panel would be set up again and for the municipal year, a training session and first meeting of the Panel was scheduled for Monday 2<sup>nd</sup> September 2013.

**Agreed:**

- **The work programme be noted.**
- **The Democratic Services Officer to contact Group Leaders asking for nominations for the Treasury Management Review Panel.**

**OS.21 Press Involvement**

There were no future items for scrutiny that might require publicity.

There being no further business, the meeting ended at 7.41pm.



## Overview and Scrutiny Committee

### Briefing Paper

Report of: Maria Dunn  
Senior Forward Planning Officer  
Date: 12<sup>th</sup> September 2013

### Open Item

## Affordable Housing Supplementary Planning Document (SPD) – Early Engagement

### 1. Summary

- 1.1 This report seeks members' views on the plans for preparing an Affordable Housing Supplementary Planning Document.

### 2. Background

- 2.1 The District Council established a Housing Review Panel in July 2012. This panel considered a number of housing related issues including the provision of affordable housing within the District. The Housing Review Panel recommended, at their meeting on 7<sup>th</sup> February 2013, that the District Council produce and adopt an Affordable Housing Supplementary Planning Document (SPD) to cover the following issues:
- Thresholds
  - On and off site affordable housing contributions
  - Size of units
  - Design (including parking)
  - Use of modern construction methods.
- 2.2 These recommendations were reported to Overview and Scrutiny Committee on 14<sup>th</sup> March 2013 who recommended them to Cabinet. The recommendations were agreed by Cabinet at their meeting on 26<sup>th</sup> March 2013.

### 3. The Affordable Housing SPD

- 3.1 SPDs provide greater detail on planning policies set out within the District's development plan. Wyre Forest District Council's development plan is made up of the Adopted Core Strategy (2010), the Site Allocations and Policies Local Plan (2013) and the Kidderminster Central Area Action Plan (2013). SPDs must be consistent with the national planning policies set out within the National Planning Policy Framework (NPPF), and the policies within the Local Development Plan. New

planning policies can not be set out within SPDs and they can not be used to allocate sites.

3.2 The following District Council planning policies relate to the delivery of affordable housing:

- Adopted Core Strategy - CP04 – Providing Affordable Housing
- Site Allocations and Policies Local Plan – SAL.DPL2 – Rural Housing
- Site Allocations and Policies Local Plan - SAL.DPL3 – Financial Viability

3.3 The Affordable Housing SPD is being prepared to provide more guidance on expectations for the delivery of affordable housing in accordance with these policies. It explains how developers, landowners and Registered Social Landlords (RSLs) should interpret the District's affordable housing policies.

3.4 The affordable housing SPD proposes to address the following issues:

- Overview of the need for affordable housing within the District and recent delivery against the targets within the Adopted Core Strategy.
- Consideration of specific affordable housing needs for example, meeting the needs of the District's ageing population.
- How viability issues are affecting affordable housing delivery and clarification of the process for implementing the viability policy within the Site Allocations and Policies Local Plan.
- The funding of affordable housing including details of s106 expectations, use of off site planning obligations money and in what circumstances the District Council will support grant applications for affordable housing development.
- Space and design standards for new affordable housing units to help improve place making
- Monitoring affordable housing provision
- Suggested wording for a S106 agreement for outline planning permissions.

*Early Engagement*

3.5 Regulations 12 and 13 of The Town and Country Planning (Local Planning) (England) Regulations 2012 require public participation on SPDs. The District Council's Statement of Community Involvement (February 2013) states that when the District Council wishes to prepare an SPD, a Scoping Paper will be published setting out the areas which the SPD is expected to cover and any relevant options for consideration and that a minimum of four weeks will be given for interested parties to respond to this. As a minimum, the SCI requires copies of the Scoping Paper to be placed on the District Council's web-site and at deposit locations.

3.6 In order to fulfil the requirements to undertake early engagement on the Affordable Housing SPD, the following measures are proposed:

- Publication of a Scoping Paper which will be available on the District Council's web-site and at deposit locations.

- Notification letters to statutory consultees and those people on the Planning Policy database who have expressed a specific interest in affordable housing issues or are known to have an interest in this area.
- A stakeholder workshop.
- A press release will be issued to publicise the consultation.

3.7 Consultation will take place between Thursday 3<sup>rd</sup> October and Friday 1<sup>st</sup> November 2013. Facilities will be put in place for representations to be made on-line, by e-mail and by post.

3.8 The draft scoping paper has been considered by the District Council's Local Development Framework Panel and the version attached to this report incorporates their comments.

#### **4. Conclusion**

4.1 The District Council is committed to producing an Affordable Housing SPD as part of the recommendations from the Housing Review Panel which have been endorsed by Overview and Scrutiny and Cabinet. As part of this process, early engagement will need to be undertaken. This report seeks members' views on the proposed Scoping Paper which will form the basis for early engagement.

#### **5. Options**

5.1 The committee may wish to:

- a) Recommend to Cabinet that the Early Engagement Leaflet draft text, as set out at Appendix 1 to this report, forms the basis for a consultation between Thursday 3<sup>rd</sup> October and Friday 1<sup>st</sup> November 2013.
- b) Propose changes to the attached Early Engagement Leaflet text, as set out to Appendix 1 to this report, before recommending to Cabinet that it forms the basis for a consultation between Thursday 3<sup>rd</sup> October and Friday 1<sup>st</sup> November 2013.

#### **6. Next Steps**

6.1 Officers will arrange for an early engagement consultation to be undertaken between Thursday 3<sup>rd</sup> October and Friday 1<sup>st</sup> November 2013. Following the Early Engagement period, all comments made will be summarised and responded to and a draft SPD will be produced. The representation summaries and responses, together with the Draft SPD will be reported to Members of the Local Development Framework panel and then the March 2014 committee cycle with a view to seeking approval to consult on the Draft SPD in March/April 2014.

#### **7. Consultation**

- Principal Solicitor
- Strategic Housing Services Manager

**8. Related Decisions**

- Housing Review Panel, 7<sup>th</sup> February 2013
- Overview and Scrutiny, 14<sup>th</sup> March 2013
- Cabinet, 26<sup>th</sup> March 2013

**9. Relevant Council Policies/Strategies**

- Corporate Plan
- Wyre Forest District Adopted Core Strategy, December 2010
- Kidderminster Regeneration Prospectus (ReWyre Initiative)

**10. Implications**

- 10.1 Resources: The costs of preparing the SPD will be met from existing budgets.
- 10.2 Equalities: An Equality and Diversity Screening Assessment will be carried out on the Draft SPD.
- 10.3 Partnership working: Consultation will be carried out with all relevant stakeholders and partners in accordance with the Adopted Statement of Community Involvement and relevant Regulations.
- 10.4 Human Rights: Consultation will be carried out with all relevant stakeholders and partners in accordance with the Adopted Statement of Community Involvement and relevant Regulations.
- 10.5 E-Government: All consultation material will be published on the Council's website.
- 10.6 Transformation: N/A

**11. Wards affected**

- 11.1 All Wards

**12. Appendices**

- 12.1 Appendix 1: Early Engagement Leaflet Draft Text

**13. Background Papers**

- 13.1 None

**Officer Contact Details:**

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**Wyre Forest District Council**  
**Affordable Housing Supplementary Planning Document - Early Engagement Paper**  
**September 2013**

**What is an Affordable Housing Supplementary Planning Document and Why is it Needed?**

Supplementary Planning Documents (SPDs) provide greater detail on planning policies set out within the District's development plan. Wyre Forest District Council's development plan is made up of the Adopted Core Strategy (2010), the Site Allocations and Policies Local Plan (2013) and the Kidderminster Central Area Action Plan (2013). SPDs must be consistent with the national planning policies set out within the National Planning Policy Framework (NPPF), and the policies within the local development plan. New planning policies can not be set out within SPDs and they can not be used to allocate sites.

**Which are the Current Relevant Planning Policies?**

The following District Council planning policies relate to the delivery of affordable housing:

- Adopted Core Strategy - CP04 – Providing Affordable Housing
- Site Allocations and Policies Local Plan – SAL.DPL2 – Rural Housing
- Site Allocations and Policies Local Plan - SAL.DPL3 – Financial Viability

The above policies set out when new development within the District will be required to make a contribution to affordable housing and the level of contribution that should be made. The adopted thresholds, above which 30% of all dwellings on-site are required to be affordable, are:

- Developments of 10 dwellings or more within Kidderminster and Stourport-on-Severn
- Developments of 6 dwellings or more within Bewdley and the rural areas.

The Affordable Housing SPD is being prepared to provide more guidance on our expectations for the delivery of affordable housing in accordance with these policies. It explains how developers, landowners and Registered Social Landlords (RSLs) should interpret the District's affordable housing policies.

The Council adopted a Planning Obligations SPD in February 2007. This document sets out detailed guidance on developer contributions for infrastructure and community facilities including affordable housing. Once adopted, the Affordable Housing SPD will replace Section 4 of the Planning Obligations SPD which is shortly due for review.

The Council also published an Affordable Housing Toolkit in April 2011. The toolkit outlines the expected design and quality standards for affordable housing, the basis for negotiation of percentage on S106 sites and details of the WFDC Registered Provider Partners. Once adopted, the Affordable Housing SPD will also replace this toolkit.

### **Proposed Issues to be Addressed**

The following are important issues for the provision of Affordable Housing in the District:

- There are high levels of housing need within the District compared with recent delivery of units. Home ownership levels are falling and private rental now makes up 14.4% of the housing stock. There has been a slight fall in the percentage of the District's housing stock which is affordable and this now accounts for 14.4%.
- More unique housing needs are becoming evident, such as properties for elderly people and those with specific needs. The majority of the District's population growth has been in the 65+ age group and is predominantly made up of people moving into the area from Birmingham and the Black Country. How will these types of housing be evidenced and provided in the future?
- Many of our housing sites are brownfield and viability issues are paramount, often resulting in reduced contributions for affordable housing. This needs to be balanced with ensuring that we continue to provide affordable housing units to meet needs.
- The funding of affordable housing including details of s106 expectations, use of off site planning obligation receipts and in what circumstances the District Council will support grant applications for affordable housing development.
- Space and internal and external design standards for new affordable housing units to help improve place making and provide high quality homes.
- Monitoring affordable housing provision
- Suggested wording for a S106 agreement for outline planning permissions.

### **How to Comment**

This is our early engagement consultation on the proposed Affordable Housing SPD. You will be able to comment between 3<sup>rd</sup> October and 1<sup>st</sup> November 2013. At this stage we are interested in hearing from key stakeholders and other interested parties on our proposals.

We would particularly welcome your comments on the following issues:

- Do you feel it is appropriate for the District Council to prepare an Affordable Housing SPD?
- Do you agree that the proposed issues to be addressed are appropriate?
- Are there any further issues which need to be addressed within the Affordable Housing SPD?

Please submit your comments on-line using the District Council's consultation portal at:

<http://wyreforestdc-consult.limehouse.co.uk/portal/>.

Representations can also be submitted by completing and returning the consultation response form available from the District Council's web-site at: [www.wyreforestdc.gov.uk/planningpolicy](http://www.wyreforestdc.gov.uk/planningpolicy)

**You can e-mail us at:** [LDF.Consultation@wyreforestdc.gov.uk](mailto:LDF.Consultation@wyreforestdc.gov.uk)

**You can write to us at:** Planning Policy Team, Wyre Forest House, Finepoint Way, Kidderminster, Worcestershire DY11 7WF

**All representations must be received by 5pm on Friday 1<sup>st</sup> November 2013**



**Next Steps**

Following the close of this consultation the representations received will be reported to the District Council's Local Development Framework Review Panel, Overview and Scrutiny Committee and Cabinet. The representations received, together with the District Council's response, will be published on the District Council's web-site and used to inform the development of the Draft Affordable Housing SPD.

A formal consultation on the Draft Affordable Housing SPD will be held for a minimum of four weeks, in accordance with Regulation 12(b) of The Town and Country Planning (England) Regulations 2012, commencing in March 2014. Again, the representations received will be reported through the District Council's committee structure. They will be used to inform the preparation of the Final Affordable Housing SPD which is expected to be adopted by the District Council in July 2014.



## Overview and Scrutiny Committee Briefing Paper

Report of: Jonathan Elmer  
Principal Planning Policy Officer  
Date: 12<sup>th</sup> September 2013

### Open Item

## West Midlands Safari and Leisure Park (WMSLP) – Planning Brief and Masterplan

### 1. Summary

- 1.1 This report provides members with an update in relation to the master-planning work being undertaken by West Midlands Safari and Leisure Park (WMSLP). The production of a Planning Brief and Masterplan is a requirement of the Site Allocations and Policies Local Plan (Adopted July 2013) and will provide a framework for considering future planning applications at the Park.

### 2. Background

- 2.1 Members may recall that a ReWyre Regeneration conference was held at the Safari Park on the 4<sup>th</sup> November 2011. This was known as the 'four rooms' conference and at this event a number of initiatives that were designed to help improve the economic fortunes of the District were officially launched. The attendees at this conference included elected members, business leaders and public sector stakeholders. The 'four rooms' were as follows:
1. Proposals for the Academy in Kidderminster (which is now complete);
  2. The proposed Local Development Order for South Kidderminster Enterprise Park (which is now in operation);
  3. Development Plans for the former British Sugar Site (which is now under construction); and
  4. Plans for development at West Midlands Safari and Leisure Park.
- 2.2 As can be seen from the above list, the majority of the initiatives launched at this event have either been completed or are being actively pursued to help economic growth. The final 'room' covered the proposals for the development at West Midlands Safari and Leisure Park, which is the subject of this report.
- 2.3 The Planning Brief and Masterplan have already been considered by the Council's LDF Panel at their meeting on the 14<sup>th</sup> May 2013. At this

meeting, Members endorsed the plan as a suitable basis to meet the policy requirements of the Site Allocations and Policies Local Plan.

**3. The Planning Brief and Masterplan**

- 3.1 The concept of developing a Masterplan for the Safari Park was originally considered through the Inspector's Report for the Core Strategy. In it, the Inspector stated that:

*"Development (at the Safari Park) ...would be premature pending the preparation of a sustainable plan for the entire site. This could include a landscape master plan to ensure that the visual impact of the park, its necessary security fencing, and any future more significant leisure development was properly balanced and designed to minimise impacts on both the openness of the Green Belt and on the attractive rural setting of the park".*

- 3.2 The suggestion made by the Inspector in his report was taken on board by the District Council and made a requirement within the Site Allocations and Policies Local Plan (Adopted July 2013), as follows:

*"The Council wants to avoid piecemeal development that could potentially result in an adverse change in the character of the area as a whole. A planning brief and masterplan setting out the comprehensive proposals for the site will therefore be required in order that the impact of proposals for future expansion and/or diversification can be adequately assessed in relation to issues such as the countryside, highway capacity and the Green Belt. The planning brief and masterplan will need be produced by the site owners and agreed by the District Council". (Paragraph 5.65, page 58)*

- 3.3 The Council's adopted policy therefore requires a plan to be produced that takes a holistic look at the Park and ensures that any development that occurs takes into account the potential wider impact. The start of this process, as indicated in section 2 above, was for draft work on the Masterplan to be presented at the 'four rooms' conference in November 2011. The main thrust of the proposals presented at the 'four rooms' conference centred on the Park's ambition to develop a 250 bed hotel, a 1,000 delegate conference centre and a Waterpark at the site. This remains the focal point of the Masterplan, although there are other elements that relate to the updating of the existing offer, which would be of a complementary nature.
- 3.4 Since the four rooms conference the Safari Park have been collecting and collating further background information in order to further understand the potential impacts of development at the Park. The proposals have also been subject to four stages of consultation, as follows:

- Consultation with statutory and non-statutory consultees (Environment Agency, Worcestershire County Council, Wyre Forest District Council)
- ReWyre Autumn Conference – Elected Members / Business Leaders / Public Sector Stakeholders
- Public Exhibitions – held on 7<sup>th</sup> November 2011 at Spring Grove House and 26<sup>th</sup> January at Bewdley Museum
- Meeting with local residents – 30<sup>th</sup> January 2012

3.5 These stages of consultation have helped to shape the final Planning Brief and Masterplan. It is anticipated that a further round of consultation will occur before any planning application is submitted by the Park.

3.6 This background work has culminated in the production of a comprehensive Planning Brief and Masterplan, which has now been submitted to the Council for consideration (attached at Appendix 1). The Planning Brief includes baseline information on the following aspects:

- Site Characteristics and History
- Planning Policy and Context
- Green Belt
- Precedents set by other similar leisure developments
- Economic Impact of potential development
- Cultural Heritage
- Landscape and Visual Impact Assessment
- Planning History
- Previously Developed Site Information
- Arboricultural Report
- Phase 1 Habitat Survey
- Transport Brief
- Level 1 Flood Risk Assessment
- Drainage
- Stakeholder Consultation

3.7 As can be seen by the above list, the Planning Brief includes a large number of planning considerations that will need to be assessed when determining the appropriateness of development in this location. Whilst all of the above elements are important considerations for development within this location, some of the key issues that will need to be addressed in any subsequent planning application are considered to be as follows:

- Green Belt. The Park is located within the West Midlands Green Belt and therefore very special circumstances are required for any 'inappropriate' development to be delivered. The proposals, by their very nature are inappropriate, and therefore very special circumstances will need to be provided through a planning

submission in order to justify the development aspirations at the Park.

- Highways. The proposals have the potential to create increased trip generations on the local highway network and therefore the traffic impact of the proposals will need to be fully understood and mitigated against accordingly.
- Design. Very careful consideration needs to be given to the design of new buildings, particularly in terms of their height and siting so as to ensure they will be completely screened when viewed from neighbouring properties and the wider area.
- Landscaping / Screening. All schemes for new buildings will be accompanied by a scheme for hard and soft landscaping and this will be an important aspect to consider for new developments. This is because screening has the potential to minimise the visual impact of any built development on the surrounding area
- Noise. Regard will need to be had to the control of noise from any developments, particularly for any new rides and attractions.

3.8 It is important to note that the Planning Brief and Masterplan purely set out a framework for considering applications against. The document highlights the key considerations that will need to be explored through more detailed work as part of any planning application. Its purpose is not to pre-determine what might be acceptable within this location instead it highlights key issues, constraints and challenges that will affect any application in this area. Whilst any future planning application will need to have regard to the Planning Brief and Masterplan, it will also need to be assessed against local and national planning policy and will require further, more detailed work and justification.

3.9 This approach to undertaking master-planning work prior to considering planning applications is not a new concept for the District. Members may recall that a similar exercise was undertaken for the Churchfields Masterplan SPD, which set guidelines for considering future development within the Churchfields area of Kidderminster.

#### **4. Conclusion**

4.1 The District Council have included within their Site Allocations and Policies Local Plan a requirement for a Planning Brief and Masterplan to be prepared at the Safari Park before any development is considered. The Safari Park has undertaken this exercise over the past few years and has now submitted to the Council the final version. This document will help to provide a framework for considering future development at this location and will ensure that the requirements of the District Councils newly adopted planning policy are met.

**5. Options**

5.1 The committee may wish to:

- a) Suggest amendments to the Planning Brief and Masterplan for consideration by the Cabinet.
- b) Endorse the Planning Brief and Masterplan (as set out at Appendix 1) as a suitable framework to meet the requirements of the Site Allocations and Policies Local Plan.

**6. Next Steps**

6.1 The Planning Brief and Masterplan will be considered by the Councils Cabinet on 17<sup>th</sup> September 2013. It is anticipated that the Safari Park are considering submitting a Planning Application before the end of the year. Prior to this, it is anticipated that a further round of consultation will be carried out.

**7. Consultation**

- Principal Solicitor, Wyre Forest District Council
- Development Manager, Wyre Forest District Council
- North Worcestershire Economic Development and Regeneration Manager

**8. Related Decisions**

- LDF Review Panel Agenda (14/05/2013)

**9. Relevant Council Policies/Strategies**

- Core Strategy (Adopted December 2010)
- Site Allocations and Policies Local Plan (Adopted July 2013)

**10. Implications**

10.1 Resources: There are no resource implications as a result of this proposal.

10.2 Equalities: An Equality and Diversity Screening Assessment has already been carried out for the Site Allocations and Policies Local Plan, which this forms part of, and this did not highlight any adverse implications.

10.3 Partnership working: Consultation has been carried out by the Safari Park on the draft proposals. This has included consulting with members, business leaders, public sector stakeholders and holding exhibition events in the local community.

**11. Wards affected**

11.1 Wribbenhall Ward

**12. Appendices**

Appendix 1 – West Midlands Safari Park Planning Brief and Masterplan (The associated appendices that accompany the planning brief and Masterplan are available electronically)

**13. Background Papers**

13.1 The adopted Core Strategy and Site Allocations and Policies Local Plan can be viewed on the Council's website in the following location:

[www.wyreforestdc.gov.uk/planningpolicy](http://www.wyreforestdc.gov.uk/planningpolicy)

13.2 Alternatively if you would like to view hard copies of any of the documents, please contact the Planning Policy team on extension 2549.

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## **WEST MIDLAND SAFARI PARK**

### **PLANNING BRIEF**

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## Quality Management

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Prepared by:	NM/RB	
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- 1 Masterplan

### APPENDICES

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Appendix 2	Scope for Planning Brief and Masterplan
Appendix 3	Study Area Plan
Appendix 4	Technical note on Cultural Heritage (RPS)
Appendix 5	Landscape and Visual Impact Assessment (RPS)
Appendix 6	Schedule of Planning History
Appendix 7	Lawful development certificate for use of land as an amusement park (LPA Ref. 08/0914/CERTE)
Appendix 8	Previously Developed Site Boundary applicable to WMSP, as defined in Site Allocations and Policies Publication Version.
Appendix 9	Representations made by RPS in July 2011 to Policy 56 of the Site Allocations and Policies Preferred Options
Appendix 10	Arboriculture report (Marlow Consulting)
Appendix 11	Phase 1 Habitat Survey (RPS)
Appendix 12	Planning Brief – Transport (RPS)
Appendix 13	Level 1 Flood Risk Assessment (RPS)

Appendix 14    Statement of Community Involvement (RPS)

# 1 Introduction

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- 1.1 This Planning Brief has been prepared by RPS Planning and Development and provides a framework for taking forward future tourism based development at West Midland Safari & Leisure Park (WMSP) in accordance with Policy 13 of the emerging Wyre Forest District Local Development Framework Site Allocations and Policies (SAP) Development Plan Document (DPD).
- 1.2 Under the heading 'Supporting Major Tourist Attractions', in relation to WMSP Policy 13 states:  
  
***"Any proposal for major development within the Park will need to be considered on a comprehensive basis in the context of a planning brief and masterplan for the whole site. The Council will consider applications for development at West Midland Safari and Leisure Park favourably, where such development would upgrade and improve the viability of the attraction; address the potential for healthland restoration and recreation; are appropriate to its function as a major tourism destination; make a positive contribution to the local economy; and are acceptable taking into account its location within the Green Belt and the need to ensure compatibility with the local infrastructure network."***
- 1.3 WMSP is already one of the leading visitor attractions in the West Midlands. Opened in 1973, the Safari Park now attracts 750,000 visitors annually and includes a 4 mile drive through the animal reserves, a walk-through Discovery Trail (featuring animal areas and shows) and a large amusement park. It employs 82 people year-round and a further 395 seasonal staff. It generates £20m of spending in the local economy.
- 1.4 The main aspirations of the owners are to improve and enhance the existing operation to turn the site from a three star attraction to a four star resort. This involves bringing forward a number of specific projects. The introduction of a major conference facility, with on-site accommodation and indoor water park will provide a much needed high quality conference venue west of Birmingham, providing overnight accommodation for delegates, and will also allow visitors to the Safari Park to stay longer and visit the Park and surrounding area more out of season. It will provide business for other hotels in the area and will generate longer visitor stays, which will increase spending in other local businesses and spread the time when people arrive and leave the park. The proposal is one of the 'economic landmark' projects identified by the ReWyre Initiative to help drive business growth and will be an important part of further enhancing the area's visitor and business tourism offer. An Economic Impact Statement produced by consultants on behalf of ReWyre (**Appendix 1**) has shown that this proposal will generate 292 net local full-time equivalent jobs in Wyre Forest with 341 in

Worcestershire as a whole, in addition to those already employed at the Park. Net additional spending in the area will increase by £9m and £10m respectively.

- 1.5 The owners would also like to create a new station on the Severn Valley Railway (SVR). This will provide a direct link to the national rail network. The new station will be linked to the park's facilities by a monorail. The owners also aspire to enhance the animal display areas and improve the facilities available for animal care and welfare. This will increase the role the park plays in international conservation of endangered species and will extend the park's educational role.
- 1.6 This document has been assembled on the basis of both technical input from specialists in various fields and with account taken of the owners' plans and aspirations for the site, and is based on consultation with statutory consultees, council officers, elected members, neighbours and the public.
- 1.7 The approach and scope for the Planning Brief and Masterplan has been discussed and agreed with Wyre Forest District Council (WFDC), and is attached as **Appendix 2** for information. The starting position has been to examine the key environmental opportunities and constraints within a defined study area, that corresponds with the land owned by WMSP (see **Appendix 3**).
- 1.8 Chapter 2 of the Brief describes the key physical and land use characteristics of the site and surrounding area, and summarises the history of the WMSP in the context of relevant planning history and work undertaken by our specialist cultural heritage consultant and landscape architect. Chapter 3 contains a technical review of existing and emerging planning policies of relevance to the site at a local, regional and national level, with emphasis on the adopted Development Plan. Chapter 4 sets out the technical findings of our baseline surveys and work, focussing on issues relevant to the Green Belt, cultural heritage, landscape, ecology, transport, flood risk and drainage. It also describes the aspirations of the Park's owner and the likely economic benefits of further tourism-related development at the site, in the context of the key findings set out within the EIS produced by AMION et al.
- 1.9 Chapter 5 summarises the consultation that has taken place with Council Officers and Members, local residents and other stakeholders concerning the evolution of the Planning Brief, and in particular the outcomes of the exhibitions that took place on the 4<sup>th</sup> and 7<sup>th</sup> November 2011 and 26<sup>th</sup> January 2012 (which is set out in more detail in the Statement of Community Involvement). Chapter 6 draws on the findings of the background work, in particular the site's constraints and opportunities, and sets out guidance on how future development at the Park should respond to the known issues and take into account relevant planning policies. Reference is made to the Masterplan which is presented in this chapter.

## 2 Site Characteristics & History

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### Site and Surroundings

- 2.1 WMSP is a major visitor attraction located to the south of the A456 near Bewdley in Worcestershire. Originally opened in 1973, the Park now attracts around 750,000 visitors annually.
- 2.2 The Wribbenhall and Catchems End districts of Bewdley lie within 100m of the western and northern boundaries of WMSP. The SVR line forms the boundary to the south west, with the River Severn approximately 500m beyond. Woodland and heath at Rhydd Covert, Whitehill Wood and Devil's Spittleful wrap around the eastern and south-eastern boundaries of the site. The residential edge of Kidderminster lies within 350m of the eastern boundary. The site is accessed via a priority controlled junction with the A456.
- 2.3 The Park is on a gently undulating landscape ranging from 34m AOD to 50m AOD, and is well vegetated on all boundaries and throughout. It covers a total site area of 88.7 hectares. The Park comprises two distinct areas: the southern part of the site contains the wildlife and animal reserve areas; northern part of the site is more built-up and comprises the amusement park, the discovery trail, Spring Grove House, entrance and administration/maintenance areas. The Park and surrounding areas form part of the Metropolitan Green Belt.

### Wildlife & Safari Park Area

- 2.4 The safari park contains around 600 animals from around 30 different species. This area (the 'animal reserves') comprises an undulating landform, that is predominantly covered by open grassland with clumps of mature trees and scrub heath, subdivided by fences to form a series of enclosures through which a 4 mile (6.4km) drive through the animal reserves passes. Accommodation buildings for the animals are located in each of the enclosures. A number of small ponds are scattered around which are used by the animals.
- 2.5 The animal reserves area overlaps with heath land in the south-east corner of the site, that forms part of the Devil's Spittleful Nature Reserve Site of Special Scientific Interest (SSSI). Trees and scrub have encroached onto the reserve in the past and works are now being undertaken to remove this vegetation and restore the area to heath.

### North of Animal Reserves

- 2.6 The northern half of the site focuses on the stone mansion of Spring Grove House (a Grade II listed building), surrounding parkland grounds and lakes. The main elements of the historic park survive today, including many fine specimen trees, the stable block and walled garden, and form a historic landscape framework into which the amusement park attraction has been

placed. Rides, some animal enclosures, educational facilities, hospitality venues, retail and food outlets and car/coach parking occupy the core of this area.

- 2.7 The parkland forms a swathe of landscape approximately 200m wide which wraps around the north and north-west boundaries of the site, adjoining the A456. This landscape comprises large areas of semi-improved grassland with scattered mature trees and areas of mature woodland. A small area in the north-west is used to store materials and is the site of a large manure heap.
- 2.8 Spring Grove House acts as the main administrative centre for the Park and is used for weddings and other corporate events. The amusement park contains a number of attractions and rides, and ancillary shops and toilet facilities, and is set around a series of lakes. This area also contains the 'Discovery Trail' containing reptile and insect houses and other animal displays and shows, and the new 'Walking with Lemurs' trail. To the east of Spring Grove House and the amusement park are the entrance complex and car/coach parking and picnicking areas. Several maintenance/storage areas and buildings are located to the south and north of the amusement park.

### Site History

- 2.9 Spring Grove House dates from the 1790s, although following a fire in 2006 the house has been rebuilt and significantly restored. The grounds which surround the house were created in the late 18<sup>th</sup> and early 19<sup>th</sup> centuries in the style of the English picturesque landscape movement, typified by Capability Brown. Spring fed watercourses were dammed and lakes created, with woodland belts and copses. The main elements of the historic park survive today, as described above.

### Spring Grove House & Associated Buildings

- 2.10 The baseline work undertaken by our cultural heritage expert (see **Appendix 4**) provides a brief history of Spring Grove House and associated buildings and park. The house was originally listed in May 1986, although it was substantially destroyed by fire on Christmas Eve 2006. The interior was completely gutted and only the main outer walls were left standing. The house was rebuilt with advice from English Heritage and the Conservation Officers of Wyre Valley Council and was reopened in September 2010.
- 2.11 With reference to the listing description, the heritage note states that the House was built between 1787 and 1790 for a wealthy local businessman, Samuel Skey. It also describes the means by which Samuel Skey acquired the land in 1775. No estate maps or drawings of the house from this time have been located and it is likely that much of the archive material that would be expected with a country house of this type was destroyed in the 2006 fire. The earliest available detailed map showing the layout of the house and grounds is the 1st edition Ordnance Survey 25" map of 1884. This indicates the house with its principal aspect to the

west, the stables just to the south of the house and a walled kitchen garden with glasshouses to the south-east of the stables.

- 2.12 The adjacent stable block was also listed as Grade II in May 1986 and dates from the late 18<sup>th</sup> century. The former stables have been covered to use as a café. The gates and gate piers located approximately 275 metres to the north of Spring Grove House, that mark the original main entrance to the house, were similarly listed as Grade II in May 1986 and originate from this same period. The former walled kitchen garden is still present and houses a number of visitor attractions.
- 2.13 The main drive runs north from the house to the main road and there is a small lodge adjacent to the gates here. This lodge is likely to be contemporary with the house and is still present. The 1884 map also shows a second lodge at the eastern edge of the estate with a track leading from the rear of the kitchen garden. This lodge is still present and appears to be of late 19<sup>th</sup> century date and is named on the map as Rhydd Lodge, with Rhydd Covert immediately beyond the lodge and outside the estate.
- 2.14 Approximately 500m south-west of Spring Grove House is Spring Grove Farmhouse (located just outside of the study area shown in **Appendix 3**). Here the late 18<sup>th</sup> century barn and stable was listed at Grade II in 1979 whilst the late 18<sup>th</sup> century cow house was listed (Grade II) in May 1986. Both of these listed buildings have been converted to residential use.

#### **Parkland**

- 2.15 The cultural heritage note goes on to describe the surrounding parkland with reference to the famous landscape architect, Lancelot 'Capability' Brown. It is considered more likely that the parkland was 'Brownian' in style (with areas of undulating grassland, clumps and belts of trees and serpentine lakes created by the damming of small rivers) rather than being designed by Capability Brown.
- 2.16 The baseline work undertaken by our landscape architect (see the Landscape and Visual Impact Assessment attached to **Appendix 5**) also includes a description of the historic landscape context. This report emphasises that the site currently contains elements of landscapes from several different historic periods. The landscape most likely comprised agricultural land on the edge of Catchems End and Wribbenhall and open heath land at Rhydd Covert, prior to the estate parkland being created in the late 18<sup>th</sup> century as a setting for the house.
- 2.17 The original designed layout of the parkland including the lakes and the majority of the locations in which woodland, copses and specimen trees were planted in the 18th century remained in place through the 19th century up to the 1940s. The main changes to the estate by the 1940s were the addition of an avenue of lime trees along the driveway from Rhydd Lodge to the east, probably at the turn of the 20th century and the clearance of the walled



garden. Glass houses have been demolished and the original cruciform arrangement of paths and fruit trees surrounding productive beds have been grassed over.

- 2.18 The WMSP site in 2011 has retained mature tree cover in approximately 75% of the original 1790s layout. These areas are predominantly in close proximity to the house, framing the west front and the east lawn. Trees have also been retained either side of the north drive, at Bunker's Hill, in clumps around the walled garden and along the road to Spring Grove Farm. The main change to the estate after World War II was the construction of the A456 which severed the western side of the parkland, cutting through the lake and woodlands. The lake was reshaped and widened and an island was created by taking land to the south of Bunker's Hill. Several rows and clusters of poplar trees have been incorporated into the Park.
- 2.19 The main area of amusement park attractions and other supporting facilities has been located within parkland west of the main drive and house and within the walled garden area. Development in these areas sits within the framework of original parkland features including lakes, trees and walls. The WMSP site entrance and parking areas are located in the north east corner of the park. Land to the south of the southern arm of the lake and the eastern drive currently comprises the animal reserves, established on former parkland. The animal reserves area extends further south over land which historically consisted of heath land. Areas of the original 1790s designed landscape which have remained largely unchanged include the lawn surrounded by tree belts east of Spring Grove House and the copses and grassland at Bunker's Hill.

### Planning History

- 2.20 Since it was opened in 1973 the Park has developed a long and complex planning history. A Schedule of Planning History can be found at **Appendix 6**, based on our own records and the Council's planning reports, history cards and website (the last of which only goes back as far as 1995). The following decisions have particular significance to the existing site:-
- Ref. BB/0080/71 – Wildlife Park; approved. WMSP started to operate as a commercial visitor attraction in the early 1970s pursuant to this consent. This planning permission also identified a 'Pleasure Park' on part of what is now the Amusement Park.
  - Ref. BB/00009/74 – Development of section of Safari Park (near lake) as children's amusement and entertainment area; approved. This is the first permission specifically relating to the amusement park area, and applies to a triangular-shaped parcel of land to the north of the existing hippo lake. The permission was implemented, with the exception of a condition (Condition 2) that required equipment and rides to be sited strictly in accordance with the deposited plans.
  - Ref. WF/1061/75 – Dolphinarium; approved. This was implemented within the amusement park area, but renamed the Sealion Show.

- Ref. WF/1067/77 – Change of use – shop to snack bar; approved. It is understood that this applies to the Grade II listed stable block mentioned previously in this section of the Brief.
- Ref. WF/1182/78 – Change of use from leisure area to narrow gauge railway for passenger traffic; approved. This applies to the train line that runs along the south side of the amusement park.
- Ref. WF/1114/79 – Railway station for use in connection with narrow gauge railway; approved. This station is situated to the west of the main entrance to the amusement park area.
- Ref. WF/231/80 – Extension of the temporary period relating to erection of cinema; approved. This relates to the 'Cine 180' attraction within a dome structure. The dome structure has now been removed pending the erection of the servery building permitted under reference 11/0027/FULL.
- Ref. WF/076/81 – Building to provide additional underground amusement facilities; approved. In the early 1980s, this expanded the amusement area further to the east of the already consented amusements.
- Ref. WF/0293/97/FULL – Erection of building for housing elephants; approved May 1997.
- Ref. 07/0685/FULL – Retention of children's play area and associated rides; approved August 2007. This relates to land to the west of the Dome and contains a number of rides such as the Simba Kiddies Train, Animal Ark, Moroccan Magic Carpet and Serengeti Gallopers. Condition 2 of this permission removes the right to development under Part 28 Class A of the Town and Country Planning (General Permitted Development) Order 1995.
- Ref. 07/1028 – Creation of cheetah enclosure with associated fencing, pools. Gates and earth mounds and extension to animal building; approved December 2007. This is located on the southern side of the safari park.
- Ref. 07/1132/FULL - Retention of area/compound for Buffalos with canopy and pool. Replacement bulk feed silo adjacent to Giraffe house; approved January 2008.
- Refs. 08/0055/FULL & 08/0056/LBC - Demolition of north wing & construction of two storey extension to accommodate toilets, lift shaft and smoking shelter. Creation of ramped access to rear. Single storey extension to rear and other external alterations. Creation of additional car parking areas. Erection of new gates. Re-siting of external freezer to allow construction of a single storey plant room. New landscape works. These consents for planning permission and listed building consent concerned works for the new, re-built, Spring Grove House.
- Ref. 08/0914/CERTE – Use of land as an Amusement Park; approved December 2008. Within the area applicable to this lawful development certificate it was deemed that part of the land benefited from planning consents Ref. Nos. BB/0009/74 and WF/076/81; the use of the

remainder of this land was immune from enforcement action because it had continued for a period of more than ten years before the date of the application. The amusement park area therefore benefits from permitted development rights as set out in Schedule 2 of the Town and Country Planning (General Permitted Development) Order 1995 (as amended). A copy of the certificate is attached to **Appendix 7**.

- Ref. 09/0253/FULL – Retention of Tower Drop amusement ride; approved June 2009.
- Ref. 10/0531/FULL – African Village and Woodland Walkway; approved November 2010. This applies to land located towards the west of the amusement park area, including the new 'Lemur Wood' attraction.
- Ref. 10/0630/FULL – 2 no. bus stop shelters on A456 at entrance to Safari Park; approved December 2010. These proposals will provide improved waiting facilities for public transport users travelling to and from the site. At the time of this report, these had not been erected.
- Ref. 11/0027/FUL - Erection of refreshment servery building and covered picnic area along with children's play area following removal of existing 'cine-dome'; approved March 2011. At the time of this report, the 'cine-dome' had been removed and the covered picnic area provided, but the servery building had not been erected.
- Ref. 11/0434/FULL - Erection of new Lion House with associated fencing, compounds and septic tank; approved September 2011.
- Ref 12/0006/FUL – Extension to existing Elephant house and re-theme building; erection of Pelican House; and associated works for enhancement of surrounding area including erection of Baobab Tree; approved February 2012.

2.21 Part 28 of the General Permitted Development Order, 1995, relates to 'development at amusement parks' and therefore has implications for future development/works within the land covered by the above lawful development certificate (Ref. 08/0914/CERTE). It confirms permitted development as:-

***“A. Development on land used as an amusement park consisting of –***

***the erection of booths or stalls or the installation of plant or machinery to be used for or in connection with the entertainment of the public within the amusement park; or***

***the extension, alteration or replacement of any existing booths or stalls, plant or machinery so used.”***

2.22 It also confirms that development is *not* permitted where:

***“(a) the plant or machinery would –***

- (i) if the land or pier is within 3 kilometres of the perimeter of an aerodrome, exceed a height of 25 metres or the height of the highest existing structure (whichever is the lesser), or*
- (ii) in any other case, exceed a height of 25 metres;*
- (b) in the case of an extension to an existing building or structure, that building or structure would as a result exceed 5 metres above ground level or the height of the roof of the existing building or structure, whichever is the greater, or*
- (c) in any other case, the height of the building or structure erected, extended, altered or replaced would exceed 5 metres above ground level.”*

### 3 Planning Policy Context

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- 3.1 Future tourism development at WMSP needs to be considered in the context of the relevant Development Plan and other Government planning policy and guidance, to inform the issues and opportunities highlighted in this Planning Brief.

#### Development Plan

- 3.2 Section 38 (6) of the Planning and Compulsory Purchase Act 2004 require that planning applications be determined in accordance with the statutory Development Plan unless material considerations indicate otherwise. For the purposes of this Brief, the development plan comprises the following documents:

- Regional Spatial Strategy for the West Midlands (2008) (RSS)
- Worcestershire County Structure Plan (2001) (WCSP)
- Wyre Forest District Local Plan (2004) (WFDLP)
- Wyre Forest District Council Core Strategy (2006-2026) (WFDC CS)

#### Regional Spatial Strategy for the West Midlands

- 3.3 The full West Midlands Regional Spatial Strategy (formerly Regional Planning Guidance Note 11) was initially published by the Office of the Deputy Prime Minister in June 2004. Following the publication of the Phase One Revision in respect of the Black Country sub-region by Communities and Local Government, a revised RSS was issued in January 2008.
- 3.4 Following the incoming Government's announcement shortly after the General Election in 2010 of its intention to abolish regional strategies, three High Court judgements have been made. The last of these, on 27<sup>th</sup> May 2011, ruled that there were very limited circumstances in which the intention to abolish could be regarded as a material consideration in the determination of planning applications, and none in the case of the preparation and examination of development plans. The RSS for the West Midlands therefore remains part of the development plan until such time as the relevant provisions of the Localism Act come into force.
- 3.5 Policy RR1 of the RSS (Rural Renaissance) states that rural areas will be regenerated by the diversification of the economy. Policy PA10 (Tourism and Culture), which specifically refers to WMSP, states:

***“Development plans should generally encourage both the improvement of existing provision as well as the creation of new facilities, subject to the capacity of***

***infrastructure and the environment to accommodate the new facilities and visitors associated with them.”***

- 3.6 Policy PA14 (Economic Development and the Rural Economy) states that sustainable diversification of the rural economy should be supported through the growth of existing business, and indicates that priority should be given to, among other things, tourism and leisure. These particular policies are permissive in principle towards tourism related development, particularly where it seeks to upgrade or extend existing provision. Policy T2 (Reducing the need to travel) encourages local authorities, developers and other agencies to work together to reduce the need to travel, especially by car. Policy T5 (Public Transport) states that local authorities, transport operators and other agencies should work together to provide attractive and reliable alternatives to the use of the private car. In terms of landscape, Policy QE6 of the RSS states that local authorities and other stakeholders should in their plans and policies conserve, enhance and where necessary, restore the quality, diversity and distinctiveness of landscape character throughout the region. Policy QE7 of the RSS states that all plans and programmes of local authorities and other relevant agencies should encourage the maintenance and enhancement of the Regions’ wider biodiversity resources.

