



South Warwickshire *Together*

# Joint Cabinet/Executive Committee

## Notice of Meeting

**Wednesday 7 December 2022**

**4.00 p.m.**

**The Town Hall  
The Parade  
Leamington Spa  
Warwickshire  
CV32 4AT**

Members of the Committee are requested to attend

Chairman: To be appointed at each meeting

Councillors:

Stratford-on-Avon

Warwick

A Parry

J Cooke

D Pemberton

A Day

I Shenton

R Hales

Observers:

Chairman of Stratford-on-Avon District Council Overview and Scrutiny Committee

Councillor Crump

Chairman of Warwick District Council Overview and Scrutiny Committee

Councillor Milton

Leader of Stratford-on-Avon District Council Liberal Democrat Group

Councillor Juned

Warwick District Council Liberal Democrat Group

Councillor Boad

Warwick District Council Labour Group

Councillor Mangat

Warwick District Council Green Group

Councillor Davison



# JOINT CABINET/EXECUTIVE COMMITTEE

7 December 2022

## AGENDA

### 1. Appointment of Chairman

To appoint a Chairman for each meeting from the members of the Council that is hosting the meeting.

### 2. Apologies for Absence

### 3. Disclosures of Interest

Members to declare the existence and nature of interests in items on the agenda in accordance with the adopted Code of Conduct.

Declarations should be disclosed during this item. However, the existence and nature of any interest that subsequently becomes apparent during the course of the meeting must be disclosed immediately. If the interest is not registered, Members must notify the Monitoring Officer of the interest within 28 days.

Members are also reminded of the need to declare predetermination on any matter.

If Members are unsure about whether or not they have an interest, or about its nature, they are strongly advised to seek advice from officers prior to the meeting.

### 4. Minutes of Previous Meetings (Pages 1 - 22)

To confirm and sign the Minutes of the meetings held on 14 April 2021, 10 March and 29 June 2022.

### 5. South Warwickshire Local Plan Part 1 - Issues and Options Consultation (Pages 23 - 38)

To consider agreement of the South Warwickshire Local Plan Issues and Option document (attached at Appendix 5) for consultation commencing in January 2023.

### 6. Urgent Business

To consider any business which, in the opinion of the Chairman, is urgent in accordance with the provisions of Section 100B (4) of the Local Government Act 1972.

CHIEF EXECUTIVES  
Stratford-on Avon and Warwick District Councils

David Buckland  
Chief Executive  
(Head of Paid Service)  
Stratford-on-Avon District Council  
Elizabeth House, Church Street  
Stratford-upon-Avon  
CV37 6HX

Chris Elliott  
Chief Executive  
(Head of Paid Service)  
Warwick District Council  
Milverton Hill  
Royal Leamington Spa  
CV32 5HZ

General Enquiries: Please contact either:

Stratford-on-Avon District Council, Elizabeth House, Church Street  
Stratford-upon-Avon CV37 6HX  
Telephone 01789 260245  
Email [committeemanagers@stratford-dc.gov.uk](mailto:committeemanagers@stratford-dc.gov.uk)

Warwick District Council, Riverside House, Milverton Hill,  
Royal Leamington Spa CV32 5HZ  
Telephone: 01926 456114  
Email: [committee@warwickdc.gov.uk](mailto:committee@warwickdc.gov.uk)

For enquiries about specific reports, please contact the officers named in the reports

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## JOINT CABINET/EXECUTIVE COMMITTEE

14 April 2021

### MINUTES

*Held via MS Teams - Virtual Teams Meeting  
Meeting commenced: 4.00 p.m. Meeting ended: 4.50 p.m.*

Present: Councillor A Day (Chairman) Councillors J Cooke, A Day, R Hales, M Jennings, D Pemberton and I Shenton

Apologies: Councillor A Parry (Councillor I Shenton substitute)

Also in attendance as Observers: Councillor A Boad (Warwick Liberal Democrat Group)  
Councillor I Davison (Warwick Green Group)  
Councillor M Mangat (Warwick Labour Group)  
Councillor A Milton (Chairman of WDC Overview and Scrutiny Committee)  
Councillor Juned (Stratford-on-Avon Liberal Democrat Group)  
Councillor P-A O'Donnell (Chairman SDC Overview and Scrutiny Committee)

#### 1. Appointment of Chairman

Nominations were invited for the appointment of Chairman of the Joint/Cabinet Executive Committee.

There being only one nomination, it was proposed by Councillor Pemberton, seconded by Councillor Jennings and

#### **RESOLVED:**

That Councillor Day be appointed as Chairman for the meeting.

#### 2. Disclosures of Interest

There were no declarations of interest made.

#### 3. South Warwickshire Local Plan - Scoping Report

*Councillor Pemberton – Place Portfolio (Stratford-on-Avon District Council) and Councillor Cooke – Development Portfolio (Warwick District Council)*

The Committee considered a report that outlined the work that had been carried out, to date, by both Councils to prepare a Local Plan for South Warwickshire and which sought agreement to undertake a Scoping and Call for Sites consultation.

In July 2020, Stratford-on-Avon District Council's (SDC) Cabinet and Warwick District Council's (WDC) Executive agreed a joint statement that had been prepared by the Leaders of the two Councils. This included the statement:

*"that agreement be given, in principle, to conducting a Joint Core Strategy/Local Plan Review and that a further paper be presented setting out details of a proposed programme, a member and officer governance".*

Subsequently, in October 2020 the Councils both approved a paper prepared by officers, in consultation with Councillor Pemberton, the Portfolio Holder for Place

(SDC) and Councillor Cooke, the Portfolio Holder for Development (WDC), which confirmed the agreement to prepare a single Local Plan for South Warwickshire, that would replace both the SDC Core Strategy and WDC Local Plan. These reports supported the principle of establishing a Joint Committee of Councillors from both Councils to consider and agree key reports relating to the Local Plan. The reports also agreed the establishment of a Joint Member Advisory Group.

A further report, approved by both Councils in February 2021, agreed the establishment of this Joint Committee.

Since October 2020, officers and Councillors had been working together to commence work on the new Local Plan. It had been agreed that the document would be called the South Warwickshire Local Plan (SWLP). To date, the work on the SWLP had three main elements: (1) early technical work undertaken by officers in consultation with Portfolio Holders, (2) engagement with the Member Advisory Group and (3) early stakeholder engagement. This had culminated in the document attached as Appendix 1 to the agenda report.

There was potentially two options available to the Joint Committee. The first to amend the scoping document before consulting in due course. The second option was for the Joint Committee not to undertake a public consultation on the scoping document.

