

14. **LOCAL DEVELOPMENT PLAN – REVISED APPROACH TO MONITORING (A.6106/BJT)**

1. **Purpose of the report**

To update members on the approach taken to monitor the Local Development Plan and agree a revised timeframe for delivering the Annual Monitoring Report.

2. **Key issues**

1. Reviewing the core indicators for monitoring the Local Development Plan
2. Resetting the timeframe for delivering an annual monitoring report
3. Establishing a set of research projects to assist long term monitoring

3. **Recommendation:**

**That members:**

1. **Note the approach taken to revise indicators for monitoring the Local Development Plan; and**
2. **Grant delegated authority for the Director of Planning to agree the final revised indicator set in consultation with the Chair and Vice Chair of Planning Committee before the end of the first quarter in 2015; and**
3. **Agree the new timeframe for publishing an annual monitoring report in July as set out in paragraph 16; and**
4. **Note the completions report at Appendix 1**

**How does this contribute to our policies and legal obligations?**

4. The Local Development Plan is a portfolio of documents setting out the planning policies for an area and is a key component for achieving the aspirations of the National Park Management Plan and the Authority's Corporate Objectives. The ability of the Authority to monitor and review the policies and objectives of our strategic planning and business documents is therefore crucial to ensure we reflect our statutory purposes and duty.
5. The Localism Act places a duty on local planning authorities to monitor their local development plan and requires this information to be made available to the public at least yearly in the interests of transparency. The local planning authority is no longer required to send a report to the Secretary of State. Local Planning Authorities can now choose which targets and indicators to include in the report as long as they are in line with the relevant UK and EU legislation. Guidance from Planning Advisory Service (an advisory agency for the department of Communities and Local Government) confirms that the report's primary purpose is to consider the performance and achievements of the planning service locally and with the local community.
6. The shift from top-down indicators to more responsive monitoring at the local level, coupled with the adoption of the Core Strategy, presented the opportunity to introduce more engagement with Members over the future approach to monitoring.

7. Although the AMR now has a greater focus on local issues and data, monitoring continues to be aligned with district, county and national monitoring indicators to highlight how delivery in the National Park contributes to both the socio-economic welfare of the wider Peak District and to a range of local and national priorities for action (such as social housing and health issues). Similarly it is important for the Authority to monitor how surrounding authorities also help address these issues, and to benchmark our performance against other areas. This also helps to foster closer partnership working.

### **Background**

8. The Authority has produced a monitoring report every year since 2005 and uses it to report on data which flows from our planning decisions. Planning policy indicators are used to tell us how many approvals are made for particular types of development, thus revealing whether the strategic plans are guiding and directing development as intended.
9. Individual cases have unique circumstances and individual merits which are judged against policy. It is not correct to trigger a review of policy on the back of individual planning applications, but the AMR can be used to consider issues and trends emerging in decision making over time to use at a future date when reviewing policy.
10. The AMR for 2012/13 provided an opportunity to record planning data from applications approved under the new Core Strategy regime and a range of indicators were approved alongside the Core Policies for monitoring the direction of travel on the new plan. New features of the 2012/13 AMR included:
- Spatial portrait updates
  - Thematic pages setting out data and progress towards meeting plan objectives
  - Use of locally developed Core Strategy indicators
  - Greater use of contextual data, graphs, maps etc., to aid the interpretation of data gathered.
11. The AMR 2012/13 captured the first full year of monitoring against the indicators set out in the Authority's Core Strategy. The development of a new style of monitoring report has enabled officers to consider the following matters:
1. Progress in producing the Local Development Plan;
  2. Performance of the adopted spatial strategy;
  3. On-going actions to improve data quality;
  4. Consideration of future options for the style and accessibility of the report
12. Following the production of the 2012/13 AMR officers reflected further on the nature of the indicators, the quality of data gathered and the systems in place to collect data. Put simply the following questions were asked:
- What do the indicators tell us? and
  - Can we collect the data required by the indicator?

These questions provided the justification for a full review of our indicator set.

### **13. The Indicator Review Project**

A review of indicators took place during 2014. A cross functional team was created drawing in officers from the Planning Service, the Policy Planning and the Research Teams. The work has revealed the following issues:

- The need to make corresponding changes to the planning database (called

M3)

- Changes to indicators and M3 need to be realistic in terms of data collection
- M3 needs to be constructed in a way that allows the planners to complete data fields in a way that does not add a burden to their daily workload

14. A range of issues have also emerged that require a more strategic approach to monitoring possibly requiring separate land-use or desk-based surveys, e.g. consideration of landscape change/cumulative impact, understand the nature of developments justified by “enhancement policies” and considering the role and use of Section 106 agreement.

15. **Outcome of Review**

The review will allow a fully revised set of indicators to be produced. The final set of revised indicators is due to be completed early in 2015 in time to allow the next AMR to be based on the new data. It is proposed that delegated approval be granted for the new indicators to be agreed in consultation with the Chair and Vice Chair of Planning Committee to allow efficient use of time in collecting the new data. As a consequence of the review it has not been possible to prepare a full AMR this January as per previous years. However the process does present an opportunity to reconstruct the timeframe for producing an AMR, away from the historic timing of Dec/Jan, to a summer release, i.e. July in order that the report is released closer to the actual monitoring period.