**Worcestershire County Structure Plan**

- 3.7 The WCSP was adopted in June 2001. A number of policies (including those referred to below) were saved in September 2007 pending the adoption of further phases of the RSS and the relevant parts of the Local Development Framework (LDF) and still form part of the development plan for the area.

- 3.8 It is clear from the Key Diagram that WMSP is located within the general extent of the West Midlands Green Belt. Policy D.39 deals with development in the Green Belt. It states:

***“There will be a presumption against allowing inappropriate development in the Green Belt as described in national planning guidance currently PPG2. Where proposals constitute inappropriate development in terms of this guidance they will only be allowed where very special circumstances exist which outweigh the harm to the Green Belt”.***

- 3.9 Policy RST.14 deals with tourism development and states that the development of the tourism industry throughout the County will be ***“encouraged”*** with the twofold aim of generating wealth and employment and contributing to the economic and social well-being of the residents of the County thereby enhancing quality of life. Policy RST.16 relates specifically to tourist accommodation, and states that the development of new accommodation, including new hotels and conference facilities, which accords with RST.14, will be encouraged.

- 3.10 In terms of landscape, Policy CTC.1 relates to landscape character, and states that proposals for development must demonstrate that they are informed by, and are sympathetic to, the landscape character of the area in which they are proposed to take place. Policy CTC.2

(skylines and Hill Features) states that development proposals should, where relevant, demonstrate that they will not have an adverse effect on skylines and hill features, including prominent views of such features. Policy CTC.5 relates to trees, woodlands and hedgerows and states that existing trees, woodlands and hedgerows of nature conservation, amenity or landscape value should be retained and their appropriate management encouraged.

- 3.11 Policy CTC.8 (Flood Risk and Surface Water Drainage) states that development will not normally be allowed where it is within a floodplain or other area at risk of flooding, it will increase the risk of flooding or cause new flooding problems at the site or elsewhere, or it will jeopardise existing flood defences, flood volumes or the ability to carry out essential maintenance work. The policy also states that development should wherever possible incorporate sustainable drainage systems.
- 3.12 As noted previously part of the site is designated as a SSSI. Policy CTC.11 (Site of National Wildlife Importance) is therefore relevant to this Brief. This states that proposals for development in or likely to affect SSSIs will be subject to the most rigorous examination. Where such development may have an adverse effect, directly or indirectly on the SSSI, it will not be allowed unless there are no reasonable alternative means of meeting that development and the reasons for the development clearly outweigh the value of the site itself. Where development or land-use change is permitted, any damage to the nature conservation of the site will be kept to a minimum, and adequate and appropriate protection and enhancement of the site's nature conservation interest will be secured, and where necessary, appropriate and adequate compensatory measures will be provided, using conditions and/or planning obligations where necessary.
- 3.13 The WCSP also contains a number of policies relating to transport which are relevant to this Brief. Policy T.1 (Location of Development) states that development proposal should include transport assessments and should be designed to maximise access by pedestrians, cyclists and public transport providers. Any additional traffic generated by the proposals will need to be shown to be capable of accommodation safely on the road system without undue environmental consequences. Policy T.3 (Managing Car Use) states that demand management measures will be implemented in order to limit the use of cars and to encourage an overall shift to the use of public transport, walking and cycling in accordance with the roads hierarchy. Policy T.6 states that measures to improve the attractiveness of rail transport will be undertaken.

#### **Wyre Forest District Local Plan**

- 3.14 The WFDLP was adopted in January 2004. In September 2007 the Secretary of State directed that a number of policies (included those outlined below) should be saved pending the adoption of the relevant parts of the merging LDF.
- 3.15 The Proposals Map confirms that the site is within the Green Belt. Policy GB.1 states:

**“Within the Green Belt, as defined on the Proposals Map, development will not be permitted, except in very special circumstances, unless one of the following applies:**

- i) there is a clear need for new buildings for the purposes of agriculture or forestry,**
- ii) the development provides essential facilities for outdoor sport or outdoor recreation, for cemeteries, or for other uses of land which preserve the openness of the Green Belt, and which do not conflict with the purposes of including land within it;**
- iii) the development is for housing in one of the following circumstances:**
  - a) it is required for the purposes of agriculture or forestry, within the provisions of Policy AG.2.**
  - b) it is for small-scale, low-cost housing, reserved for local needs in settlements accepted by the District Council as having a special identified need, and the development accords with Policy H.11; or**
  - c) it is infilling only, in a small gap in an otherwise built-up frontage within an existing village ; or**
  - d) it is for the extension of an existing dwelling, provided that it does not result in disproportionate additions over and above the size of the original dwelling;**
- iv) it involves the replacement of a dwelling, provided that the new dwelling is not materially larger than the dwelling it replaces, and is on the same site (unless an immediately adjacent alternative position would reduce the impact on the Green Belt);**
- v) the development involves the re-use or conversion of buildings, in accordance with Policy GB.5, or the Policies for the Re-use and Adaptation of Rural Buildings;**
- vi) the proposals involve the redevelopment of an identified Major Developed Site in the Green Belt under the provisions of PPG2 Annex C, in accordance with Policy GB.4.”**

- 3.16 The WMSP is not currently defined as a Major Developed Site (MDS) in the Local Plan in the context of this policy, although the Site Allocations and Policies Preferred Options Development Plan Document published in May 2011 proposes that part of the site is included as a MDS. We address this later under the ‘other material considerations’ section of this chapter, where it should also be noted that such MDSs are proposed to be replaced by a



broader category of 'previously developed sites' in the Green Belt within the Coalition Government's consultation draft National Planning Policy Framework dated July 2011.

- 3.17 Policy GB 1 states that development will not be allowed within the Green Belt, except in very special circumstances, unless there is a clear need for new buildings for the purposes of agriculture or forestry, the development provides essential facilities for outdoor sport or recreation, or the development is residential accommodation involving agriculture or forestry workers, small-scale affordable housing, infilling a small gap in an otherwise built-up frontage in a village, an extension to an existing dwelling, a replacement dwelling, re-use or conversion of an existing building or the proposal involves the development of an identified Major Developed Site in the Green Belt. Policy GB.6 states that proposals within, or conspicuous from the Green Belt, must not be detrimental to the visual amenity of the Green Belt, by virtue of their siting, materials or design.
- 3.18 As regards noise pollution, Policy NR.11 states that proposals for development that are likely to generate an adverse degree of disturbance from noise to nearby sensitive locations, uses or activities, will not be permitted unless the noise emitted from the development can be reduced to an accepted level through appropriate attenuation or other measures.
- 3.19 Policy LB.5 concerns new development affecting the setting of listed buildings. It states that new buildings and structures affecting the setting of a statutorily or non-statutorily listed building, must: i) relate well to them in terms of design, style, materials, proportion and plan: and ii) otherwise harmonise with the building or structure, its curtilage and setting.

#### **Wyre Forest District Council Core Strategy**

- 3.20 The WFDC CS was adopted in December 2010 and sets out the future pattern of development in the Borough over the period to 2026. Among the development objectives in the Core Strategy are: (2) to diversify and grow the District's economy, emphasising the development of the service sector, high tech industry and sustainable tourism, and (5) safeguard and enhance the District's unique landscape character, Green Belt, natural environment and green infrastructure. Again, the Core Strategy Key Diagram confirms the site's location within the Green Belt.
- 3.21 Policy DS01 (Development Locations) states that development in the open countryside will be closely controlled to safeguard the integrity of the District's Green Belt and landscape character.
- 3.22 Policy DS02 (Kidderminster Regeneration Area) states that Kidderminster will be the strategic centre for the District and its role in providing a focus for new housing, retail, office and leisure development is to be enhanced. Development proposals which help to promote Kidderminster as the tourism 'hub' of the District will be encouraged during the plan period. This includes the provision of supporting facilities such as hotels, conferencing facilities and developments that improve the evening/night time economy and cultural offer of the town. Sustainable transport

links and infrastructure to promote ease of access to the Wyre Forest, Bewdley, West Midlands Safari Park and Kidderminster Railway Station will be sought.

- 3.23 Significantly, the location of WMSP itself is also highlighted on the Key Diagram, to which Policy CP10 applies. This policy relates to sustainable tourism and states that the strategy is to support the local tourism industry *through “supporting sustainable proposals that improve the quality and diversity of existing tourist facilities, attractions, accommodation and infrastructure, subject to the proposals not causing adverse impacts on the surrounding environment and infrastructure”*. The policy also states that *“new developments should incorporate sustainable transport links wherever possible, especially between attractions and town centres”*.
- 3.24 The reasoned justification for the policy notes in Paragraph 8.34 that tourism in the region generates over £5 billion to the economy and supports 130,000 jobs. WMSP is specifically mentioned in paragraph 8.36 as one of the two largest tourist attractions in the District (the other being the SVR).
- 3.25 Policy CP01 (Delivering Sustainable Development Standards) states that all new development proposals within the District must demonstrate how they reduce their impact on the environment. The design, layout, siting, orientation, construction method and materials used should seek to maximise energy conservation and efficiency.
- 3.26 Policy CP02 (Water Management) requires all new development to incorporate appropriate Sustainable Drainage Measures (SUDs).
- 3.27 Policy CP03 promotes transport choice and accessibility. This states that development proposals should have full regard to the traffic impact on the local highway network and that major development proposals or those that are likely to have a significant impact on the local transport network will be required to submit a Travel Plan to demonstrate that they have fully considered access by all modes of transport. In addition, where appropriate, new developments will be required to connect into the surrounding infrastructure and contribute towards new or improved walking and cycling facilities within the District and the provision of an integrated public transport network across the District.
- 3.28 Policy CP11 relates to quality design and local distinctiveness and states that new development should sensitively connect to the surrounding streets, spaces and communities.
- 3.29 Policy CP12 (Landscape Character) states that new development must protect and where possible enhance the unique character of the landscape. Opportunities for landscape gain will be sought alongside all new development, such that the landscape character is strengthened and enhanced.
- 3.30 Policy CP14 relates to the provision of opportunities for local biodiversity and geodiversity. New development will be required to contribute towards biodiversity within the District, either

by enhancing opportunities for biodiversity within the site or by making a contribution to off-site biodiversity projects.

## Other Material Considerations

### National Planning Policy Framework March 2012

- 3.31 The National Planning Policy Framework (NPPF) sets out the Government's economic, environmental and social planning policies, that articulate its vision of sustainable development. It supersedes all previous Planning Policy Guidance Notes (PPGs) and Planning Policy Statements (PPSs).
- 3.32 Paragraph 7 states that there are three dimensions to sustainable development, each of which give rise to the need for the planning system to perform a number of different roles, which include:
- “An economic role – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type, and in the right places and at the right time, to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure”;***
- A social role – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality built environment, with accessible local services that reflect the community's needs and support its health, social and cultural well-being; and,***
- An environmental role – contributing to protecting and enhancing our natural, built and historic environment, and as part of this helping to improve biodiversity, use natural resources prudently, minimise waste and pollution and mitigate and adapt to climate change, including moving to a low-carbon economy.”***
- 3.33 A presumption in favour of sustainable development is at the heart of the NPPF, and is to be seen as the golden thread running through both plan making and decision-taking (paragraph 14).
- 3.34 Paragraph 18 states that planning must operate to encourage growth and not act as an impediment. As such, ***“significant weight should be placed on the need to support economic growth through the planning system”***.
- 3.35 Paragraphs 29 to 41 cover the promotion of sustainable transport. Paragraph 29 states that the transport system needs to be balanced in favour of sustainable transport modes, and paragraph 30 states that encouragement should be given to solutions which support reductions in greenhouse gas emissions and reduce congestion.
- 3.36 Green Belt is covered by Paragraphs 79 to 92. Paragraph 79 states:

**“The Government attaches great importance to Green Belts. The fundamental aim of Green Belt policy is to prevent urban sprawl by keeping land permanently open; the essential characteristics of Green Belts are their openness and permanence.”**

3.37 Paragraph 80 states that Green Belt serves five purposes:

- To check the unrestricted sprawl of large built-up areas;
- To prevent neighbouring towns merging into one another
- To assist in safeguarding the countryside from encroachment
- To preserve the setting and special character of historic towns; and
- To assist in urban regeneration, by encouraging the recycling of derelict and other urban land.

3.38 As with previous Green Belt policy, paragraph 87 states that inappropriate development is, by definition, harmful to the Green Belt and should not be approved except in very special circumstances. When considering any planning application, paragraph 88 continues, local planning authorities should ensure substantial weight is given to any harm to the Green Belt. ‘Very special circumstances **“will not exist unless the potential harm to the Green Belt by reason of inappropriateness, and any other harm, is clearly outweighed by other considerations.”**

3.39 Paragraph 89 states that the construction of new buildings is inappropriate development, except in the following cases:

- Buildings for agriculture and forestry
- Provision of appropriate facilities for outdoor sport, outdoor recreation and for cemeteries, as long as it preserves the openness of the Green Belt and does not conflict with the purposes of including land within it
- The extension or alteration of a building provided the new building is in the same use and not materially larger than the one it replaces
- Limited infilling in villages
- Limited infilling or the partial or complete redevelopment of previously developed sites, whether redundant or in continuing use (excluding temporary buildings), which would not have a greater impact on the openness of the Green Belt and the purpose of including land within it than the existing development.

3.40 WMSP falls into the category of previously developed sites, to which the last bullet point above refers, for which formal designation does not appear to be required. The NPPF no

longer refers to Major Developed Sites, which were the subject of detailed advice in Annex 2 of PPG2, and which are now included in the broader category of “previously developed sites”.

- 3.41 Certain other forms of development are also not inappropriate in Green Belt provided they preserve the openness of the Green Belt and do not conflict with the purposes of including land in Green Belt. These are: mineral extraction, engineering operations, local transport infrastructure which can demonstrate a requirement for a Green Belt location, the re-use of buildings provided that the buildings are of permanent and substantial construction, and development brought forward under a Community Right to Build Order.
- 3.42 Meeting the challenge of climate change, flooding and coastal change is covered by paragraphs 93 to 108. Paragraph 99 states that new development should be planned to avoid increased vulnerability to the range of impacts arising from climate change. When new development is brought forward in areas which are vulnerable, care should be taken to ensure that risks can be managed through suitable adaptation measures, including through the planning of green infrastructure. Paragraph 103 states that when determining planning applications, local planning authorities should ensure flood risk is not increased elsewhere and only consider development appropriate in areas at risk of flooding where, informed by a site specific flood risk assessment following a sequential test, and if required, an exception test, it can be demonstrated that within the site, the most vulnerable development is located in areas of lowest flood risk unless there are overriding reasons to prefer a different location; and development is appropriately flood resilient, including safe access and escape routes where required, and that any residual risk can be safely managed, including by emergency planning; and it gives priority to the use of sustainable drainage systems.
- 3.43 The natural environment is covered by Paragraphs 109 to 125. Paragraph 109 states that the planning system should contribute to and enhance the natural and local environment by:
- Protecting and enhancing valued landscapes, geological conservation interests and soils;
  - Recognising the wider benefits of ecosystem services
  - Minimising impacts on biodiversity and providing net gains in biodiversity where possible, contributing to the Government’s commitment to halt the overall decline in biodiversity, including by establishing coherent ecological networks that are more resilient to current and future pressures;
  - Preventing both new and existing development from contributing to or being put at unacceptable risk from, or being adversely affected by unacceptable levels of soil, water or noise pollution or land instability; and
  - Remediating despoiled, degraded, derelict, contaminated and unstable land, where appropriate.

- 3.44 Historic environment is covered by Paragraphs 126 to 141 of the NPPF. In setting out a positive strategy for the conservation and enjoyment of the historic environment, they should recognise that heritage assets are an irreplaceable resource and conserve them in a manner appropriate to their significance.
- 3.45 Paragraph 129 states that local planning authorities should identify and assess the particular significance of any heritage asset that may be affected by a proposal taking account of the available evidence and any necessary expertise, They should take this assessment into account when considering the impact of a proposal on a heritage asset, to avoid or minimise conflict between the heritage asset's conservation and any aspect of the proposal.
- 3.46 Paragraph 132 states that when considering the impact of a proposed development on the significance of a designated heritage asset, great weight should be given to the asset's conservation, and warns that significance can be harmed or lost through alteration or destruction of the heritage asset or development within its setting.

### **Planning For Growth**

- 3.47 Under the Coalition Government's Planning for Growth agenda, national planning policy is changing and the weight to be attached to economic benefits is increasing. The 23rd March 2011 Government statement of planning policy, 'Planning for Growth', sets out the role of planning in rebuilding Britain's economy by ensuring that the sustainable development needed to support economic growth is able to proceed as early as possible. Councils should use plan making "to be proactive in driving and supporting the growth that this country needs".

### **Wyre Forest District Site Allocations and Policies (SAP)**

- 3.48 The Site Allocations and Policies DPD will allocate and designate areas of land for particular uses, in order to meet the requirements set out in the Adopted Core Strategy. It will also set out Development Management Policies which will apply across the whole of the District and will be used for determining planning applications. The Publication version, that was published for Council approval in June 2012, represents the Council's preferred sites for allocation and identified areas for protection, and provides draft development management policies.
- 3.49 Under the heading 'sustainable tourism', the SAP recognises (Paragraph 5.49) that jobs within the tourism industry in the District have consistently been above the national average and in 2008 accounted for nearly 10% of the total jobs within the District. It states that ***"The importance of the industry is clear to see and it is important that future planning policy protects and enhances this aspect of the economy"***.
- 3.50 Importantly, Policy SAL.GPB5 seeks to support major tourist attractions and, as already established, provides the specific policy justification for the Planning Brief and Masterplan that is the subject of this report. To repeat, in relation to WMSP, it states:-

*“Any proposal for major development within the Park will need to be considered on a comprehensive basis in the context of a planning brief and masterplan for the whole site. The Council will consider applications for development at West Midland Safari and Leisure Park favourably, where such development would upgrade and improve the viability of the attraction; address the potential for heathland restoration and recreation; are appropriate to its function as a major tourism destination; make a positive contribution to the local economy; and are acceptable taking into account its location within the Green Belt and the need to ensure compatibility with the local infrastructure network.”*

3.51 The supporting text to Policy SAL.GPB5 (Paragraphs 5.56 to 5.60, respectively) states:-

*“5.56 WMSLP is one of the largest tourist attractions in Worcestershire, and has been in operation for over 35 years. As well as the major Safari Park, it contains one of the UK's leading and longest established inland amusement parks, with over 30 rides catering for the family market, and is also a major events venue. The business now attracts between 700,000 and 750,000 visitors each year. It employs almost 200 full time equivalent (FTE) staff in the low season, rising to over 350 FTE in the high season. The company spends several million pounds each year with local and regional suppliers; its payroll is a substantial, multi-million pound sum which goes directly to the local economy as WMSLP primarily recruits from the local area.*

*5.57 In order to understand more fully the impact that the WMSLP has on the District, a study was carried out by Amion Consulting in 2011 which focussed on the potential Economic Impact of the Park. The study looked at how proposed redevelopment at the Park would impact on the local economy. The conclusions of the study were that proposed improvements to the Park would help to drive the development of the visitor economy, enable business growth and create new employment opportunities, as well as building on an existing local asset. The study identified that redevelopment at the Park has the potential to generate significant net additional local jobs and economic activity.*

*5.58 The WMSLP undoubtedly has a large impact on the economy of the District, with the potential for this impact to grow further. However, future expansion or redevelopment of the Park is constrained by the Green Belt designation. There are currently competing priorities in planning policy terms within this location and the Council is seeking to achieve a balanced approach which maintains the essence of the Green Belt whilst providing some flexibility to enable one of the District's key tourist attractions, and employers, to develop in a sustainable and appropriate manner. Unless the Park can continue to introduce new attractions and complementary development, the park's contribution to the local economy will be restricted.*



***5.59 In recognition of the valuable role which WMSLP plays in the region's tourism industry, and to help secure its long term future as a major tourist attraction, the Council will support the ongoing enhancement and improvement of the WMSLP as a major tourism destination, subject to other policies being conformed to (including Green Belt policies). To aid in this process the site is identified as a Previously Developed Site in the Green Belt and is included in Part B of the document.***

***5.60 The Council wants to avoid piecemeal development that could potentially result in an adverse change in the character of the area as a whole. A planning brief and masterplan setting out the comprehensive proposals for the site will therefore be required in order that the impact of proposals for future expansion and/or diversification can be adequately assessed in relation to issues such as the countryside, highway capacity and the Green Belt. The planning brief and masterplan will need be produced by the site owners and agreed by the District Council."***

- 3.52 Issues, opportunities and constraints concerning the countryside, highway capacity and Green Belt, as referred to under Policy SAL.GPB5 and the supporting text, are addressed in subsequent chapters of this Planning Brief.
- 3.53 Policy SAL.UP1 applies to the Green Belt and is similar to Policy GB.1 of the Council's District Local Plan. It mentions that within the Green Belt development will not be permitted, except in very special circumstances, unless one of various scenarios applies, including proposals involving the redevelopment of an identified Previously Developed Site in the Green Belt. Proposals within or conspicuous from the Green Belt, must not be detrimental to the visual amenity of the Green Belt, by virtue of their siting, materials or design.
- 3.54 Significantly, Policy SAL.PDS1 identifies WMSP as a Previously Developed Site (PDS) in the Green Belt, where ***"development proposals that support and enhance the parks operations as a leisure and tourism destination will be permitted"***.
- 3.55 In considering development within the sites identified as being Previously Developed Sites the policy states that proposals should contribute to the achievement of the objectives for the use of land in Green Belts, not exceed the height of existing buildings and structures and not give rise to off-site infrastructure problems.. In addition it states that design and landscaping of development should seek to minimise the impact on the Green Belt through:
  - 1. Not normally protruding above the existing development and trees.
  - 2. Using sensitive materials and colours.
  - 3. Providing extensive landscaping and tree planting to screen boundaries, where appropriate.
- 3.56 The extent of the defined PDS, as shown and described in the SAP, is attached to **Appendix 8**.



- 3.57 RPS made formal written representations to the Council in July 2011 on behalf of WMSP, as part of the public consultation stage of the SAP, arguing that the Major Developed Site (as it was then called) boundary for WMSP should be extended to include other operational land (including the drive through the animal reserves area), the car parks and the other lakes. A copy of this submission together with the accompanying plan showing the suggested MDS boundary is attached to **Appendix 9** for information. The Council's formal response published in September 2011 mentioned that these comments were ***"noted"***, and that ***"further discussions will need to be held as part of the development of the Publication document and the masterplanning process"***.

**The Kidderminster Regeneration Prospectus (2009)**

- 3.58 This document was produced by WFDC and forms part of its evidence base for the Local Development Framework.
- 3.59 The Prospectus is a central part of the ReWyre Initiative and ***"aims to highlight the challenges and opportunities facing Kidderminster to a wide audience from within and outside the area, in order to attract support and investment to transform the fortunes of the town... to deliver a renaissance"*** (Page 4).
- 3.60 WMSP is specifically mentioned as one of three regionally significant attractions drawing more than 750,000 visitors a year to the area. Moreover, one of the main objectives identified in the Prospectus is ***"to develop the tourism potential of the town and establish Kidderminster as a base for tourists"***. Other wider objectives include: to maximise tourism potential including hotel development; to 'differentiate' the offer with leisure and tourism; to improve transport connectivity.



## 4 Baseline Surveys & Research

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- 4.1 This section draws on the technical findings of our baseline surveys and work, focussing on issues relevant to the Green Belt, landscape and arboriculture, cultural heritage, ecology, transport, and flood risk and drainage. It also describes the short, medium and long-term aspirations of the owners of WMSP to secure a sustainable long-term future for the site.

### Green Belt Issues

- 4.2 It has already been established that the WMSP site is located entirely within the Green Belt, to which relevant Development Plan policies and relevant sections of the NPPF apply. Arguably, the WMSP site does not itself constitute a particularly sensitive part of the Green Belt in terms of contributing towards the fundamental aim of the Green Belt identified in the NPPF, since the developed and brownfield characteristics of a large proportion of the site already reduce its openness. This must be balanced with its location in the important gap between Bewdley and Kidderminster, and so is sensitive in its own right.
- 4.3 Taking into account relevant planning policies such as Local Plan Policies GB.1, GB.2 and GB.6, and the NPPF, we consider that there are four fundamental planning issues which need to be addressed in determining the suitability of future tourist related development, both strategically as part of this Planning Brief and as part of future planning application submissions, as follows:-
- Whether the sort of development likely to be sought by the owners of WMSP is likely to be inappropriate development in the Green Belt;
  - Whether it is likely to harm openness and conflicts with any purpose of the Green Belt;
  - Whether it is likely to harm the visual amenity of the Green Belt;
  - And if so, whether there are likely to be any very special circumstances which outweigh the harm identified.

### Inappropriate Development

- 4.4 The NPPF sets out clear guidance on the limited forms of development that are appropriate in the Green Belt. This is summarised under Paragraphs 3.36 to 3.41 of the previous chapter.
- 4.5 It is clear that new buildings in the Green Belt would be inappropriate, unless for one for the specific purposes listed. As can be seen in a later section of the report, hotels, conference centre, indoor water park, railway station and animal accommodation would technically constitute buildings that don't fall into any of the categories of exceptions, and would therefore be inappropriate development by definition.

- 4.6 Part of what the owners of WMSP are seeking to achieve are not ‘buildings’<sup>1</sup> as such in the context of the NPPF. It constitutes animal enclosures, pathways and landscaping, and children’s rides. Much of this type of development would fall under the development set out under Paragraph 90 of the NPPF. It would be inappropriate if it would harm the openness and conflict with the purposes of including land in the Green Belt. In our view some of the items listed above could be appropriate.
- 4.7 However, the Brief needs to provide a framework for a range of tourism uses, and to consider whether certain types of inappropriate development would be acceptable in the context of other economic development priorities and other considerations so that it provides a level of certainty to the owners.
- 4.8 Taking into account emerging planning policy at both a national and local level, limited infilling or the partial or complete redevelopment of previously developed parts of the site is to be deemed acceptable, notwithstanding whether this fits into the PDS policy/boundary being put forward as part of the Council’s SAP. Other development may be considered acceptable if there are very special circumstances which outweigh the presumption against inappropriate development in the Green Belt.

### Openness

- 4.9 In terms of harming openness and conflicting with any purpose of the Green Belt, the extent to which development keeps land permanently open is a matter of fact and degree, and the word ‘openness’, which is not defined in the NPPF, is to a large extent subjective. However, as a general rule, the extent of harm to the openness of the Green Belt is likely to be more significant where development is located further away from existing clusters of existing development, and/or is more visible from within or outside the site as a result of its actual or perceived scale and bulk.
- 4.10 There are a large number of other visitor attractions in Green Belt locations. Much of the development associated with attractions in the Green Belt is not built development and therefore falls within the categories of development outlined in paragraph 90 of the NPPF. But a large proportion of development at major theme parks and zoos/safari parks, including ancillary development, is inappropriate development and has been allowed by local planning authorities for a variety of reasons.
- 4.11 In order for this Brief to provide a clear framework on what type of tourist activities would be acceptable, it is helpful to have reviewed the types of development that have been considered acceptable in other Green Belt locations, and the reasons why these Councils have considered that very special circumstances apply. We can then assess the extent to which these reasons are likely to apply in the case of WMSP.

<sup>1</sup> Section 336 of the Town and Country Planning Act 1990 states that a building “*includes any structure or erection, and any part of a building, as so defined, but does not include plant or machinery comprised in a building*”.

*Chessington World of Adventures*

- 4.12 Chessington World of Adventures is situated within the Metropolitan Green Belt in Surrey between Chessington and the M25. It is a large theme park, operated by Merlin Entertainments, which opened in 1987 on the site of Chessington Zoo, which itself opened in 1931. It contains a large number of substantial rides and attractions, together with a major zoo and a SEALIFE Centre aquarium. It is a similar scale animal/theme park attraction to WMSP.
- 4.13 The Park is designated as an MDS within the Green Belt in the Royal Borough of Kingston-upon-Thames Unitary Development Plan. Its Permitted Development Rights have been removed by the Council. However, the Council has consistently granted planning permission for major rides and attractions that fall outside of the constraints of its MDS status - either by allowing development outside its boundaries, allowing significant intensification within the boundaries, or allowing development that is significantly higher than existing development within the MDS - and these have mainly been granted permission because of the Park's importance to the local economy (as referred to in the Unitary Development Plan).
- 4.14 The Council has recently granted planning permission for a hotel at the theme park and zoo, which is now implemented and operating. This relates to the Holiday Inn Hotel, known as the Safari Lodge, which contains 150 rooms plus various facilities (including conference rooms). The hotel fell outside the MDS development envelope as it existed at the time, and the applicants therefore needed to demonstrate very special circumstances for the development. The applicants explained in their application submissions that they were at a crossroads from which the site's future as a theme park would be decided due to the competitive market place and an inability to attract major capital investment. The planning application set out the benefits of the theme park to the Borough (which included being a major employer of local people, its role as a user of local suppliers and services and the multiplier effect of money spent at the Park), and outlined the owners strategy to 'reposition' the Park between other attractions in the area, namely Legoland and Thorpe Park, and to establish it as the primary UK family sector theme park. It also explained that the hotel (along with other projects) was integral and critical to the future viability and therefore success of the Theme Park. The Officer's report on the application stated that the Council gave considerable weight to this argument, and that it believed a case could be made in relation to very special circumstances relating to the hotel. The role of the Park in the local economy and the need to strengthen its position within a competitive market place are very special circumstances that have clear similarities with the drivers for the proposals for WMSP.

*Thorpe Park*

- 4.15 Thorpe Park opened in 1979 on a site formally worked for minerals. Like WMSP, the site is a very well established major tourist attraction. Unlike WMSP, the theme park is located in a very open location close to the junction between the M3 and M25 west of London. Although designated as a MDS in the Runnymede Local Plan 2001, many of the ride developments at

Thorpe Park have not been compliant with the MDS policy, including very tall 'white knuckle' rides. However, the Council has consistently supported inappropriate Green Belt development because of the Park's importance to the local economy and the provision of jobs.

- 4.16 In 2006 permission was granted for the 62m high 'Stealth' ride, which can be clearly seen from the M25 and M3 motorways. This was approved as infilling within the context of a comprehensive scheme, albeit as a one off on account of its exceptional height, on the basis of the important role the ride would have in maintaining the Park's attraction to visitors and its future viability.
- 4.17 Most recently, in March 2011, the Council granted permission for a 40m high roller coaster. In this case, Officers also considered that it constituted infilling within the context of a comprehensive scheme. Notwithstanding this, the report on the application to the planning committee set out the benefits of Thorpe Park to the local and regional economies. These could be considered as very special circumstances in the event that Councillors disagreed that the development was infilling within the context of a comprehensive scheme.
- 4.18 Thorpe Park hosts a range of conferences and events, and in 2006 opened the Lake View conference venue. The largest space caters for up to 500 delegates. This was also permitted as infilling within the context of a comprehensive scheme. Later in 2006, planning consent was granted for a 250 bed hotel and associated infrastructure. This was deemed by Runnymede Borough Council to be inappropriate development, and it was considered that the following amounted to very special circumstances which outweighed the harm to the openness of the Green Belt:
- The need for the hotel for the positioning of Thorpe Park in an increasingly competitive market;
  - The requirements for the hotel to be located on-site for it to satisfy the objectives for the scheme;
  - The lack of alternative options/sites;
  - The benefits of the proposals in terms of the positive impacts on the local environment, the community and the economy;
  - The tourism policy for the local area;
  - The need for a family hotel in the area;
  - The sustainable transport improvement for Thorpe Park;
  - The characteristics of the proposals that maximise the sustainable credentials for the scheme; and,
  - Fallback position (extant planning consent for built development).

- 4.19 Runnymede Borough Council is presently considering a minor non-material amendment application for the proposal.

*Legoland*

- 4.20 Legoland is a large theme park which opened in 1996 on the site of the former Windsor Safari Park.

- 4.21 In the case of Legoland, outline planning permission for a hotel was granted in 2009. While the development represented inappropriate development in the Green Belt, the Council felt that very special circumstances existed to justify the proposed development. These very special circumstances were considered to be:

- The key need for a hotel at Legoland, as one of the Borough and nation's major tourist attractions, for its long term economic benefit;
- The combined benefits resulting from increasing the variety of hotel accommodation in Windsor;
- There are no other appropriate sites for the hotel;
- That the hotel will have 14% of its energy consumption deriving from on-site renewable energy;
- The improvements to the adjacent park and ride; and,
- Providing a wider benefit to the community and encouraging people to stay longer in the area, and the contribution to the generation of jobs in the area.

- 4.22 The need for the accommodation and the wider economic benefits to the area again have clear similarities with the drivers for the proposals the subject of this Brief.

*Drayton Manor Zoo & Theme Park*

- 4.23 Drayton Manor is a theme park and zoo in the West Midlands Green Belt. It opened in 1949 and has developed into the biggest theme park in the West Midlands. It includes very large roller coasters and other rides, some significant buildings housing dark rides, retail, catering and other facilities. It is designated as a MDS in the Litchfield District Local Plan (adopted 1998).

- 4.24 Planning permission was granted in 2009 for a hotel which opened in 2011. The hotel was deemed by Lichfield District Council to be inappropriate development, and the Council accepted the following as very special circumstances which outweighed the harm of the development to the openness of the Green Belt:

- The importance of the hotel in maintaining the Park's share in the Theme Park market;

- The importance of the hotel in supporting the Park's banqueting and conference facilities; and,
- The importance of the hotel in supporting the Park's role as defined in the RSS as a regional tourism asset.

*Paradise Wildlife Park*

- 4.25 Paradise Wildlife Park originated as Broxbourne Zoo in the 1960s, but its more recent development has been carried out by its current owners, the Sampson family, which acquired the site in 1984. Most of the park's redevelopment occurred in the 1990s and 2000s, as much of the park's infrastructure was upgraded. Paradise Wildlife Park has a much greater appearance of built development, with extensive large animal buildings and substantial enclosures for dangerous animals. The visitor facilities are also very built-up and it has a sizeable amusement park area with various fairground rides and attractions, with restaurants and indoor facilities.
- 4.26 Paradise Wildlife Park is a heavily developed site and large parts of this site would be inappropriate in the Green Belt. Again, it is significant that the council continues to support built development at this site on the basis of the importance of the attraction to the local economy.

*Center Parcs, Woburn*

- 4.27 Planning permission was granted on appeal by the Secretary of State in 2007 for a Center Parcs Forest Holiday Park, comprising 700 villas, a 75 bedroom hotel and a 12 bedroom spa accommodation, on part of the Woburn Abbey Estate owned by the Duke of Bedford, close to Woburn Safari Park. Although planning permission was originally refused by Mid Bedfordshire District Council on Green Belt grounds, the decision was overturned by the Secretary of State following an appeal. The Secretary of State considered that the beneficial effects of the proposal on tourism, the economy and employment, along with the positive contribution to ecology and biodiversity, together amounted to very special circumstances which were of sufficient weight to clearly outweigh the harm to the Green Belt.
- 4.28 In reviewing these sites, it is clear that councils within the Metropolitan Green Belt have generally provided a high level of flexibility for tourism-related development. In the case of the four theme parks briefly considered, these are all MDSs, but the respective councils have allowed significant development outside the MDS parameters (outside defined areas and above height limits) on the basis of very special circumstances being found that outweigh the harm to the Green Belt. It is interesting that in the case of the four theme parks, particularly Thorpe Park, the councils have accepted very special circumstances regularly, so whilst the circumstances may well be special, they certainly cannot be said to be unique. The very special circumstances that have been accepted can be summarised as follows:



- The role of attractions in the respective economies, local authority areas in terms of job creation and increased revenues, particularly in terms of encouraging people to stay in an area for longer;
- The need to strengthen the role of major attractions within a competitive environment ;
- The importance of new rides/facilities attractions in the future viability of attractions;
- The importance of hotels in supporting other facilities/attractions within the theme park;
- Specific locational requirements;
- Lack of alternative options/sites;
- Supporting local/regional tourism;
- Need for hotel accommodation; and,
- Improved sustainability of facilities.

4.29 In general, therefore, the approach taken by most councils in relation to tourist attractions in the Green Belt is to generally facilitate developments that assist in maximising the contribution of the attractions to local economies and ensuring that these attractions are sustainable in the long-term. This is a materially different approach to that taken by councils for other forms of development in the Green Belt, where Green Belt boundary reviews are often required.

**Conflict with Purpose**

- 4.30 The extent to which harm is caused by conflict with any purpose of the Green Belt will similarly depend upon the nature and location of the proposed development.
- 4.31 In relation to the first purpose, checking unrestricted sprawl, at present, in addressing the purposes under Paragraph 80 of the NPPF, the site as a whole arguably plays a limited role in the checking of unrestricted sprawl, as it does not directly abut any of the main surrounding urban areas (Kidderminster or Bewdley). The type of development proposed is important, because if the development was not typical urban development (e.g. residential, commercial, industrial) it would not necessarily have the appearance of urban sprawl.
- 4.32 In terms of the second purpose, preventing neighbouring towns from merging, the WMSP site plays an important role in preventing the merger of the two towns. Clearly any buildings or other significant built development could potentially harm this purpose, although some parts of the site are already significantly developed so potentially have capacity to accommodate additional development without material harm to this purpose. In the light of Paragraph 89 of the NPPF very special circumstances will not be required. Outside of the main cluster of

buildings it will be necessary to restrict buildings, unless very special circumstances apply that outweigh harm to this purpose.

- 4.33 In terms of safeguarding the countryside, the third purpose, much of the site cannot in practice be classed as 'countryside' as it forms built development associated with a major tourist attraction. However, the open areas of the site (i.e. those areas to the south of the driveway to Rhydd Lodge) would be classed as open countryside as it is relatively undeveloped.
- 4.34 In terms of the fourth purpose, the preservation of the setting and special character of historic towns, as WMSP, particularly the built up area to the north of the site, is relatively well screened from the surrounding area, it preserves the setting and character of Kidderminster and Bewdley, which have varying degrees of historic importance.
- 4.35 Lastly, in terms of assisting in urban regeneration, it is unlikely that the tourism uses that are likely to come forward at WMSP would be developed within an urban location, as they are integral parts of the existing tourist attraction. However, further development at the WMSP is likely to have a positive impact on the regeneration of Kidderminster and Bewdley.

**Conflict with Visual Amenity**

- 4.36 The extent to which the visual amenity of the Green Belt is affected will also depend upon the nature and location of development proposed on the site, taking into account the landform and any landscape mitigation measures included.

**Very Special Circumstances**

- 4.37 Subject to an assessment of whether any proposal at WMSP is appropriate or inappropriate, its location in relation to existing built development, and its likely effect on openness, it may be necessary to demonstrate very special circumstances to outweigh the harm by reason of inappropriateness and any other harm. It is not the role of this Brief to set out very special circumstances; that is a requirement of an applicant on submission of a planning application. However, it is the role of this Brief to take a view as to whether very special circumstances are likely to apply to development proposals and, if they are, what circumstances would be likely to be considered 'very special'. This all then provides a framework for bringing forward certain types of development in specific parts of the site. Taking into account the NPPF, the Development Plan and our review of other major tourist attractions in Green Belt locations, this is likely to relate to some, or all, of the following considerations:-

- The need and economic case for the development (hotel, conference centre and water park), in terms of its support of the local tourism industry, jobs and the local economy (with reference to the EIS)
- The need to ensure a viable business and ensure the long-term future of the attraction;

- The need to compete with other similar sized attractions which have introduced accommodation and indoor attractions;
- The need for indoor attractions to extend the season;
- The tourism need for specific facilities;
- The positive impact that a viable business will have on the on-going maintenance of the listed buildings and historic parkland;
- Lack of harm, including lack of harm to openness;
- Enhancement of landscape features and mitigation, and in particular the benefits of comprehensively improving the landscape setting of the site;
- The extent to which the impact on openness of any inappropriate development proposed would be similar to specific types of development that are appropriate;
- Planning policy support for tourism development;
- Planning policy status of the emerging PDS, that gives weight to the appropriateness of infilling or redevelopment as 'appropriate' development within the Green Belt;
- The extent to which development is reversible, and therefore any harm whilst technically permanent could be reinstated by the easy removal of the development;
- Ecological and biodiversity benefits (as at Woburn);
- Lack of alternatives;
- Precedent set at other day-visitor attractions; and
- The proximity of development to an established amusement park, taking into account the fact that part of this area can be developed and expanded without requiring planning permission, within the parameters set by Part 28 of the General Permitted Development Order, 1995.

### Landscape and Arboriculture

- 4.38 The aforementioned Landscape and Visual Impact Assessment (LVIA) prepared by RPS, as attached to **Appendix 5**, contains a summary of the existing landscape and visual baseline conditions within the study area; details of published landscape guidance and other information; description of the types of development; constraints and opportunities for future development.
- 4.39 In terms of landscape character the LVIA mentions that, at a national level, the site forms part of the 'Mid Severn Sandstone Plateau' based on guidance published by the Countryside Agency, that comprises an extensive broad landscape of river valleys and wooded hills west

of the Midlands conurbation. At a local level, WMSP falls within the 'Sandstone Estatelands' character type defined by guidance produced by Worcestershire County Council, which is located mostly around the fringes of Kidderminster. The characteristic of the Sandstone Estatelands is described as follows:-

- *Primary*: arable land use; hedgerow boundaries to fields; planned enclosure pattern – straight roads and field boundaries.
- *Secondary*: discrete pastern of woodland blocks; planned woodland character – estate plantations and tree belts; large scale landscape with wide views over open farmland; clustered settlement pattern; healthy/acid grassland ground vegetation.