In respect of the first option, Members were reminded that the scoping document was simply the first stage in a process and did not make any decisions itself. It was a discussion document about how the Councils could best meet the development challenges facing South Warwickshire to 2050. It made some suggestions in order to elicit responses. As the document itself stressed, further detailed technical work needed to be undertaken to assess the suitability and/or appropriateness of any locations for future development. This consultation would help focus where and how to move forward.

In respect of the second option, such an approach was not supported. Early engagement with the public and key stakeholders was important to help local communities understand the Local Plan process and to help inform both Councils as they made key decisions on the strategy and policies of the Local Plan at a later stage. Early engagement with surrounding planning authorities was also important to underpin the Councils' duty to cooperate requirements.

Following which, it was

**RESOLVED:**

- 1) That the work carried out to date on commencing preparation of the South Warwickshire Local Plan, be noted;
- 2) That the consultation document "South Warwickshire Local Plan: Stage 1: Scoping and Call for Sites Consultation", attached as Appendix 1 to the agenda report, be approved for consultation with the public and stakeholders; and
- 3) That the two lead officers, in consultation with the Portfolio Holders for Place (Stratford-on-Avon District Council) and Development (Warwick District Council), be authorised to make any final editorial amendments to the Scoping Document prior to consultation.

**4. Urgent Business**

There were no items of urgent business.

CHAIRMAN

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## JOINT CABINET/EXECUTIVE COMMITTEE

10 March 2022

### MINUTES

*Held at The Town Hall - Leamington Spa - The Town Hall - Leamington Spa  
Meeting commenced: 4.15 p.m. Meeting ended: 5.00 p.m.*

Present: Councillors A Day (in the Chair), M Jennings, D Pemberton, J Cooke, R Hales and T Harvey (substitute for A Parry)

Apologies: Councillor Milton and A Parry

Also in attendance as Observers: Councillor Boad (Warwick Liberal Democrat Group Observer)  
Councillor Davison (Warwick Green Group Observer)  
Councillor Juned (Stratford-on-Avon Liberal Democrat Group Observer)  
Councillor Mangat (Warwick Labour Group Observer)  
Councillor O'Donnell (Chairman of the SDC Overview & Scrutiny Committee)

#### **5. Appointment of Chairman**

Nominations were invited for the appointment of Chairman of the Joint/Cabinet Executive Committee.

There being only one nomination, it was proposed by Councillor Cooke, seconded by Councillor Pemberton and

#### **RESOLVED:**

That Councillor Day be appointed as Chairman for the meeting.

#### **6. Disclosures of Interest**

There were no declarations of interest made.

#### **7. South Warwickshire Local Plan - Evidence Report**

*Councillor Pemberton – Place Portfolio (Stratford-on-Avon District Council) and  
Councillor Cooke – Development Portfolio (Warwick District Council)*

The Committee considered a report that updated Members on the various technical studies being prepared as part of the local plan evidence base to inform the preparation of the South Warwickshire Local Plan (SWLP). In particular, it sought endorsement of the Housing and Employment Land Availability Assessment (HELAA) methodology.

The National Planning Policy Framework (NPPF) required Local Plans were underpinned by relevant and up-to-date evidence. These needed to be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and took into account relevant market signals.

The Scoping and Call for Sites consultation put forward suggestions as to what new evidence would be required to inform the SWLP, and question four of the consultation sought views on this. Analysis one of the responses to this and ongoing discussions with stakeholders was informing the identified evidence

base required for the next stage of the Plan – the Issues and Options consultation. Some of this evidence was being collected by partners and would form part of the discussions with the stakeholder meetings in the next few weeks.

The Scoping document also identified a range of key plans and strategies that would be taken into account. A number of respondents cited other documents that needed to be used to inform the SWLP. Other more recently published strategies would also need to be taken into account, including the Levelling Up White Paper as the SWLP would be a critical document in delivering on these missions and ambitions, and securing finance from the UK Shared Prosperity Fund.

Another aspect of the preparation of the Plan was ongoing engagement with the Councils' key stakeholders. To inform the next stage of the Plan, the Issues and Options, meetings were set up with a range of organisations in order to progress any issues raised in their scoping consultation response, and to develop the growth strategy and necessary infrastructure requirements, along with the possible policy options.

A number of pieces of evidence were in the process of being prepared in-house or commissioned externally by consultants. Appendix 1 to the report set out the current position with regards to preparing the evidence base, and identified which initial evidence was expected to inform the Issues and Options, and which would be produced at a later date to inform the Preferred Options version of the Plan.

The climate change evidence, which was in the process of being commissioned, was highlighted as particularly significant. This evidence was required to address ten aspects in relation to climate change as follows and which would need to be refined as the plan progressed:

1. Set the context for climate change in relation to the South Warwickshire area using an analysis of the relevant existing available information, including a technical assessment of current and predicted changes;
2. Inform the growth strategy of the Plan by assessing the impacts of a variety of options and potential strategic allocations in relation to impacts on carbon emissions and impact on flooding and biodiversity and ability/opportunities for suitable mitigation and adaptation including the effect of higher temperatures;
3. Identify sites or broad locations within South Warwickshire where it would be appropriate to locate renewable and decentralised energy sources, including serving site allocations and existing built-up areas. This might include the establishment of a criteria-based assessment upon which a Local Plan policy could be derived;
4. An assessment on what 'net zero carbon' means and looks like for new development in South Warwickshire, including embodied carbon, both in relation to residential and non-residential uses through a technical feasibility. Consideration of how the design and layout of schemes could embrace not only net zero carbon but also address other climate change mitigation and adaptation elements such as biodiversity, flooding, overheating, resilience to increased temperatures, accessibility – building on concepts such as the 20-minute neighborhood and how this could be applied to the South Warwickshire area. This would help inform the establishment of specific criteria-based climate change policies within the Plan that new development would be required to satisfy;

5. Consideration of how the Plan could address retrofitting existing buildings to minimise carbon emissions and enable buildings to adapt to climatic changes, particularly given the local character and distinctiveness of many settlements within South Warwickshire. This should link to the point above in relation to decentralised energy sources;
6. Climate Change impact assessment of policies within the Plan, including those not directly related to climate change, to understand any potential positive and negative implications;
7. Viability implications of both the preferred growth strategy and specific policies within the Plan related to Climate Change mitigation and adaptation. This should include an assessment of the whole life costs. It was anticipated that the Plan would be aimed at carbon zero developments, as this was beyond the Future Home Standard evidence that was required to demonstrate if/how this could be achieved, and if not then what the Council's carbon reduction targets should be;
8. Carbon Sequestration – The extent to which the Local Plan could assist in this process;
9. Offsetting evidence to inform a policy in the Local Plan on climate change offsetting, in terms of process, type of development eligible, cost and how it could be spent; and
10. In recognition of the multiple pressures on rural land (such as renewable energy, local food production, biodiversity, tree planting etc), consideration of whether there were existing land typologies that could be protected and/or allocation to minimise carbon emissions.