16. **What can we present now?**

An on-going approach to monitoring presents an opportunity for mini reports to be produced at any stage. As such while officers are unable to produce a full AMR at this time a focussed report setting out progress on housing completions has been produced and is attached at Appendix 1. The key finding here is the low amount of completions activity during 2013/14 in comparison with other years. This may be due to the poor economic circumstances since the adoption of the Core Strategy but nevertheless new permissions have been forthcoming and the report also details a pipeline of new schemes being lined up which should ensure that delivery increases in subsequent years.

17. **Progress in Producing the Local Development Plan**

Following the adoption of the Core Strategy in October 2011 the Authority has found itself in a position of strength compared to other authorities. Following the introduction of the National Planning Policy Framework (NPPF) officers have considered the level of consistency between national and local policy and the Authority has stated its view that there is a high level of consistency. Performance at appeal has also reconfirmed this general position. The production of Development Management Policies provide a further opportunity to refine policies to allow them to meet both national and local aspirations framed within the legal context of National Park designation.

18. Significant progress has been made during 2013/14 to produce a full draft version of the Development Management Policies document with a supporting Policies Map. Officers aim to bring a full draft for approval at the Authority meeting in March 2015. Furthermore, during 2013/14 two technical design guides have been produced covering Extensions and Alterations; and Shop Fronts. In addition the Authority is now engaged with 10 communities in the production of Neighbourhood Plans which could ultimately form a part of the Local Development Plan.

19. **Performance of the adopted spatial strategy**

The AMR sets out detailed data for each indicator and this suggests good progress in the first year. Although figures appear small in themselves (see section below on data quality) the direction of travel is generally good.

20. Performance data shows that between 1 April 2013 and 31 March 2014, there were some 1011 applications decided. 86.8% of these were approved (including all aspects of the planning function such as determining full planning applications, discharging conditions and dealing with lawful development certificates). In terms of planning applications the approval rate is 84%. This indicates that the majority of development permitted accords with policy. Occasionally schemes may be permitted by the Authority as an exception to development plan policy where members believe other material considerations are significant enough to warrant such an exception. This may be either to an individual area of policy in which case it may be justified by meeting wider or higher level plan aims, or in some cases a scheme may be approved as a clear departure from the development plan, e.g. where there is acknowledged harm to the National Park contrary to its policies and statutory purposes. All such cases are scrutinised further through deferral to a subsequent Planning Committee and these cases are then reported in the AMR so that officers can consider the issues such cases reveal.

21. The percentage of appeals allowed against the Authority's decisions in 2013/14 is slightly higher than last year, at 33% rather than 26%. The total number of appeals has dropped, particularly from the very high level of 2009/10, so the absolute number of appeals allowed is similar to last year. Whilst any increase in the percentage of appeals allowed may be a cause for concern, the analysis of each case shows that there are no underlying policy concerns. Those appeals which have been allowed have been cases where a site specific judgment by the Inspector has been different from that of the Authority. There have been no appeals allowed during this period which were fundamentally contrary to policy. This is welcome and shows that the Authority's decisions and its policies, particularly its housing policies, are being supported by the Planning Inspectorate and therefore demonstrates a high degree of compatibility with national policy.

22. Previous AMR committee reports brought to members have confirmed the intention to delay any substantive review of the Local Development Plan to a point after the adoption of the Development Management Policies Development Plan Document, in order to allow the new policies to bed in and provide 3-5 years of monitoring data to allow a more meaningful consideration of performance. On this basis, officers intend to bring a revised Local Development Scheme back to the full Authority in March 2015 which sets out the remaining time period for completing the Development Management Policies document, and then subsequently showing the intention to enter a period of partial review commencing in the 2016/17 year.

23. **Conclusions**

Progress on plan making has been good with the strong basis of an adopted strategy and a very constructive period of debate on development management policy with the local community.

24. Performance in planning decisions in year 2 reveals steady progress to the implementation of the Core Strategy with a range of cases involving housing, renewables and economic uses raising interesting test cases which are both

recorded through the monitoring process and which in some cases have triggered the need for closer debate to aid interpretation and consistent application. On-going measures to improve data capture and data quality will continue in order to properly assess the direction of travel for the performance of planning policy and planning decisions over the coming years. The moves towards a more integrated Planning directorate and the close working relationship between officers and members during the review period have been very positive in terms of realising a mature and accountable planning office which is displaying a growing culture of self-awareness and performance improvement.

**Are there any corporate implications members should be concerned about?**

25. **Financial:**

None

26. **Risk Management:**

There is a cross-functional characteristic to monitoring that needs careful management. Various teams have responsibility for data management and ensuring data quality, including data entry, maintaining and updating data dictionaries, and undertaking qualitative checks of the state of the park, to inform data. If this does not meet the desired standard, then the quality of the monitoring can be undermined. There is an onus on all Heads of Service to ensure that data capture is sound so that the whole cycle of Authority work can be achieved competently.

27. **Sustainability:**

The AMR is an important means of testing whether local planning policies and objectives are achieving their stated aims for the sustainability of the area in the context of National Park purposes.

28. **Consultees:**

Research and Monitoring Team, Director of Planning, Assistant Director Policy and Partnerships

29. **Background papers:** (not previously published)

None

30. **Appendices:**

Appendix 1 – Housing Completions report

31. **Report Author, Job Title**

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