4.40 However, the LVIA states that the site occupies a particular parkland which is less typical of this character area as whole. It describes the historic landscape context and setting of the site (parts of which are summarised in Chapter 2 of this Planning Brief). It states that typical tree species from the 18<sup>th</sup> century planting which are still present within the site include English oak, Sweet chestnut, Common lime (*Tilia x euchlora*), Horse chestnut (*Aesculus hippocastanum*), Cedar of Lebanon (*Cedrus libani*), Scots pine (*Pinus sylvestris*) and Wellingtonia (*Sequoiadendron giganteum*).

4.41 Under the heading 'visual resources', the LVIA defines the 'Zone of Theoretical Visibility' and states that visibility of development at WMSP is limited in the wider rural landscape due to the characteristic of the landform and presence of extensive areas of visually significant vegetation. It lists the main visual receptors with views of any part of the site, and then describes typical public viewpoint locations with reference to attached figures (Figures 11 to 18). It also describes views from within the WMSP site, as shown on attached photographs (Figures 3 to 6). In summarising views it states (Page 10):-

***“The West Midland Safari Park is relatively unobtrusive in the landscape when viewed from surrounding public vantage points. The undulating landform rising up from the lakes, combined with woodland and trees within the site and adjoining landscape, conceal many of the attractions. The large scale brightly coloured rides within the theme park area nestle amongst the trees. Views into the park are directed over the tree tops, merging the site with the surrounding well wooded landscape. The Safari Park [animal reserve] is more visible in views from the south and west, where reduced tree cover within and around the site allows views in of the built structures, roads, traffic and screen fences.”***

4.42 In assessing landscape and visual effects (Chapter 3), the LVIA states that built structures within the animal reserves are relatively visible since this area is less densely planted than the remaining areas of the site, and therefore this area will could be sensitive to change. Future development has the potential to have some effects on visual amenity and influence over the

character of the rural landscape. The proposed station, located on the southern boundary of the animal reserves, would potentially be prominent in views from the south.

- 4.43 It considers that the areas in and around the amusement park and discovery trail are generally well enclosed by the nature of the surrounding landform and the presence of mature trees. There is very limited visibility of this area from surrounding public areas, and future development would not affect the visual amenity or the character of the surrounding landscape.
- 4.44 The admissions/parking area lies on land which rises up towards a high point at the site entrance, however there is sufficient surrounding vegetation within the park and adjoining Rhydd Covert to contain most views. Limited views into the site, through and over fencing and vegetation, from the public footpath adjoining the eastern boundary at Rhydd Covert can be gained.
- 4.45 As regards effects within the parkland along the northern part of the site surrounding Spring Grove House, the LVIA states that mature trees and surrounding landscape contain this part of the site and conceal most views of built development. It states (Page 13):-
- “Development in this area, if it is maintained at a lower level than the trees, is unlikely to have effects on visual amenity and influence over the character of the rural landscape. Development at Bunker’s Hill would be partially visible through a screen of trees from the A456 and some properties at Catchems End.”***
- 4.46 Finally, the LVIA goes on to list a series of constraints and opportunities associated with future development, that are addressed in Chapter 6 of this Planning Brief.
- 4.47 A technical report on arboriculture, prepared by Marlow Consulting Ltd, is attached to **Appendix 10**. It states that trees within the Park have been protected by the County of Worcester (Bewdley) Tree Preservation Order (TPO) 1960 for just over 50 years. WFDC reviewed the TPO in 2010, and created a new TPO covering the whole site (Land at West Midland Safari Park, Kidderminster Road, Bewdley Tree Preservation Order 2010). The 2010 TPO is in the form of 40 individual trees (T1-40), nine groups (G1-9) and nine woodlands (W1-9).
- 4.48 A tree survey of the site was carried out in 2007/8, with a survey of the animal reserve taking place in February 2009. The survey was updated in March 2010 for those trees within the amusement area. Ideally, the percentage of trees within each age group should be similar, reflecting a continuous succession of trees moving through the different age groups, ensuring a continuity of tree cover and maintenance of the treescape within the site. However, the majority of the trees were found to be mature, reflecting an ageing tree population, and most of the larger trees will be lost within the next 50 years.

## Cultural Heritage

- 4.49 A technical note attached to **Appendix 4**, produced by RPS's cultural heritage expert, relates to cultural heritage and historic environment issues, based on site visits and background research.
- 4.50 It describes those features within or immediately adjacent to WMSP that are designated heritage assets: Spring Grove House and adjacent stable block; wrought iron gates about 275 metres to the north of Spring Grove House; Spring Grove Farmhouse about 500 metres to the south-west of the House. These were all listed as Grade II in May 1986 (apart from the late 18<sup>th</sup> century barn and stable associated with the farmhouse that was listed as Grade II in 1979). It also presents a brief history of Spring Grove House and the estate. The site characteristic and history section of this Planning Brief (Chapter 2) draws on and summaries some of this technical information, all of which should be read in conjunction with other baseline reports dealing with the characteristics of the existing site (as appended to this Planning Brief), particularly the LVIA.
- 4.51 The cultural heritage note also states that an examination has been undertaken with regards to features and events recorded on the Worcestershire Historic Environment Record (HER). Such records include a small area to the north of Spring Grove House described as a Historic Park and Garden, also a number of lakes to the west of Spring Grove House that are described as 'fishponds'. Other features recorded on the HER as being within the current boundary of WMSP include two small quarries (one adjacent to a lodge at the former principal entrance and one in the south-western corner). There are no known archaeological features or findspots of archaeological material within WMSP.
- 4.52 The note addresses the significance of the heritage assets. Based on guidance published by English Heritage in 2008 titled 'Conservation Principles: Policies and Guidance for the Sustainable Management of the Historic Environment', it states that heritage vales fall into four inter-related groups:-
- Evidential value – the potential of a place to yield evidence about past human activity;
  - Historical value - this derives from the ways in which past people, events and aspects of life can be connected through a place to the present. This value tends to be illustrative (providing insights into past communities and their activities) or associative (association with a notable family, person, event or movement);
  - Aesthetic value – this derives from the ways in which people draw sensory and intellectual stimulation from a place; and
  - Communal value – this derives from the meanings of a place for the people who relate to it, or for whom it figures in their collective experience or memory.

- 4.53 The note states that the principal significance of Spring Grove House and other listed structures and surrounding parkland derives from their historical associative value, i.e. clear connections with past people and events. This includes connections with the Skey family. As mentioned previously, the postulated design of the parkland by Capability Brown cannot be verified.
- 4.54 Several elements of the estate and the parkland have survived and provide context within the setting of the house. These include the stables, the serpentine lakes and the principal drive leading to the north from the house to the lodge and gateway along with some of the original plantations of trees. However much of what has survived is in an altered form (e.g. loss of parts of the lakes) and the setting of the house also now includes the visitor attractions and associated infrastructure associated with WMSP.

### Ecology

- 4.55 RPS was also commissioned to carry out a Phase 1 Habitat Survey, the findings of which are contained in a report attached to **Appendix 11**. Natural England was consulted during the preparation of the report, and their views were taken into account in the recommendations section of this report.
- 4.56 The report identifies and maps (with reference to a series of target notes shown on the accompanying Figure 1 plan), in Chapter 3, various habitats that may be summarised as follows:-
- *Semi-natural broad-leaved woodland*: Principally located at the northern end of WMSP. The woodlands typically have a diverse age structure containing some mature trees (including some likely to have been planted during the 19<sup>th</sup> Century landscaping) and young and semi-mature trees.
  - *Plantation Woodland*: Small areas of broad-leaved, coniferous and mixed woodland planted around the safari park.
  - *Broad-leaved trees*: Scattered broad-leaved trees are present across the site. Examples of this include the avenue of common lime, scattered English oak and sweet chestnut located to the east of Spring Grove House; scattered broad-leaved trees, including silver birch and English oak, located within Devil's Spittleful Nature Reserve (many of which are proposed to be removed as part of a programme to restore the heath land in this area).
  - *Coniferous trees*: These trees are present across the park, particularly comprising Scots pine.
  - *Scrub*: Dense scrub is present within the north-east corner of WMSP. Scattered scrub is also situated within the Devil's Spittleful Nature Reserve.



- *Semi-improved grassland:* Large areas of this type of grassland are present at the northern end of the park, including an area of dry grassland on Bunker's Hill previously grazed and used for car parking. The grasslands are dry with small areas of bare sandy soil evident.
- *Poor semi-improved grassland:* The animal reserves predominantly comprises poor semi-improved grassland, which in a number of places has a thin sward with areas of bare, sandy soil. The grassland receives a high level of use by the animals present, including grazing species.
- *Amenity grassland:* Areas of amenity grassland are present within the amusement and car parking areas situated at the northern end of the park. These areas are regularly mown and contain low floral diversity.
- *Tall ruderal vegetation:* Small areas of tall ruderal vegetation are present along the boundaries of woodland and grassland at the northern end of the park, particularly at the bottom of Bunker's Hill around a large manure heap.
- *Dry heath land/acid grassland mosaic:* The Devil's Spittleful Nature Reserve mostly comprises a mosaic of dry heath land and acid grassland. Areas of gorse frequently occur in some areas.
- *Open Water:* Four ornamental lakes are present in the northern part of the site, and a further two lakes are present beyond the western boundary. All lakes contain fish and little aquatic vegetation; one is also the site of the hippo enclosure. A number of small ponds are also present within the safari park, most of which are heavily disturbed due to either being regularly cleaned or used by animals, resulting in no aquatic vegetation being present. The pond in the tiger enclosure is less disturbed and does support aquatic vegetation, including duck weed on the surface.
- *Hedges:* A remnant, species-poor, mature hedge is located within the animal reserves, as well as a small section of young, species-rich hedge.
- *Ornamental planting:* Ornamental planting has been planted around the amusement park, and small areas have been planted within the animal reserves.

4.57 The report contains a more detailed composition of the species composition applicable to these habitats. It also refers to 'other' habitats, in the form of the storage yard below Bunker's Hill, the heap of manure and straw to the north of this area, and the other buildings present in the north side of the park (including Spring Grove House).

4.58 The Phase 1 Habitat Survey report also assesses the potential for legally protected fauna and flora, and describes the relevant legislation and requirement to obtain a licence from natural England for different species. The park provides suitable habitat for a variety of mammal, reptile, amphibian, bird and invertebrate species, including protected and notable species. In



relation to plants and habitats, whilst no protected or notable species were recorded within the study area, the area within the Nature Reserve comprises areas of lowland heath land and lowland dry acid grassland – both UK Biodiversity Action Plan (UK BAP) Priority Habitats.

- 4.59 In relation to amphibians, the large lakes and small ponds are generally of low suitability for amphibians; however, the tiger enclosure pond and some secluded corners of the large lakes provide a higher value habitat for amphibians, including great crested newts.
- 4.60 Signs of badger activity were identified on the site, on the side of Bunker's Hill in the north of the park. The animal reserves are securely fenced preventing badgers from accessing it, but badgers may occupy other areas of suitable habitat within the park.
- 4.61 A number of the mature trees scattered across the park and within areas of woodland contain features which bats may use as a roost. Some buildings on the park also have the potential to support bat roosts, including the two lodge buildings. Modern buildings on the park may also provide roosting opportunities. The various habitats within the park provide good opportunities for foraging bats, particularly the areas of woodland in the north and south-west of the park, the mature trees, water bodies, and heath land.
- 4.62 The report states that the park provides numerous opportunities for nesting birds, particularly within semi-natural and plantation woodlands, hedges, scrub, scattered trees and buildings. Marginal areas around the lakes provide nesting opportunities for wildfowl and the heath land provides opportunities for ground nesting birds such as woodlark and stonechat which have been recorded on heath land outside of the park.
- 4.63 In relation to reptiles, Common lizard has been recorded within the park on the Devil's Spittleful Nature Reserve. This area also provides suitable habitat for other reptiles but no other species are known to be present and adders are known to be absent in the surrounding area. Marginal areas around the semi-improved grassland and woodland, and around the lakes, in the north of the site also provide suitable habitat for reptiles. An area of tall ruderal vegetation and a large manure heap at the bottom of the western side of Bunkers Hill also provides suitable habitat.
- 4.64 Otters have been recorded along the river Severn which runs to the west of the park. Otters could potentially use the large lakes on the park to forage for fish and could find shelter within the surrounding woodland. Woodland habitat suitable for supporting dormice is present on the park and connects to further areas of suitable habitat outside of the park boundary. Dormice were recorded within 2km of the park in 1993 and dormice have been recorded in woodland within 5km to the north and west of the park post 2000 (NBN, 2011).
- 4.65 The various habitats found within the park are likely to support a variety of invertebrate species and may support protected or notable species. The hornet robberfly has been recorded on the Devil's Spittleful Nature Reserve outside of the park but is also likely to be

present within it. Several notable ground nesting wasps and bees have also been recorded in this area and could potentially be present on the park.

- 4.66 The Phase 1 Habitat Survey goes on to assess the requirements for further ecological surveys and identify potential ecological enhancement measures on the park. This is addressed in Chapter 6 of this Planning Brief.

## Transport

- 4.67 The accompanying transport report (**Appendix 12**), prepared by RPS, investigates the issues, opportunities and constraints of further development at WMSP in relation to transport, highways and accessibility. As part of the preparation of the report, RPS met with Officers at WCC on 28 September 2011.
- 4.68 Section 3 provides an analysis of the existing operation of the site, a description of the local highway network and an analysis of the road safety records. As regards existing operations, a total of 1952 parking spaces are provided within the WMSP site. This includes 1780 visitor parking spaces, 37 disabled parking spaces, 122 staff parking spaces and 13 coach parking spaces.
- 4.69 Based on visitor/journey information provided by the owners of WMSP, it states that the park benefits from a high number of relatively local journeys, which offers the opportunity for WMSP to encourage visitors to use sustainable forms of travel. Minibuses are provided within the site to enable visitors who travel by sustainable modes of transport to be transported through the safari.
- 4.70 In terms of highway capacity issues, the site is situated adjacent to the A456 Kidderminster Road and is accessed via a priority controlled junction with the A456. The A456 provides a principal link road between the urban areas of Bewdley with Kidderminster. To the east of Kidderminster the A456 also provides a link into the West Midlands conurbation and a connection to Junction 3 of the M5 Motorway. Bus stops with lay-bys are situated approximately 75m to the west of the site access junction.
- 4.71 The roundabout junction of the A456/B4190 is situated adjacent to the north-western corner of the WMSP site. Discussions with WCC indicated that the Highway Authority is not aware of any capacity issues at the junction.
- 4.72 The report states that there are constraints with regard to highway capacity levels within the vicinity of the site, which primarily concern the A456 as it travels through Kidderminster. According to Highway Authority Officers at Worcestershire County Council, there are particular capacity issues during the peak periods at the A456/Summer Place/Sutton Road junction with Kidderminster. Future development on the WMSP site would need to consider existing capacity levels along the A456 and how any future development proposals will impact on highway capacity levels during peak periods.

- 4.73 The aim of any major development proposal at the park will be to increase visitor dwell time and to reduce vehicle movements at peak periods. Traffic flows will be managed by the Park using a number of methods, including managing opening times, pricing and staggering event times, to the benefit of the adjacent highway network.
- 4.74 The accident records received for the local highway network do not indicate that the local highway network suffers from any particular road safety issues. The majority of the observed Personal Injury Accidents (PIAs) do not relate to visitors to WMSP.
- 4.75 The report states that small scale development on the site is unlikely to have a material impact on the local highway network. However, any development proposals that would result in a significant increase in trip generation levels during peak periods are likely to increase capacity issues along the A456, through Kidderminster, and are likely to result in the provision of off-site mitigation or management measures. The scale of these mitigation measures would be dependent on the level of impact which could be attributed to any proposed development taking into account the peak spreading of visitor numbers that will occur and the aspiration of reducing overall vehicle trips from the park during these periods. This would be set out in any supporting documentation with a planning application.
- 4.76 Section 4 analyses existing accessibility levels for the site and recommends potential improvements. It states that there are forms of access available to both staff and visitors at the WMSP. The site is linked to the local highway network with the site access directly onto the A456 and regular public transport services stop along the road, within the vicinity of the site access. Pedestrian and cycling journeys are catered for by the provision of a joint pedestrian/cycleway on the northern side of the A456, which provides access from Kidderminster and Bewdley, and a bridleway runs along the eastern boundary of the site which enhances links the south and east of the site.
- 4.77 The report states that as part of any major development proposals for the future of the site there are a number of elements that are recommended for consideration which would further enhance accessibility levels of the WMSP site. These elements can be categorised as improvements aimed at:
- Increasing vehicular capacity levels; and
  - Enhancing sustainable transport accessibility.
- 4.78 The introduction of any new measures to enhance sustainable transport accessibility will need to be supported by an appropriate marketing and promotional campaign in order to raise staff and visitor awareness of the travel options available to them. Previously, WMSP has successfully promoted the use of public transport services, also in conjunction with public transport operator Centro. It is noted that the role of SVR will increase now that it is linked to the mainline rail network. WMSP intend to provide a station as soon as possible.

- 4.79 In terms of the scale of any future improvements to the accessibility levels of the site, this will be dependent on the scale of any future development proposals for the site and the levels of trip generation that the future proposals will constitute. Due to the current levels of accessibility small scale developments on the site which do not result in significant trip increases would not justify transport improvements or off site mitigation.
- 4.80 It is not the intention to increase car use to and from the park but the aim to get existing visitors to stay longer. This will be achieved by improving the quality of the offer, increasing the attractions and by amending the pricing structure, and this has been achieved at other leading visitor attractions.
- 4.81 Section 5 summarises the key issues, opportunities and constraints for further development at the WMSP site. It summaries the main issues as follows:-
- Potential capacity issues along the A456 as it travels through Kidderminster, particularly at the A456/Summer Place/Sutton Road junction.
  - Potential exit capacity issues at the site access junction on the A456.
  - Limited on-site provision for some sustainable transport modes.

### **Flood Risk and Drainage**

- 4.82 A Level 1 Flood Risk Assessment (FRA) has been produced by RPS for potential development and is attached in **Appendix 13**. This Level 1 FRA is regarded as a 'Screening Study' and has been produced in accordance with the guidance included within the Planning Policy Statement 25 Practice Guide. RPS met with Officers from WFDC and the EA on 10<sup>th</sup> February 2012.
- 4.83 The Environment Agency (EA) Flood Map shows estimates of the risk of flooding from rivers and the sea (ignoring the presence of defences). The Flood Map provides a starting point to indicate when flooding issues need to be considered. Most of the WMSP site is shown to be located within Flood Zone 1 (Low Probability). This is considered to be land assessed as having a less than 1 in 1000 annual probability of river or sea flooding in any year (<0.1%).
- 4.84 However, some areas of Flood Zone 2 (Medium Probability) encroach onto the site along the western boundary. This Flood Zone is associated with a local surface watercourse that flows from north to south in close proximity to the western boundary. This watercourse is designated as 'Main River' by the EA. Flood Zone 2 is land assessed as having between a 1 in 100 and 1 in 1000 annual probability of river flooding (1% - 0.1%) or between a 1 in 200 and 1 in 1000 annual probability of sea flooding in any year (0.5% - 0.1%). In this case however, tidal flood risk can be discounted as the safari park is situated at levels that exceed 40 metres above Ordnance Datum.

- 4.85 However, the EA Flood Map only considers flood risk for rivers with a catchment size greater than 3km<sup>2</sup> and the sea. The Ordnance Survey (1 in 10,000) map shows additional watercourses and lakes within the development area.
- 4.86 The proposed development includes a hotel, conference centre, monorail and water park. PPS25 regards hotels as 'More Vulnerable' under the Flood Risk Vulnerability Classification. The proposed water park falls under the definition of 'Water Compatible' development. Both 'More Vulnerable' and 'Water Compatible' developments are appropriate in Flood Zone 1 and Flood Zone 2.
- 4.87 A Level 3 FRA will be required for this development proposal as part of any planning application submission. This Level 3 FRA will be a 'Detailed Study' and will be produced in accordance with the guidance included within the NPPF. The Assessment will also consider the guidance given in the WFDC's Adopted Core Strategy and the Level 2 Strategic Flood Risk Assessment (SFRA). The SFRA provides guidance for site specific FRAs within the council's jurisdiction. The EA will be consulted as a key stakeholder throughout the reporting procedure.
- 4.88 In addition to the considerations of fluvial flood risk the Level 3 FRA will include a surface water drainage assessment. This will be used to compare the runoff regimes for the existing site and the proposed development. The surface water drainage assessment will establish an allowable discharge rate for the site based on the existing runoff rates, and using these rates attenuation volumes will be established (where required) to neutralise the potential impacts on surface water flooding at the site and to third party land.
- 4.89 The EA generally requires free-draining systems with surface water storage areas located within the site and in a location, which promotes the use of free drainage, without the requirement for pumping.
- 4.90 The development area benefits from the presence of a series of on-line lakes. The hydraulic capacity and performance of the lake should be assessed as part of a Level 3 FRA. If there is existing capacity within the lakes to attenuate some of the volumes of surface water generated by the proposed development then this may be included as part of the proposed surface water drainage system.
- 4.91 The Council's Level 2 SFRA highlights Sustainable Drainage Strategies (SUDS) as being of particular benefit to new developments. This will be a key consideration when developing the surface water drainage measures to be included within the proposed development.
- 4.92 All elements of the flood risk and drainage work to be undertaken as part of the proposed development will be targeted towards ensuring that new development does not exacerbate flood risk and strive to reduce overall flood risk where possible. The Adopted Core Strategy gives this as being one of the Key Issues and Challenges within the District

**The Owners' Aspirations & Related Benefits**

- 4.93 The owners have the following objectives for the park over the next 10 to 15 years:
- To further upgrade and improve the attraction;
  - To improve the quality of the visitor experience;
  - To extend the season and to make it less weather dependent;
  - To increase the proportion of visitors travelling to the site by modes of transport other than the private car; and
  - To increase the contribution that the site makes to the local economy.
- 4.94 The owners wish to bring forward a number of specific projects. They wish to introduce a major 1,000 delegate conference facility, with an on-site 250-bed hotel and an indoor water park. This facility will provide a much-needed high quality conference venue west of Birmingham, it will provide overnight accommodation for delegates, and will also allow visitors to WMSP to stay longer and visit the park more out of season. It will provide business for other hotels in the area and will generate longer visitor stays, which will increase spending in other local businesses and spread the time when people arrive and leave the park. This proposal is one of the 'economic landmark' (paragraph 1.1 of the EIS (see below)) projects identified by the ReWyre Initiative to help drive business growth and will be an important part of further enhancing the area's visitor and business tourism offer.
- 4.95 The Economic Impact Study (EIS), referred to in Chapter 1 of this Planning Brief, produced by AMION and other consultants, was sponsored by WFDC, Destination Worcestershire and WMSP. The study sought to demonstrate the possible economic and regenerative impact of the proposed hotel, conference centre and waterpark development. By way of summary, it contained the following key findings and conclusions:-
- In terms of economic context, facilitating the delivery of this project has the potential to enhance the performance of a key sector of the economy close to an area of local need.
  - In terms of market context, a review of the local market highlights a clear gap in the provision of quality branded hotels, and highlights opportunities in relation to business tourism. At a regional level, conference facilities are strongly focused within Birmingham, and wider provision including in the Wyre Forest is at present limited.
  - A survey of visitors to WMSP highlighted support for the project and indicated that proposals have the potential to significantly enhance the attraction, with some 82% of respondents considering the proposals to be positive.

- In terms of impact, with the capital costs of the scheme around £60 million, it would have the potential to create 41 construction jobs over a 10 year construction period. It will increase the overall number of visits to WMSP to 1.2 million per annum, that could increase visitor expenditure from £34 million to £71 million per annum. The number of net additional local full-time equivalent jobs that would be created in Wyre Forest is estimated to be 292 and in Worcestershire it is 341. Net additional spending in the area will increase by £9m and £10m respectively.

4.96 The owners also wish to create a new station on the SVR line, providing a direct link to the national rail network. The new station will be linked to the park facilities by a monorail. The station and monorail link will allow more visitors to access the Safari Park by alternative means of transport (other than by car), as well as creating opportunities to develop and extend the leisure offer in conjunction with the railway.

4.97 They also aspire to enhance animal display areas and improve the facilities available for animal care and welfare. This will increase the role the park plays in international conservation of endangered species and will extend the park's educational role. They also wish to enhance and expand the amusement park area, again to increase dwell time on site and increase the proportion of people staying overnight.





## 5 Stakeholder Consultation & Feedback

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- 5.1 As noted above, the Planning Brief has been assembled on the basis of both technical input from specialists in various fields and with account taken of the owner's plans and aspirations for the site. A Statement of Community Involvement (SCI) has been prepared documenting the consultation on the Planning Brief and Masterplan that has taken place with elected representatives, Council Officers, local residents, statutory consultees, other stakeholders and members of the general public. A copy of this report is attached at **Appendix 14**.
- 5.2 There were six key elements of the consultation process:
- Consultations with Statutory and Non-statutory Consultees
  - A series of meetings with WFDC Officers
  - Presentation of proposals at the 2011 ReWyre Autumn Conference
  - Public Exhibitions
  - Press Releases
  - Meetings with Local Residents.
- 5.3 The SCI sets out how these elements were organised and operated.
- 5.4 Through the consultation process the views from a wide range of people and organisations have been received and considered. The feedback has largely been very positive, although a number of issues have been raised which have been addressed in this document. There has been widespread recognition of the contribution the Park currently makes to the local economy, and the importance of future development to the economic well-being of the region.
- 5.5 The importance of bringing forward the development in a way that does not have a detrimental impact on the character and appearance of the area and the levels of amenity currently enjoyed by local residents, was also clearly expressed through the process. The impact of the development on the local road network and the impact of noise from the wider site were the two key issues that were raised.
- 5.6 The SCI also sets out how all the issues raised through the process have subsequently been addressed. This is also covered in section 6 of this Planning Brief.



## 6 The Brief

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- 6.1 Drawing on the findings of previous chapters of this report including site history and policy review, work undertaken by specialist consultants concerning the Green Belt, landscape and trees, cultural heritage, ecology, transport and flood risk and drainage, and feedback from the Council and other statutory and non-statutory consultees/stakeholders, it is possible to list and summarise the key constraints and opportunities on the site that have implications for future development. From this, and taking into account the future vision and aspirations of the site's owners, guidance is provided on the broad form and location for further comprehensive tourist related development at WMSP. This guidance should be read in conjunction with the accompanying Masterplan.

### Constraints

- Location of WMSP within the Green Belt. 'Very special circumstances' are required for any 'inappropriate' development in the Green Belt.
- Grade II listed Spring Grove House and adjacent Stable Block are buildings of special interest, as well as the nearby wrought iron gates and Spring Grove Farmhouse, warranting every effort to preserve them. The local planning authority shall have special regard to the desirability of preserving the buildings or their setting or any features of special architectural or historic interest which they possess.
- Countryside, including local level Character Area status as 'Sandstone Estatelands'. Development proposals must show that they are informed by and sympathetic to landscape character.
- Open views into animal reserves areas limit the amount of built development that would be appropriate here.
- Small sections of the site along the western boundary are within areas at 0.1% to 1% annual risk of river flooding – Flood Zone 2. However, 'water-compatible', 'less vulnerable' and 'more vulnerable' uses of land and 'essential infrastructure' are appropriate in this zone, as defined by Technical Guidance to the NPPF. All uses of land are appropriate within Flood Zone 1, that applies to the rest of the site.
- Without capacity improvements along the A456 or management measures being introduced by the operator (opening times/travel plan etc.), the level of potential future development which generates peak period trips on the WMSP site could be constrained or subject to increased management.

- There may be limitations to the level of sustainable transport improvements that are possible, both on and off site. Limited bus services to some destinations and distance from Kidderminster Railway Station.
- Pedestrian provision to entrance could be improved.
- Protection of trees by TPOs, although a planning permission issued by a Local Planning Authority can allow for the removal of trees with TPO.
- Heath land in south-east corner of animal reserves forms part of the Devil's Spittleful Nature Reserve SSSI. Development will not be allowed which might have an adverse effect on the SSSI, directly or indirectly.
- The park provides suitable habitat for a variety of mammal, reptile, amphibian, bird and invertebrate species, including protected and notable species. Further surveys will be required applicable to amphibians, badgers, bats, birds, dormice, reptiles, otters and invertebrates, depending on the location of development proposed.

### **Opportunities**

- As a major driver of the local economy, there may be very special circumstances that would outweigh any harm to the Green Belt.
- As previously developed site under the NPPF, certain development involving infilling and redevelopment is considered to be appropriate in the Green Belt.
- Contribute to the NPPF objectives for the use of land within the Green Belt: provide opportunities for access to the open countryside for the urban population; opportunities for recreation; enhancing the landscape setting of the site; improve damaged and derelict land around towns; secure nature conservation interests; retain land in agricultural, forestry and related uses.
- Preserving and enhancing the Grade II listed buildings and their settings, by the implementation of a comprehensive Masterplan that provides a clear framework for development.
- Protect, conserve and enhance the character and distinctiveness of the Local Character Area.
- Further development could be placed in the amusement area with very limited adverse effects on views as this area is well screened. There is the potential to extend this area both northwards and southwards without harm to the landscape, but this will need to be balanced with potential effects on the setting of the listed buildings.

- There is potential for development on Bunkers Hill but this should include retention of woodland, copses and large specimen trees to provide screening in views from the A456 and Catchems End. The animal reserve areas could be extended to the south of Bunkers Hill to form an impressive setting to any development in this parcel of land and to be visible from it.
- Although there is less potential for development in the animal reserve areas, particularly the southern part, new tree belts and planting to subdivide enclosures within the animal reserves would help to break up views across this relatively open space, obscure the more intrusive solid screen fences (referred to by the Core Strategy Inspector) and filter views into the site from surrounding public vantage points.
- Tree planting around the southern perimeter of the site adjoining the railway would help to filter and screen views into the animal reserves from the wider landscape.
- Heath land which straddles the boundary of the animal reserves and Devil's Spittleful Nature Reserve should be managed to maintain biodiversity and landscape character.
- Proposed tree planting to reinstate some historic parkland features towards the north of the site would screen views of the car park and traffic to the east.
- Rejuvenate the declining tree stock within the animal reserve area, creating more visual diversity and providing a link with the parkland landscape of Spring Grove House.
- All new tree planting across the whole site should reflect the 18th century parkland species which provide a dominant theme for the landscape framework at the site.
- Shrub and decorative planting within the contained Discovery Trail and amusement area can be exotic and ornamental to reflect the global theme of the attraction.
- Rationalise the use of fencing treatments and planting styles.
- Taking into account the alternative site search, the availability of undeveloped land on the site, the potential for access from the adjacent roundabout and the well-screened nature of this part of the site, the most appropriate location for the conference facilities, hotel and water park is Bunkers Hill.
- Improve the quality of the existing offer to meet challenging consumer demands and high environmental standards in terms of design and access.
- Provide additional facilities on site to encourage existing visitors to remain on site for longer periods enabling a higher degree of traffic management, including on-site accommodation and indoor facilities to spread the season.

- Potential to contribute towards capacity improvements along the A456 through Kidderminster which would enhance accessibility to the site by vehicular forms of transport. This will be subject to an assessment of trips and impact. It is feasible that vehicle trips to and from WMSP could be dispersed and reduce overall.
- Potential to improve the operation of the existing site access junction of the A456.
- Potential to create a second point of access from the A456/B4190 roundabout.
- Potential to create a joint pedestrian/cycle crossing on the A456.
- Potential to offer further enhancements to the existing pedestrian/cycle network within the vicinity of the site.
- Potential to intensify or extend the bus service coverage of existing services which operate along the A456.
- Potential to reintroduce shuttle bus services operating between WMSP and Kidderminster Railway Station.
- Potential to develop a SVR station on the southern boundary of the site which would transport visitors directly into the site by rail. The SVR connection to the mainline rail network will increase the potential catchment area for rail passengers.
- The further development of WMSP has been identified as having significant potential to contribute to the creation of new jobs in the area and increase spending in the local economy.
- Take full account of biodiversity interests and improve ecological conservation value.
- Ensure Nature Reserve continues to be effectively and well managed.

## **Guidance and Masterplan**

6.2 Taking into account the above constraints and opportunities, the technical work undertaken, the aspirations of the owners and the public consultation exercise, we have developed a framework for the site as set out in the Masterplan shown as Figure 1. The masterplan is based on the following identified areas and themes:

- Conference Centre, Hotel and Water Park
- New Rail Link & Station
- Maintenance Area/Amusement Park Extension
- Extension to Discovery Trail and New Animal Exhibit area
- Spring Grove House

- Improved Accessibility
- Improved Animal Welfare & Conservation
- Enhancement of Landscape Framework
- Management of Nature Reserve

6.3 This section of the report provides guidance that accompanies the Masterplan. It sets out the relevant policy considerations for these areas/themes, sets out the relevant findings of the technical work undertaken, highlights the relevant feedback from the consultation exercise, and explains how these have informed what is shown on the Masterplan. It also sets out guidance for future planning applications. The section should be read in conjunction with the Masterplan.

#### **Conference Centre, Hotel & Water Park**



**An opportunity exists to develop a new high quality conference centre, hotel and indoor water park on the natural topography called Bunker's Hill. This facility would provide much-needed high quality conference facilities and provide overnight accommodation for delegates, and will also allow visitors to WMSP to stay longer and visit the park more out of season. It is intended that the hotel will complement the existing network of hotels in the area.**

#### Analysis

#### *Policy*

6.4 A key element of the owner's aspirations to turn WMSP from a three star attraction to a four star resort will be a new hotel, conference centre and water park. This has been a highly successful business model at a number of other major attractions, including Alton Towers,

Drayton Manor and Chessington World of Adventures, and has created benefits for their communities.

- 6.5 In general terms, the provision of these new tourist-related facilities are supported by existing and emerging development plan policy, particularly policies RR1 and PA14 of the RSS, policy RST.14 of the WCSP and CP10 of the WFDCCS. The facilities also find clear support in the NPPF and Planning for Growth. As noted above, the EIS highlighted a clear gap in the local market in the provision of quality branded hotels, and that at a regional level, conference facilities are strongly focused within Birmingham, with limited provision elsewhere, including Wyre Forest. The EIS also found that there was a perceived gap in the local area for high quality family attractions and that the indoor Water Park would be particularly important in encouraging visitors to extend their stay at the Park or visit during off-peak periods, reducing the Park's reliance on seasonal jobs. The importance of the project to the local economy is demonstrated by the fact that the project is being supported by ReWyre as one of the area's landmark projects.
- 6.6 In terms of whether the development is compliant with Green Belt policy it is necessary to consider the proposed scale and location of the development, and this is considered in more detail below.

#### *Baseline Surveys and Research*

- 6.7 The scale of the proposed development (i.e. a 250 bedroom hotel and a conference facility capable of accommodating up to 1,000 delegates) has been informed by WMSP's own market research.
- 6.8 Given the proposed scale of these facilities, there are few locations within the Park where they could be located without interfering with the existing offers and attractions or creating technical issues such as visual impact within open landscapes. The animal reserves area covering the southern part of the site, south of the drive to Rhydd Lodge, has been discounted, as the buildings would detract from the predominantly open character of this part of the site and severely impact on the operation of the drive through the animal reserves. Similarly there are no sites available within the central core of the northern part of the site focused around Spring Grove House where these buildings could not be provided without displacing key facilities and attractions.
- 6.9 This leaves two areas of undeveloped land surrounding this core area in the northern part of the site as suitable locations: Bunkers Hill in the north west corner of the site (option 1), and land to the west of the main entrance (option 2). In considering which of these locations would be more suitable for the hotel, conference centre and water park, the findings of the technical reports have been given very careful consideration.
- 6.10 The Transport Report states WCC has not expressed any concern with the concept of a new site access layout should this be deemed to be necessary to accommodate new development



at WMSP. However, the report also highlights the potential to create an additional vehicular site access at the A456/B4190 junction, which would be immediately to the north west of Bunkers Hill and could directly serve any new development in this area, as well as providing an additional egress from WMSP during peak times. Whilst this could also be achieved with development to the west of the site entrance, this location could put more pressure on the existing site access.

- 6.11 In terms of landscape, while the trees at Bunkers Hill is identified in the LVIA as an important part of 18<sup>th</sup> century parkland within the WMSP site (para. 2.11), the same report also observes that the site to the west of the entrance is on higher land and therefore more prominent in the local landscape. The Tree Report states that considerable scope exists within the Park to enhance the existing stock of trees, and while it has not specifically identified areas where this should take place, the LVIA does specifically refer to proposed tree planting to infill the gap in the Horse Shoe tree belt to reinstate this historic landscape feature as an opportunity, thereby limiting the scope for new development in this area of the site.
- 6.12 As far as ecology is concerned, the northern part of the site contains habitats associated with the former manor house on the park, and 18<sup>th</sup> century landscaping which include mature trees and woodland. The development of any part of the northern part of the site outside the core area would require further survey work and the identification of any necessary mitigation. These areas are also both within Flood Zone 1 (low probability of fluvial flooding) and any development in these areas will require a suitable surface water drainage strategy to neutralise the potential impacts on surface water flooding at the site and to third party land.
- 6.13 While the studies do not highlight an obvious location for the hotel, conference centre and water park, the opportunities afforded by the direct access to the A456/B4190 junction and the opportunity to re-instate the Horse Shoe Copse, do point to Bunkers Hill as being the preferred location. This location is also considered to afford better opportunities to provide a more attractive setting for the hotel by extending the animal attraction areas to the base of the hill to afford guests magnificent views of this part of the WMSP experience, whereas with option 2, it would be severed from the animal reserves by car parks and other visitor facilities.
- 6.14 For the reasons set out in paragraphs 6.7 to 6.13 above, land at Bunkers Hill has been identified as the best location for the hotel, conference centre and water park. As an undeveloped part of the site, outside the existing built envelope, the proposed development would therefore constitute inappropriate development in Green Belt terms, and very special circumstances would be required. In this case, the need and economic case for the development, in terms of its support of the local tourism industry jobs and the local economy, and the need to strengthen WMSP's position in a competitive market would be the principal consideration. These very special circumstances were accepted in the cases of hotel accommodation at Legoland, Thorpe Park, Drayton Manor and Center Parcs, Woburn. Lack of alternative locations on the site would also be likely to weigh in its favour.

*Consultation*

- 6.15 The consultation feedback on these particular facilities was very positive. None of the statutory or non-statutory consultees, or any of the respondents to the questionnaires completed following the public exhibitions objected to the facilities *per se*, or said they disliked the proposed location. Local residents were supportive of the proposals, subject to the levels of amenity they currently enjoy being preserved. The key issues that came out of the consultation exercise was the need to ensure that the traffic is managed such that the development will not have a materially detrimental impact on the road network.

Guidance for Planning Applications

- 6.16 The following aspects will need particular consideration as part of any future planning application:

- The hotel, conference centre and water park will be located in the Bunker's Hill area of the WMSP site.
- The hotel will accommodate around 250 bedrooms could be provided, including a restaurant, function rooms and other ancillary facilities.
- The conference centre will cater for around 1,000 delegates and be capable of hosting a range of different events, including conferences, banquets, product launches, exhibitions, shows and performances.
- The water park could offer a number of water rides, slides and pools, and will be linked to the hotel and safari park.
- Direct access to the complex will be taken from the A456/B4190 junction.
- As this development would constitute inappropriate development in the Green Belt, very special circumstances will need to outweigh any adverse harm to openness and conflicts with any purpose of the Green Belt, and any harm to visual amenity. In considering any very special circumstances, the need and economic case for development, in terms of its support for the local economy through the provision of jobs and encouraging people to stay in the area for longer should also be considered, as should the need to maintain WMSP's position in a competitive market, through the provision of these facilities.
- Very careful consideration should be given to the design of these buildings, particularly in terms of their height and siting, so as to ensure they will be completely screened when viewed from neighbouring residential properties and from the wider area.
- Particular regard will be had to the control of noise and lighting spillage from the buildings.

- The development of Bunkers Hill should include retention of woodland, copses and large specimen trees, along with significant additional planting to provide screening in views from the A456 and Catchems End.
- The proposed development will require a surface water drainage strategy.
- Development may require advanced archaeological investigation.
- There will be a requirement for a Travel Plan.

#### **New Station and Monorail Link**

**Taking advantage of the SVR's access to the mainline rail network from 2012, the introduction of a new station on the SVR at the southern boundary of the site is proposed. The station will be linked to the Safari Park, Conference Centre, Hotel and Water Park by a new monorail system. This will link the District's two main attractions and improve the accessibility of WMSP by modes of travel other than the private car.**

#### Analysis

#### *Policy*

- 6.17 Policies T2 and T5 of the RSS aim to reduce the need to travel by car and to allow attractive and reliable alternatives to the use of the car to come forward. Opening up the SVR and providing a new station on the line would be wholly consistent with these objectives. This would also be consistent with Policies T.3 of the WCSP which encourages an overall shift to the use of public transport, and Policy T.6 which encourages measures to improve the attractiveness of rail transport to be undertaken. While the Local Plan does not contain any policies relevant to the provision of a new rail link, Policy CP03 of the WFDCCS does promote transport choice and accessibility. The SVR and WMSP, are recognised as the two largest attractions in the District, and it is considered that a link between them would be wholly consistent with the aims of policy CP10 to promote sustainable tourism particularly through the incorporation of sustainable transports links.
- 6.18 The new link would also be consistent with the NPPF which seeks a transport system which is balanced in favour of sustainable transport modes, giving people a real choice about how they travel and which encourages solutions which support reductions in greenhouse gas emissions.
- 6.19 In terms of Green Belt policy, there is only one place where the new station could be located without the need to cross or acquire third party land, and this is the southern-most part of the site immediately adjacent to the railway. There is no existing built form in this area, and the erection of a new station and the monorail link would constitute inappropriate development which would require very special circumstances to justify the development. This is considered in more detail below.