Members were reminded that the potential need to undertake a Green Belt review was highlighted in the Scoping consultation. It was proposed that such a review should be carried out following the Issues and Options stage. This would conform to national policy in terms of needing to demonstrate exceptional circumstances before a review was undertaken and the Issues and Options consultation could be used to frame the conversation with residents and stakeholders about the merits and challenges of undertaking a Green Belt review, particularly in relation to addressing the climate change emergency.

It would also enable further engagement with the Council's duty to co-operate with partners, particularly surrounding local authorities about the potential for other authorities to meet the needs and the level of support for a sub-regional approach.

Regarding the Housing and Employment Land Availability Assessment (HELAA), a standard approach to the assessment of housing and employment sites was being applied across Coventry and Warwickshire and a public consultation in respect of this methodology concluded in December 2021. This sub-regional HELAA methodology set out a high-level framework for assessing potential locations/directions for growth, within which individual Local Planning Authorities could tailor specific criteria to respond to their local circumstances. The HELAA replaced existing SDC and WDC Strategic Housing Land Availability Assessments or SHLAAs.

The methodology applied the standard 'traffic light' (red, amber, green) colour coding to indicate how a location might perform against each of the criteria:

- Red – locations might be considered unsuitable. The constraint was absolute and could not be mitigated;
- Amber – a constraint to development existed, but mitigation might be possible; and
- Green – the location was not constrained by this criterion.

For some criteria a 'red' assessment would be sufficient to remove the site from the process as unsuitable. In others, it was possible that a more nuanced assessment might be necessary where a location/site might on balance had the potential to achieve other objectives through development.

The sub-regional methodology outlined the types of locations and sites which might be identified for assessment. This included, but was not restricted to, the sites identified in the Call for Sites exercise. Other locations/directions/sites would be compiled by officers in due course for assessment, in line with the sub-regional approach. This could include for example current allocations which did not presently benefit from planning permission, unimplemented planning permissions, previously withdrawn or refused planning applications, and sites from the Brownfield Registers.

It was important to note that any assessment of whether a location/site could be appropriate, was distinct from whether it should be developed, which was linked to the spatial strategy. Work on defining the spatial strategy options would run concurrently (though discretely) from the application of the HELAA methodology. It did not therefore automatically follow, that sites that could be appropriate for development would be allocated for such.

A multi-layered approach was being applied to the SWLP; within the HELAA itself, under the assessment of suitability, site/location attributes were being considered first before policy designations and site constraints were applied – see Appendix 2 to the report. The availability of sites and their achievability for development were also assessed to reach a conclusion about the overall deliverability of sites/locations.

An additional assessment outside the scope of the sub-regional HELAA based on the SWLP Scoping and Call for Sites consultation was then being applied.

Regarding HELAA Suitability Assessment: Location/site attributes, this stage was focused on quickly sifting out obviously unsuitable sites, both in the 'call for sites' submissions and other types of sites which might be identified from the sub-regional methodology (e.g., previously withdrawn or refused planning applications). This was based on site size, location and in the case of 'call for sites' submissions, the proposed purpose of the site. All sites assessed as 'red' in one or more of the criteria in this sub-section would be removed from the assessment process at this stage.

The HELAA Suitability Assessment Policy designations and site constraints principally using a desk-based assessment (i.e., GIS mapped data) would identify whether a location/site was subject to any known policy or physical constraints. This would identify whether the site fell within or was adjacent to any policy designations (such as the Green Belt or the AONB), and whether it had any relevant ecological, land, or heritage constraints that would need to be considered.

The HELAA Availability and Achievability Assessment would confirm that the site was available for development at a given point in time and that there were no other legal or market impediments to delivery.

Additional Assessment based on the four overarching principles set out in the SWLP Scoping and Call for Sites consultation, additional settlement design and infrastructure mapping criteria were developed. This work included, for example:

- access and connection opportunities including barriers to connectivity;
- landform;
- accessibility to public transport services;
- accessibility to infrastructure such as schools, shops, and health services; and
- accessibility to public open spaces.

In respect of recommendation two, two options were available; to endorse the methodology as presented or to amend the methodology. Not endorsing a methodology was not considered an option as officers required some objective means of selecting potential locations for inclusion within the next Issues and Options consultation.

The Group Observers supported the recommendations in the report, stating that the “direction of travel” was excellent. However, Councillor Juned requested an update on how national government plans might affect the powers available to the Council.

Following which, it was

**RESOLVED:**

- 1) That the various technical studies underway be noted, the results of which used to inform the preparation of the South Warwickshire Local Plan; and
- 2) That the Housing and Employment Land Availability Assessment methodology be endorsed.

**8. South Warwickshire Local Plan - Update Report**

*Councillor Pemberton – Place Portfolio (Stratford-on-Avon District Council) and Councillor Cooke – Development Portfolio (Warwick District Council)*

The Committee considered a report that updated Members on the progress of the South Warwickshire Local Plan and to agree its scope and end date. Stratford-on-Avon (SDC) and Warwick (WDC) District Councils consulted on the South Warwickshire Local Plan (SWLP) Scoping and Call for Sites document between 10 May and 21 June 2021. Four ‘golden threads’ ran throughout the plan:

- Tackling climate change;
- Increasing connectivity;
- Increasing biodiversity; and
- Promoting wellbeing.

In the same way as infrastructure, the economy was not a ‘golden thread’ in itself but cut across all four components. As such, the Plan was also seen as a key delivery mechanism for the various corporate strategies including climate change and the emerging joint South Warwickshire Economic Strategy.

The consultation sought responses to 53 specific questions covering range of topics and structured across four chapters:

- Questions 1-6 about the scope of the plan and the call for sites;
- Questions 7-38 about key strategic planning issues;

- Questions 39-41 about the vision and strategic objectives; and
- Questions 42-53 about various options for growth.

561 individuals/organisations responded to the consultation and 557 sites were submitted as part of the Call for Sites. A Consultation Statement setting out the consultation approach and a summary of the consultation responses received was available in Appendix 1 to the report. Social media for the consultation attracted some 84,500 impressions and the accompanying videos were watched over 2,500 times. Officers also undertook a feedback survey of those who responded to learn lessons from the consultation.