*Baseline Surveys and Research*

- 6.20 As noted above, there is only one location where the new station could be built, and that is at the point where the railway line and the WMSP landform are level within the segment of land at the southern end of the WMSP which immediately abuts the SVR. There is a further segment of land further to the north west where the Park adjoins the railway, but there is an intervening access road serving neighbouring properties which the station and/or the monorail link would have to straddle. This part of the site was therefore discounted for this reason.
- 6.21 None of the baseline surveys carried out point to any reason why the provision of a new station, and monorail cannot be provided in the locations shown on the Masterplan. The development would not have an adverse impact on any of the heritage assets highlighted in the Cultural Heritage Technical Note or their settings. It can be seen from the LVIA that a single storey station building would be visible above the railway line but below the crest of the ridge in mid distance views to the south of the site, and that there are no other obvious sensitivities with this part of the site in this regard. There are no trees along this section for the site boundary, and the monorail would avoid dense areas of woodland along with more isolated existing trees where possible. The station would be located on part of the site which is poor semi-improved grassland, which the monorail would also mainly traverse. Like most of the wider site, this particular area is within Flood Zone 1, with a low probability of fluvial flooding.
- 6.22 The Transport Report notes that since 2012, the SVR will have access to the mainline rail network providing access to a national rail catchment, and it is recommended that as part of any major development at WMSP the opportunity to develop an additional SVR station serving WMSP is considered. WMSP estimate that up to 50,000 people could visit the site using the rail network, which will reduce the number of vehicles visiting the Park.
- 6.23 As inappropriate development, very special circumstances will need to outweigh any adverse harm to openness of the Green Belt. While the new rail link and monorail does not bear any direct comparisons with the types of development at other theme parks and safari parks in the Green Belt considered above, the use of the SVR by visitors to the WMSP offers potential benefits to the park, the railway and visitors to the wider area, in terms of increased accessibility, and may offer the opportunity to provide combined tickets for the two attractions to be sold at a reduced rate, thereby encouraging people to stay in the area for longer, or to return at a later date. In this respect the economic benefits of the support to the local tourism industry would be a very special circumstance justifying the development. There is clear planning policy support for the development in terms of the tourism related development, and in terms of encouraging a modal shift away from the use of the private motor car. Improvements to accessibility via sustainable transport methods was accepted as a very special circumstance in the case of the hotel at Legoland.

*Consultation*

- 6.24 A new station received widespread support during the consultation exercise. It was particularly welcomed by business leaders and elected representatives, and 22% of respondents to the questionnaire specifically mentioned the SVR link as something they liked. A significant proportion of residents expressed concern about the impact of existing and future development on the local highway network, which a modal shift away from the private car will alleviate. There were no objections to the link from any of the statutory or non-statutory consultees.
- 6.25 The route of the monorail was a key issue that was raised at the public exhibitions, and at meetings with local residents. The version of the Masterplan used for the consultation exercise showed the monorail leaving the station heading north west in parallel with the SVR for short distance until the point where the Park abuts the railway line again, at which points it headed northwards where it crossed the Elephant Valley, where the route was close to the western boundary of the site. From there, it headed north across the lake, where a new crossing will have taken the monorail to the base of Bunker's Hill where it would have terminated on the western side.
- 6.26 Given the close proximity of the monorail to the residential properties beyond the western boundary of the site, residents expressed concern about the route in terms of line of sight, noise, lighting and loss of privacy. These comments have been very carefully considered, and a revised route taking the monorail more centrally through the southern part of the site away from the western boundary is now shown on the Masterplan. This should ensure that the levels of amenity to residents is unaffected, and remove the need for the monorail to cross the access road adjacent to the railway.

Guidance for Planning Applications

- 6.27 The following aspects will need particular consideration as part of any future planning application:
- The station should comprise a single storey building on WMSP land adjacent to the SVR.
  - The preference will be for the monorail to follow a central route through the animal reserves as far away as possible from the site's boundaries, so as to protect the privacy of local residents but also to maximise opportunities to view the Park's animals from the monorail cars.
  - The station and the monorail should be capable of accommodating up to 50,000 visitors per year.

- The monorail will require a service road underneath for part of its length where it is above ground level, and will need to be at a necessary height to enable service vehicles to pass underneath.
- Development of the station will benefit from planting to merge buildings and earthworks into the landscape.
- Sensitive alignment of the rail link within low lying areas should be considered to avoid prominent ridgelines and potential visual intrusion.
- It is likely the station will be constructed first, with the monorail following at a later stage. In the interim period, visitors arriving at the station can be transported to the hotel, conference centre and water park using a shuttle bus system.
- As this development would constitute inappropriate development in the Green Belt, very special circumstances will need to outweigh any adverse harm to openness and conflicts with any purpose of the Green Belt, and any harm to visual amenity. In considering any very special circumstances, the need and economic case for development, in terms of its support of the local tourism industry and the local economy should be considered, along with the clear policy support for tourist related development of this nature and a development which will encourage the use of public transport and reduce the impact of cars on the local highway network.

#### Maintenance Area/Amusement Park Extension

**It is proposed to expand the amusement area into the well-screened area to the north of the existing amusement park to allow for the much-needed expansion of rides and attractions. This area can also be used to provide improved maintenance facilities. The proportion of land in this area to be taken up by each of these uses will be defined at the planning application stage, but in principle the area shown on the Masterplan is acceptable for each of these uses.**

#### Analysis

#### *Policy*

- 6.28 The amusement park has become a key reason for visiting WMSP and is a key part of the business. It is an important part of the strategy of the site to expand the amusement area to allow the introduction of some additional rides and attractions, and to create a maintenance area that would consolidate other maintenance areas on the site. Extending the amusement park area would be extending an existing use within one of the area's largest and most popular tourist attractions (the existing amusement park area having the benefit of the Lawful Development Certificate granted under 08/0914/CERTE), and the maintenance area would be ancillary to that. In this respect, the extension would find support in Policies RR1 and PA14 of the RSS, Policy RST.14 of the WCSP and CP10 of the WFDCCS. The extended amusement

park area and the ancillary maintenance facilities also find clear support in the NPPF and Planning for Growth.

- 6.29 In terms of the Green Belt, there is no built development within this area at present, and so new buildings which do not benefit from permitted development rights would constitute inappropriate development, where very special circumstances will need to outweigh any adverse harm to the openness of the Green Belt. Very special circumstances appropriate to these developments are considered in more detail below.

*Baseline Surveys and Research*

- 6.30 This particular part of the site is currently used as a maintenance area. It is the only area adjacent to the existing amusement park area where expansion could take place, with other options constrained by the lakes, woodland and Spring Grove House. New attractions in other locations would be somewhat isolated from the main core of the amusement park and would be closer to receptors that would be sensitive to noise and visual impact i.e. adjoining residents. This area is already well screened and is identified as location that can accommodate development, and for these reasons no other sites for expanding the amusement park area have been considered. For operational reasons, it would be necessary to locate any enhanced maintenance area as close to the amusement park as possible. Given this area is currently used as a maintenance area, it is considered appropriate to retain part of this area for this purpose (albeit with improved facilities).
- 6.31 The Cultural Heritage Technical Note identifies the principal drive leading to the north from Spring Grove House, the lodge, gateway and the tree plantations as among the surviving elements of the original estate which provide context within the setting of the house. While the presence of these features do not preclude the development of this area, careful consideration will need to be given to how future development will impact on them.
- 6.32 The LVIA confirms that the area is well screened by existing trees. This would be enhanced by infilling gaps in the Horse Shoe tree belt to the south west. There are no other landscape or visual impact constraints that would preclude development within this area. Most of the site does not have any nature conservation significance as shown in Figure 1 accompanying the Phase 1 Habitat Plan. The remaining areas of the site are semi-improved broadleaved woodland.
- 6.33 There are no specific highways issues relating to the use of this part of the site and like most other parts of the site it is within Flood Zone 1 where there is a low risk of fluvial flooding. It is not expected that this form of development will materially increase the number of visitors to WMSP. The introduction of such developments will enable WMSP to maintain visitor levels to prevent decline.
- 6.34 In terms of the Green Belt, the importance of new rides and attractions in cementing WMSP's role as one of the District's premier tourist attractions and maintaining its role within a



competitive market, are very special circumstances which outweigh the harm to the openness of the Green Belt. These very special circumstances were accepted by Runnymede Borough Council in approving planning consent for the roller coaster rides referred to at Thorpe Park, which has expanded significantly over the past 10 years (noting that it is not the intention of WMSP to install rides of the scale of Thorpe Park, nor to alter the balance between animals and amusements). The strategy is to enhance both aspects of the business. Amusement park rides in the Green Belt are well established at Drayton Manor, Chessington World of Adventures, Thorpe Park, Legoland, Camelot Theme Park and several other smaller operations. The amusement park at WMSP is smaller scale than all of these named parks.

*Consultation*

- 6.35 The feedback from the Four Rooms Conference was supportive of the role WMSP plays within the local and regional economy, and the intention to improve the offer at the Park. This was reflected in the questionnaire responses received following the public exhibitions. There were no objections or concerns raised at any stage of the consultation process about expansion of the amusement park into the area shown on the Masterplan or the improved maintenance facilities.

Guidance for Planning Applications

- Development should avoid the original driveway to Spring Grove House and will provide an opportunity to enhance it.
- Particular regard will be had to the control of noise from new rides and attractions and their visual impact.
- Any development outside the built envelope will require very special circumstances. The importance of any new rides/attractions in terms of maintaining WMSP's position as one of the District's premier tourist attractions and its position in a competitive market should be considered.
- Light Pollution will have to be very carefully considered

**Creation of New Animal Discovery/Display Area and Extension to Discovery Trail**

**An extension of animal discovery and display facilities into the area south of Bunkers Hill is proposed. This will create a distinctive outlook for the new hotel rooms, and allow the introduction of new and improved animal attractions. An extension to the Discovery Trail in place of all or part of the existing maintenance area (which is to be relocated into the area adjacent to the amusement park) is also proposed.**



Analysis

*Policy*

- 6.36 As with the amusement park, the use of the area to the south of Bunkers Hill and the extension of the Discovery Trail would represent an enhancement of the existing tourist attraction at WMSP, and as such finds support in Policies RR1 and PA14 of the RSS, policy RST.14 of the WCSP and CP10 of the WFDCCS. These improvements also find clear support in the NPPF and Planning for Growth.
- 6.37 The use of these areas would be similar to uses that are normally considered appropriate in the Green Belt, although some aspects would technically be inappropriate.

*Baseline Surveys and Research*

- 6.38 The Discovery Trail occupies most of the area south of the amusement park and Spring Grove House, incorporating the former Stables and Walled Garden, and has limited scope for further expansion. Extending the Discovery Trail and creating new areas for animal exhibits in any location other than the locations shown on the Masterplan, would conflict with other existing uses within the park and would be quite isolated, which would be impractical from an operational point of view and detract from visitors' enjoyment of the Park. The opportunity to create a distinctive outlook for the new hotel rooms provides a clear advantage to extending the animal exhibits in the proposed location.
- 6.39 None of the baseline surveys or research that has been carried out suggest that these sites should be precluded from this form of development. The lake and the trees in this area provide context within the setting of the house, although the proposed use of these areas would not require the removal of tree cover. The sites are within a dip in the wider landform and will be well screened by existing vegetation as shown in the LVIA. The western site would however be visible from neighbouring properties on the south side of the lake which will determine the nature and scale of development in this area. Development in this area should be low key and involve no significant built development. It should not be visually prominent and should not create noise and activity that could harm residential amenity. The sites are part semi-improved grassland, part semi-improved broadleaved woodland. The use of these areas would not give rise to any highways or transportation issues.

*Consultation*

- 6.40 As with other aspects of the Masterplan, the feedback from the consultation exercise was supportive of the role WMSP plays within the local and regional economy, and the intention to improve the offer at the Park. The extension of these areas was not singled out as something respondents to the questionnaire particularly liked or disliked. Local residents however did query the scale and nature of development in this area, and were keen that existing levels of amenity that they currently enjoy will be maintained.

Guidance for Planning Applications

- Proposals for any new buildings in this area will be very carefully considered so as to protect the amenities of residents who adjoin this part of the site. There is a preference for more open uses for this location, with limited built development.
- Planting should be used to ensure that any development or activity in this area is screened from residential properties.
- The use of this area would be similar to uses that are normally considered appropriate in the Green Belt.
- The erection of significant new buildings should be avoided except those to support animal enclosures.

**Spring Grove House**

**This stunning, fully restored venue will offer an alternative location for varying functions that require a more traditional location, and will potentially include a spa facility.**

Analysis

*Policy*

- 6.41 As an integral part of the major tourist attraction, any complementary development at Spring Grove House would benefit from development plan policies which promote tourist related development in the area. A number of development plan policies seek to ensure that heritage assets are afforded adequate protection, and these include Policy QE5 of the RSS and LB.5 of the WFDLP, as well as the NPPF.
- 6.42 Internal alterations to Spring Grove House would require listed building consent, but would not require planning consent. Any further extensions to the building will need listed building consent and would also require planning consent. Such extensions would constitute inappropriate development, and very special circumstances would need to outweigh any adverse harm to openness and conflicts with and purpose of the Green Belt. These are considered in more detail below.

*Baseline Studies and Research*

- 6.43 The Cultural Heritage Technical Note confirms Spring Grove House as a Grade II listed building. It states that future development at WMSP should seek to ensure the physical retention of those surviving elements of the original estate of Spring Grove House, which include the main house itself. The immediate setting of the house to the front and rear is well-contained by screen planting and should remain thus.

- 6.44 None of the other technical studies produced give rise to any issue that would prevent the on-going use of Spring Grove House or any minor future improvements/alterations.

*Consultation*

- 6.45 It was clear from the consultation exercise that the building is held in great affection by visitors, local residents and those who work at the Park. Several specific comments were made in the questionnaire responses welcoming greater use of Spring Grove House.

Guidance for Planning Applications

- 6.46 The continued use of Spring Grove House as a venue for functions will not require planning consent. The provision of a spa facility would require Planning and Listed Building Consent. The following aspects will need particular consideration as part of any future applications for planning and listed building consent:

- The impact of any future development on the character and appearance of the Grade II listed building will be given very careful consideration.

**Improved Accessibility**

**Creation of a second point of access from the A456/B4190 roundabout is proposed, allowing dedicated access to the new hotel, conference centre, and water park, and providing an alternative egress from the site on busy days. This will allow for improved traffic management around the site. Improvements to the operation of the existing site access junction with the A456 are also proposed, creating a joint pedestrian/cycle route alongside the site access road, and developing a joint pedestrian/cycle crossing on the A456. Potential exists for intensification and/or extension of the coverage of existing bus services operating along the A456, and the reintroduction of a shuttle bus service to and from Kidderminster Railway Station.**

Analysis

*Policy*

- 6.47 As noted above, the new access from the A456/B4190 roundabout will serve the new hotel, conference centre and water park, and in this respect would be consistent with the policies of the Development Plan which promote tourist-related development.
- 6.48 As far as the improvements to the existing site access junction are concerned, the creation of a joint pedestrian/cycle route alongside the access road, and improving bus links to and from the site are wholly consistent with current planning policy. Policies T2 and T5 of the RSS aim to reduce the need to travel by car and to allow attractive and reliable alternatives to the use of the car to come forward. These proposals would also be consistent with Policies T.3 of the WCSP which encourages an overall shift to the use of public transport. Policy CP03 of the

WFDCCS promotes transport choice and accessibility, while Policy CP10 promotes sustainable tourism particularly through the incorporation of sustainable transports links.

- 6.49 These improvements would constitute other operations which would be inappropriate development unless they maintain openness and do not conflict with the purposes of including land within the Green Belt. The access from the A456/B4190 would be considered as part of the development proposals for the hotel, conference centre and water park, which in itself would constitute inappropriate development and would have its own very special circumstances. The other works to the existing access junction and driveway would be capable of maintaining the openness of the Green Belt. Improving bus services to and from the site would not constitute development.

*Baseline Surveys and Research*

- 6.50 It is not considered that there are any other locations where a new and improved access to the park can be located without detriment to the openness of the Green Belt, the setting of the Listed Building or the site's parkland setting.
- 6.51 The baseline surveys do not point to any constraints that would prevent these improvements from being delivered. Neither the existing nor proposed accesses would affect parts of the original estate, or areas that are particularly sensitive from a landscape and visual impact point of view. The impact on trees would need to be carefully managed, particular in the case of the provision of a new arm from the roundabout. Otherwise the proposals would affect amenity land of limited arboricultural or ecological importance. The improvements would again be located in areas of low risk fluvial flooding and as with other development proposals surface water run-off will need to be considered at the detailed design stage.
- 6.52 The transport report states that the creation of a new access from the A456/B4190 junction can be considered, and that WCC has not raised any specific concerns in this regard. The report also specifically recommends as part of any major development at the site, that a joint pedestrian/cycleway is considered alongside the site access road to formally segregate pedestrian/cycle movements from traffic arriving and departing the site, as well as a formal crossing route across the A456 to enable pedestrians and cyclists to cross the road safely and without having to walk on the grass covered central reserve. The report also recommends that the intensification of bus services and/or expansion of service periods are considered. The report notes that WMSP previously trialled the use of a shuttle bus between the site and Kidderminster Railway Station, and recommends that the results of the trail were such that further use of the service, on a permanent basis, should be considered.

*Consultation*

- 6.53 The existing impact of the Park on the local highway network and the impact of any future development was an issue raised by a number of people through the public exhibitions and the questionnaire responses. The creation of the new access would take the pressure off the

existing access when the hotel, conference centre and water park come forward. In addition, the improvements to the existing access (along with the SVR link) will make it more attractive to visit the Park by means other than the private motor car, and a number of questionnaire respondents welcomed these initiatives.

Guidance for Planning Applications

6.54 The following aspects will need particular consideration for those elements of the access improvements which require planning permission in any future planning application:

- The new access from the A456/B4190 junction will come forward as part of the proposals for the Hotel, Conference Centre and Water Park, and will need to be subject to a Transport Assessment.
- Impact on A456 to be carefully considered.

**Improvement to Animal Reserves**

**The park will continue to upgrade and enhance the animal reserve areas to improve their attractiveness to the public, improve the welfare of animals and to enhance the contribution that the park plays to international animal conservation programmes. Older animal houses will be replaced with more modern facilities that improve the level of care and welfare. Opportunities to improve education facilities on site will be taken. Maintenance areas associated with the animals will be consolidated to improve their efficiency and external appearance.**

Analysis

*Policy*

6.55 Improvements to the animal reserves, welfare facilities, including for example the proposed giraffe house and African plains viewing area and walk through areas, black rhino and Namibian exhibit, and proposed lion house and compounds, would support WMSP's role as one of the most popular tourist attractions in the District and the wider region and would increase its contribution to international animal conservation programmes. In this respect, the improvements would find support in Policies RR1 and PA14 of the RSS, policy RST.14 of the WCSP and CP10 of the WFDCCS. The improvements to the tourist attraction also find clear support in the NPPF and Planning for Growth.

6.56 The improvements to animal welfare facilities would be likely to constitute inappropriate development in the Green Belt. Therefore very special circumstances will need to outweigh any harm to openness and conflicts with any purpose of the Green Belt. These are considered in more detail below.

*Baseline Surveys and Research*

- 6.57 The vast majority of animals are to be found within the animal reserve area covering the southern part of the site. For practical and operational reasons, the majority of the improved animal welfare facilities will be located in this area, as will general enhancements and upgrades to the reserves themselves. The LVIA states that this part of the site is less densely planted than other parts of the site allowing greater intervisibility with the surrounding landscape. Development in this area therefore has the potential to have some effects on visual amenity and influence over the character of the rural landscape. Given the open nature of the area, there are unlikely to be any conflicts with the site's heritage assets, and conflicts with protected trees could be avoided. Most of the southern part of the site is poor semi-improved grassland. The site has a low fluvial flood risk potential and development of this nature in this area does not give rise to any highways or transportation related issues.

*Consultation*

- 6.58 While there were no specific comments about the animal reserves or animal welfare raised during the consultation exercise, it is apparent from many of the comments received that WMSP is a popular attraction and that people enjoy visiting the park and seeing the animals. Continuation of ongoing improvements to the reserves along with improved welfare facilities for the animals will only enhance visitors' enjoyment of the Park.

Guidance for Planning Applications

- 6.59 The following aspects will need particular consideration as part of any future planning application:
- The size of any new buildings will be proportionate to the need for the new facility, and careful consideration will be given to their wider visual impact, and any impacts on residential amenity.

**Enhancement of Landscape Framework**

**A comprehensive landscaping scheme will be introduced, drawing on the recommendations of the Landscape and Visual Impact Assessment (Appendix 5) and the Arboricultural Report (Appendix 10). The scheme will strengthen the existing parkland landscape of the entire WMSP site, replace trees which are over mature and provide screening to the main views into the exposed animal reserve areas**

Analysis

*Policy*

- 6.60 Policy QE6 of the RSS states that local authorities and other stakeholders should in their plans and policies conserve, enhance and where necessary, restore the quality, diversity and distinctiveness of landscape character throughout the region. Policy CP12 of the WFDCCS

states that new development must protect and where possible enhance the unique character of the landscape and that opportunities for landscape gain will be sought alongside all new development

*Baseline Survey and Research*

- 6.61 The LVIA sets out a summary of the existing landscape and baseline conditions within the study area, provides details of published landscape character studies and identifies constraints and opportunities for future development. Among these opportunities are proposed tree belts to subdivide enclosures within the Park, which will help to break up views across the open space, obscuring the more intrusive solid screen fences and filtering views into the site from surrounding public vantage points, tree planting along the southern perimeter of the site to filter and screen views into WMSP from the wider landscape and receptors to the south, as well as rejuvenating the declining tree stock across the Park and infilling gaps in existing tree belts. Particular areas where additional structural landscaping could be considered are shown on the Masterplan.
- 6.62 None of the other technical studies undertaken highlight any reasons why the park cannot be landscaped in this manner. The soft landscaping proposed would not in itself require planning consent and would not have any impact on the openness of the Green Belt, although most of it will come forward as part of the different phases of development envisaged by the Masterplan.

*Consultation*

- 6.63 Landscape was not identified as a particular issue through the consultation process.

Guidelines for Planning Application

- 6.64 The following aspects will need particular consideration as part of any future planning application:
- All schemes for new buildings will be accompanied by a scheme for hard and soft landscaping.
  - All new tree planting should reflect the 18<sup>th</sup> century parkland species which provide a dominant theme for the landscape framework at the site.
  - Shrub and decorative planting contained within the amusement park and Discovery Trail can be exotic and ornamental to reflect the global theme of the attraction.

## Management of Nature Reserve

**WMSP will continue to ensure that the Nature Reserve is effectively and well managed. The opportunity exists to manage areas of the animal reserves adjacent to the Nature Reserve to restore acid grassland/heath, and to restore existing ponds and create new water bodies. Additional survey work will identify additional mitigation where impacts on protected or notable species are identified, and consideration will be given to the potential to reposition animal species where there is potential to improve the heath land.**

### Analysis

#### *Policy*

- 6.65 Policy QE7 of the RSS states that all plans and programmes of local authorities and other relevant agencies should encourage the maintenance and enhancement of the Regions' wider biodiversity resources. Policy CP14 of the WFDCCS states that development which has a detrimental impact on habitats or protected species will not be permitted, and that new development will be required to contribute towards biodiversity within the District, either by enhancing opportunities for biodiversity within the site or through off-site contributions.

#### *Baseline Surveys and Research*

- 6.66 The Phase 1 Habitat Survey notes that a small part of the WMSP site falls within the Devils Spittleful SSSI Nature Reserve. The part of the reserve which falls within the Park comprises areas of heathland. Restoration works are currently being undertaken to restore heathland which had become dominated with scattered trees and shrubs, and continued restoration measures and on-going maintenance works are planned to ensure the long-term viability of the heathland on the Park which will have a positive impact on the wider biodiversity value of WMSP. The survey recommends that appropriate management of this area continues to encourage the establishment of lowland heath and acid grassland.

#### *Consultations*

- 6.67 While the impact on biodiversity across the whole site wasn't a key issue that arose during the consultation exercise, it was apparent from the consultation exercise that people were concerned that development wouldn't encroach into the SSSI, but that the existing and enhanced management of the area would be welcomed.

### Guidelines for Planning Application

- 6.68 The management of the Nature Reserve will be on-going, and will be carried forward outside of the development management process. WMSP will continue to work with WFDC, Natural England and other partners to ensure the effective management of the SSSI.



## Figure 1

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Masterplan



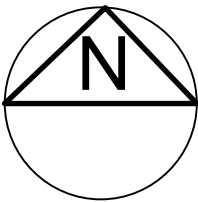
PLAN KEY:

- New Development Area
- New Rail Link
- New Internal Road Link
- New Pedestrian & Cycle Route
- Existing Structures
- Proposed Structures
- New Landscaped Area
- Improvements to animal reserve

- 1 New Access Road To Spring Grove House
- 2 Spring Grove House Refurbishment
- 3 Proposed Conference Centre, Hotel And Water Park
- 4 School Picnic Area
- 5 Additional New Planting At Entrance
- 6 Development Area For Discovery Trail Extension
- 7 Supplement Planting To Filter Views
- 8 New Wildlife Area
- 9 Proposed Rail Halt
- 10 Proposed Giraffe House And African Plains Viewing Area
- 11 Proposed African Plains Walk Through Exhibit / Black Rhino and Namibian Exhibit
- 12 Proposed Lion House And Compounds
- 13 Proposed Vip Cafe
- 14 Eco Education Centre
- 15 Elephant Valley
- 16 Asian Rhino Exhibit
- 17 Earthworks And Planting To Screen Views From The South
- 18 Proposed Maintenance Area / Amusement Park Extension
- 19 Potential Pedestrian / Cycle Bridge Link Across Road To Hotel
- 20 New Bridge Link
- 21 Existing Junction Improvement
- 22 New Ponds / Water Features
- 23 New Themed Bus Stops
- 24 Re-creation of original landscape levels using excavated material from hotel development



GENERAL NOTE:  
Roads may be slightly re-orientated to make better use of Safari Area







## Overview & Scrutiny Committee

### Briefing Paper

Report of: Tracey Southall  
Chief Financial Officer  
Date: 12<sup>th</sup> September 2013  
Open

#### Recommendations from Treasury Management Review Panel:

#### Consideration of Annual Report on Treasury Management Service and Actual Prudential Indicators 2012/13

##### 1. Summary

- 1.1 The purpose of this report is to provide a review of the treasury management activities for 2012/13, in line with the Chartered Institute of Public Finance and Accountancy (CIPFA) Code of Practice on Treasury Management (the Code) and the CIPFA Prudential Code for Capital Finance in Local Authorities (the Prudential Code).
- 1.2 To seek approval for the actual 2012/13 prudential and treasury indicators in this report.
- 1.3 To note the annual treasury management report for 2012/13.
- 1.4 This annual report was endorsed by the Treasury Management Review Panel on 2<sup>nd</sup> September 2013. Overview and Scrutiny will recommend to Cabinet that Council gives approval to this report. This is in compliance with the CIPFA Treasury Management Code of Practice.

##### 2. Background

- 2.1 This Council is required by regulations issued under the Local Government Act 2003 to produce an annual treasury management review of activities and the actual prudential and treasury indicators for 2012/13. This report meets the requirements of both the CIPFA Code of Practice on Treasury Management (the Code) and the CIPFA Prudential Code for Capital Finance in Local Authorities (the Prudential Code).
- 2.2 During 2012/13 the minimum reporting requirements were that the full Council should receive the following reports:
  - an annual treasury strategy in advance of the year (Council 29/02/12); a revision to the investment policy and strategy statement was approved by Council on 21/11/12
  - a mid year treasury update report (Council 21/11/12)
  - an annual review following the end of the year describing the activity compared to the strategy (this report)

- 2.3 The regulatory environment places responsibility on members for the review and scrutiny of treasury management policy and activities. This report is therefore important in that respect, as it provides details of the outturn position for treasury activities and highlights compliance with the Council's policies previously approved by members.
- 2.4 This Council also confirms that it has complied with the requirement under the Code to give prior scrutiny to all of the above treasury management reports by the Treasury Management Review Panel, reporting to Overview and Scrutiny Committee and Cabinet before they were reported to the full Council. Member training on treasury management issues was undertaken during the year on 5<sup>th</sup> September 2012 and 31<sup>st</sup> January 2013 in order to support Members' scrutiny role.

### 3. Key Issues

- 3.1 During 2012/13, the Council complied with its legislative and regulatory requirements. The key actual prudential and treasury indicators detailing the impact of capital expenditure activities during the year, with comparators, are as follows:

<b>Actual prudential and treasury indicators</b>	<b>2011/12 Actual £'000</b>	<b>2012/13 Original £'000</b>	<b>2012/13 Actual £'000</b>
Actual capital expenditure	7,763	10,217	5,546
Capital Financing Requirement	4,570	10,996	5,505
Net borrowing	(11,238)	6,437	(5,812)
External debt	27	8,233	3,023
Investments:			
• Longer than 1 year*	1,790	1,796	1,356
• Under 1 year	9,475	-	7,479
• <b>Total</b>	<b>11,265</b>	<b>1,796</b>	<b>8,835</b>

\*Investments at 31<sup>st</sup> March 2012 & 2013 include Icelandic investments at impaired values.

Actual capital expenditure in 2012/13 was lower than originally anticipated mainly due to slippage in the Future Leisure Provision, Local Authority Mortgage Scheme, Regeneration of Economic Development, Contribution towards Civic Facilities and Housing Assistance Schemes.

- 3.2 Other prudential and treasury indicators are to be found in Appendix 1. The Chief Financial Officer also confirms that borrowing was only undertaken for a

capital purpose and the statutory borrowings limit (the authorised limit), was not breached.

- 3.3 The financial year 2012/13 continued the challenging environment of previous years, namely low investment returns.
- 3.4 The Council entered into external borrowing, drawing £2m in January 2013 and £1m in March 2013. Competitive rates were achieved with the officers working in close liaison with Sector our professional advisors. The borrowing was undertaken within the Capital Financing Requirement (CFR). Full details can be found in Section 4 of Appendix 1.
- 3.5 The full annual review can be found at Appendix 1. This provides greater detail on the treasury activity for 2012/13 along with other relevant information.
- 3.6 REVISION TO THE INVESTMENT POLICY AND STRATEGY STATEMENT 2012/13
  - 3.6.1 Council approved the initial Investment Policy and Strategy Statement 2012/13 on 29<sup>th</sup> February 2012. This included the counterparty criteria and investment limits for the financial year 2012/13. The individual counterparty/group limit approved by Council was 25% of total investments (excluding Icelandic investments). However, due to the current banking sector, problems within the Eurozone and depleted fund balances it became increasingly difficult to place effective investments using this criteria, resulting in the increased use of the Debt Management Office to remain within policy.
  - 3.6.2 Approval was therefore sought to increase the counterparty/group limit to 50% with a maximum limit of £5m (whichever is the lower) for the UK part-nationalised banks, by exception only. Where an investment is above 25% this needs prior approval by the Chief Financial Officer. This allows the Council to secure effective rates of return whilst ensuring that the funds are placed with those counterparties that are considered to be a low risk, demonstrating security and liquidity over yield. Council approval was given to this revision on 21<sup>st</sup> November 2012, having immediate effect.
- 3.7 UPDATE ON CONSULTANCY AND BANKING CONTRACTS
  - 3.7.1 The Council has used Sector Treasury Services as its external treasury advisors since September 2010, when they were appointed following a full competitive tendering process. The contract included an option to extend for a further 2 years following the initial three year term (section 2.5 of the original agreement). Following a review of the services provided, consideration of market factors and liaison with the Cabinet Member, the Sector contract has been extended by a further two years, commencing 1<sup>st</sup> September 2013. The Chief Financial Officer was able to secure favourable terms for the contract extension to ensure this service still provides good value for money.

- 3.7.2 The Council's current banking contract with the Co-operative Bank expires on 31<sup>st</sup> March 2014. The tender process is now under way and the Council anticipates appointing the successful tenderer before Christmas to allow sufficient time for any changes that may be required to systems. Members will be aware of the briefings issued as a result of the result credit rating downgrades of the Co-operative Bank. Appropriate consideration of credit ratings will be included as part of the tender process to ensure the Council is protected as far as possible, going forward.

**4. Options**

**Overview and Scrutiny Committee to propose to Cabinet that it recommends to Council to:**

- 4.1 **Approve the actual 2012/13 prudential and treasury indicators in this report.**
- 4.2 **Approve Note the annual treasury management report for 2012/13.**

**5. Consultation**

- 5.1 Sector Treasury Services
- 5.2 Cabinet
- 5.3 CMT
- 5.4 Treasury Management Review Panel

**6. Related Decisions**

- 6.1 Recommendation from Treasury Management Review Panel 2<sup>nd</sup> September 2013.

**7. Relevant Council Policies/Strategies**

- 7.1 Council 29/02/12 – The Prudential System of Local Government Finance and the Treasury Management Policy and Strategy Report 2012/2013  
<http://www.wyreforest.gov.uk/council/meetings/com55.htm#mt6972>
- 7.2 Council 26/09/12 – Annual Report on Treasury Management Service, Actual Prudential Indicators 2011/2012 and Revision to the Investment Policy and Strategy Statement 2012/13  
<http://www.wyreforest.gov.uk/council/meetings/com55.htm#mt7147>
- 7.3 Council 21/11/12 – Treasury Management Strategy Statement, Annual Investment Strategy Mid-year Review Report and Updated Prudential Indicators 2012/2013  
<http://www.wyreforest.gov.uk/council/meetings/com55.htm#mt7148>

**. Implications**

- 8.1 **Resources:** The Financial Implications are contained within paragraphs 3.1, and Appendix 1.
- 8.2 **Legal & Policy:** Legal and Policy Implications are contained within paragraph 13.1 of Appendix 1.
- 8.3 **Risk Management:** Risk Management is contained within paragraphs 13.2, 13.3, 13.4 and 13.5 of Appendix 1. As demonstrated within this report the current economic position is very erratic; as a result, the risk is managed by more frequent and detailed reviews supported by the Treasury Management Panel. The Council will continue to invest with only those institutions which have the necessary credit ratings in order to preserve the Council's Capital.

There is a small increase in risk by placing up to 50% of the total investments with the part-nationalised banks. However, such investments will only be placed by exception, with the express approval of the Chief Financial Officer. The Council will continue to aim to achieve the optimum return on its investments commensurate with its investment priorities of security and liquidity. The Council has been advised that any withdrawal of Government support for the part-nationalised banks could take 12 months.

**9. Equality Impact Needs Assessment**

- 9.1 This is a financial report and there is no requirement to consider an Equality Impact Assessment.

**10. Wards affected**

- 10.1 All

**11. Appendices**

- 11.1 Appendix 1 – Treasury Activity 2012/13

**12. Background Papers**

- 12.1 Local Government Act 2003
- 12.2 CIPFA's Revised Prudential Code for Capital Finance in Local Authorities, 2011
- 12.3 CIPFA's Revised Code of Practice on Treasury Management in the Public Services, 2011
- 12.4 Local Government and Housing Act 1989
- 12.5 02/09/13 Report to the Treasury Management Review Panel - Annual Report on Treasury Management Service and Actual Prudential Indicators 2012/13

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**APPENDIX 1****TREASURY ACTIVITY 2012/13****1. Introduction**

1.1 This report summarises:

- Capital activity during the year;
- Impact of this activity on the Council's underlying indebtedness (the Capital Financing Requirement);
- The actual prudential and treasury indicators;
- Overall treasury position identifying how the Council has borrowed in relation to its indebtedness, and the impact on investment balances;
- Summary of interest rate movements in the year;
- Detailed debt activity; and
- Detailed investment activity.

**2. The Council's Capital Expenditure and Financing 2012/13**

2.1 The Council undertakes capital expenditure on long-term assets. These activities may either be:

- Financed immediately through the application of capital or revenue resources (capital receipts, capital grants, revenue contributions etc.), which has no resultant impact on the Council's borrowing need; or
- If insufficient financing is available, or a decision is taken not to apply resources, the capital expenditure will give rise to a borrowing need.

2.2 The actual capital expenditure forms one of the required prudential indicators. The table below shows the actual capital expenditure and how this was financed.

<b>£'000</b>	<b>2011/12 Actual</b>	<b>2012/13 Estimate</b>	<b>2012/13 Actual</b>
Capital Expenditure	7,763	10,217	5,546
Resourced by:			
• Capital receipts	4,756	2,752	3,661
• Capital grants	664	1,091	748
• Revenue	570	20	-
<b>Unfinanced capital expenditure</b>	<b>1,773</b>	<b>6,354</b>	<b>1,137</b>

**3. The Council's Overall Borrowing Requirement**

- 3.1 The Council's underlying need to borrow for capital expenditure is termed the Capital Financing Requirement (CFR). This figure is a gauge of the Council's debt position. The CFR results from the capital activity of the Council and what resources have been used to pay for the capital spend. It represents the 2012/13 unfinanced capital expenditure (see above table), and prior years' net or unfinanced capital expenditure which has not yet been paid for by revenue or other resources.
- 3.2 Part of the Council's treasury activities is to address the funding requirements for this borrowing need. Depending on the capital expenditure programme, the treasury service organises the Council's cash position to ensure sufficient cash is available to meet the capital plans and cash flow requirements. This may be sourced through borrowing from external bodies (such as the Government, through the Public Works Loan Board (PWLb) or the money markets), or utilising temporary cash resources within the Council.
- 3.3 **Reducing the CFR** – the Council's underlying borrowing need (CFR) is not allowed to rise indefinitely. Statutory controls are in place to ensure that capital assets are broadly charged to revenue over the life of the asset. The Council is required to make an annual revenue charge, called the Minimum Revenue Provision (MRP), to reduce the CFR. This is effectively a repayment of the borrowing need. This differs from the treasury management arrangements which ensure that cash is available to meet capital commitments. External debt can also be borrowed or repaid at any time, but this does not change the CFR.
- 3.4 The total CFR can also be reduced by:
- the application of additional capital financing resources (such as unapplied capital receipts); or
  - charging more than the statutory revenue charge (MRP) each year through a Voluntary Revenue Provision (VRP).
- 3.5 The Council's 2012/13 MRP Policy (as required by CLG Guidance) was approved as part of the Treasury Management Strategy Report for 2012/13 on 29<sup>th</sup> February 2012.

- 3.6 The Council's CFR for the year is shown below, and represents a key prudential indicator.

CFR £'000	31 <sup>st</sup> March 2012 Actual	31 <sup>st</sup> March 2013 Original Indicator	31 <sup>st</sup> March 2013 Actual
Opening balance	2,959	4,870	4,570
Add unfinanced capital expenditure (as above)	1,773	6,354	1,137
Less MRP	(162)	(228)	(202)
Closing balance	4,570	10,996	5,505

- 3.7 The borrowing activity is constrained by prudential indicators for net borrowing and the CFR, and by the authorised limit.
- 3.8 **Net borrowing and the CFR** - in order to ensure that borrowing levels are prudent over the medium term the Council's external borrowing, net of investments, must only be for a capital purpose. This essentially means that the Council is not borrowing to support revenue expenditure. Net borrowing should not therefore, except in the short term, have exceeded the CFR for 2012/13 plus the expected changes to the CFR over 2013/14 and 2014/15 from financing the capital programme. This indicator allows the Council some flexibility to borrow in advance of its immediate capital needs. The table below highlights the Council's net borrowing position against the CFR. The Council has complied with this prudential indicator.

It should be noted that this indicator is changing to compare gross borrowing to the CFR with effect from 2013/14; this is expected to provide a more appropriate indicator.

£'000	31 <sup>st</sup> March 2012 Actual	31 <sup>st</sup> March 2013 Original	31 <sup>st</sup> March 2013 Actual
Net borrowing position	(11,238)	6,437	(5,812)
CFR	4,570	10,996	5,505

- 3.9 The authorised limit - the authorised limit is the "affordable borrowing limit" required by s3 of the Local Government Act 2003. The Council does not have the power to borrow above this level. The table below demonstrates that during 2012/13 the Council has maintained gross borrowing within its authorised limit.

- 3.10 The operational boundary – the operational boundary is the expected borrowing position of the Council during the year. Periods where the actual position is either below or over the boundary is acceptable subject to the authorised limit not being breached.
- 3.11 Actual financing costs as a proportion of net revenue stream - this indicator identifies the trend in the cost of capital (borrowing and other long term obligation costs net of investment income) against the net revenue stream.

	2012/13
<b>Authorised limit</b>	<b>£20.000m</b>
<b>Maximum gross borrowing position</b>	<b>£3.054m</b>
<b>Operational boundary</b>	<b>£15.000m</b>
<b>Average gross borrowing position</b>	<b>(£0.627m)</b>
<b>Financing costs as a proportion of net revenue stream</b>	<b>0.89%</b>

**4. Treasury Position as at 31<sup>st</sup> March 2013**

- 4.1 The Council's debt and investment position is organised by the treasury management service in order to ensure adequate liquidity for revenue and capital activities, security for investments and to manage risks within all treasury management activities. Procedures and controls to achieve these objectives are well established both through Member reporting detailed in the summary, and through officer activity detailed in the Council's Treasury Management Practices. At the beginning and the end of 2012/13 the Council's treasury position was as follows:

Treasury position	31 <sup>st</sup> March 2012		31 <sup>st</sup> March 2013	
	Principal £'000	Average Rate/Return %	Principal £'000	Average Rate/Return %
Fixed rate funding:				
PWLB	-	-	1,000	2.62
Market – Other Local Authority*	-	-	2,000	0.75
Market – Mortgage Bonds**	27	6.21	23	6.26
<b>Total Debt</b>	<b>27</b>	<b>6.21</b>	<b>3,023</b>	<b>1.41</b>
<b>Fixed Interest Investments***</b>	<b>(11,265)</b>	<b>0.87</b>	<b>(8,835)</b>	<b>0.73</b>
<b>Net investment position</b>	<b>(11,238)</b>		<b>(5,812)</b>	

\* Borough of Kings Lynn & West Norfolk.

\*\*Liverpool Victoria Friendly Society Ltd.

\*\*Principal at 31<sup>st</sup> March 2012 & 2013 includes Icelandic investments at impaired values. The average rate achieved excludes Icelandic investments.

The maturity structure of the debt portfolio was as follows:

	2011/12 Actual £'000	2012/13 Original Limits £'000	2012/13 Actual £'000
Under 12 months	-	100%	-
Between 1 and 2 years	-	100%	2,000
Between 2 and 5 years	8	100%	17
Between 5 and 10 years	19	100%	1,006
<b>Total</b>	<b>27</b>		<b>3,023</b>

The maturity structure of the investment portfolio was as follows:

	2011/12 Actual £'000	2012/13 Original £'000	2012/13 Actual £'000
Investments:			
• Longer than 1 year*	1,790	1,796	1,356
• Under 1 year	9,475	-	7,479
• <b>Total</b>	<b>11,265</b>	<b>1,796</b>	<b>8,835</b>

\* The only investments held for more than 1 year relate to impaired Icelandic deposits.

The exposure to fixed and variable rates was as follows:

	31 <sup>st</sup> March 2012 Actual	2012/13 Original Limits	31 <sup>st</sup> March 2013 Actual
Fixed rate (principal or interest)	100%	100%	100%

**5. The Strategy for 2012/13**

- 5.1 The expectation for interest rates within the strategy for 2012/13 anticipated a low Bank Base Rate that would start to rise in quarter 4 of 2013. Gradual rises in medium and longer term fixed borrowing rates were also predicted over 2012/13. Variable or short-term rates were expected to be the cheaper form of borrowing over the period. Continued uncertainty in the aftermath of the 2008 financial crisis promoted a cautious approach, whereby investments would continue to be dominated by low counterparty risk considerations, resulting in relatively low returns compared to borrowing rates.
- 5.2 In this scenario, the treasury strategy was to postpone borrowing for as long as possible to avoid the cost of holding higher levels of investments and to reduce counterparty risk.
- 5.3 The actual movement in gilt yields meant that Public Works Loan Board (PWLb) rates fell during the first quarter of the year to historically low levels. This was caused by a flight to quality into UK gilts from European Union (EU) sovereign debt, and from shares, as investors became concerned about the potential for a Lehman's type crisis of financial markets, if the Greek debt crisis were to develop into a precipitous default and exit from the Euro. During the second and third quarters, rates rose gradually and agreement of a second bail out for Greece in December saw the move into gilts reverse somewhat, as confidence rose that the Eurozone crisis was finally subsiding. However, gilt yields then fell back again during February and March as Eurozone concerns returned, with the focus now shifting to Cyprus, and flight to quality flows into gilts resumed. This was a volatile year for PWLB rates, driven by events in the Eurozone which oscillated between crises and remedies.
- 5.4 The strategy adopted in the original Treasury Management Strategy Report for 2012/13 approved by Council on 29<sup>th</sup> February 2012 was subject to revision during the year due to the current banking sector, problems within the Eurozone and depleted fund balances making it increasingly difficult to place effective investments using the existing criteria, resulting in the increased use of the Debt Management Office to remain within policy. Approval was therefore sought to increase the counterparty/group limit to 50% with a maximum limit of £5m (whichever is the lower) for the UK part-nationalised banks, by exception only. Where an investment is above 25% this needs prior approval by the Chief Financial Officer. This allows the Council to secure effective rates of return whilst ensuring that the funds are placed with those counterparties that are considered to be a low risk, demonstrating security and liquidity over yield. Council approval was given to this revision on 21<sup>st</sup> November 2012, having immediate effect.

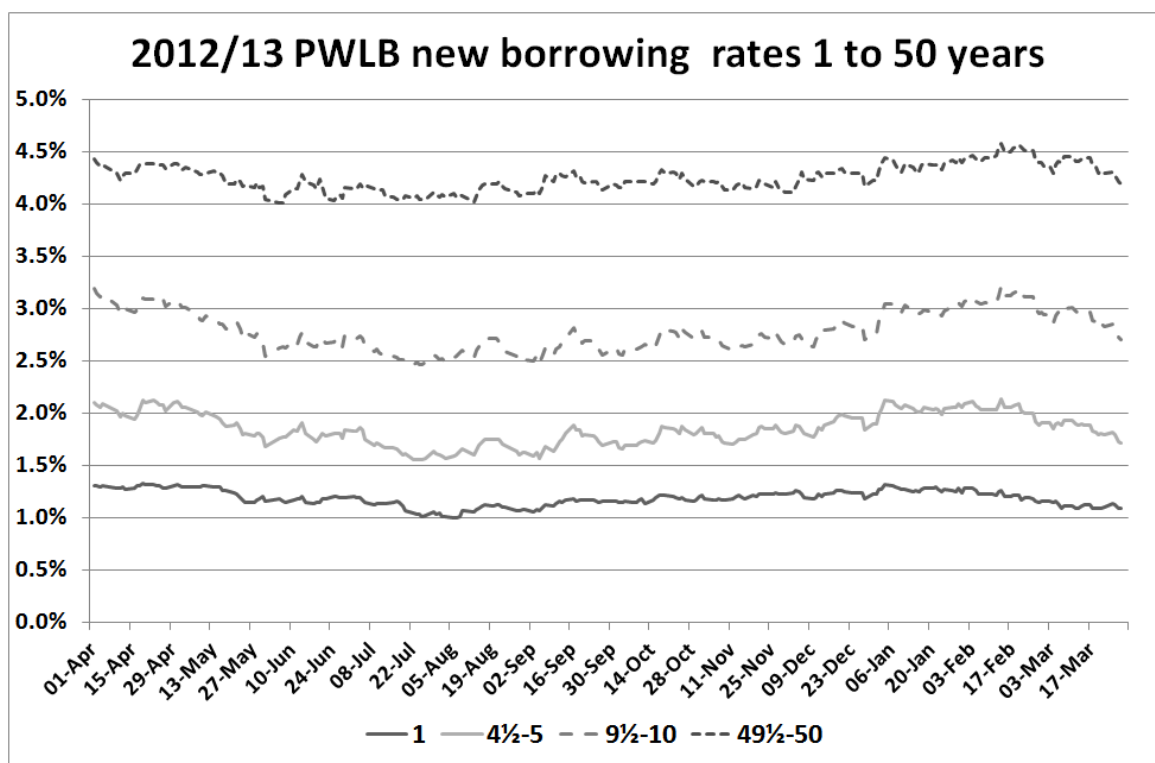
## 6. The Economy and Interest Rates

- 6.1 **Sovereign debt crisis.** The EU sovereign debt crisis was an ongoing saga during the year. However, the European Central Bank (ECB) statement in July that it would do “whatever it takes” to support struggling Eurozone countries provided a major boost in confidence that the Eurozone was (at last) beginning to get on top of its problems. This was followed by the establishment of the Outright Monetary Transactions Scheme in September. During the summer, a €100bn package of support was given to Spanish banks. The crisis over Greece blew up again as it became apparent that the first bailout package was insufficient. An eventual very protracted agreement of a second bailout for Greece in December was then followed by a second major crisis, this time over Cyprus, towards the end of the year. In addition, the Italian general election in February resulted in the new Five Star anti-austerity party gaining a 25% blocking vote; this has the potential to make Italy almost ungovernable if the grand coalition formed in April proves unable to agree on individual policies. This could then cause a second general election – but one which could yield an equally ‘unsatisfactory’ result. This result emphasises the dangers of a Eurozone approach heavily focused on imposing austerity, rather than promoting economic growth, reducing unemployment, and addressing the need to win voter support in democracies subject to periodic general elections. This weakness leaves continuing concerns that this approach has merely postponed the ultimate debt crisis, rather than provide a conclusive solution. These problems will, in turn, also affect the financial strength of many already weakened EU banks during the expected economic downturn in the EU. There are also major questions as to whether the Greek Government will be able to deliver on its promises of cuts in expenditure and increasing tax collection rates, given the hostility of much of the population.
- 6.2 **The UK coalition Government** maintained its tight fiscal policy stance against a background of warnings from two credit rating agencies that the UK could lose its AAA credit rating. Moody’s followed up this warning by actually downgrading the rating to AA+ in February 2013 and Fitch then placed their rating on negative watch, after the Budget statement in March. Key to retaining the AAA rating from Fitch and S&P will be a return to strong economic growth in order to reduce the national debt burden to a sustainable level, within a reasonable timeframe.
- 6.3 **UK growth.** 2012/13 started the first quarter with negative growth of -0.4%. This was followed by an Olympics boosted +0.9% in the next quarter, then by a return to negative growth of -0.3% in the third quarter and finally a positive figure of +0.3% in the last quarter. This weak UK growth resulted in the Monetary Policy Committee (MPC) increasing quantitative easing (QE) by £50bn in July to a total of £375bn on concerns of a downturn in growth and a forecast for inflation to fall below the 2% target. QE was targeted at further gilt purchases. In the March 2013 Budget, the Office of Budget Responsibility yet again slashed its previously over optimistic growth forecasts, for both calendar years 2013 and 2014, to 0.6% and 1.8% respectively.

- 6.4 **UK CPI inflation** has remained stubbornly high and above the 2% target, starting the year at 3.0% and still being at 2.8% in March; however, it is forecast to fall to 2% in three years time. The MPC has continued its stance of looking through temporary spikes in inflation by placing more importance on the need to promote economic growth.
- 6.5 **Gilt yields** oscillated during the year as events in the ongoing Eurozone debt crisis ebbed and flowed, causing corresponding fluctuations in safe haven flows into / out of United Kingdom (UK) gilts. This, together with a further £50bn of QE in July and widely expected further QE still to come, combined to keep PWLB rates depressed for much of the year at historically low levels.
- 6.6 **Bank Rate** was unchanged at 0.5% throughout the year, while expectations of when the first increase would occur were pushed back to quarter 1 2015 at the earliest.
- 6.7 **Deposit rates.** The Funding for Lending Scheme, announced in July, resulted in a flood of cheap credit being made available to banks and this has resulted in money market investment rates falling sharply in the second half of the year. However, perceptions of counterparty risk have improved after the ECB statement in July that it would do “whatever it takes” to support struggling Eurozone countries. This has resulted in some return of confidence to move away from only very short term investing.

## 7. Borrowing Rates in 2012/13

- 7.1 **PWLB borrowing rates** - the graphs and table for PWLB maturity rates below show, for a selection of maturity periods, the high and low points in rates, the average rates, spreads and individual rates at the start and the end of the financial year.





## 8. Borrowing Outturn for 2012/13

### 8.1 Treasury Borrowing

The Council entered into external borrowing with The Borough of Kings Lynn and West Norfolk on 14<sup>th</sup> January 2013 and the PWLB on 15<sup>th</sup> March 2013. The loans were drawn to fund net unfinanced capital expenditure within the CFR.

The loans drawn were:

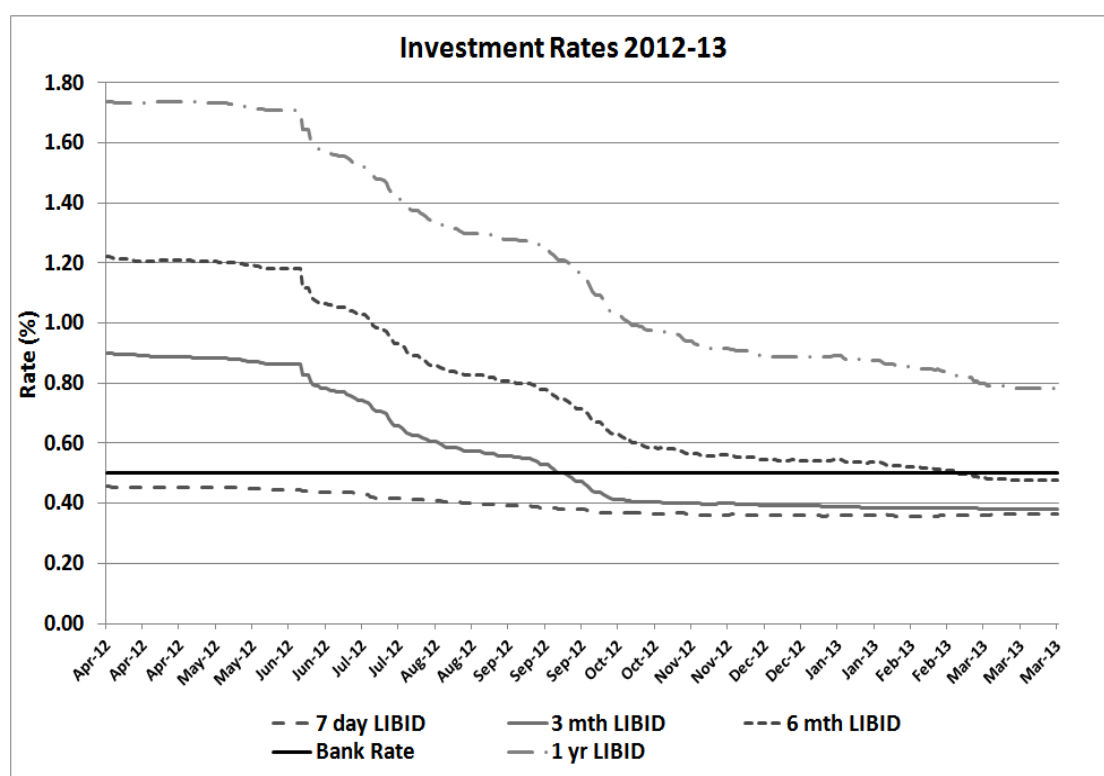
Lender	Date	Principal	Type	Interest Rate	Maturity
Market - Borough of Kings Lynn & West Norfolk	14/01/13	£2m	Fixed interest rate	0.75%	14/07/14 (1.5 years)
PWLB	15/03/13	£1m	Fixed interest rate	2.62%	15/03/22 (9 years)

### 8.2 Rescheduling

No rescheduling was carried out during the year.

## 9. Investment Rates in 2012/13

9.1 Bank Rate remained at its historic low of 0.5% throughout the year; it has now remained unchanged for four years. Market expectations of the start of monetary tightening were pushed back during the year to early 2015 at the earliest. The Funding for Lending Scheme resulted in a sharp fall in deposit rates in the second half of the year.



**10. Investment Outturn for 2012/13**

- 10.1 Investment Policy – the Council’s investment policy is governed by CLG guidance, which was been implemented in the annual investment strategy approved by the Council on 29<sup>th</sup> February 2012. This policy sets out the approach for choosing investment counterparties, based on credit ratings provided by the three main credit rating agencies supplemented by additional market data (such as rating outlooks, credit default swaps, bank share prices etc.). The Sector Credit Worthiness Policy adds further layers of check.
- 10.2 Approval was sought to increase the counterparty/group limit to 50% with a maximum limit of £5m (whichever is the lower) for the UK part-nationalised banks, by exception only. Where an investment is above 25% this needs prior approval by the Chief Financial Officer. This allows the Council to secure effective rates of return whilst ensuring that the funds are placed with those counterparties that are considered to be a low risk, demonstrating security and liquidity over yield. Council approval was given to this revision on 21<sup>st</sup> November 2012, having immediate effect.
- 10.3 The investment activity during the year conformed to the approved strategy and the Council had no liquidity difficulties.
- 10.4 Resources – the Council’s cash balances comprise revenue and capital resources and cash flow monies. The Council’s core cash resources comprised as follows, and met the expectations of the budget:

<b>Balance Sheet Resources (£'000)</b>	<b>31<sup>st</sup> March 2012</b>	<b>31<sup>st</sup> March 2013</b>
Balances	<b>3,069</b>	<b>3,168</b>
Earmarked reserves	<b>4,003</b>	<b>4,396</b>
Provisions	<b>49</b>	<b>169</b>
Usable capital receipts	<b>5,484</b>	<b>2,139</b>
<b>Total</b>	<b>12,605</b>	<b>9,872</b>

- 10.5 **Investments held by the Council** - the Council maintained an average balance of £12.218m of internally managed funds. The internally managed funds earned an average rate of return of 0.73%. The comparable performance indicator is the average 7-day LIBID rate, which was 0.42%. External Interest received on investments totalled £89,290 compared to the revised budget of £66,000.

**11. Performance Measurement**

- 11.1 One of the key requirements in the Code is the formal introduction of performance measurement relating to investments, debt and capital financing activities. Whilst investment performance criteria have been well developed and universally accepted, debt performance indicators continue to be a more problematic area with the traditional average portfolio rate of interest acting as the main guide. The Council's performance indicators were set out in the Annual Treasury Management Strategy.
- 11.2 This service has set the following performance indicator:
- Investments – Internal returns (0.73%) above the 7 day London Interbank Bid (LIBID) rate (0.42%)
- 11.3 Sector established a regional benchmarking group in April 2011. The group comprises seven Local Authorities; 2 County Councils and 6 District Councils, and the group meets twice a year. Quarterly performance reports are prepared by Sector. The purpose of the benchmarking group is to compare Security of Capital, Liquidity and Yield (SLY - risk and return), aiming to maximise return in line with each authority's individual risk appetite.
- 11.4 Sector reported that the results of the benchmarking group at 31<sup>st</sup> March 2013 were that the Weighted Average Maturity (WAM) was 14 days and the Risk Factor was 2.0 (1 being the lowest, 7 being the highest). The Council's yield was 3<sup>rd</sup> lowest in the group and the risk factor was the 4<sup>th</sup> lowest, demonstrating the Council's low risk appetite and reduced investment balances. It should be noted that some members of the group invest almost entirely in the DMO (AAA), with a risk factor of 1 and a return of 0.25%. This is explored in more detail in the separate benchmarking report on this agenda.

**12. Icelandic Bank Defaults**

- 12.1 As has been widely reported, this Council had £9m invested in Icelandic banks at the time of their collapse in October 2008.
- 12.2 The position on recovery of the £9m of Icelandic investments that were frozen in October 2008 is that, at 31st March 2013, a total of £5.991m had already been received (66%).

## Agenda Item No. 7

Financial Institution	Principal Invested £	Principal Repaid at 31/03/13 £	Recovery at 31/03/13 %	Estimated Total Recovery %
Landsbanki	3,000,000	1,418,566	47.29	Close to 100%
Kaupthing Singer & Freidlander	5,000,000	3,800,000	76.00	85.25
Heritable Bank	1,000,000	772,543	77.25	88.00
<b>Total</b>	<b>9,000,000</b>	<b>5,991,109</b>	<b>66.57</b>	<b>90.47</b>

The Council has received a further distribution after 31<sup>st</sup> March 2013 bringing total principal repayments to £6.141m as at 30<sup>th</sup> June 2013.

- 12.3 The Icelandic Government has stated its intention to honour all of its commitments as a result of their banks being placed into receivership. The UK Government, Administrators and other agencies continue to work with the Icelandic Government to help bring this about. The Local Government Association is co-ordinating the efforts of all UK councils with Icelandic investments.
- 12.4 At the current time, the process of recovering assets is still ongoing with the administrators. In the cases of Heritable Bank plc and Kaupthing, Singer and Friedlander Ltd, the administrators have made a number of dividend payments to date, with further payments and updates anticipated during 2013/14. Investments outstanding with the two Iceland –domiciled banks (Glitnir Bank hf and Landsbanki Islands hf) have been subject to decisions of the Icelandic Courts. Following the successful outcome of legal test cases in the Icelandic Supreme Court in late-2011, the Administrators have now commenced the process of dividend payments in respect of both of these banks (please note this Council does not hold any Glinir investments). Members will be periodically updated on the latest developments on these efforts.

**13. Regulatory Framework, Risk and Performance**

- 13.1 The Council's treasury management activities are regulated by a variety of professional codes, statutes and guidance:
- The Local Government Act 2003 (the Act), which provides the powers to borrow and invest as well as providing controls and limits on this activity;
  - The Act permits the Secretary of State to set limits either on the Council or nationally on all local authorities restricting the amount of borrowing which may be undertaken;
  - Statutory Instrument (SI) 3146 2003, as amended, developed the controls and powers within the Act;
  - The SI requires the Council to undertake any borrowing activity with regard to the CIPFA) Prudential Code for Capital Finance in Local Authorities;
  - The SI also requires the Council to operate the overall treasury function with regard to the CIPFA Code of Practice for Treasury Management in the Public Services;
  - Under the Act the CLG has issued Investment Guidance to structure and regulate the Council's investment activities.
  - Under section 238(2) of the Local Government and Public Involvement in Health Act 2007 the Secretary of State has taken powers to issue guidance on accounting practices. Guidance on Minimum Revenue Provision was issued under this section on 8<sup>th</sup> November 2007.
- 13.2 The Council has complied with all of the above relevant statutory and regulatory requirements which limit the levels of risk associated with its treasury management activities. In particular its adoption and implementation of both the Prudential Code and the Code of Practice for Treasury Management means both that its capital expenditure is prudent, affordable and sustainable, and its treasury practices demonstrate a low risk approach.
- 13.3 The Council has fully co-operated with a number of internal and external reviews into the Icelandic investments, including a member Treasury Management Review Panel that showed full compliance with all approved policies and procedures.
- 13.4 The Council is aware of the risks of passive management of the treasury portfolio and, with the support of Sector, the Council's advisers, has proactively managed its treasury position.
- 13.5 Shorter-term rates and likely future movements in these rates predominantly determine the Council's investment return. These returns can therefore be volatile and, whilst the risk of loss of principal is minimised through the annual investment strategy, accurately forecasting future returns can be difficult.



## Overview & Scrutiny Committee

### Briefing Paper

Report of: Rhiannon Foxall, Business Improvement Officer  
Date: Thursday 12<sup>th</sup> September 2013  
Open

### How Are We Doing? Performance Update

#### 1. Summary

- 1.1 To update Members on the performance of the Council for Quarter 1 (from 1st April 2013 to 30<sup>th</sup> June 2013).

#### 2. Background

- 2.1 Performance management is instrumental in all council activities as it helps us to keep track of how well we are performing and enables any potential issues to be identified at an early stage so remedial action can be taken. It also informs our decision making processes which underpin the delivery of our Corporate Plan 2011-14 (*Engage, Consult, Deliver*).
- 2.2 The Council has a number of processes in place to monitor our performance including:
- Corporate Plan Actions
  - Corporate Risks and associated actions
  - Leading Measures
  - Lagging Measures

#### 3. Progress

- 3.1 Appendix 1 details the current progress with each of our purposes:
- [Keep my place safe and looking good](#) (Place)
  - [Ensure that there are good things for me to do, see and visit](#) (Place)
  - [Improve my local area](#) (Place)
  - [Help me find somewhere to live in my local area](#) (Housing)
  - [Making good development happen](#) (Planning)
  - [Support me to run a successful business](#) (Business)
  - [Provide me with information that I need](#) (People)
  - [Give me a voice](#) (People)
  - [Help me improve my health and well-being](#) (People)
  - [Help me with my financial situation](#) (People)
  - [Enabling others to do what they need to do](#) (Enabling)

**4. Key Achievements/Issues**

- 4.1 Any overdue items are listed in Appendix 1. However, for many of these, the delays have clear reasons and revised timescales are identified. At this stage, none of the projects seem significantly adrift or unlikely to be completed.
- 4.2 A key achievement to note is the continued increase in our numbers of followers on social media – both facebook and twitter. This supports our channel shift work and reflects our efforts in promoting different ways to contact the council.

**5. Options**

- 5.1 That the progress in performance for quarter 1 be noted.
- 5.2 That the Committee consider future reporting options. Performance has always been reported as performance overall or by exception (actions off tracks, PIs missing targets etc). The Committee may wish to consider only scrutinising one or two of our high level purposes at each quarterly meeting on order to make the information more manageable.

**6. Consultation**

- 6.1 Cabinet Member for Community Well-Being
- 6.2 Corporate Management Team

**7. Related Decisions**

- 7.1 None.

**8. Relevant Council Policies/Strategies**

- 8.1 Wyre Forest District Council Corporate Plan 2011 – 2014.
- 8.2 Wyre Forest Forward Programme of Projects 2013/14.

**9. Implications**

- 9.1 Resources: No direct implications from this report.
- 9.2 Equalities: No direct implications from this report.
- 9.3 Partnership working: No direct implications from this report.
- 9.4 Human Rights: No direct implications from this report.
- 9.5 E-Government: No direct implications from this report.

**10. Equality Impact Needs Assessment**

- 10.1 An equality impact assessment has been undertaken and it is considered that there are no discernible impacts on the nine protected characteristics as set out by the Equality Act 2010.

**11. Wards affected**

11.1 None.

**12. Appendices**

12.1 Appendix 1 – current progress with our purposes

**13. Background Papers**

Corporate Plan action information is available on the Council's Performance Management System, Covalent. Alternatively, reports can be requested from the Business Improvement Officer.






**Officer Contact Details:**

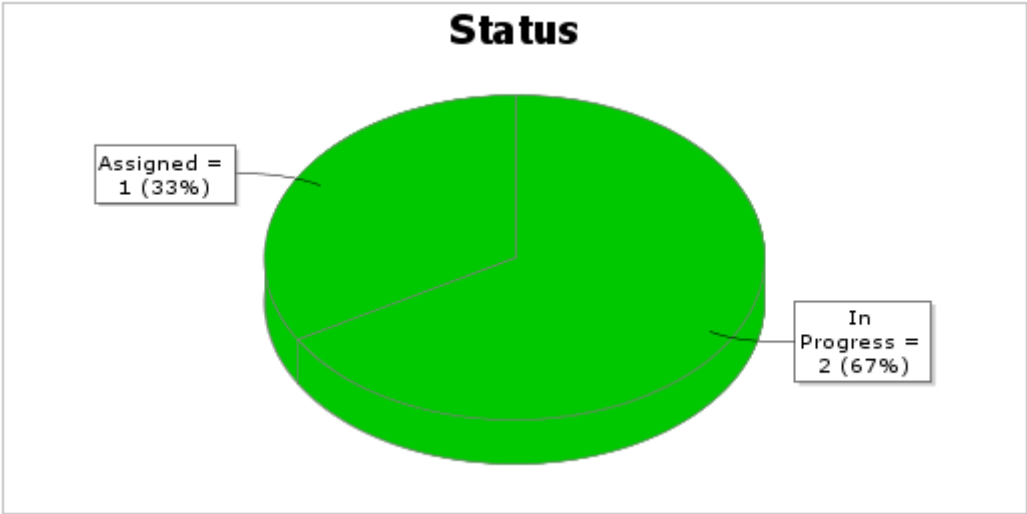
Name:	Rhiannon Foxall
Title:	Business Improvement Officer
Contact Number:	Ext. 2786
Email:	<a href="mailto:rhiannon.foxall@wyreforestdc.gov.uk">rhiannon.foxall@wyreforestdc.gov.uk</a>



# Keep my place safe and looking good



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed



31-Mar-2014                      Linda Collis                      LC: Reviewing available sites.                      27-Aug-2013

WFF 13/14 09

Route optimisation refuse collection

0%



Due Date	Managed By	Latest Note	Latest Note Date
31-Oct-2013		LC: Options for borders with Bromsgrove identified.	27-Aug-2013

WFF 13/14 29

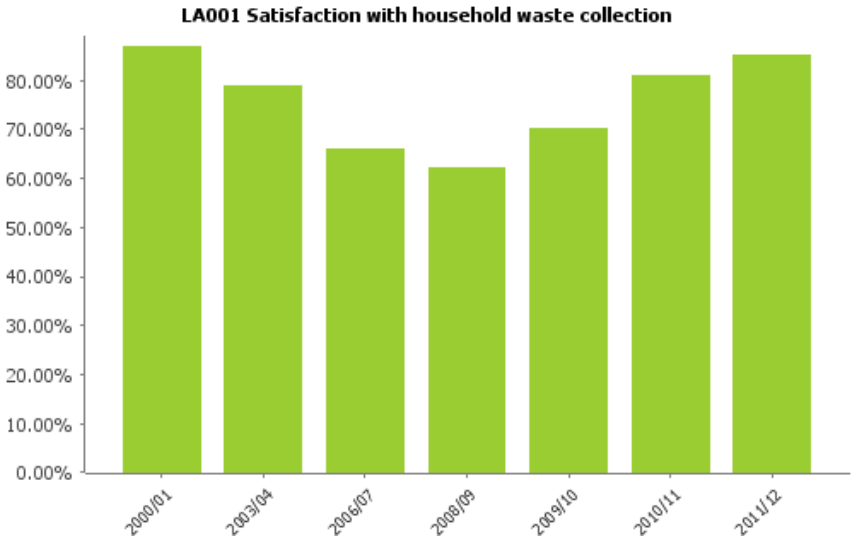
Keep My Place Safe and Looking Good

50%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Linda Collis	LC: Members briefing on 17th October to advise of changes. Projects reported in July update progressing and ongoing. Supervisors job descriptions updated and standardised.	27-Aug-2013

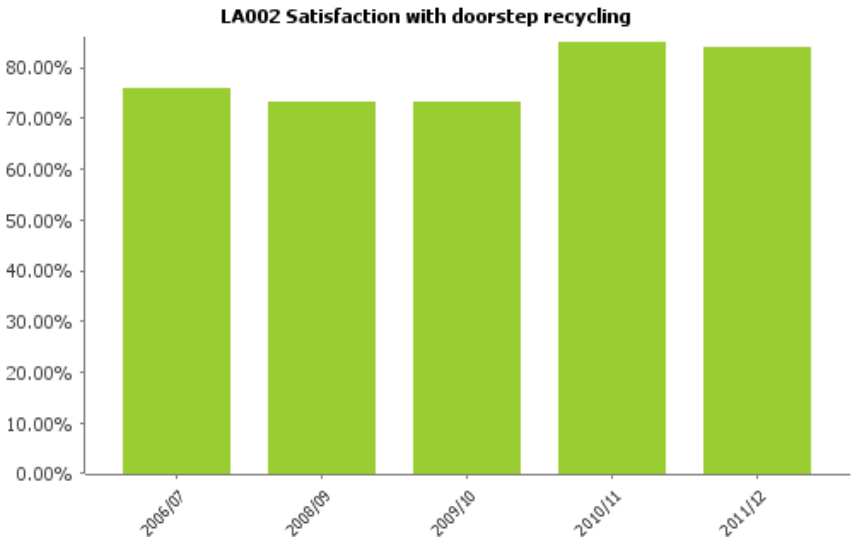
LA001 Satisfaction with household waste collection



Current Value 85.00%

Managed By Steve Brant

LA002 Satisfaction with doorstep recycling



Current Value 84.00%

Managed By \_\_\_\_\_

LA003 Satisfaction with street cleanliness

LA003 Satisfaction with street cleanliness

Current Value

Managed By Steve Brant

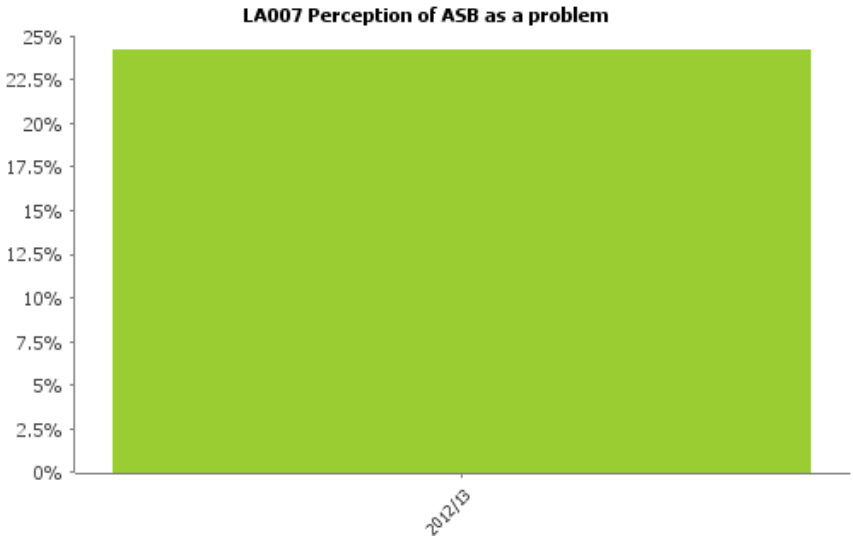
LA005 Satisfaction with parks

LA005 Satisfaction with parks

Current Value

Managed By Kay Higman

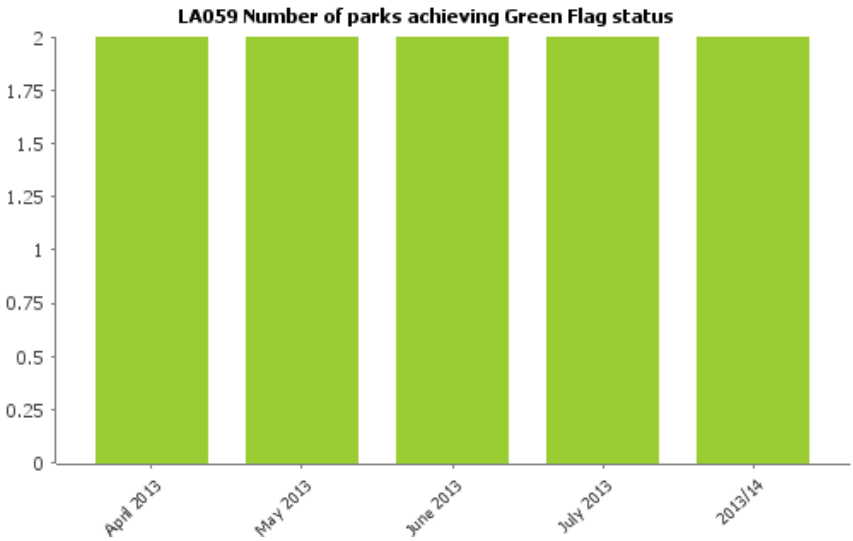
LA007 Perception of ASB as a problem



Current Value 24.2%

Managed By Kathryn Washington

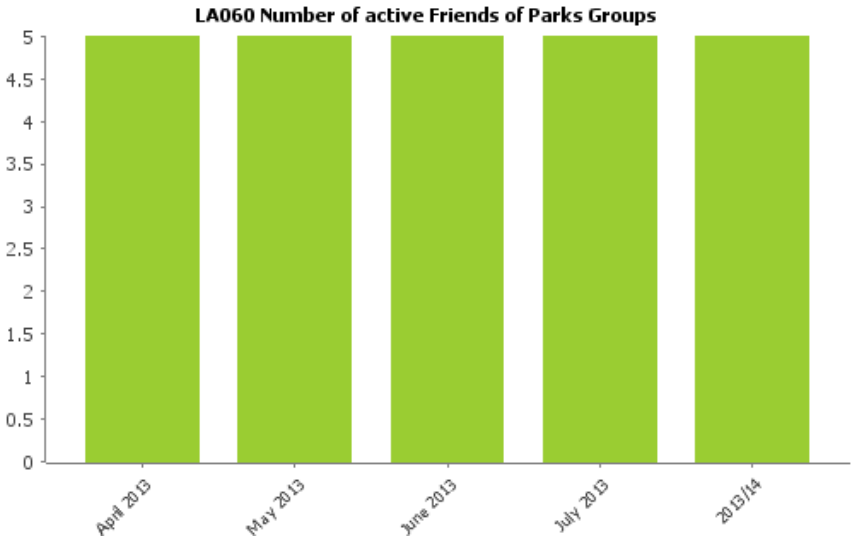
LA059 Number of parks achieving Green Flag status



Current Value 2

Managed By Kay Higman

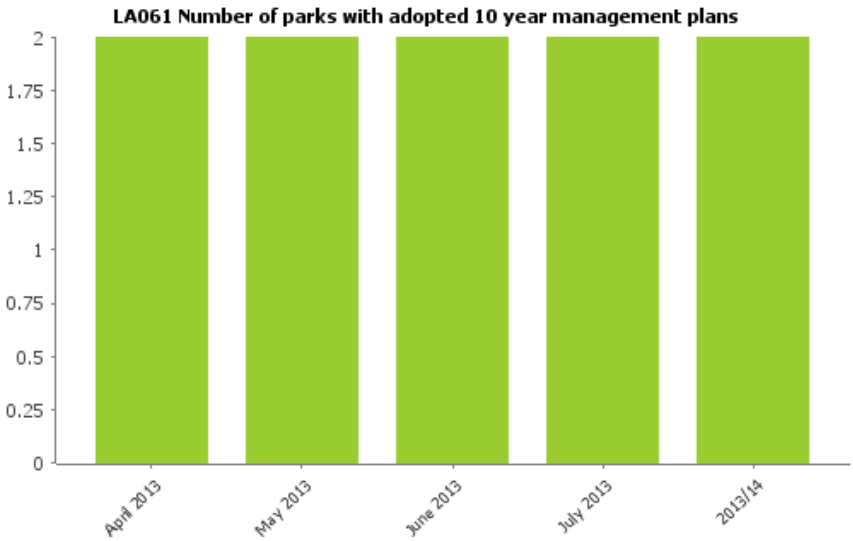
LA060 Number of active Friends of Parks Groups



Current Value 5

Managed By Kay Higman

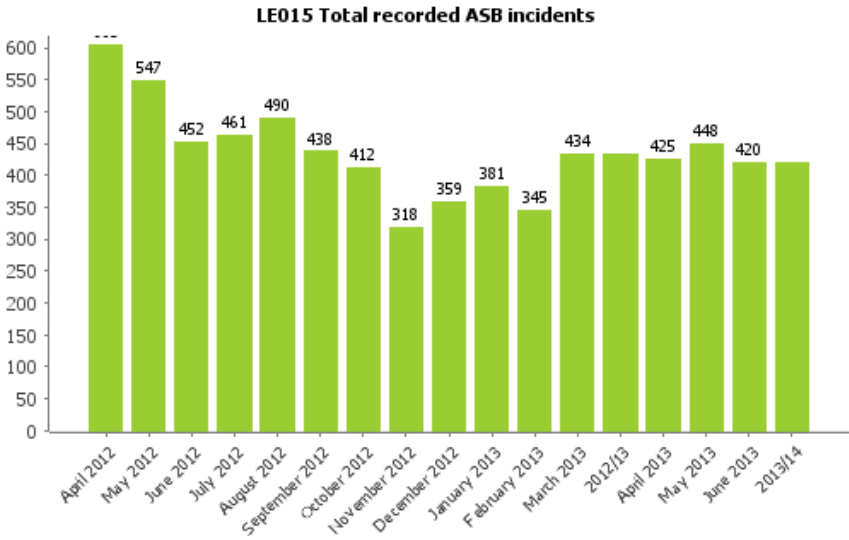
LA061 Number of parks with adopted 10 year management plans



Current Value 2

Managed By Kay Higman

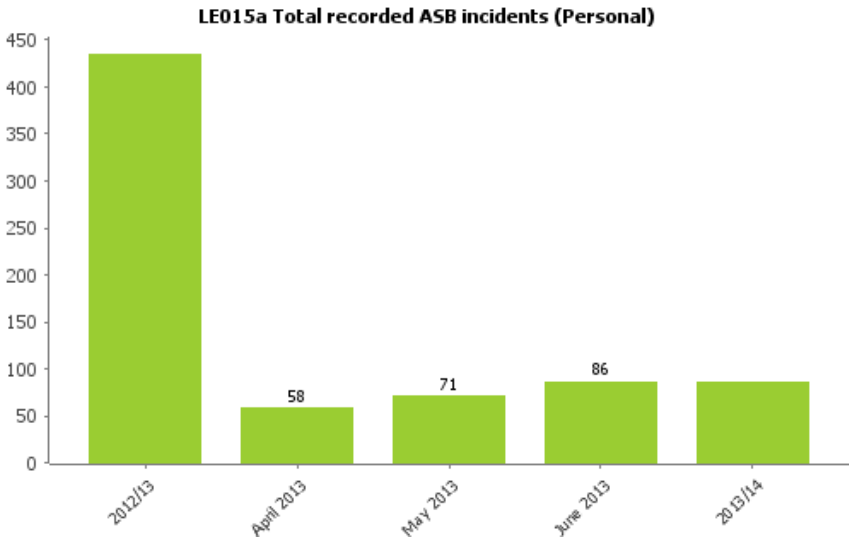
LE015 Total recorded ASB incidents



Current Value 420

Managed By Kathryn Washington

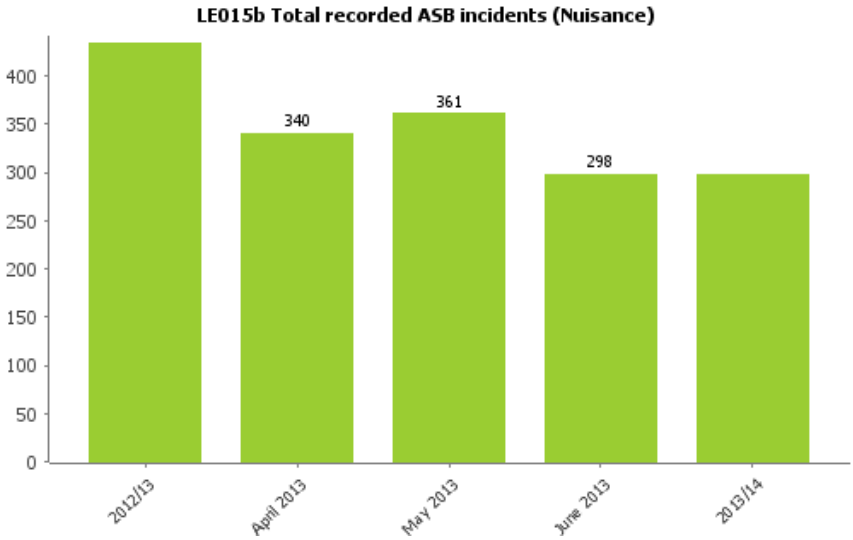
LE015 Total recorded ASB incidents  
a (Personal)



Current Value 86

Managed By Kathryn Washington

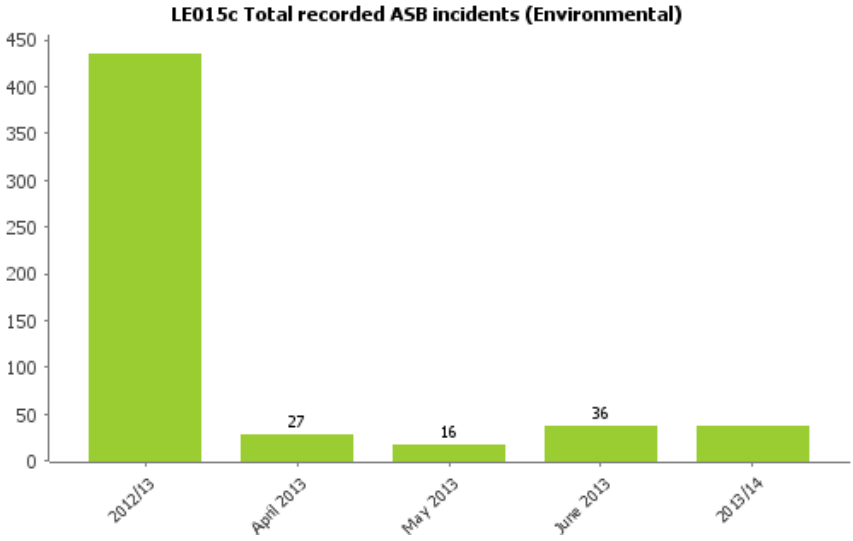
LE015 Total recorded ASB incidents  
b (Nuisance)