The results of the call for sites exercise were available to view via interactive mapping software at South Warwickshire Local Plan. It was stressed that the call for sites was simply a long list of the sites that had been submitted to Stratford-on-Avon and Warwick District Councils for consideration through the South Warwickshire Local Plan process. Publication of the Call for Sites was in no way an endorsement by either Council that the site was suitable for development or would be included within the Local Plan itself. These sites had not yet been analysed and as such it was unlikely that all sites would be taken forward as the plan progressed. The decision to publish the call for sites in their 'raw' form was one of transparency. The methodology that the Councils were applying to assess locations and sites was set out in a separate agenda item in respect of the evidence base update.

Section 3.3 of the report and question three in the Scoping and Call for Sites report sought responses on the plan period i.e., the length of time that the policies in the Local Plan should be valid for. Paragraph 22 of the NPPF (July 2021) stated that:

"Strategic policies should look ahead over a minimum 15-year period from adoption, to anticipate and respond to long-term requirements and opportunities, such as those arising from major improvements in infrastructure. Where larger-scale developments such as new settlements or significant extensions to existing villages and towns form part of the strategy for the area, policies should be set within a vision that looks further ahead (at least 30 years), to take into account the likely timescale for delivery."

By planning over a longer time period, the Councils would be able to align more easily with infrastructure providers who typically take a longer-term view on investment decisions. This would help ensure that new developments were supported by the necessary improvements in infrastructure. 2050 was also the date of the Government's goal to achieve a 100% reduction in net greenhouse gas emissions (relative to 1990 levels). There were 235 respondents to this question. In total there were 127 respondents supporting the proposed end date, 71 objecting and 37 did not provide conclusive answers either way.

Of those supporting the proposed 2050 end date the majority agreed that this would provide an opportunity to consider strategic growth options and to plan more sustainably. A longer plan period would allow the delivery of significant developments, and even new settlements, in full, which would help meet the needs of both districts and the unmet need across the Housing Market Area. A longer plan period would also help in bringing forward the necessary infrastructure, as well as provide certainty to local communities and developers.

Respondents also commented on the importance of a longer plan period when a review of the Green Belt was considered. Any changes to the Green Belt boundary would need to endure well into the future, and to prevent piecemeal

release in the future, a realistic understanding of future development was required. It was also commonly acknowledged that 2050 aligned with the national targets to be carbon neutral.

The arguments against the proposed end date were largely centred around the uncertainty of the future and the pace at which society and technology could change, as shown by the recent pandemic. As such, it was believed the Plan would become out of date too quickly. There were also concerns that a long-term Plan would not meet short term requirements, and there was a strong feeling that quicker action needs to be taken to combat climate change.

Another strong argument against the proposed end date, was that both existing Plans were being 'replaced' four to five years after they were adopted, despite still having approximately ten years left of the Plan period. There was therefore concern as to how a new Plan, with an even longer Plan period could remain relevant, when the existing ones were being replaced so soon after adoption.

With regards to the 38 respondents who did not provide conclusive answers either in support or against the proposed end date, most believed 2050 should be the absolute minimum end date, and it should in fact extend beyond this date. There were also comments relating to the rigidity of the Plan, and how it would be important to ensure adequate review mechanisms to make sure the Councils were not 'stuck' with an out-of-date plan based on out-of-date evidence.

Regarding the scope of the plan, Section 3.2 of the report and question two in the document sought responses on the scope of the plan. It suggested that rather than prepare a single comprehensive Plan, the plan-making process should be split into at least two separate parts.

Part One would establish a robust and flexible framework setting out where and how much development should take place across South Warwickshire. It would include the core principles and strategic policies that could provide the context for more detailed policies to follow. This framework should be capable of remaining relevant for the duration of the Plan period. This split approach would enable the Councils to prepare the first part of the Local Plan much more quickly. This would provide clarity and certainty to communities and landowners.

It would also ensure that the Councils could continue to proactively manage development pressures facing South Warwickshire. Essentially, Part One established the framework for subsequent parts of the SWLP to come forward. It could also provide a meaningful role for neighbourhood plans to focus on detailed local policies within the context of the strategic planning framework established by Part One.

No decisions had yet been made about how to progress subsequent plans although this approach provided flexibility to adopt the most appropriate solution. It might be that a hybrid approach was most appropriate reflecting the geography and challenges facing South Warwickshire.

The practical effect of having a Part One Plan was an acceptance that Part One would not identify or include every development site; it would only identify strategic sites and locations. Non-strategic sites would be identified in subsequent parts of the Plan. There was a further discussion to be had as to what the detail of this approach would look like.

The most important component of Part One was the development strategy – also known as the spatial strategy; the name given to the approach set out in policy as to how the Plan apportions growth to the area. It identified a hierarchy of settlements based on the principles of sustainable development where the more sustainable locations, at the top of the hierarchy, received more growth. The hierarchy could include existing settlements, locations/key sites as well as new settlements. Typically, housing and job numbers were apportioned to these locations. Essentially, the development strategy set out how much development went where.

The current development strategies were set out in Policies CS.15 and CS.16 of the SDC Core Strategy and Policies DS4, DS6, DS7 and DS8 of the Warwick Local Plan. They related to both housing and employment. The WDC Local Plan met its housing requirement in full by allocating sites of a variety of sizes. The SDC Core Strategy also met its housing requirement in full albeit by allocating a more limited number of larger sites, strategic and non-strategic in nature. Both plans fully met their jobs requirement by allocating sufficient employment sites.

The term 'strategic sites' was not defined as such but was regarded as being sites central to the delivery of the plan. As such, strategic sites should not be defined by size alone, although this could be a useful proxy. The NPPF set out guidance in respect of the approach to strategic policies (not sites per se) – see excerpt in Appendix Two to the report.

The most important aspect of the Plan was to demonstrate deliverability. As such, strategic sites could encompass locations where significant change or substantial growth was proposed or where development was required in the early years of the Plan period necessary to maintain a five-year housing land supply. For the avoidance of doubt, the Part One plan would need to identify any areas for Green Belt release, including any areas of new Green Belt.

It should have been noted that local planning authorities were required to assess the up-to-dateness of their Plan every five years, and review Plans if necessary. This requirement fitted well with the framework set in a Part One Plan, thus enabling the detailed policies in subsequent Plans to be updated and remain relevant to 2050. In other words, Part One were fixed now for the period to 2050 and subsequent parts of the Plan were prepared and reviewed on a more regular basis as necessary over the 25-year period e.g., to take into account changes in technology and standards.