Current Value 298

Managed By Kathryn Washington

LE015 Total recorded ASB incidents  
c (Environmental)



Current Value 36

Managed By Kathryn Washington



LE085 Value demand across all channels for safe and looking good service areas



Current Value 65%

Managed By Lucy Wright

LE086 Cost of household waste collection BV086



Current Value £38.97

Managed By \_\_\_\_\_

LE087 Percentage of recycling

LE087 Percentage of recycling

Current Value

Managed By Steve Brant

Listed below are primary actions for other purposes but also impact on this purpose






WFF 13/14 17      State of the Area – Apprenticeships

WFF 13/14 18      State of the Area – Incubator Units

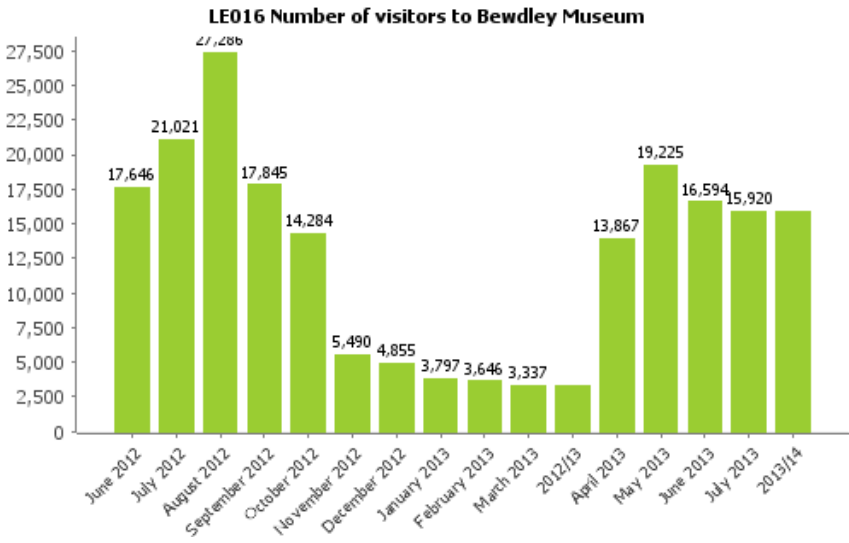
Listed below are primary measures for other purposes but also impact on this purpose

# Ensure that there are good things for me to do, see and visit



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed

LE016 Number of visitors to Bewdley Museum



Current Value

15,920

Managed By

Kay Higman

Listed below are primary actions for other purposes but also impact on this purpose






WFF 13/14 07                      New Leisure Centre

Listed below are primary measures for other purposes but also impact on this purpose

LA005	Satisfaction with parks
LA028	National survey on participation rates – Sport England
LA029	Percentage of people whose quality of life and sense of wellbeing has improved as a result of Cultural Activities
LA059	Number of parks achieving Green Flag status
LA060	Number of active Friends of Parks Groups
LA061	Number of parks with adopted 10 year management plans
LE033	Participation rates in sport/leisure facilities
LE033a	Participation rates in sport/leisure facilities – Glades
LE033b	Participation rates in sport/leisure facilities – Stourport
LE033c	Participation rates in sport/leisure facilities – Bewdley

# Improve my local area



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Linda Collis	Discussions with Victoria Carpets Ltd regarding the purchase of the land are ongoing. When these have been concluded the next step will be to invite selected companies to tender for the contract to design and build, operate and maintain the leisure centre.	22-Aug-2013

Listed below are primary actions for other purposes but also impact on this purpose

WFF 13/14 20

Delivery of Hoobrook Link Road

Listed below are primary measures for other purposes but also impact on this purpose






**LA047** Amount of new/extended business/commercial floorspace built

**LA049** Percentage of dwellings completed compared to the annual expected figure

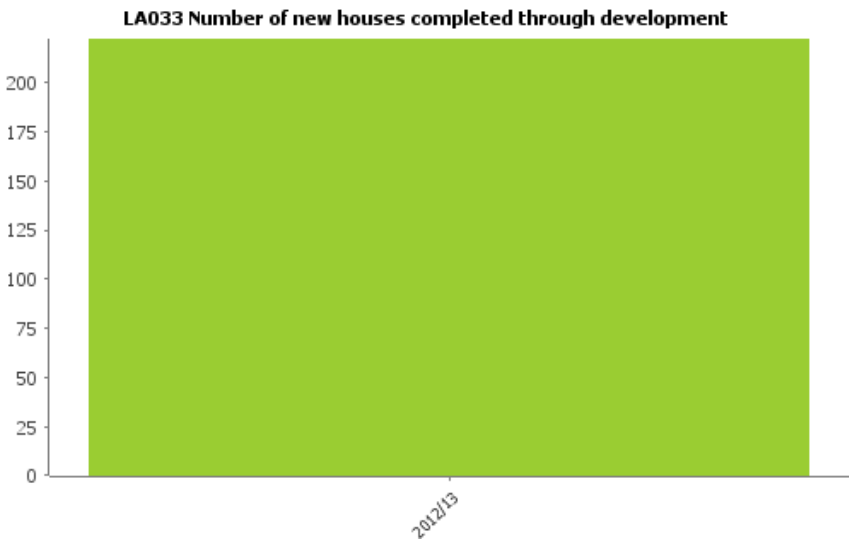
**LA050** Percentage of business floor space completed compared to the annual expected figure

# Help me find somewhere to live in my local area



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed

LA033 Number of new houses completed through development



Current Value 222

Managed By Rebecca Mayman

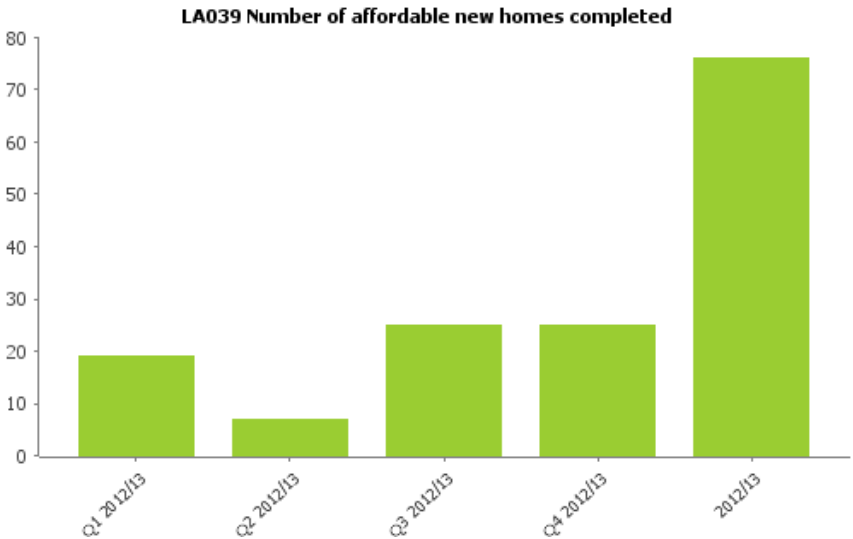
LA038 Average house price



Current Value £173,675.00

Managed By Kate Bailey

LA039 Number of affordable new homes completed

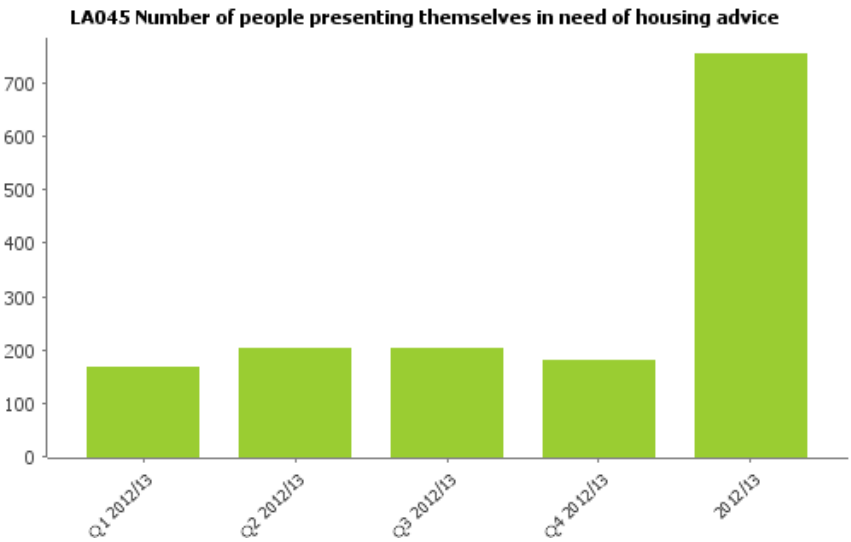


Current Value 25

Managed By Kate Bailey



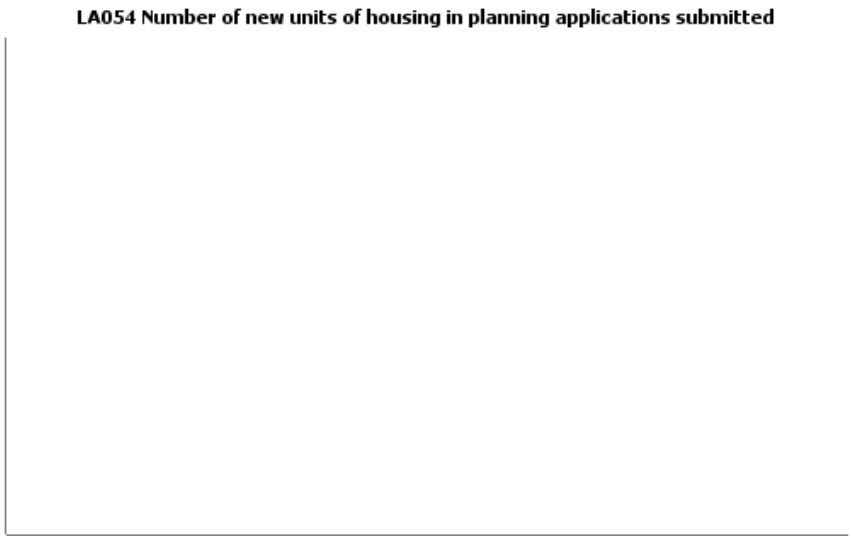
**LA045** Number of people presenting themselves in need of housing advice



Current Value 179

Managed By Kate Bailey

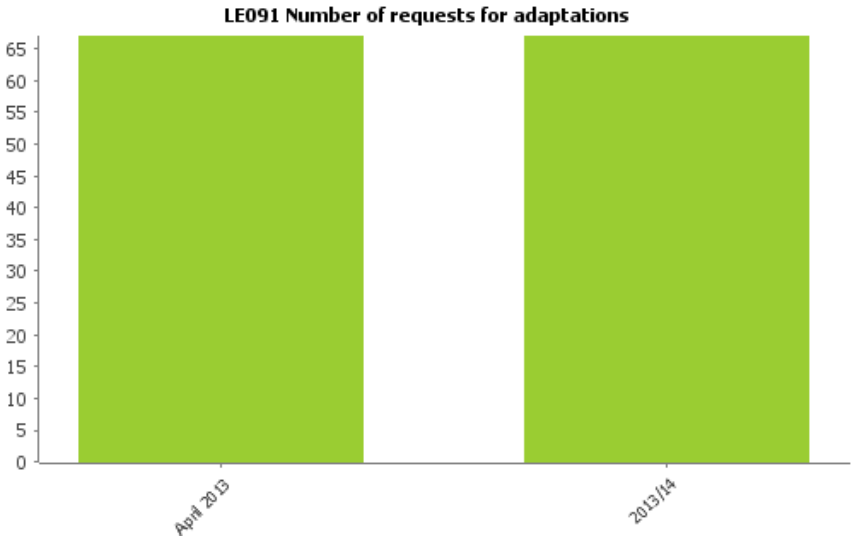
**LA054** Number of new units of housing in planning applications submitted



Current Value

Managed By Kate Bailey

LE091 Number of requests for adaptations

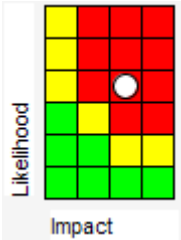


Current Value 67

Managed By Kate Bailey

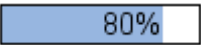
CORPRISK04

Unable to deliver good quality, affordable homes



RA13/14 05

To implement the approved investment in the Local Authority Mortgage Scheme (LAMs).



Action cancelled and replaced with new action to include Shared Ownership Model






RA13/14 05.1

To implement the approved investment in the Local Authority Mortgage Scheme (LAMs).



Rates continue to be monitored but differential remains too low to launch. Sector are working on the development of the shared ownership model but this is not yet signed off.



RA13/14 06	Continue to implement actions form the Housing Strategy	<div><div>100%</div></div>	Implementation of year 2/3 actions underway	
RA13/14 07	To assist a Council scrutiny of the delivery of housing to meet local needs.	<div><div>100%</div></div>	Implementation of HRP recommendations underway. Affordable housing SPD to LDF in Sept and then early engagement commences.	
RA13/14 08	To procure a new contract for the delivery of the Council's Homelessness, Housing Advice and Register Service.	<div><div>100%</div></div>	Pre Qualification Questionnaire and invitations to tender undertaken March/April 2013; tenders currently in preparation for submission by end May 2013; evaluation of tenders to begin June 2013.	






Listed below are primary actions for other purposes but also impact on this purpose

Listed below are primary measures for other purposes but also impact on this purpose

**LA044** Number of residents who experience a positive health outcome as a consequence of a housing improvement intervention

# Make good development happen



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed



WFF 13/14 15

Bewdley Medical Centre

66%



Due Date	Managed By	Latest Note	Latest Note Date
----------	------------	-------------	------------------

30-Nov-2013 Mike Parker Planning application submitted but yet to be determined – further and more detailed information required on parking provision and temporary parking during construction. 28-Aug-2013

WFF 13/14 16

Crown House

50%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Mike Parker	Hendersons have instigated discussions with Trilliam regarding vacating Crown House. Pre-planning application meetings underway and planning application expected in next few months.	28-Aug-2013

WFF 13/14 20

Delivery of Hoobrook Link Road

20%



Due Date	Managed By	Latest Note	Latest Note Date
15-Mar-2014	Mike Parker	Successful bid for pinch point funding (£5m) for Hoo Brook Link Road; bids also made to both LEPs for remainder through Local Major Transport Scheme funding. WCC committed to design and delivery of road; planning application expected shortly.	28-Aug-2013

WFF 13/14 01

Systems Thinking – Make Good Development Happen

58%



Due Date	Managed By	Latest Note	Latest Note Date
----------	------------	-------------	------------------

31-Mar-2014

Mike Parker

EPP DMT meeting 10th July for discussion regarding restructuring. DC now engaged with Wolverley and Cookley Parish Council on pilot to streamline their consultation process.

22-Aug-2013

**LA049** Percentage of dwellings completed compared to the annual expected figure

**LA049 Percentage of dwellings completed compared to the annual expected figure**

Current Value

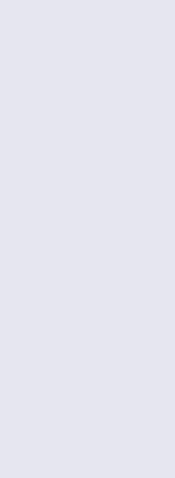
Managed By Rebecca Mayman

**LA050** Percentage of business floor space completed compared to the annual expected figure

**LA050 Percentage of business floor space completed compared to the annual expected figure**



Current Value



Managed By Rebecca Mayman

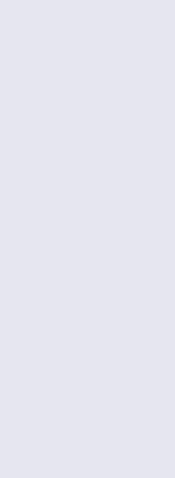


**LA051** Upper control limit (Major)

**LA051 Upper control limit (Major)**



Current Value



Managed By John Baggott



LA052 Upper control limit (Minor)

LA052 Upper control limit (Minor)

Current Value

Managed By John Baggott

LA053 Upper control limit (Other)

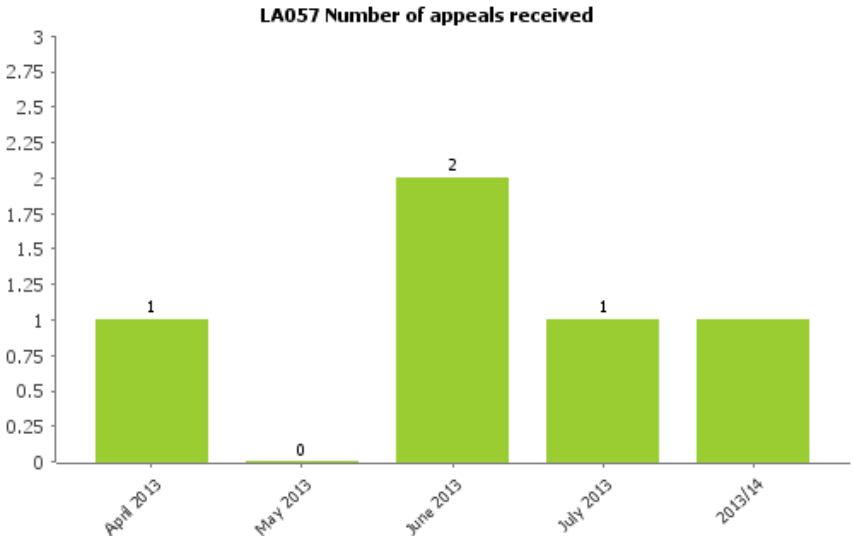
LA053 Upper control limit (Other)

Current Value

Managed By John Baggott



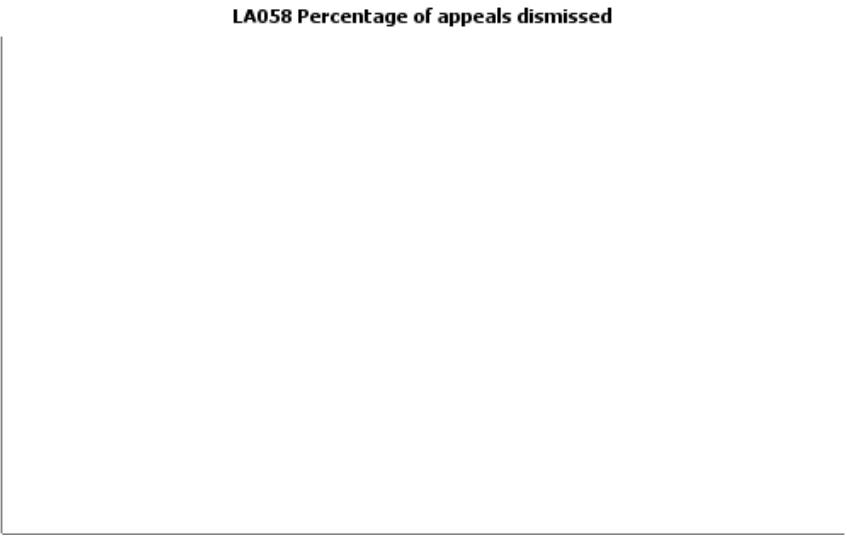
LA057 Number of appeals received



Current Value 1

Managed By John Baggott

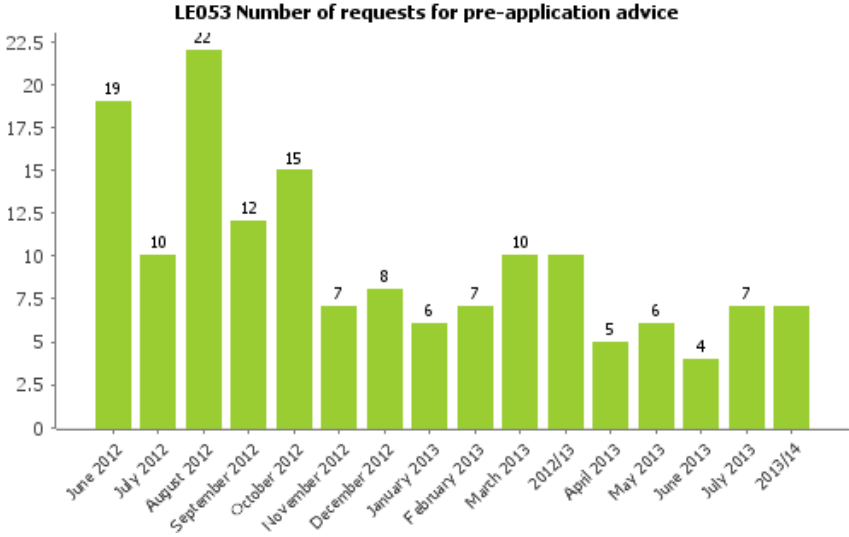
LA058 Percentage of appeals dismissed



Current Value

Managed By John Baggott

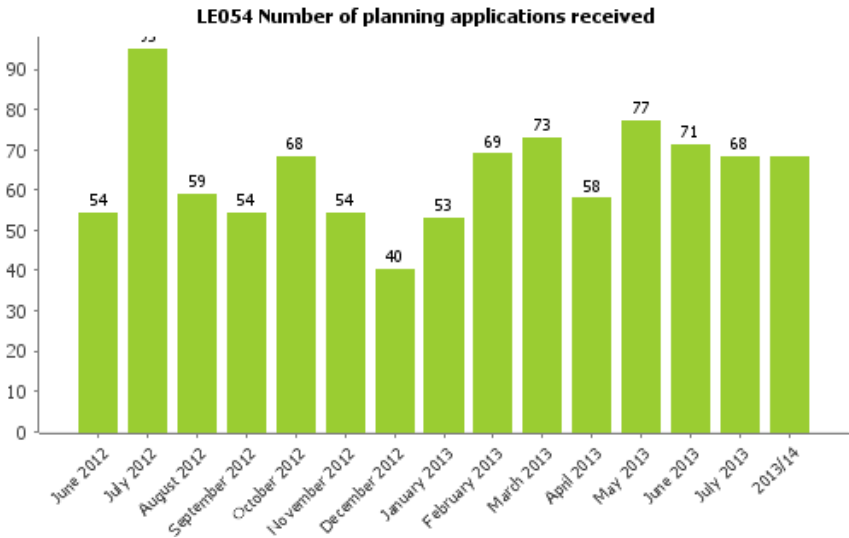
LE053 Number of requests for pre-application advice



Current Value 7

Managed By John Baggott

LE054 Number of planning applications received

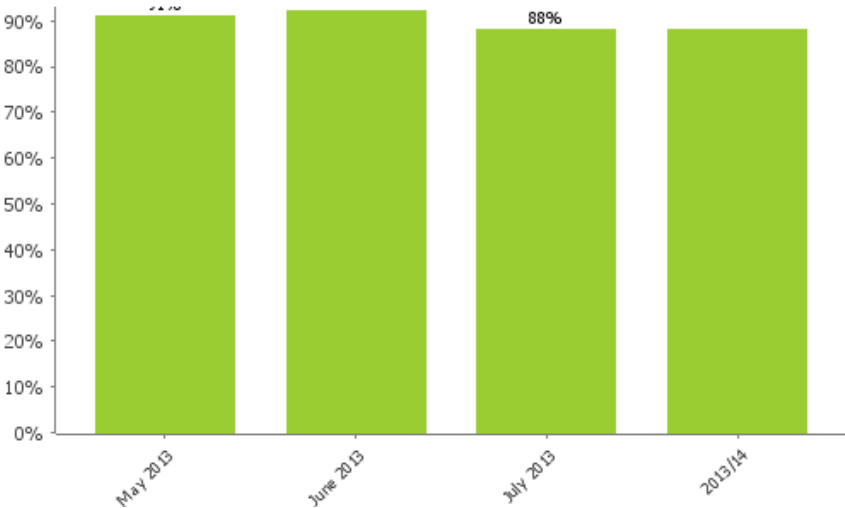


Current Value 68

Managed By John Baggott

**LE065** Percentage of applications that at point of receipt are valid and can be approved

**LE065 Percentage of applications that at point of receipt are valid and can be approved**

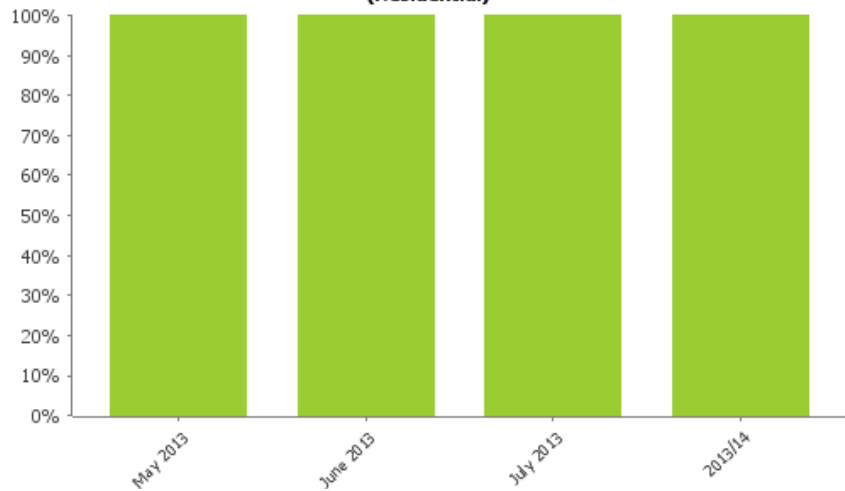


Current Value 88%

Managed By John Baggott

**LE065a** Percentage of applications that at point of receipt are valid and can be approved (Residential)

**LE065a Percentage of applications that at point of receipt are valid and can be approved (Residential)**



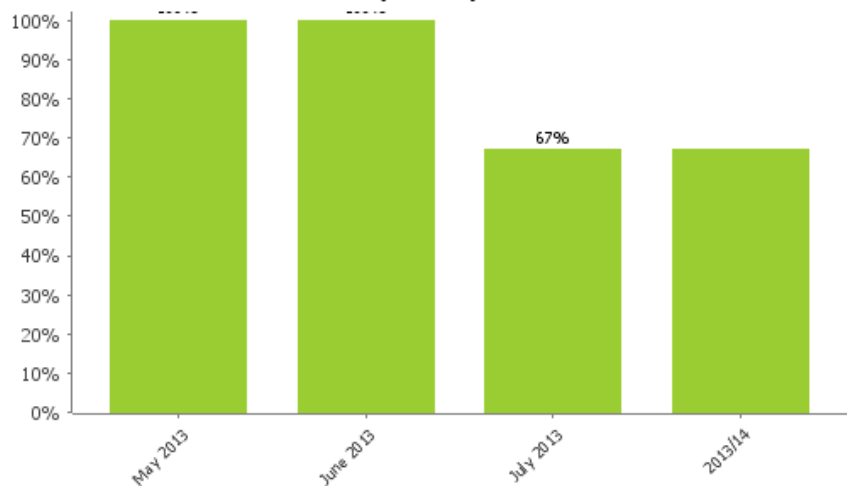
Current Value 100%

Managed By John Baggott

**LE065** Percentage of applications that at point of receipt are valid and can be approved (Business)

**b**

**LE065b Percentage of applications that at point of receipt are valid and can be approved (Business)**



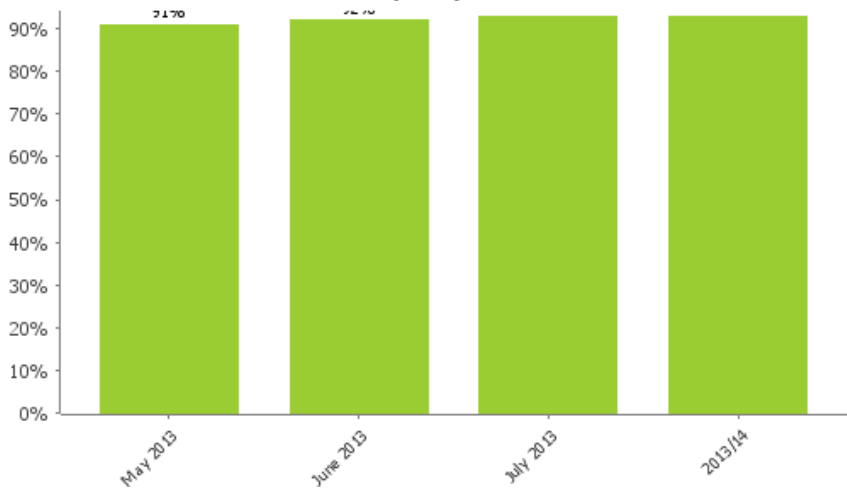
Current Value 67%

Managed By John Baggott

**LE065** Percentage of applications that at point of receipt are valid and can be approved (Other)

**c**

**LE065c Percentage of applications that at point of receipt are valid and can be approved (Other)**



Current Value 93%

Managed By John Baggott

**LE066** Percentage of applications that at point of receipt are valid and capable of being approved that are approved

**LE066 Percentage of applications that at point of receipt are valid and capable of being approved that are approved**

Current Value

Managed By John Baggott

**LE066 a** Percentage of applications that at point of receipt are valid and capable of being approved that are approved (Residential)

**LE066a Percentage of applications that at point of receipt are valid and capable of being approved that are approved (Residential)**

Current Value

Managed By John Baggott

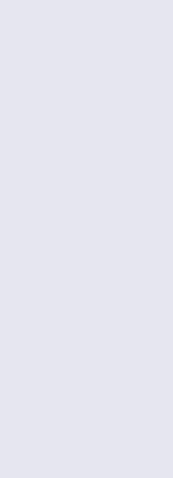
**LE066** Percentage of applications that at point of receipt are valid and capable of being approved that are approved (Business)

**b**

**LE066b** Percentage of applications that at point of receipt are valid and capable of being approved that are approved (Business)



Current Value



Managed By John Baggott



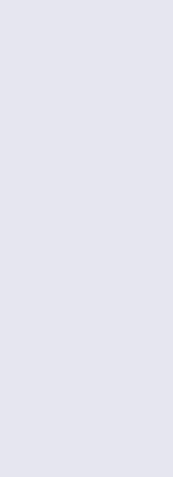
**LE066** Percentage of applications that at point of receipt are valid and capable of being approved that are approved (Other)

**c**

**LE066c** Percentage of applications that at point of receipt are valid and capable of being approved that are approved (Other)



Current Value



Managed By John Baggott

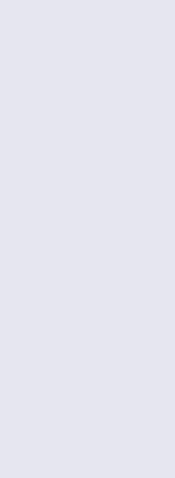


**LE068** Percentage of applications that are dealt with within the upper limit of the end to end times

**LE068** Percentage of applications that are dealt with within the upper limit of the end to end times



Current Value



Managed By John Baggott

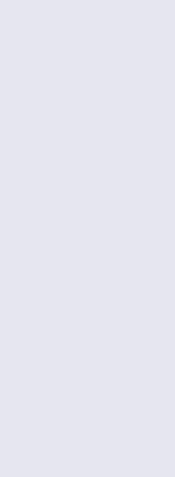


**LE068 a** Percentage of applications that are dealt with within the upper limit of the end to end times (Major)

**LE068a** Percentage of applications that are dealt with within the upper limit of the end to end times (Major)



Current Value



Managed By John Baggott



**LE068 b** Percentage of applications that are dealt with within the upper limit of the end to end times (Minor)

**LE068b** Percentage of applications that are dealt with within the upper limit of the end to end times (Minor)



Current Value

Managed By John Baggott

**LE068 c** Percentage of applications that are dealt with within the upper limit of the end to end times (Other)

**LE068c** Percentage of applications that are dealt with within the upper limit of the end to end times (Other)

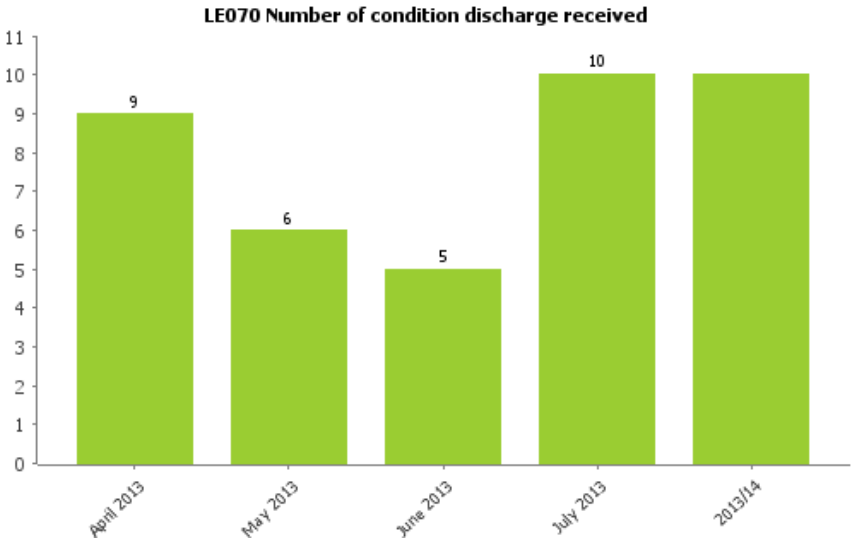


Current Value

Managed By John Baggott



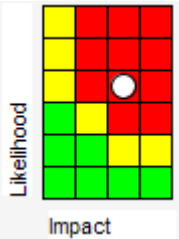
LE070 Number of condition discharge received



Current Value 10

Managed By John Baggott

CORPRISK04 Unable to deliver good quality, affordable homes



RA13/14 05 To implement the approved investment in the Local Authority Mortgage Scheme (LAMs). 80%




Action cancelled and replaced with new action to include Shared Ownership Model



RA13/14 05.1 To implement the approved investment in the Local Authority Mortgage Scheme (LAMs). 40%

Rates continue to be monitored but differential remains too low to launch. Sector are working on the development of the shared ownership model but this is not yet signed off.



RA13/14 06	Continue to implement actions form the Housing Strategy	<div><div>100%</div></div>	Implementation of year 2/3 actions underway	
RA13/14 07	To assist a Council scrutiny of the delivery of housing to meet local needs.	<div><div>100%</div></div>	Implementation of HRP recommendations underway. Affordable housing SPD to LDF in Sept and then early engagement commences.	
RA13/14 08	To procure a new contract for the delivery of the Council's Homelessness, Housing Advice and Register Service.	<div><div>100%</div></div>	Pre Qualification Questionnaire and invitations to tender undertaken March/April 2013; tenders currently in preparation for submission by end May 2013; evaluation of tenders to begin June 2013.	






Listed below are primary actions for other purposes but also impact on this purpose

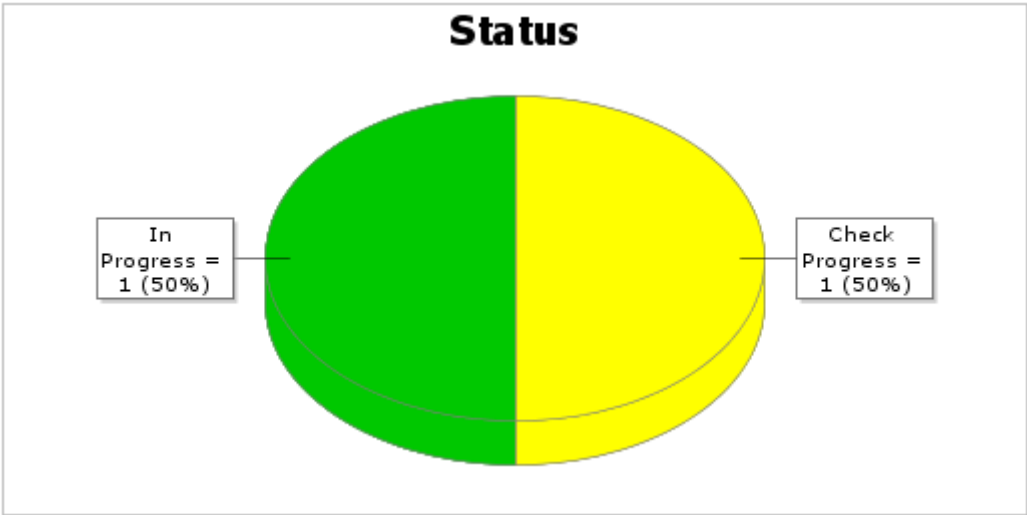
Listed below are primary measures for other purposes but also impact on this purpose

LA034	Number of new commercial floor space completed through development
LA039	Number of affordable new homes completed

# Support me to run a successful business



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed



15-Mar-2014	Mike Parker	Second year of apprenticeship programme with Kidderminster College implemented and well received with good take up of £50,000 grant support to employers.	28-Aug-2013
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WFF 13/14 18

State of the Area – Incubator Units

50%

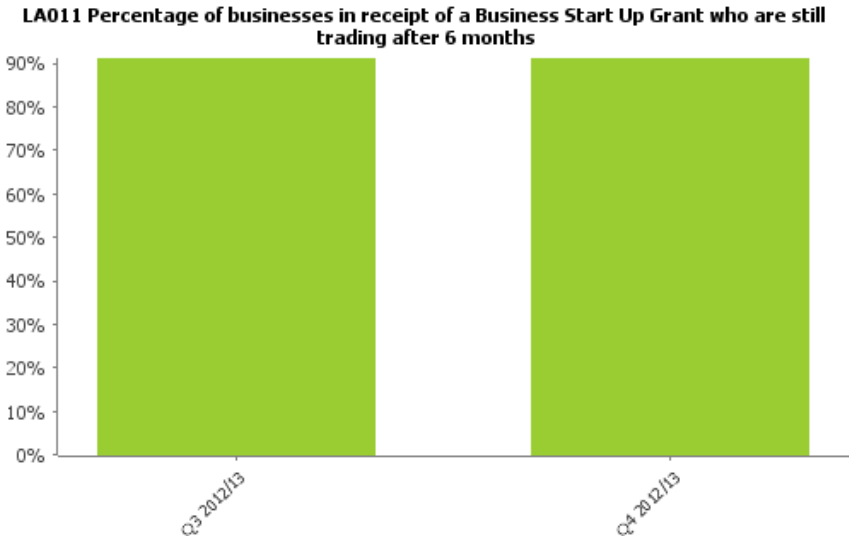


Due Date	Managed By	Latest Note	Latest Note Date
30-Sep-2013	Mike Parker	Leasing of new industrial unit for business incubator conversion expected to be completed early September; conversion anticipated by end of October with occupation following. Policy and principles for leasing units has been agreed by Cabinet Review Group.	28-Aug-2013

LA010 Total value of start up grants to businesses provided



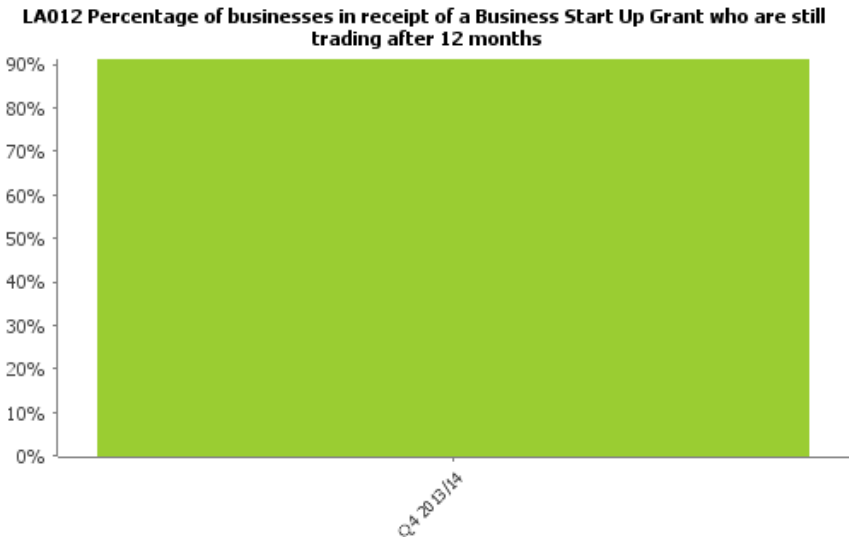
**LA011** Percentage of businesses in receipt of a Business Start Up Grant who are still trading after 6 months



Current Value 91%

Managed By Mike Parker

**LA012** Percentage of businesses in receipt of a Business Start Up Grant who are still trading after 12 months



Current Value 91%

Managed By Mike Parker

**LA013** Percentage of businesses in receipt of a Business Start Up Grant who are still trading after 18 months

**LA013 Percentage of businesses in receipt of a Business Start Up Grant who are still trading after 18 months**



Current Value

Managed By Mike Parker

**LA014** Total value of booster grants to businesses provided

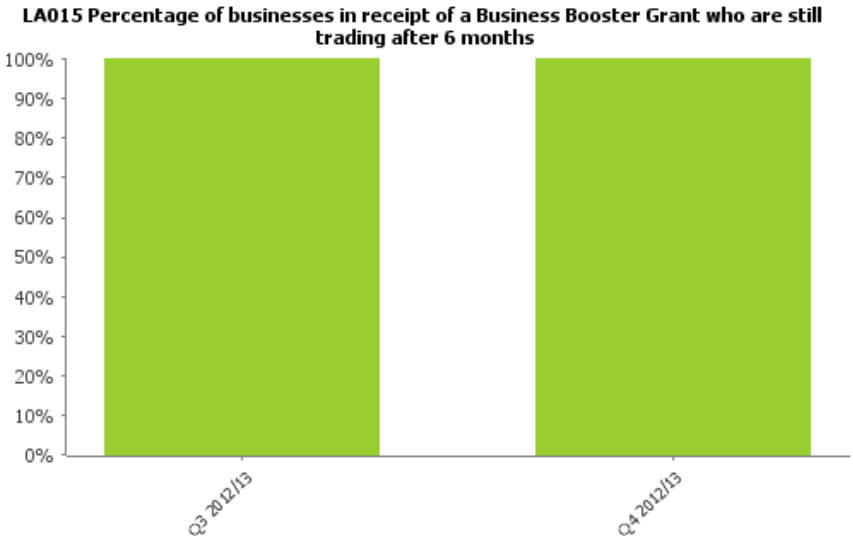
**LA014 Total value of booster grants to businesses provided**



Current Value

Managed By Mike Parker

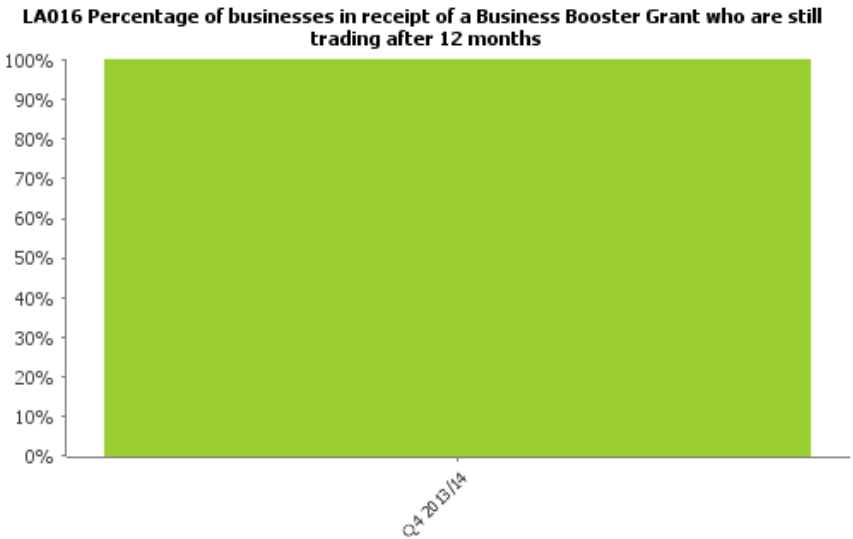
**LA015** Percentage of businesses in receipt of a Business Booster Grant who are still trading after 6 months



Current Value 100%

Managed By Mike Parker

**LA016** Percentage of businesses in receipt of a Business Booster Grant who are still trading after 12 months

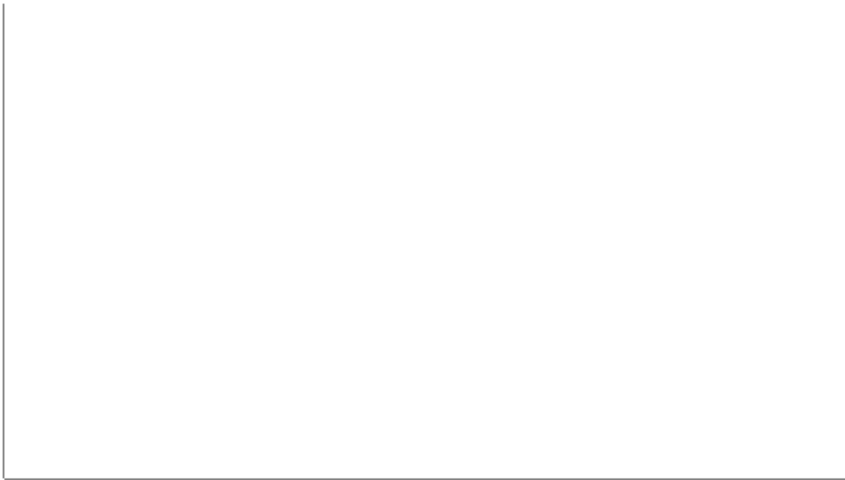


Current Value 100%

Managed By Mike Parker

**LA017** Percentage of businesses in receipt of a Business Booster Grant who are still trading after 18 months

**LA017 Percentage of businesses in receipt of a Business Booster Grant who are still trading after 18 months**



Current Value

Managed By Mike Parker

**LA034** Number of new commercial floor space completed through development

**LA034 Number of new commercial floor space completed through development**



Current Value 5,793

Managed By Rebecca Mayman



**LA047** Amount of new/extended  
business/commercial floorspace built

**LA047** Amount of new/extended business/commercial floorspace built

Current Value

Managed By Dan Boden

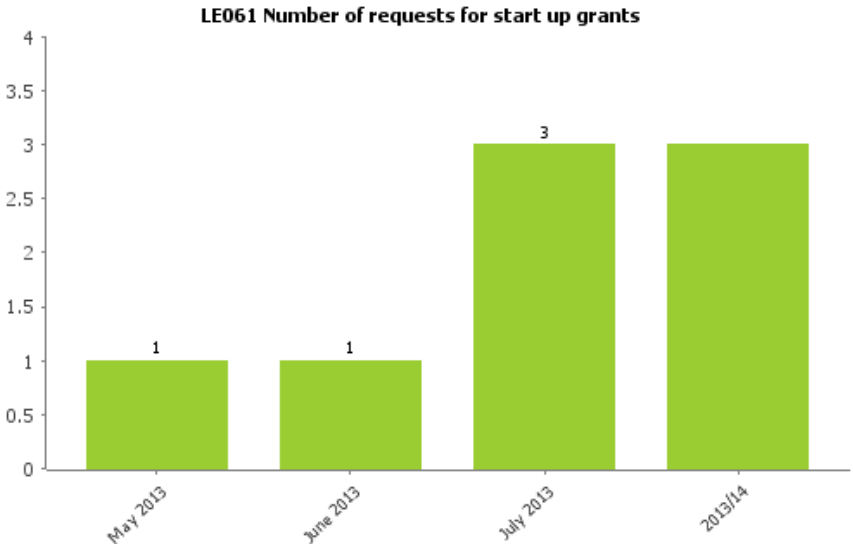
**LA048** Amount of new/extended  
business/commercial floorspace built  
as a result of the LDO

**LA048** Amount of new/extended business/commercial floorspace built as a result of the  
LDO

Current Value

Managed By Dan Boden

LE061 Number of requests for start up grants



Current Value 3

Managed By Dan Boden

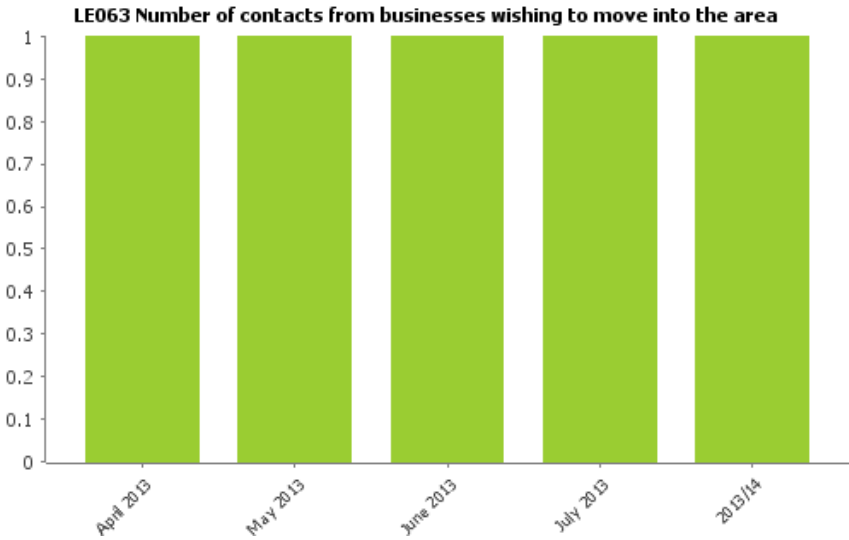
LE062 Number of requests for booster grants



Current Value 1

Managed By Dan Boden

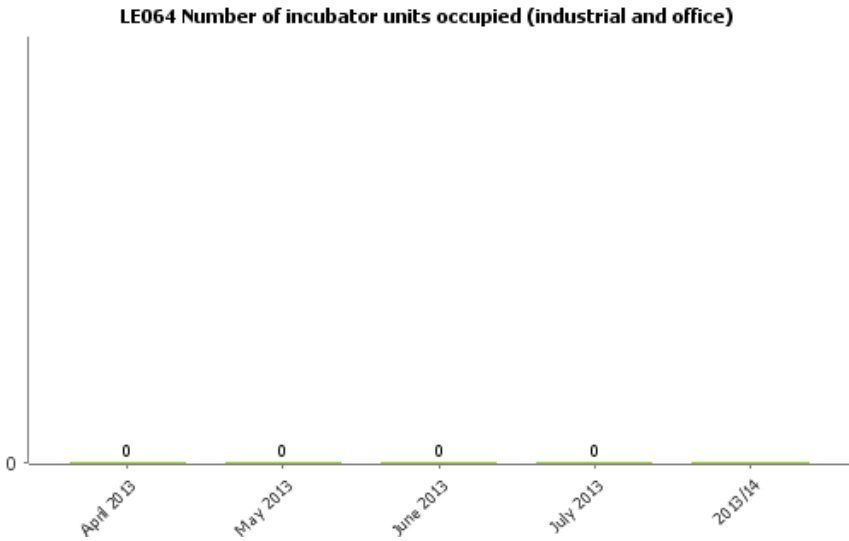
**LE063** Number of contacts from businesses wishing to move into the area



Current Value 1

Managed By Dan Boden

**LE064** Number of incubator units occupied (industrial and office)



Current Value 0

Managed By Dan Boden






Listed below are primary actions for other purposes but also impact on this purpose

WFF 13/14 20

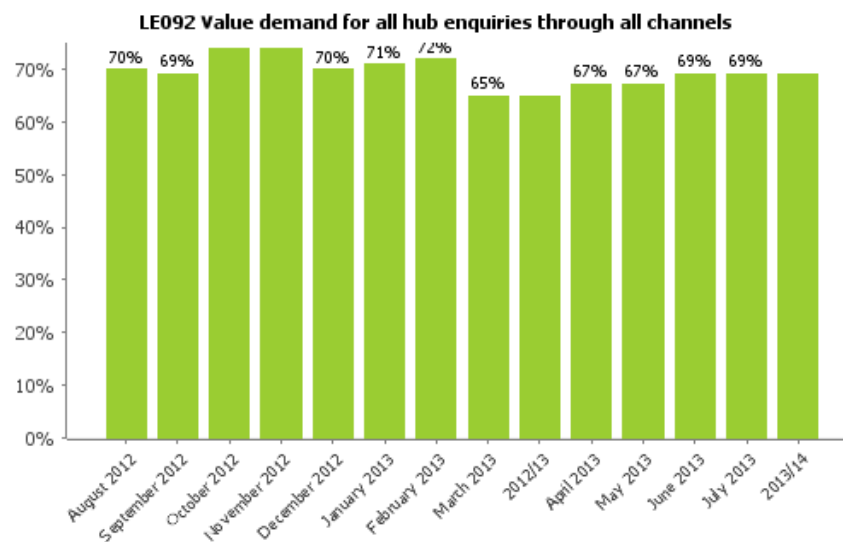
Delivery of Hoobrook Link Road

Listed below are primary measures for other purposes but also impact on this purpose

# Provide me with information that I need

Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed

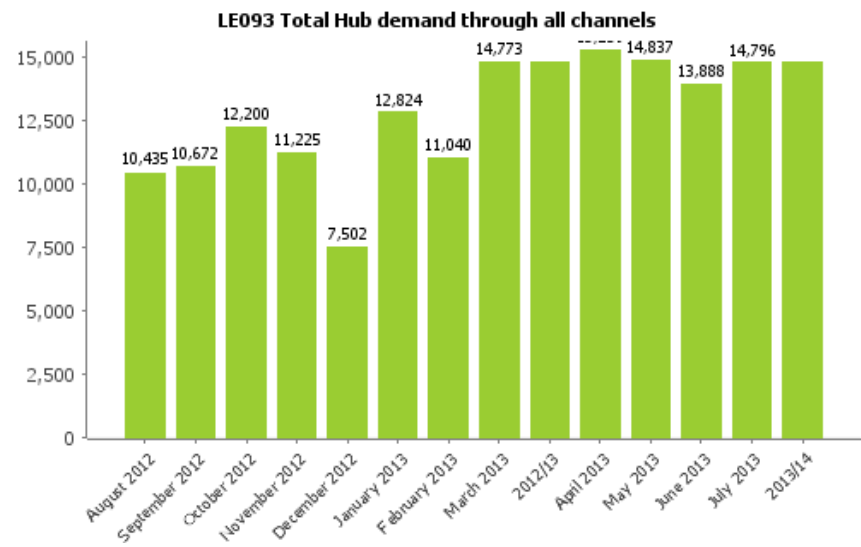
**LE092** Value demand for all hub enquiries through all channels



Current Value 69%

Managed By Lucy Wright

LE093 Total Hub demand through all channels



Current Value 14,796

Managed By Lucy Wright

Listed below are primary actions for other purposes but also impact on this purpose






Listed below are primary measures for other purposes but also impact on this purpose

LA045	Number of people presenting themselves in need of housing advice
LE030	Number of followers on social media
LE030a	Number of followers on Facebook
LE030b	Number of followers on Twitter

LE091      Number of requests for adaptations

# Give me a voice



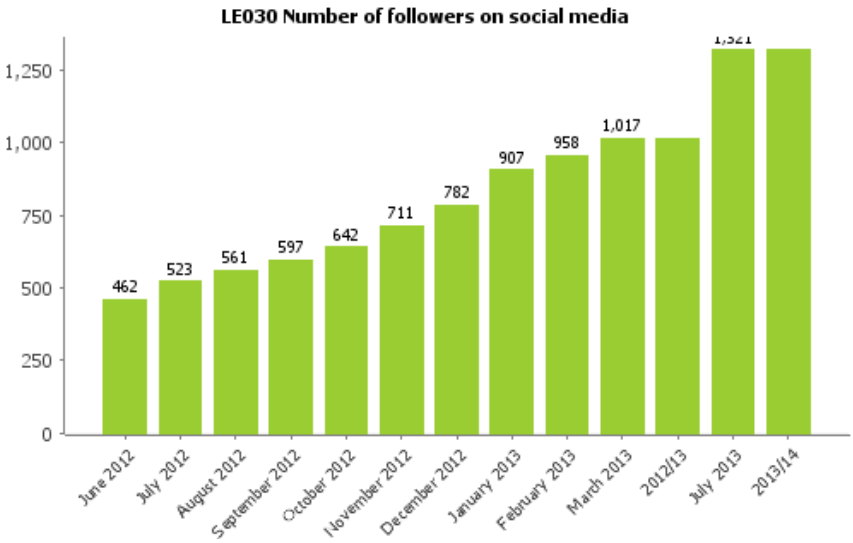
Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed





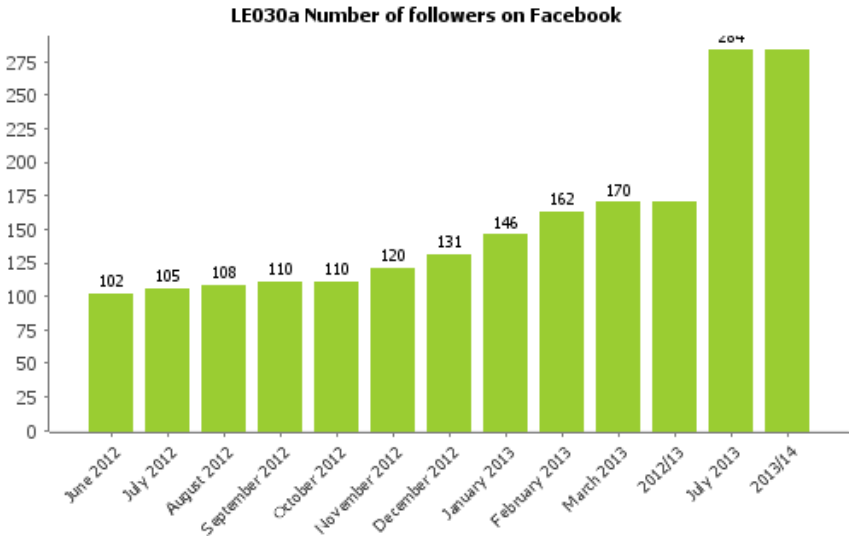
Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Caroline Newlands		

LE030 Number of followers on social media



Current Value	1,321	Managed By	Lucy Wright
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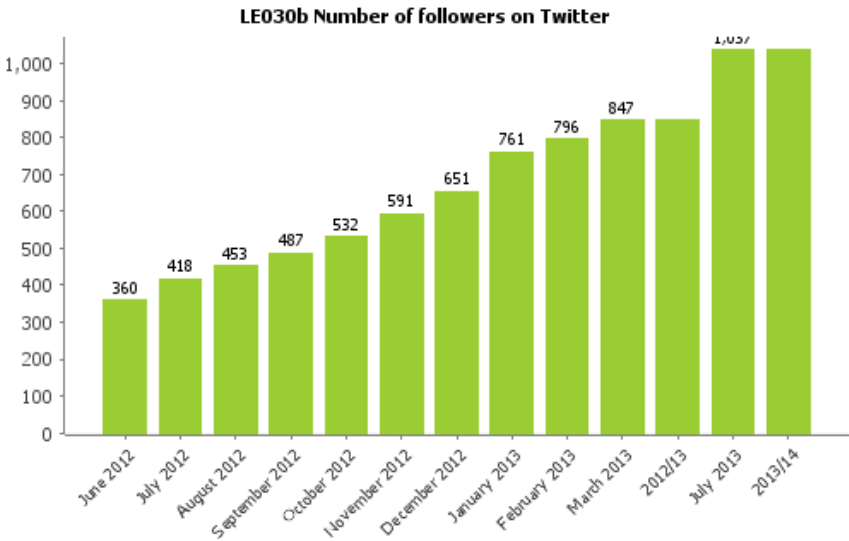
LE030 Number of followers on Facebook  
a



Current Value 284

Managed By Lucy Wright

LE030 Number of followers on Twitter  
b



Current Value 1,037






Managed By Lucy Wright

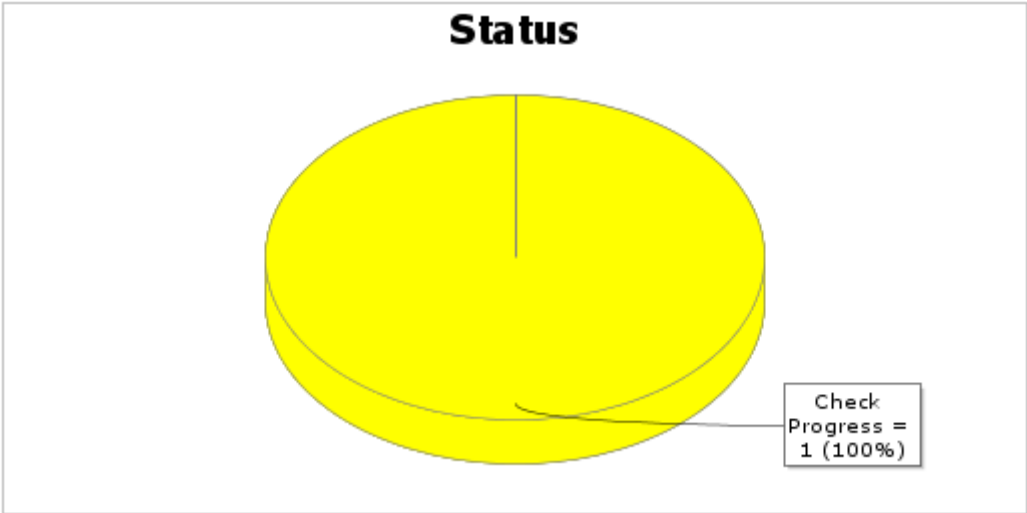
**Listed below are primary actions for other purposes but also impact on this purpose**

**Listed below are primary measures for other purposes but also impact on this purpose**

# Help me improve my health and well-being



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Linda Collis	Discussions with Victoria Carpets Ltd regarding the purchase of the land are ongoing. When these have been concluded the next step will be to invite selected companies to tender for the contract to design and build, operate and maintain the leisure centre.	22-Aug-2013

**LA028** National survey on participation rates  
– Sport England

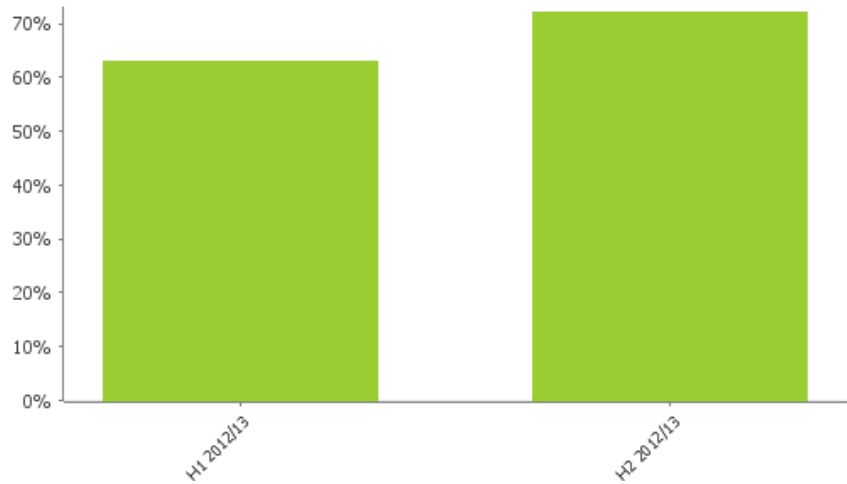
**LA028 National survey on participation rates - Sport England**

Current Value

Managed By Kay  
Higman

**LA029** Percentage of people whose quality of life and sense of wellbeing has improved as a result of Cultural Activities

**LA029 Percentage of people whose quality of life and sense of wellbeing has improved as a result of Cultural Activities**



Current Value 72%

Managed By Kay Higman

**LA030** Participation rates in attending Healthy Living events and training

**LA030 Participation rates in attending Healthy Living events and training**

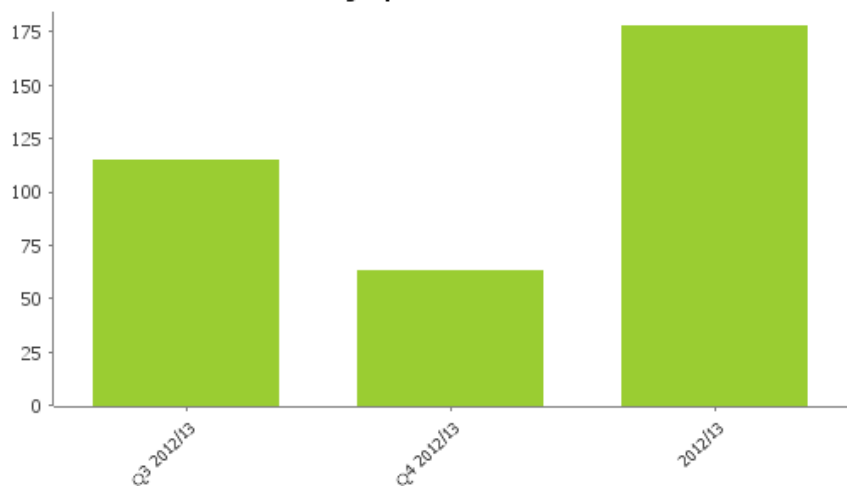


Current Value 350

Managed By Kate Bailey

**LA044** Number of residents who experience a positive health outcome as a consequence of a housing improvement intervention

**LA044 Number of residents who experience a positive health outcome as a consequence of a housing improvement intervention**

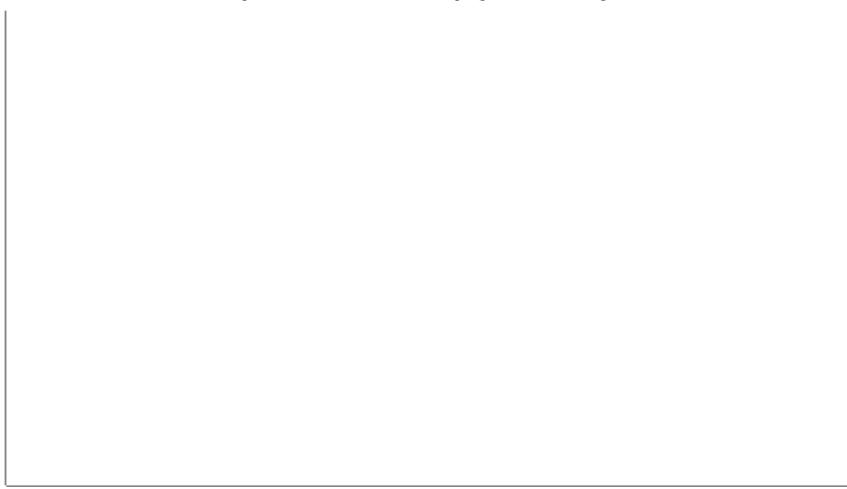


Current Value 63

Managed By Kate Bailey

**LA055** Percentage of viewpoint responses who said lack of facilities or cost of facilities prevented them from physical activity

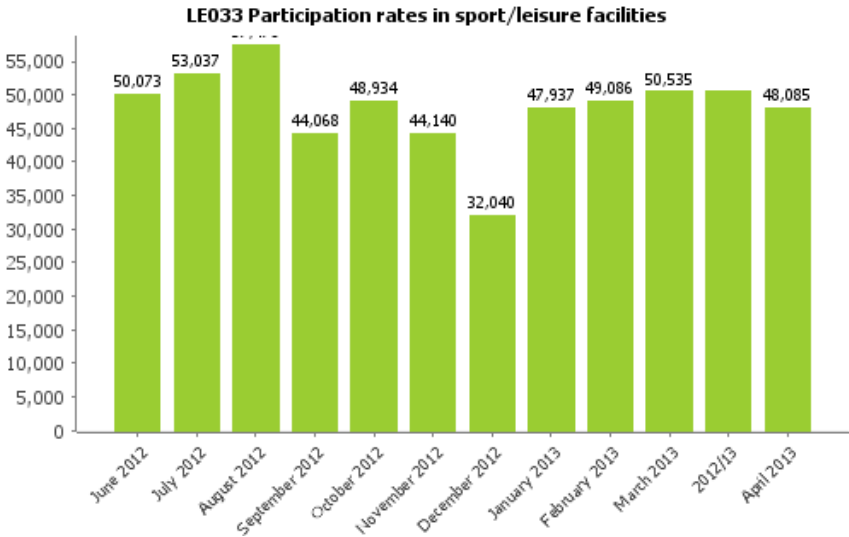
**LA055 Percentage of viewpoint responses who said lack of facilities or cost of facilities prevented them from physical activity**



Current Value

Managed By Kay Higman

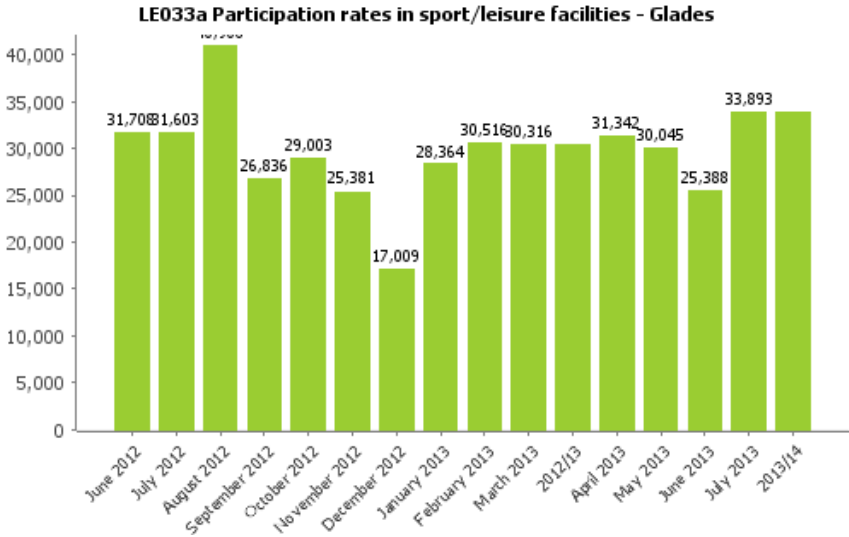
LE033 Participation rates in sport/leisure facilities



Current Value

Managed By Kay Higman

LE033a Participation rates in sport/leisure facilities – Glades

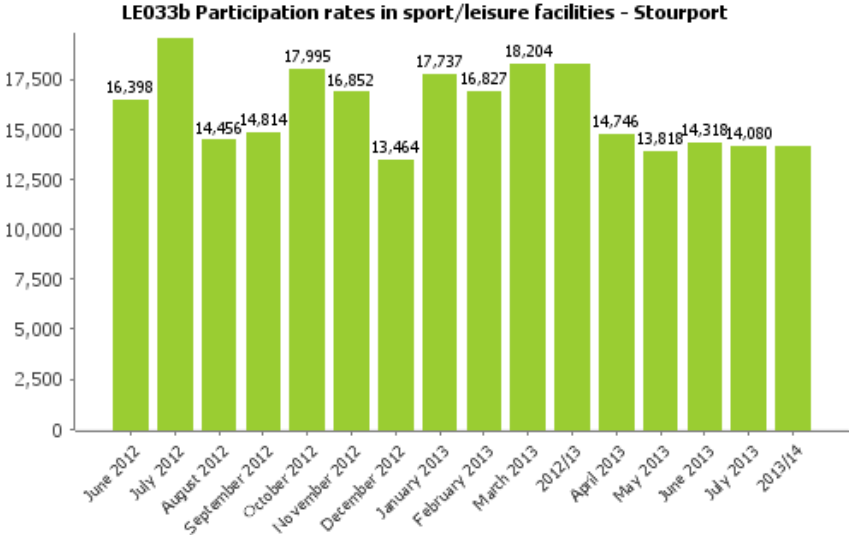


Current Value 33,893

Managed By Kay Higman



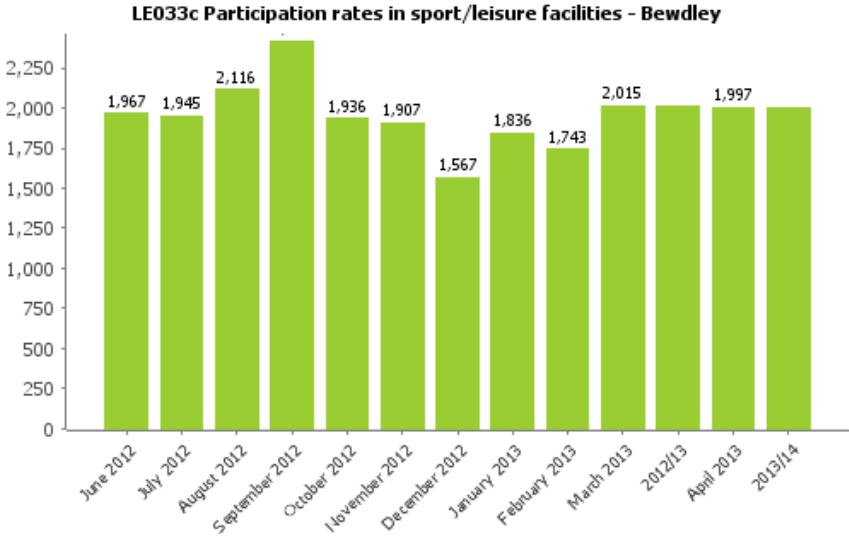
LE033 Participation rates in sport/leisure facilities – Stourport  
b



Current Value 14,080

Managed By Kay Higman

LE033 Participation rates in sport/leisure facilities – Bewdley  
c



Current Value 1,997

Managed By Kay Higman

Listed below are primary actions for other purposes but also impact on this purpose






WFF 13/14 15

Bewdley Medical Centre

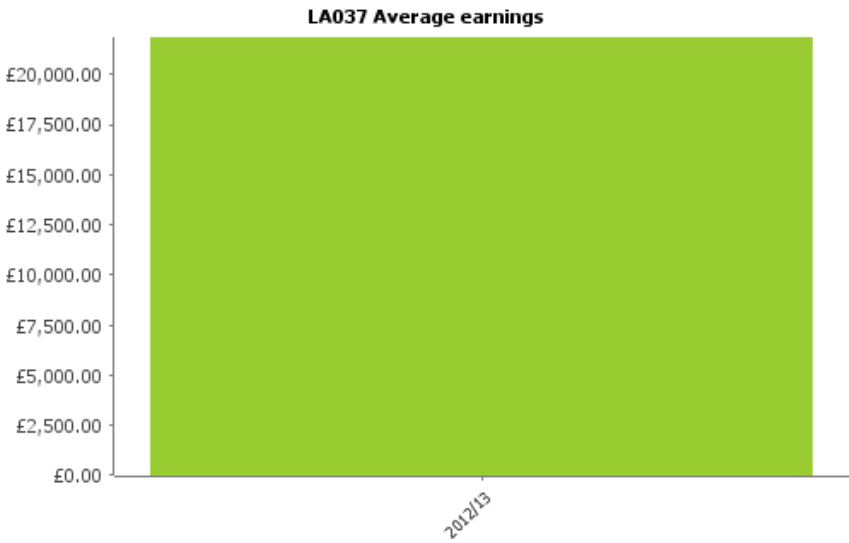
Listed below are primary measures for other purposes but also impact on this purpose

# Help me with my financial situation



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed

LA037 Average earnings



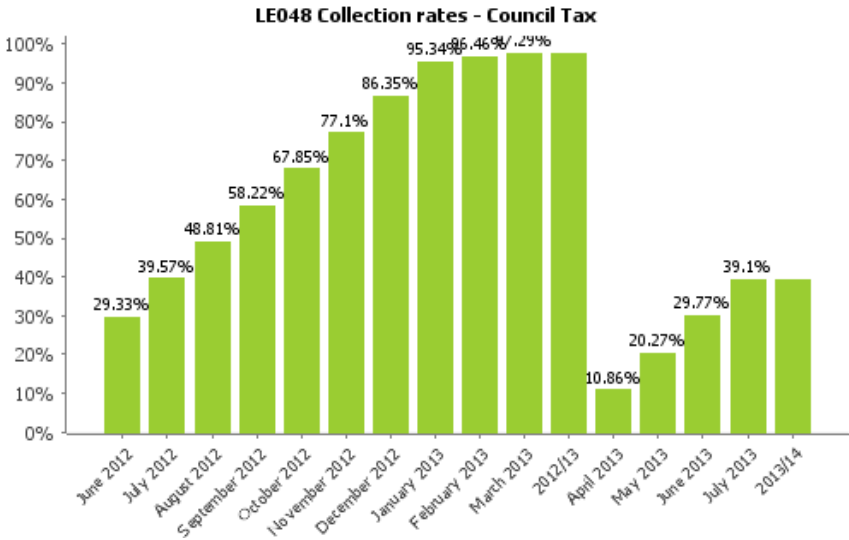
Current Value

£21,840.00

Managed By

Kate Bailey

LE048 Collection rates – Council Tax



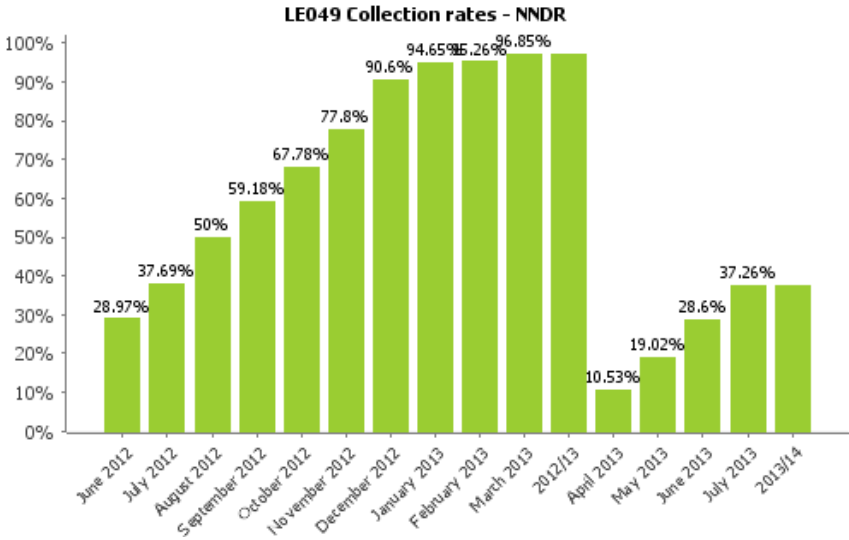
Current Value

39.1%

Managed By

Val Upton

LE049 Collection rates – NNDR



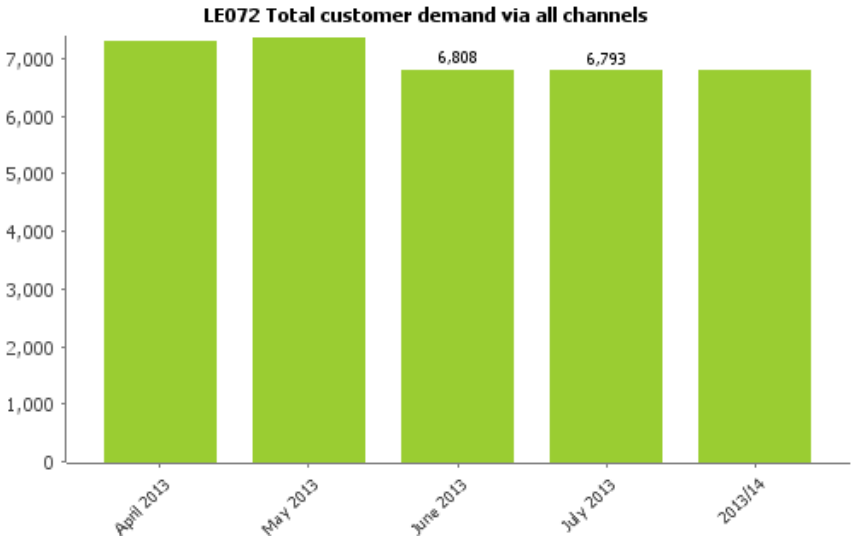
Current Value

37.26%

Managed By

Val Upton

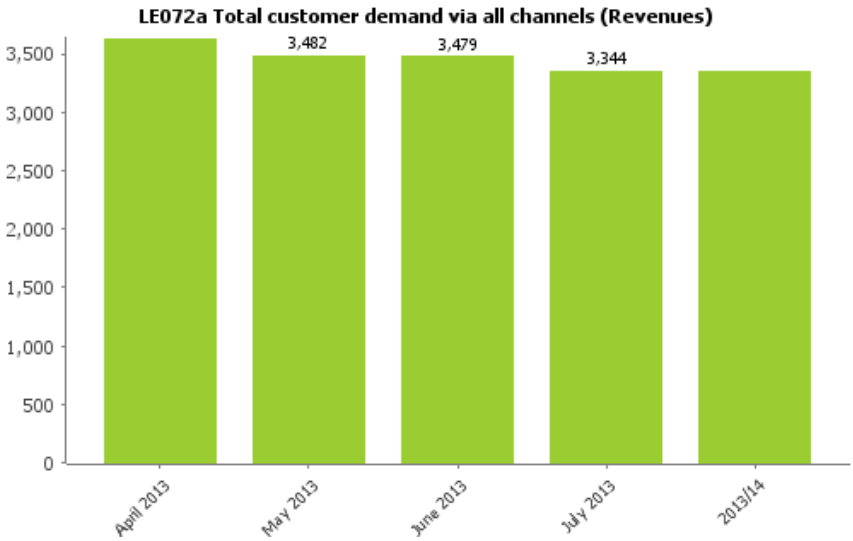
LE072 Total customer demand via all channels



Current Value 6,793

Managed By Lucy Wright

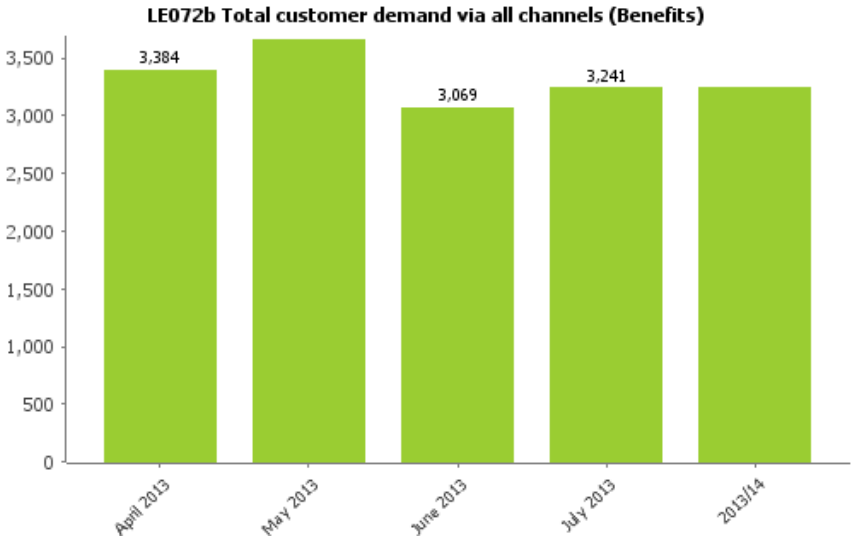
LE072a Total customer demand via all channels (Revenues)