The housing 'to-find' figure needing to be met by allocations in the Core Strategy was significantly reduced owing to applications being granted consent or via appeal. The Site Allocations Plan sought to identify additional housing sites beyond the housing requirement as well as reserve housing sites.

There were 230 respondents to this question. In total there were 151 respondents supporting the approach of a strategic Part One Plan, 43 objecting and 36 did not provide conclusive answers either way.

The two primary arguments in support of a strategic Part One Plan, was that it would expedite the Plan making process, in turn providing clarity and certainty for developers and communities, and that it would allow the Councils to focus on the strategic priorities of the area.

There was also an understanding that having a high-level Plan allowed a level of flexibility in the plan making process should there be any drastic changes or reforms.



Interestingly, many of the arguments against a Two-Part Plan were direct opposites of the arguments above. Many respondents believe that a Two-Part Plan would cause confusion and uncertainty, particularly for smaller villages who would need to wait for the Part Two Plan to come forward before they understood the full extent of development across the District. However, the most prolific argument against a Two-Part Plan, was the time taken for the second Plan to come forward. Many respondents believed that a Two-Part Plan would take too long to be adopted and there were concerns that this might cause shortfalls in the five-Year Housing Land Supply which might result in unplanned development. Many respondents pointed to the difficulties Stratford-on-Avon District Council had with the Site Allocations Plan. The view of these respondents was that a 'full' plan should be progressed.

For those that did not provide conclusive answers they shared many of the views presented above. Most understood the sentiment behind the high-level strategic Part One Plan, but they also had some concerns. For some, it was unclear what the Part One Plan would contain, and what 'strategic matters' it would cover, and whether a Part 1 Plan might lack the necessary detail; greater clarity over its contents were requested. Many respondents suggested that the Part One Plan would need to cover strategic allocations and have a conclusive development strategy. For those that were concerned about the timescales, it was commonly stated that Part Two would need to come forward in a timely manner so that the detailed matters were not delayed.

Overall, the vast majority of respondents understood and agreed with the approach of a Two-Part Plan. In conclusion, a Part One plan that established the strategic principles for development over the long term provided flexibility in respect of how we then plan the details. Some of those details would be included in Part One (i.e. strategic locations and any Green Belt locations), some would be incorporated in subsequent South Warwickshire Local Plans, whilst some details could be included within neighbourhood plans.

Importantly, commencement of any work on subsequent SWLP documents would not have to wait until adoption of Part One but could be brought forward in close succession.

In terms of alternative options, there were two substantive recommendations in this report. In respect of recommendation two, an end date was required. A date of 2050 was proposed for the reasons set out in the report. If Members did not agree that 2050 was the appropriate date, then an alternative date needed to be established.

In respect of recommendation three, if Members did not agree that with the proposed approach of having a strategic Part One Plan, then the alternative was for a single comprehensive SWLP to be produced. Members should be aware of the likely impact on plan-preparation timescales of such an approach.

In response to questions from Group Observers, the Head of Place and Economy explained that the benefit of Part One Planning was flexibility, although what that would look like had not yet been decided. He stated that a more flexible approach enabled the Councils to adapt to changing government policy. Each plan had its own statutory processes to go through, and the Councils aimed to create a high-level and robust framework that enabled the details to be changed as and when.

Following which, it was:

## **RESOLVED:**

- 1) That the summary of the feedback that had been received in response to the Scoping and Call for Sites consultation during May/June, be noted;
- 2) That the end date of the South Warwickshire Local Plan be 2050; and
- 3) That the South Warwickshire Local Plan be prepared as a suite of plans, with Part 1 to the report being a strategic plan establishing the development strategy and strategic policies, be agreed.

## **9. South Warwickshire Local Plan - Timetable Report**

*Councillor Pemberton – Place Portfolio (Stratford-on-Avon District Council) and Councillor Cooke – Development Portfolio (Warwick District Council)*

The Committee considered a report that sought to agree the timetable for the preparation of the South Warwickshire Local Plan.

There were a number of stages to the preparation of Local Plan documents (see Figure 1 below). Publishing a timetable setting out when these various stages were likely to occur helped to ensure that residents and stakeholders could more fully engage in the process.

An indicative timetable for the South Warwickshire Local Plan (SWLP) was published in Autumn 2020 with the intention that it would be confirmed following the initial Scoping and Call for Sites Consultation held between May and June 2021.

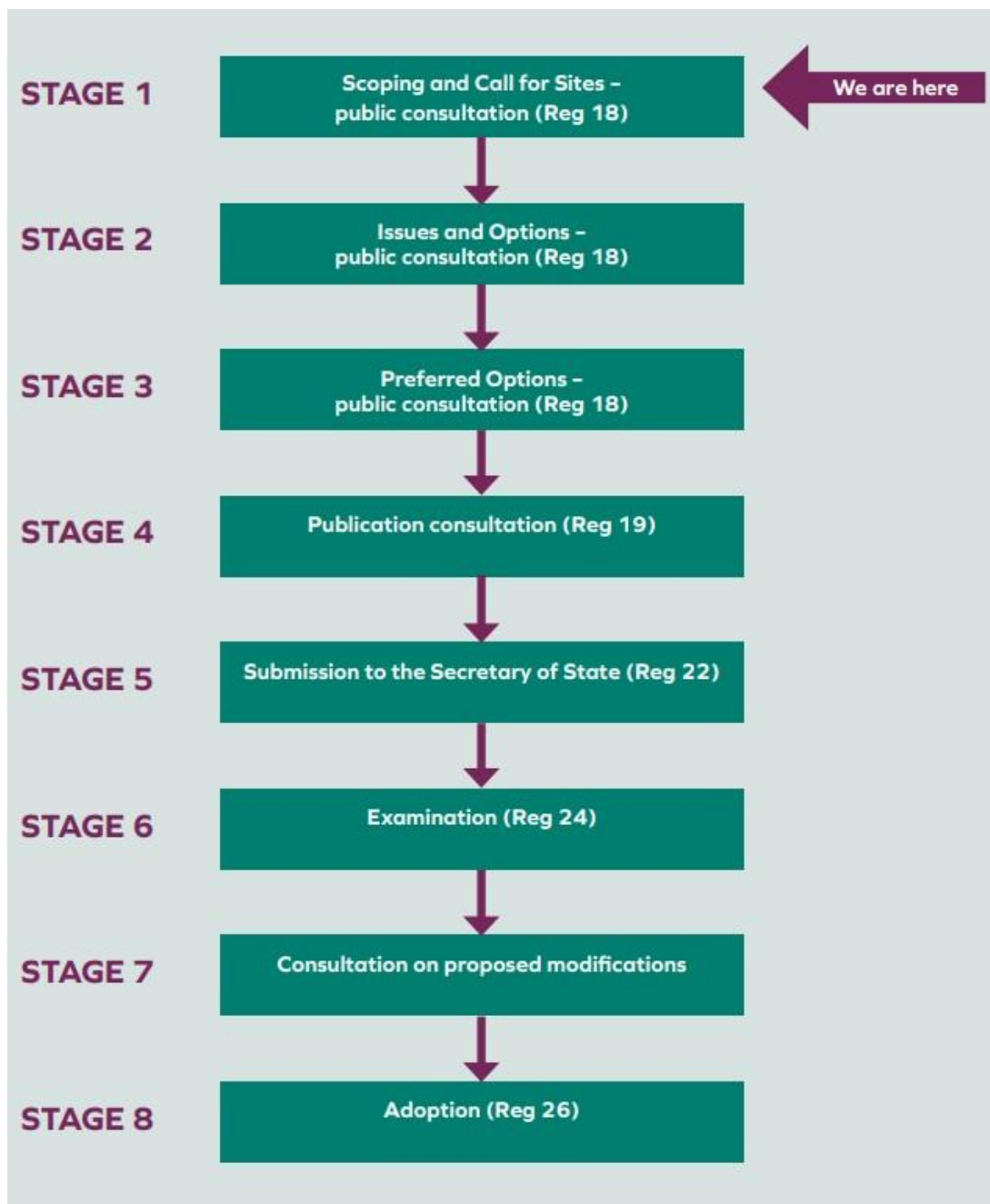
The intention was to consult on the next stage of the SWLP – Issues and Options – in late summer 2022. As such, it was considered necessary to confirm these timescales.