Current Value 3,344

Managed By Lucy Wright

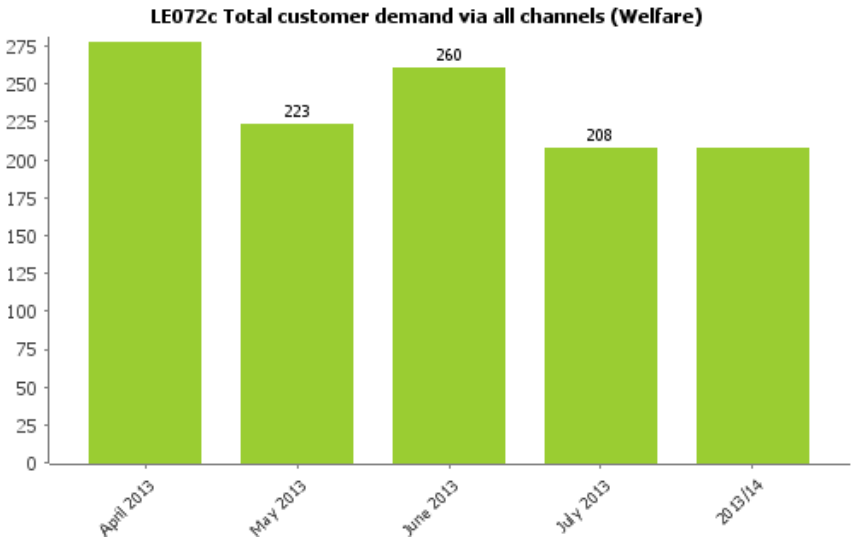
LE072 Total customer demand via all channels (Benefits)  
b



Current Value 3,241

Managed By Lucy Wright

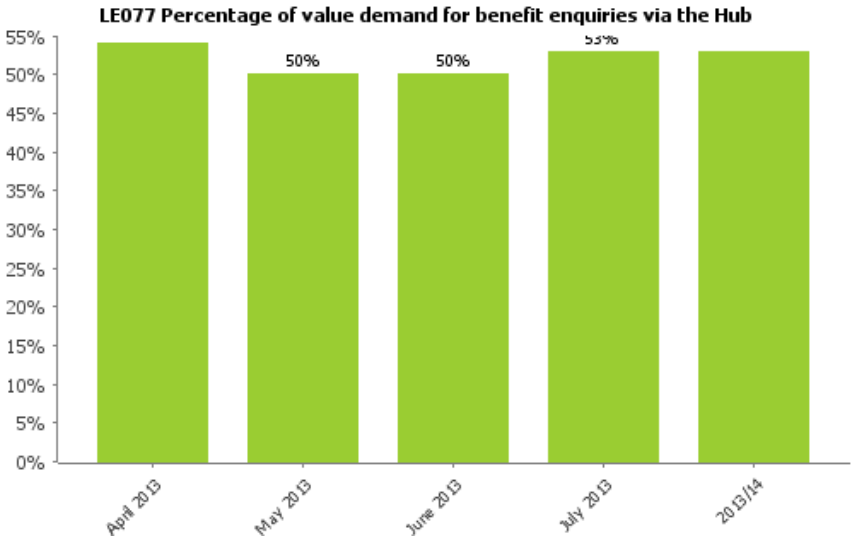
LE072 Total customer demand via all channels (Welfare)  
c



Current Value 208

Managed By Lucy Wright

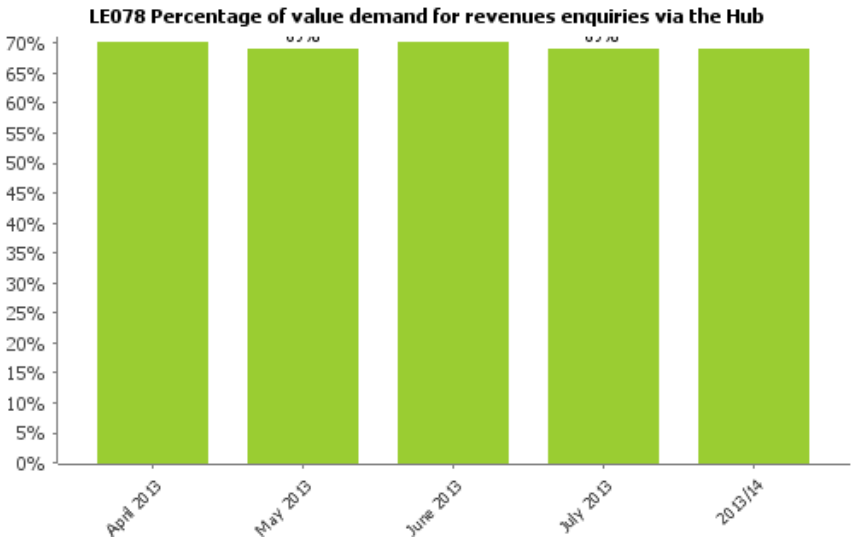
LE077 Percentage of value demand for benefit enquiries via the Hub



Current Value 53%

Managed By Lucy Wright

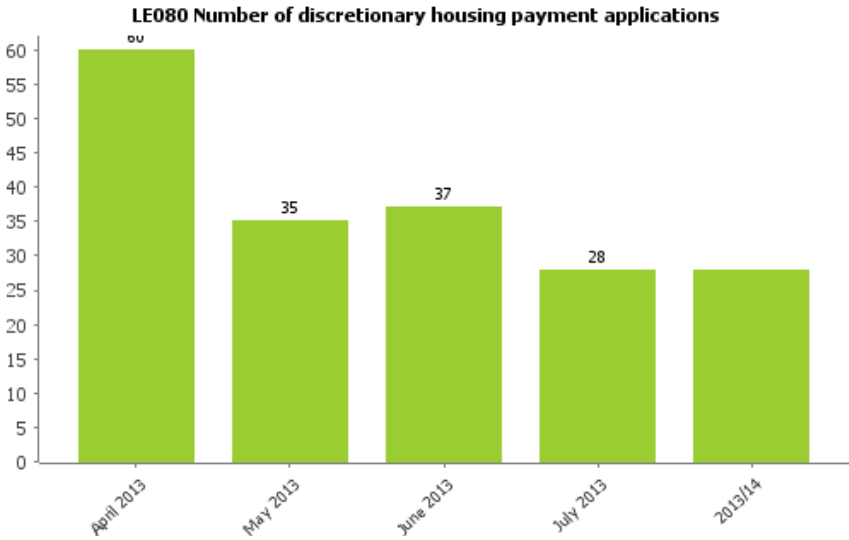
LE078 Percentage of value demand for revenues enquiries via the Hub



Current Value 69%

Managed By Lucy Wright

**LE080** Number of discretionary housing payment applications



Current Value 28

Managed By Lucy Wright

**LE081** Number of households on housing benefit, council tax discount or both

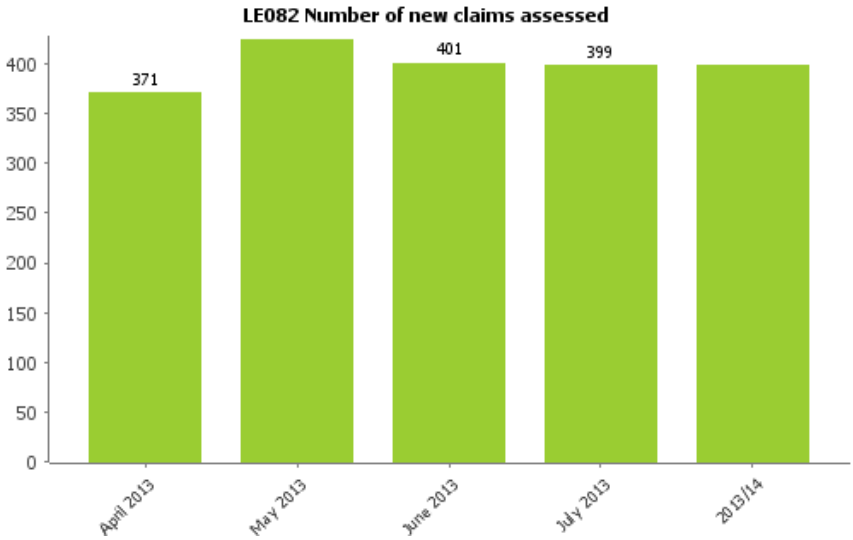


Current Value 10,741

Managed By Val Upton



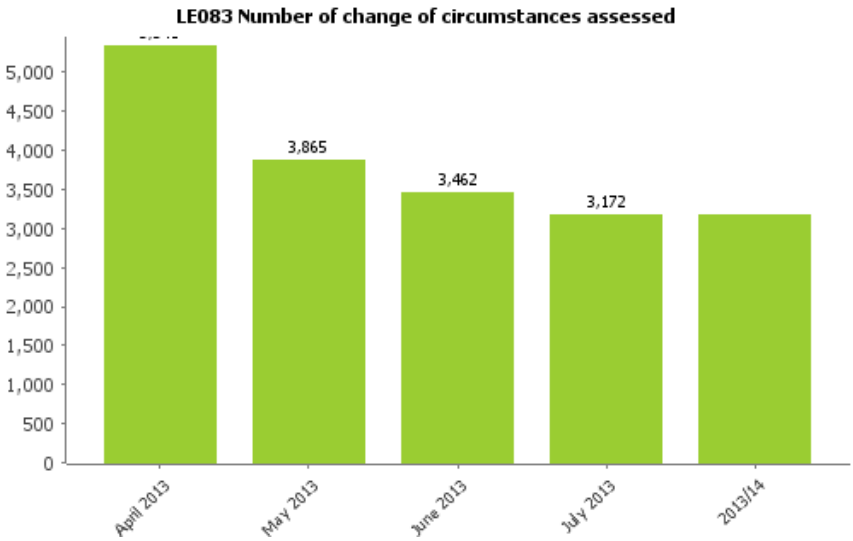
LE082 Number of new claims assessed



Current Value 399

Managed By Val Upton

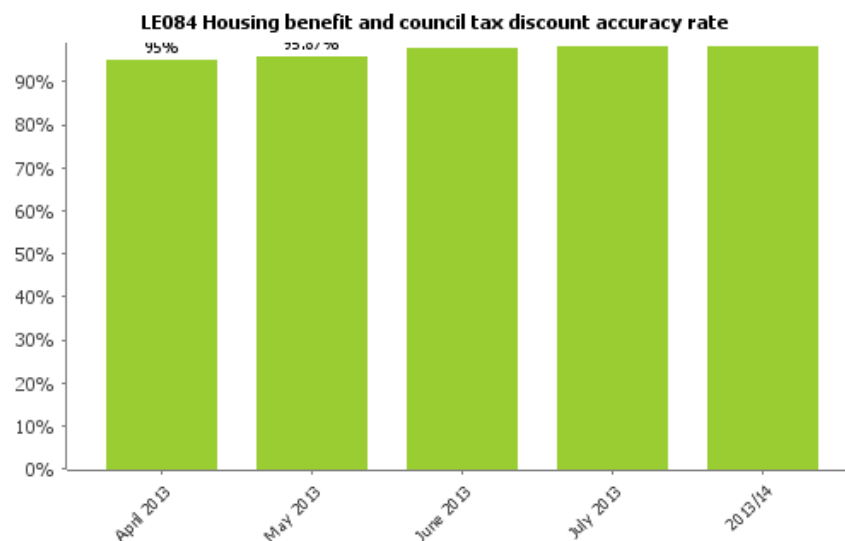
LE083 Number of change of circumstances assessed



Current Value 3,172

Managed By Val Upton

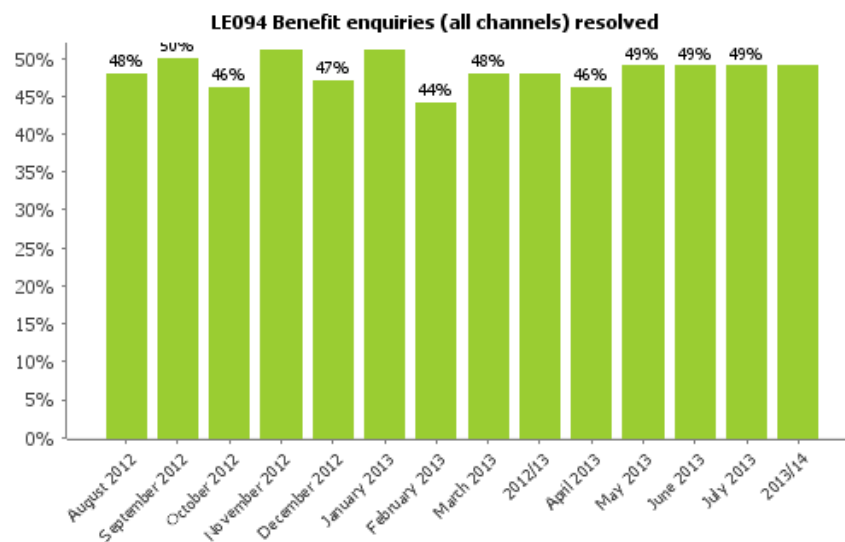
**LE084** Housing benefit and council tax discount accuracy rate



Current Value 98%

Managed By Val Upton

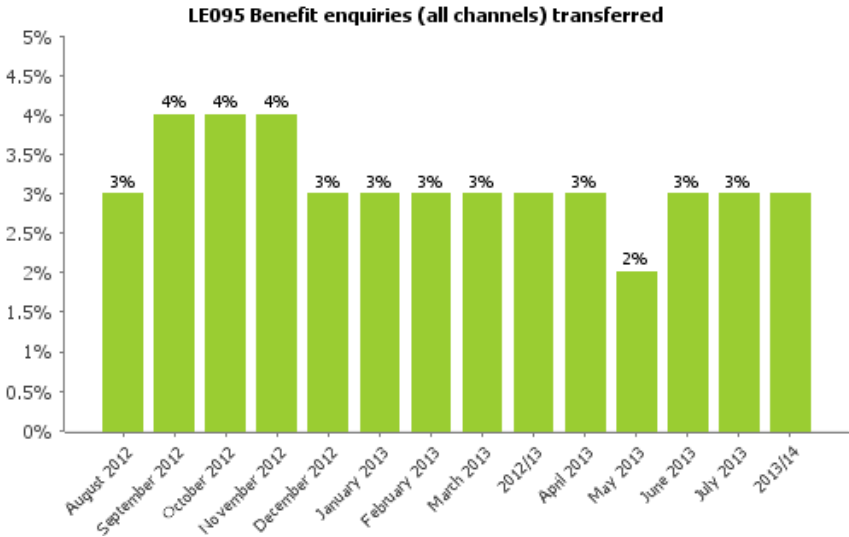
**LE094** Benefit enquiries (all channels) resolved



Current Value 49%

Managed By Lucy Wright

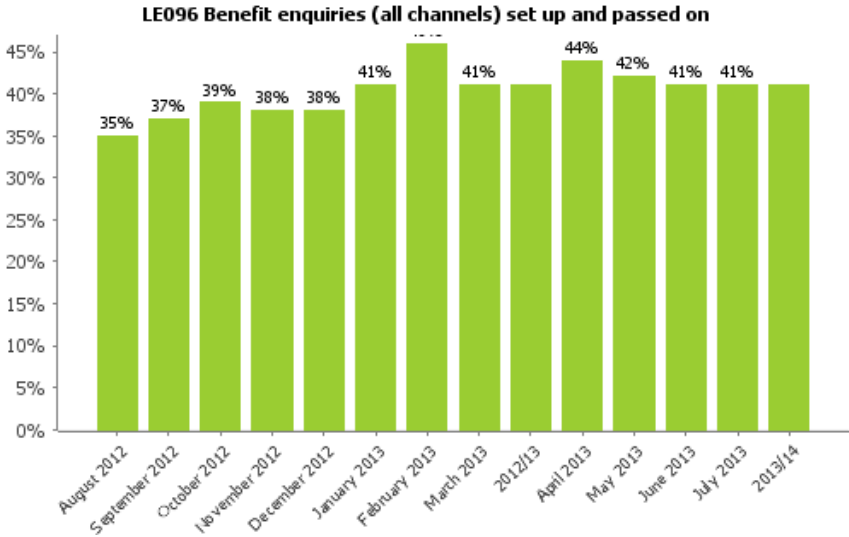
LE095 Benefit enquiries (all channels) transferred



Current Value 3%

Managed By Lucy Wright

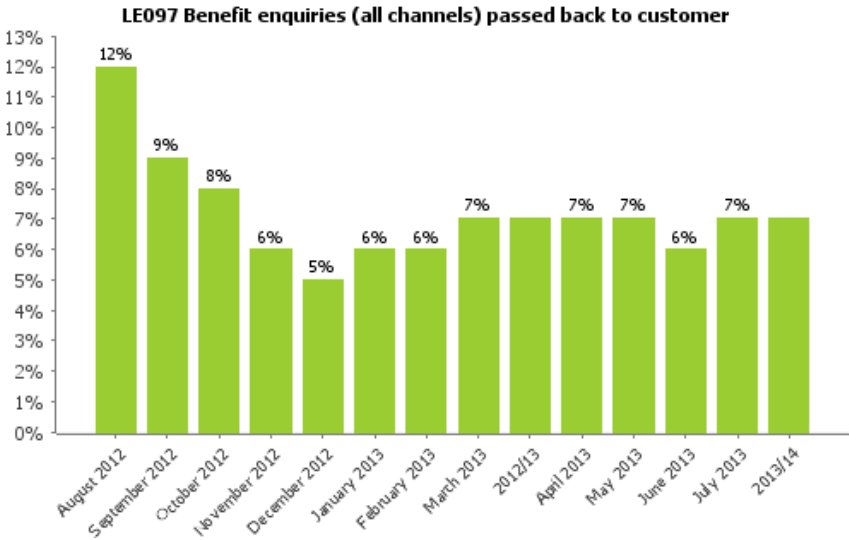
LE096 Benefit enquiries (all channels) set up and passed on



Current Value 41%

Managed By Lucy Wright

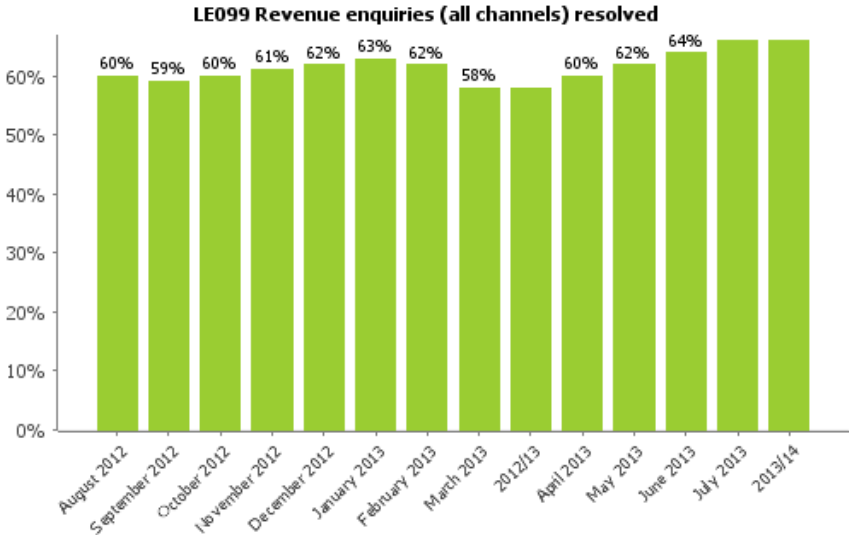
LE097 Benefit enquiries (all channels) passed back to customer



Current Value 7%

Managed By Lucy Wright

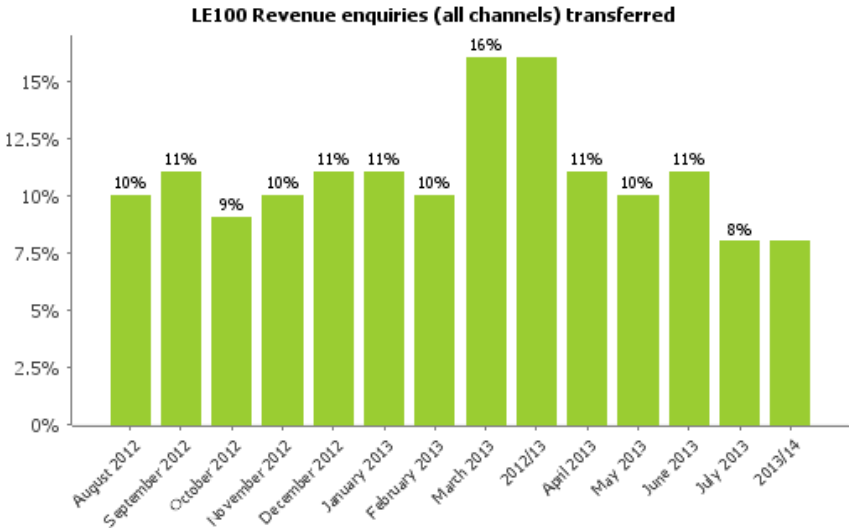
LE099 Revenue enquiries (all channels) resolved



Current Value 66%

Managed By Lucy Wright

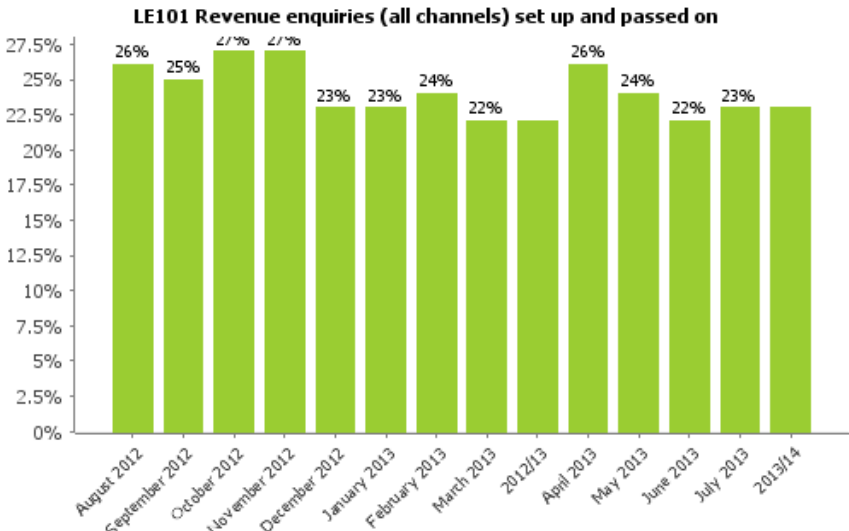
LE100 Revenue enquiries (all channels) transferred



Current Value 8%

Managed By Lucy Wright

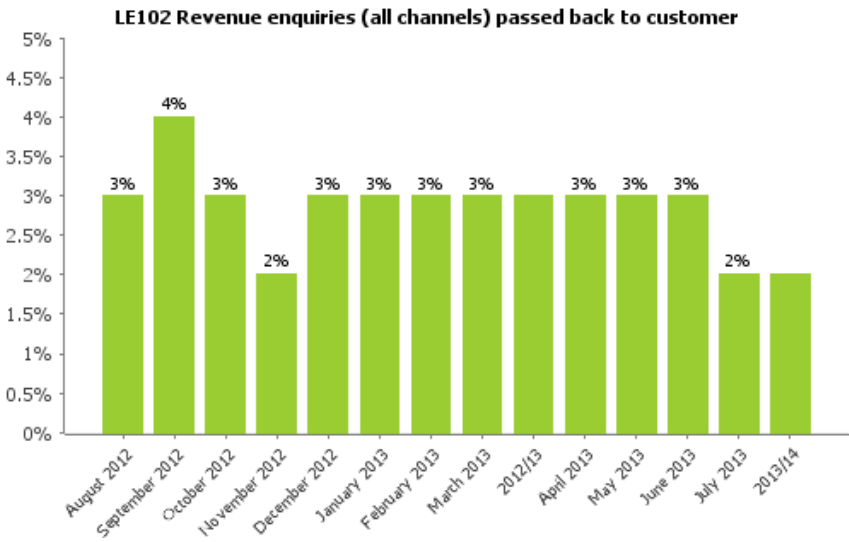
LE101 Revenue enquiries (all channels) set up and passed on



Current Value 23%

Managed By Lucy Wright

LE102 Revenue enquiries (all channels) passed back to customer



Current Value 2%






Managed By Lucy Wright

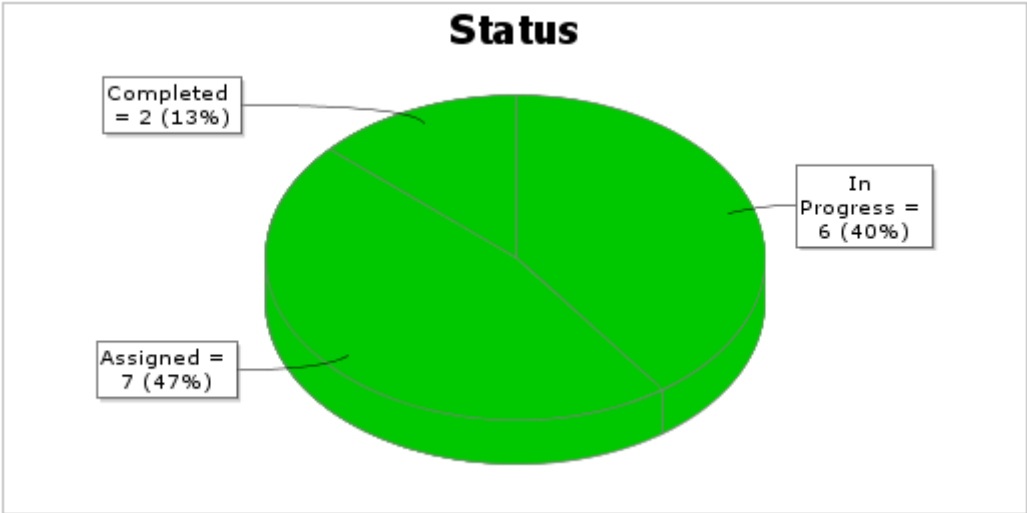
Listed below are primary actions for other purposes but also impact on this purpose

Listed below are primary measures for other purposes but also impact on this purpose

# Enabling others to do what they need to do



Action Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	Completed



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Ian Miller	IRM: Implemented by 1st August 2013.	20-Aug-2013

WFF 13/14 03

Voluntary Redundancy

0%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Caroline Newlands		

WFF 13/14 04

Corporate Support Services/Enabling Review

45%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Ian Miller	Chief Executive's Unit Review completed and restructure implementation has commenced and will be completed by April 2014. Review of the operation of the design service will be completed by the end of August. Admin support services review completed.	28-Aug-2013

WFF 13/14 05

Wyre Forest House

0%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Ian Miller	IRM: Project managers are pursuing resolution of the snagging list with the contractor. Independent review of ground source heat pump commissioned and due to report shortly.	20-Aug-2013



WFF 13/14 06

Review of Major Contracts

25%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Tracey Southall	TS: On target to achieve savings. Work with major suppliers continues.	20-Aug-2013

WFF 13/14 10

Shared Services Review

10%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Ian Miller	Review of future depot requirement started. Will examine shared depot solutions.	20-Aug-2013

WFF 13/14 13

Delivery of the ICT Strategy

30%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Dave Johnson	New Strategy has been approved with project group set up to investigate Document Management moving forward and customer payment options. New call centre has already been implement and a new open source website content management system agreed. Work program for 2013 / 2014 has been agreed as part of the strategy board.	08-Aug-2013

WFF 13/14 21

Organisational Development – Employee Survey Action Plan


0%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Jane Doyle; Suzanne Johnston-Hubbold		

WFF 13/14 22	Organisational Development – Enabling Support Services Action Plan	0%	
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Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Dave Johnson		

WFF 13/14 23	Organisational Development – Employee Survey	0%	
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Due Date	Managed By	Latest Note	Latest Note Date
31-Oct-2013	Jane Doyle; Suzanne Johnston-Hubbold		

WFF 13/14 24	Organisational Development – Enabling Support Services Survey	0%	
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Due Date	Managed By	Latest Note	Latest Note Date
31-Dec-2013	Jane Doyle; Suzanne Johnston-Hubbold		

WFF 13/14 25	Organisational Strategy	0%	
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Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Caroline Newlands		

WFF 13/14 26

Member Development – Members Survey Action Plan

30%



Due Date	Managed By	Latest Note	Latest Note Date
31-Mar-2014	Alison Braithwaite	A key action arising from the Members' Survey (2012) was around communication and reputation management. Two externally facilitated workshops have been held with Members to better understand and explore how their role contributes to the council's reputation. Further work with Members on this is now being developed.	02-Aug-2013

WFF 13/14 27

Members' Forum

100%



Due Date	Managed By	Latest Note	Latest Note Date
30-Apr-2013	Alison Braithwaite	This action was completed at the Members' Forum in April 2013. It was agreed that the Forum would continue on a bi-monthly basis with up to three 20 minute presentations. The sessions would last no longer than one and a half hours. The items for the sessions will be agreed at the Group Leaders meetings.	02-Aug-2013

WFF 13/14 28

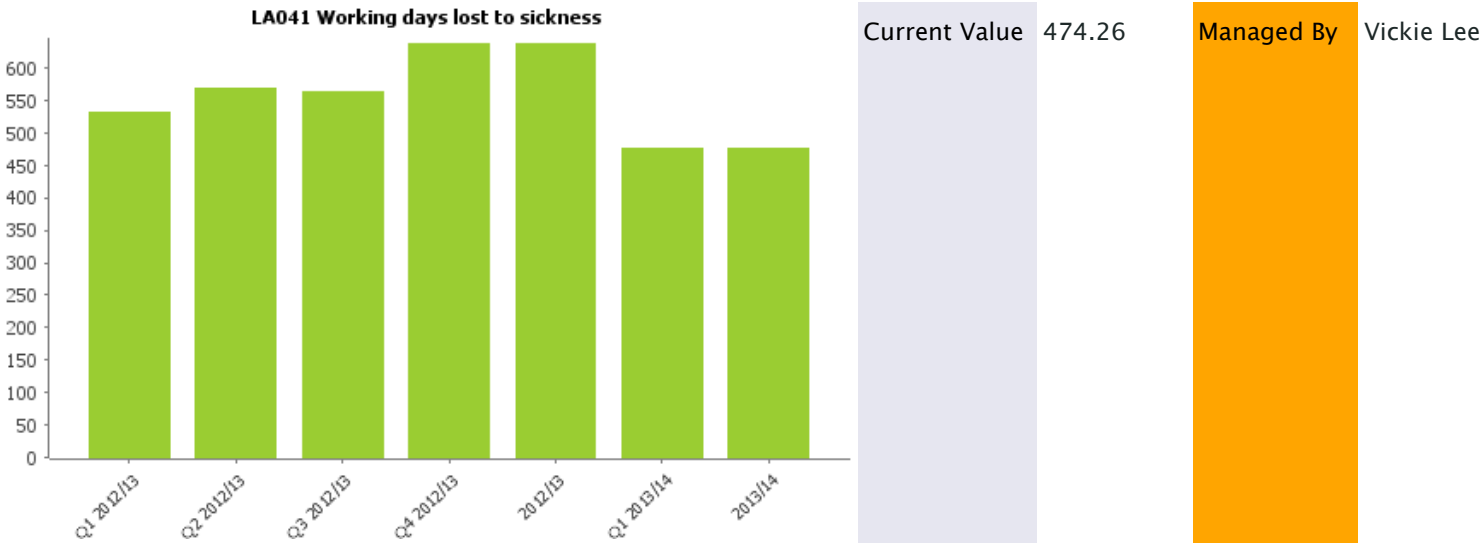
Members Survey

30%

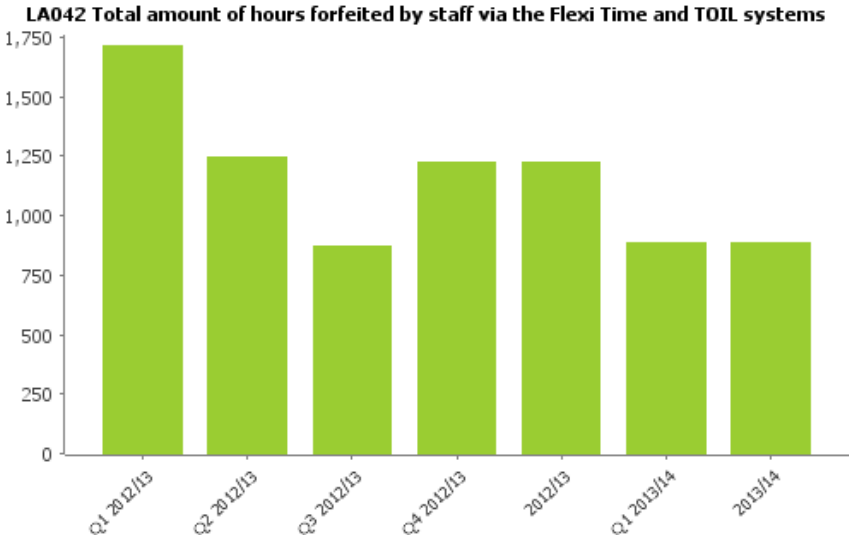


Due Date	Managed By	Latest Note	Latest Note Date
31-Dec-2013	Alison Braithwaite	Work has commenced on reviewing the questions from last year's survey to ensure they are still fit for purpose and relevant. The survey will be undertaken in December 2013.	02-Aug-2013

LA041 Working days lost to sickness



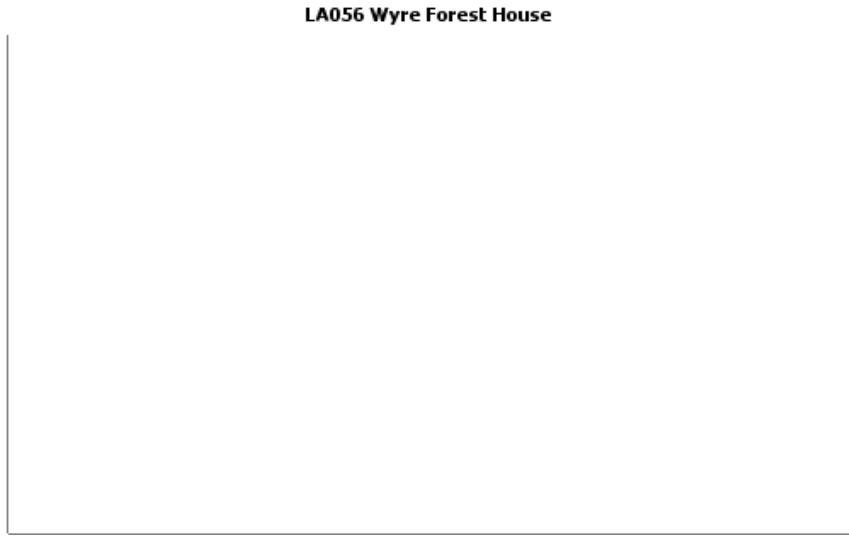
**LA042** Total amount of hours forfeited by staff via the Flexi Time and TOIL systems



Current Value 883

Managed By Vickie Lee

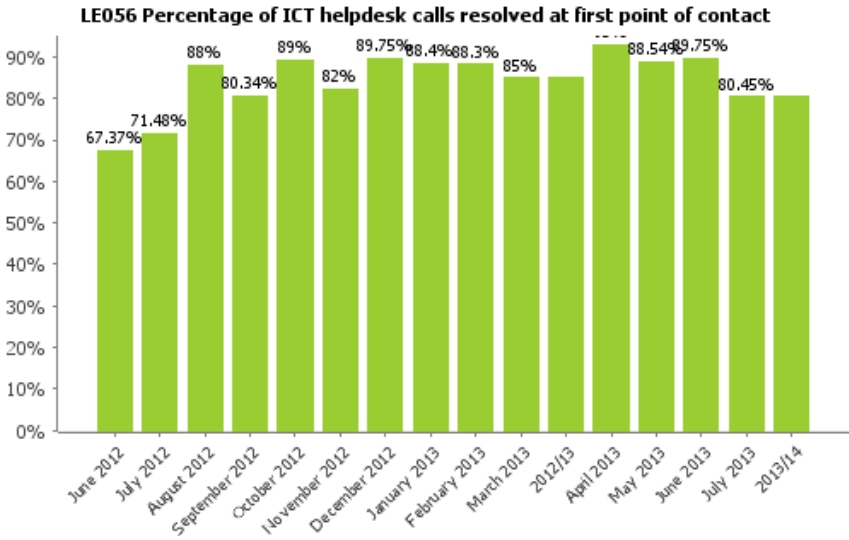
**LA056** Wyre Forest House



Current Value

Managed By Ian Miller

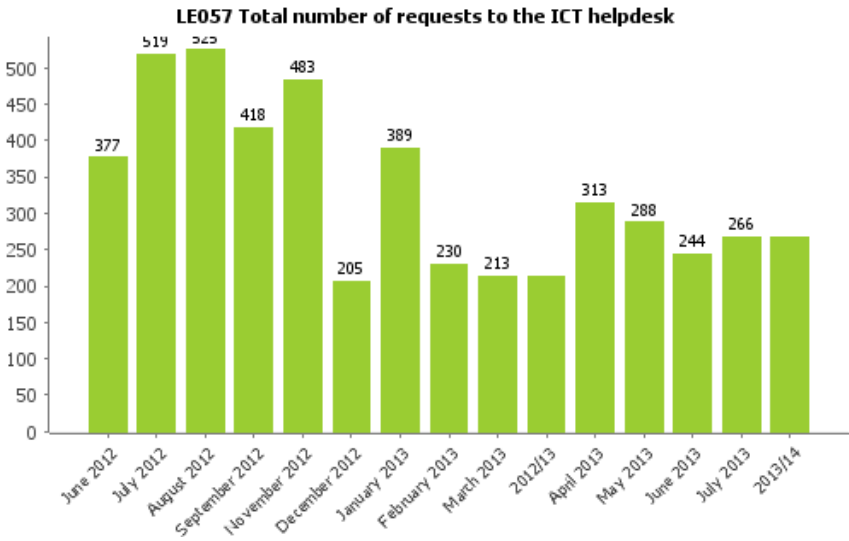
LE056 Percentage of ICT helpdesk calls resolved at first point of contact



Current Value 80.45%

Managed By Dave Johnson

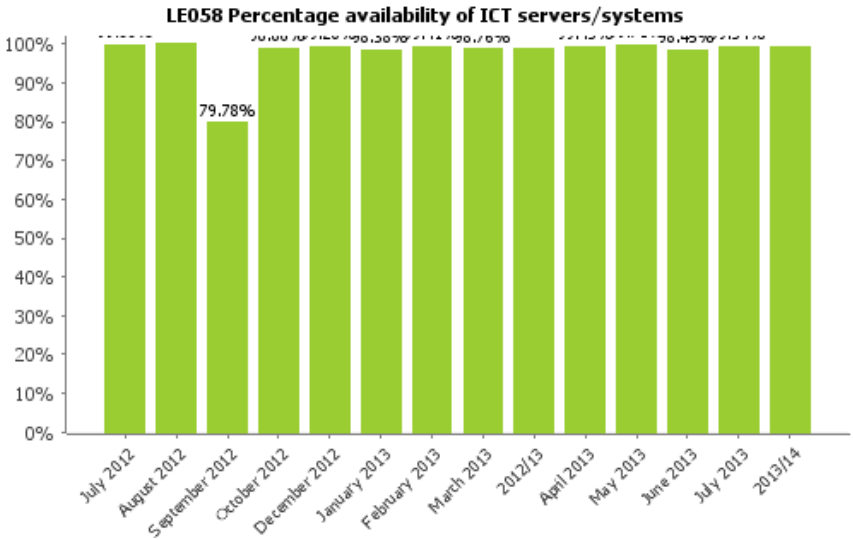
LE057 Total number of requests to the ICT helpdesk



Current Value 266

Managed By Dave Johnson

LE058 Percentage availability of ICT servers/systems



Current Value 99.34%

Managed By Dave Johnson

Listed below are primary actions for other purposes but also impact on this purpose

WFF 13/14 12      Community Asset and Service Transfer Work

WFF 13/14 19      State of the Area – Kidderminster Town Centre Public Realm Framework

Listed below are primary measures for other purposes but also impact on this purpose

**WYRE FOREST DISTRICT COUNCIL  
FEEDBACK FROM CABINET MEETING HELD ON  
TUESDAY 16TH JULY 2013**

**Agenda  
Item No.**

**DECISION**

**8.1 Wyre Forest District Site Allocations & Policies Local Plan and  
Kidderminster Central Area Action Plan – Adoption**

**Recommend to Council:**

- a) The Inspector's report as attached to the report to Cabinet at Appendix 1 be accepted in its entirety including the proposed main modifications.
- b) The Site Allocations and Policies Local Plan incorporating the modifications as recommended in Appendix A of the Inspector's Report in the Cabinet report be adopted to be used to determine planning applications from the 24<sup>th</sup> July 2013.
- c) The Kidderminster Central Area Action Plan incorporating the modifications as recommended in Appendix B of the Inspector's Report to the Cabinet report be adopted to be used to determine planning applications from the 24<sup>th</sup> July 2013.
- d) The accompanying Policies Map as attached at Appendix 3 to the report to Cabinet be adopted.
- e) To note that upon Adoption of the Plans, the list of remaining 2004 Adopted Local Plan Saved Policies (as set out at Appendix 4 to the report to Cabinet), will be fully replaced by those incorporated within the Adopted Core Strategy, the Site Allocations and Policies Local Plan and the Kidderminster Central Area Action Plan.
- f) Delegated authority be granted to the Director of Economic Prosperity and Place to make the necessary presentational amendments, including the minor amendments as set out at Appendix 2 to the report to Cabinet, to the Site Allocations and Policies Local Plan, Kidderminster Central Area Action Plan and the accompanying Policies Map.



**Overview & Scrutiny Committee Work Programme 2013-2014**

**June 2013**

Performance Management Quarter 4 Update (including March and annual lagging measures)

Recommendations from the No Surprises Protocol Review Panel

Recommendations from the Housing Review Panel

**July 2013**

Development Plan Documents (DPDs)

Scrutiny Scoping Form – Parking Enforcement

Wyre Forest House – update on the savings achieved and other matters relating to the project

Nominations for the Treasury Management Review Panel

**September 2013**

Affordable Housing SPD

How Are We Doing? Performance Update (Q1)

Recommendations from Treasury Management Panel to approve the Treasury Management Strategy Backward Look 2012/13

West Midlands Safari and Leisure Park Planning Brief and Masterplan

**October 2013**

Health Action Plan update

Community Infrastructure Levy (CIL)

Revised Local Development Scheme (Project Plan) 2013 – 2016

NNDR Relief Policy

**November 2013**

How Are We Doing? Performance Update (Q2)

**December 2013**

Annual Crime & Disorder Review

**January 2014**

Review of Planning Obligations SPD – Early Consultation

**February 2014**

How Are We Doing? Performance Update (Q3)

**June 2014**

How Are We Doing? Performance Update (Q4)