It was also a legal requirement to prepare a Local Plan in accordance with the published Local Development Scheme (LDS). The LDS was a work programme that provided information about the Local Plan/Development Plan Documents (DPDs) that a Local Planning Authority would produce. The LDS set out the subject and geographical area that each DPD would cover and the timetable for its preparation and revision. SDC and WDC's current LDSs did not include an up-to-date timetable for the SWLP.

The report sought to agree the SWLP timetable so that it could then be included within each Council's LDS in due course. The timetable is attached at Appendix 1 to the report.

It should have been noted that the timetable would be kept under review and could be adjusted as necessary. It was considered challenging but realistic and provided for a degree of flexibility. One key variable related to the 2023 local elections which might be postponed to 2024 if the Government confirmed the political merger of the two Councils.

**Figure 1 – Stages of Local Plan Preparation**



Whilst much of the work on the SWLP could be undertaken in parallel, certain aspects of plan preparation were sequential. Given the importance of housing and job numbers, it was considered sensible to await the publication of the 2021 Census results before consulting on the Issues and Options version of the SWLP. The headline results were due Spring 2022. Delay to publication might impact on the proposed timetable. The alternative would be to consult using current projections which were based on figures that were now 10 years old. The Census would also provide an opportunity to verify the accuracy of these projections.

It should also be noted that the timetable, post submission of any plan was determined by the Planning Inspectorate.

In terms of alternative options, there were two options available to the Joint Cabinet Committee. The first was to agree the timetable as drafted, noting that it could be kept under review and adjusted as necessary. The second option was to agree an alternative timetable. Not confirming a timetable was not considered to be a realistic option.

In response to comments from Group Observers, the Head of Place and Economy explained that, as this was a high-level plan, it was advisable to adopt this timetable. He assured Members that a more detailed timetable would be circulated in due course to allow Members to provide better and more timely scrutiny.

Following which, it was

**RESOLVED:**

That the timetable for the preparation of the South Warwickshire Local Plan be agreed and incorporated into each Council's respective Local Development Scheme in due course.

**10. Urgent Business**

There were no urgent business items.

CHAIRMAN

## JOINT CABINET/EXECUTIVE COMMITTEE

29 June 2022

### MINUTES

*Held at The Town Hall - Leamington Spa - The Town Hall - Leamington Spa  
Meeting commenced: 6.10 p.m. Meeting ended: 7.12 p.m.*

Present: Councillor A Day (Chairman) Councillors A Parry, D Pemberton, J Cooke and R Hales

Apologies: Councillor M Mangat

Also in attendance: Councillor A Milton (Chair of Warwick District Overview & Scrutiny Committee)  
as Councillor A Boad (Warwick District Liberal Democrat Group Observer)  
Observers: Councillor J Falp (Whitnash Residents' Association Group)

#### **11. Appointment of Chairman**

Nominations were invited for the appointment of Chairman of the Joint/Cabinet Executive Committee.

There being only one nomination, it was proposed by Councillor Cooke, seconded by Councillor Pemberton and

#### **RESOLVED:**

That Councillor Day be appointed as Chairman for the meeting.

#### **12. Disclosures of Interest**

There were no declarations of interest received.

#### **13. South Warwickshire Local Plan - Settlement Analysis Evidence Report**

*Councillor Pemberton – Place Portfolio (Stratford-on-Avon District Council) and Councillor Cooke – Development Portfolio (Warwick District Council)*

The Committee considered a report which sought endorsement of the Settlement Analysis Evidence Report which was prepared as part of the local plan evidence base to inform the preparation of the South Warwickshire Local Plan.

Settlements were identified for assessment on the basis that they fell within the first or second tier settlements in either the Stratford-on-Avon District Core Strategy (Main Town and Main Rural Centres) or the Warwick District Local Plan (Urban Areas and Growth Villages) and were relevant to more than one of the growth scenarios set out in the Scoping and Call for Sites consultation. This approach enabled officers to focus on settlements already considered amongst the most sustainable in planning policy. In addition, a number of other settlements were identified for assessment on the basis that they were relevant to the rail corridor or socio-economic growth scenarios. In analysing feedback from the scoping consultation, the 'rail corridor' option was the option most cited as the preferred scenario (21%), with the fewest citing it as the least

preferred (5%), and this contributed to the decision to focus on settlements within rail corridors. Whilst all of the other options (with the exception of 'dispersed', which was stated as the least preferred option by 36% of respondents) had reasonably balanced responses in terms of 'most preferred' and 'least preferred' options, officers identified the socio-economic option for further analysis.

Kineton was selected due to its existing policy status, relative size and infrastructure provision, and South of Coventry because the city edge also forms a potentially sustainable location. There was potential for additional settlements to be assessed using the methodology set out in the report if the spatial strategy evolved to necessitate it.

For the purposes of this study, only settlements within the Cotswold Area of Outstanding Natural Beauty (AONB) were excluded from selection, all other settlements including those within the Green Belt were not excluded from assessment as it was considered important for the study to take a 'policy-off' approach at this stage in order to have the most use in informing future decision-making on growth options.

The evidence covered three main elements which were: connectivity evidence and analysis; accessibility evidence and analysis; and density mapping.

The methodology for the connectivity evidence and analysis element of the study was designed to consider the existing settlement structure, and the opportunities and constraints this might afford, to create growth which was well connected to the established town or village.

The Settlement Structure Analysis considered each settlement as it currently existed including a review of historic maps to get an impression of how the settlement had evolved over time, existing green and blue corridors, and railway lines along with route structure analysis using a colour coded approach to categorise different types of routes and help to establish how permeable and connected the street network was:

- Strategic long-distance highways;
- Primary streets;
- Thoroughfares;
- Loops;
- Cul de sacs;
- Cycle only routes;
- Bridleways; and
- Footpath connections.

Using a combination of desk-based GIS analysis and site visits, the following key landform information was recorded for each of the settlements assessed:

- Notable gradients in and around the settlements;
- Areas at risk of flooding; and
- Significant areas of Green Infrastructure.

Based on the analysis undertaken for parts above, further analysis of the relative connectivity of the 'edges' of each settlement was analysed and graded by dividing the settlement into edge segments and assessing each edge against a range of factors to identify a 'Connectivity Grade' between A (best connectivity) and E (poorest connectivity) which were colour coded between green (A) and red (E) on the maps. It enabled the comparison of different

directions for potential growth around settlements, in terms of their ability to connect into the established 'structure' of the settlement, and the opportunities and constraints in this respect.

It was acknowledged that other constraints beyond the scope of this study might also impact on whether growth may or may not be appropriate in different directions from existing settlements (e.g. ecological or heritage designations, or infrastructure capacity) and this evidence was also gathered and layered up to provide a comprehensive picture.

The methodology was designed to identify those local services that were necessary to meet the day-to-day needs of residents within a 10-minute walk (800m).

The types of services necessary to meet day-to-day needs were identified for each of the settlements and broken down into a number of typologies:

- Retail, jobs and economy;
- Places to meet;
- Open space, leisure and recreation;
- Healthcare; and
- Education.

Having identified the location of existing services and facilities within the settlements, the next step explored the extent of the area which was likely to fall within a 10-minute walk (800m) of each of the five categories of services as set out above. From this, it was possible to identify how many of the categories were within a 10-minute walk of each of the edge segments identified in the connectivity analysis. This helped to inform how accessible any growth in this location would potentially be. It was acknowledged that this analysis was focussed on existing infrastructure and did not take account of whether the quality/capacity of the infrastructure or the scope for new infrastructure to be provided as part of any new development. These aspects would need to be considered separately.

The appropriate density of new development needed to take into account a range of factors including the surrounding context and accessibility, along with the proposed building form and character of a particular site. More compact forms of development in certain locations could bring people together to support local services and make destinations easily accessible by walking or cycling thus reducing dependency upon the private car. Density considerations also had an important role to play in tackling climate change both in relation to reducing carbon emissions and in adaptation and mitigation.

This element of the settlement analysis mapped the different density ranges within the existing settlements using a coding structure recommended by the National Model Design Code. This information would help guide assumptions in respect of appropriate densities of any new growth and identify potential capacity to inform the extent to which the various growth options would be able to deliver the necessary development need.

In terms of options, the two available options were to endorse the Settlement Analysis evidence report as presented or to amend the methodology. Not endorsing the evidence report was not considered an option as officers required some objective means of assessing existing settlements in order to assist in identifying potential locations for inclusion within the next Issues and Options consultation.

Warwick District Council Overview & Scrutiny Committee had considered the report and had provided the following comments. It was keen that Warwick District Council stayed close to housing demand numbers and interrogated them when they were published along with the requirements for infrastructure within the areas; wished to know when the budget shortfall would be addressed; and requested that information should be added to the report up front to provide clarity on:

- a) how the greenbelt is impacted (or not) by this report and when that will be addressed;
- b) the definition of a twenty-minute neighbourhood, with examples provided, for people to better understand the concept;
- c) densities and the impact these might have on future issues and options; and
- d) the distinction/difference between the Scoping and Call for Sites consultation results and the analysis done in this report and at what stage the results from both would come together.

The Warwick District Council Overview & Scrutiny Committee also recommended to the Joint Cabinet Committee that the District Councils should engage with Town and Parish Councils earlier in the process to validate the findings for particular settlements.

Councillor Pemberton expressed thanks to the officers involved in writing this report, stating that he felt confident in the evidence base provided. Councillor Cooke echoed these sentiments, requesting that the expression of gratitude to officers be recorded in the minutes.

Following comments from Councillor Boad, the Warwick District Liberal Democrat Group Observer, and the Whitnash Residents' Association Group about the clarity of the report, Councillor Pemberton offered to work with Councillor Cooke and officers to help Town and Parish Councils comment on the analysis on settlements. He suggested that the timetable with anticipated dates and summaries (suggested by Councillor Parry) could also have keys included to help explain further.

In response to a question about the budget from WDC for this report, Councillor Hales reassured Members that the rest of the budget would be provided, but for now officers were still working on where the allocation would be coming from.

After suggestions from Councillor Pemberton about a joint Overview and Scrutiny Committee, the Chair of the WDC Overview & Scrutiny Committee recognised the importance of joint working but noted that this was being done by the Joint Cabinet meetings. He stated that he was elected to represent the interests of residents of Warwick District, and in order to do that properly the Scrutiny Committees needed to be kept separate.

Councillor Day stressed the importance of benefitting from the input of both Scrutiny Committee chairs at Joint Cabinet meetings but felt that the two Chairs should be trusted to bring their comments to Joint Cabinet individually. While there were things the two Councils had in common, there were other things that needed to be considered separately, and that could not be done with a Joint Overview & Scrutiny Committee.



Councillor Cooke then proposed that the recommendation from the WDC Overview & Scrutiny Committee be rejected and replaced with the following additional recommendation:

*"That Parish and Town Councils are given the opportunity to comment on the settlement analysis prior to the Issues and Options consultation; and the Heads of Development, in consultation with the Portfolio Holders for Place and Economy and Planning and Place, make any subsequent factual and consistency changes, and any changes, as appropriate, following consultation with Parish and Town Councils, and ward members".*

Councillor Cooke proposed the report as laid out, subject to the above additional recommendation proposed in the meeting.

It was therefore

**RESOLVED:**

- 1) That the Settlement Analysis evidence report, the results of which to be used to inform the preparation of the South Warwickshire Local Plan (SWLP), be endorsed; and
- 2) That Parish and Town Councils be given the opportunity to comment on the settlement analysis prior to the Issues and Options consultation; and the Heads of Development, in consultation with the Portfolio Holders for Place and Economy and Planning and Place, make any subsequent factual and consistency changes, and any changes, as appropriate, following consultation with Parish and Town Councils, and Ward Members.

**14. Dates of future meetings**

The Joint Cabinet Committee agreed that the next two meetings would take place at the Town Hall, Royal Leamington Spa, on the following dates:

- 21 September 2022 at 4pm; and
- 3 November 2022 at 4pm.

**15. Urgent Business**

There were no items of urgent business.

CHAIRMAN

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Joint Cabinet/Executive Committee  
7 December 2022

Subject: South Warwickshire Local Plan Part 1 – Issues and Options Consultation

Lead Officers: John Careford, Head of Development, Stratford-on-Avon District Council (01789 260801)

Philip Clarke Head of Place, Arts & Economy, Warwick District Council (01926 456518)

Portfolio Holders: Councillor D Pemberton, Councillor J Cooke

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### Summary

To endorse the South Warwickshire Local Plan Issues and Options document (attached at Appendix 5) for consultation commencing in January 2023. This report sets out the background to the consultation document itself. It also seeks to note the accompanying Sustainability Appraisal/Strategic Environmental Assessment (SA/SEA).

### Recommendations:

- (1) That the Housing & Economic Development Needs Assessment (HEDNA) (attached as Appendices 1 (a) and (b)) as providing a basis for continuing work on the South Warwickshire Local Plan be noted;**
  - (2) That the findings of the Sustainability Appraisal/Strategic Environmental Assessment (attached at Appendices 2 (a), (b) and (c)) that accompanies and informs the South Warwickshire Local Plan Issues and Options consultation be noted;**
  - (3) That the notes from the Duty to Co-operate meetings (attached at Appendix 3) as evidence of the ongoing, positive and proactive discussions with neighbouring Authorities be noted;**
  - (4) That the Evolving Spatial Growth Options' Topic Paper attached at Appendix 4 be noted and the South Warwickshire Local Plan Issues and Options document (attached at Appendix 5) for consultation be endorsed, commencing in January 2023; and**
  - (5) That the respective Portfolio Holders for Place (Stratford-on-Avon District Council) and Planning & Place (Warwick District Council), in consultation with the respective Head of Development and Head of Place, Arts & Economy, be authorised to make any final editorial amendments to Appendix 5, prior to commencement of the consultation.**
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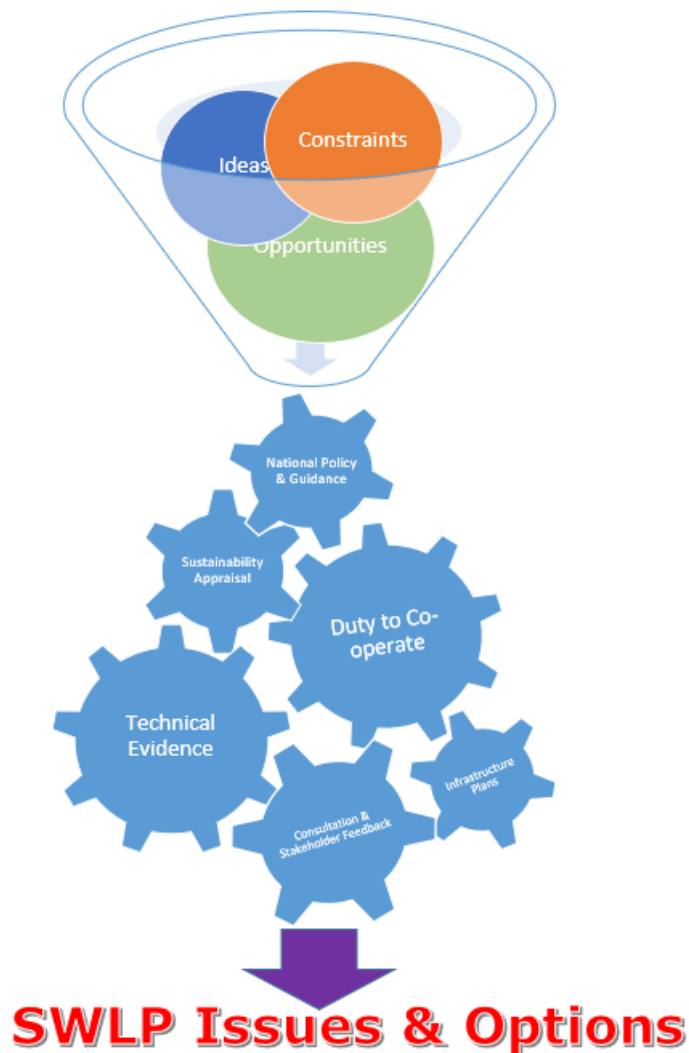
## **1 Background/Information**

- 1.1 The South Warwickshire Local Plan (SWLP) is the name for a suite of planning documents that will manage development across Stratford-on-Avon and Warwick Districts to 2050. The SWLP is being prepared in parts, with work underway on Part 1 focusing on strategic planning matters, e.g. how much development goes where. In summary, Part 1 aims to establish a new planning strategy and principles for development that sets a robust yet flexible framework for subsequent detailed local plan documents.
- 1.2 Preparing a Local Plan is not a one-off event and there are numerous stages of preparation and public consultation. In terms of the SWLP Part 1, this is the second stage of preparation and follows on from the Scoping and Call for Sites Consultation undertaken in summer 2021. More information about the previous consultation is available at [www.southwarwickshire.org.uk/swlp](http://www.southwarwickshire.org.uk/swlp). The stages of plan-preparation are as follows:
1. Scoping and Call for Sites (including public consultation)
  2. Issues and Options (including public consultation)
  3. Preferred Options (including public consultation)
  4. Publication (including public consultation)
  5. Submission
  6. Examination
  7. Main Modifications (including public consultation)
  8. Adoption
- 1.3 As can be seen, the Councils are still at an early stage of plan preparation and the Issues and Options (I&O) is very much an ideas paper that asks a series of questions about how both Councils might best address the difficult development challenges facing South Warwickshire to 2050. Following the consultation there will be refinement of the plan and further rounds of public and stakeholder engagement. This process of refinement can be conceptualised as the image in Figure 1 (below). Indeed, it is important to stress that the Issues and Options consultation is an ideas paper where we explore a variety of options and seek feedback on those proposals. The Issues and Options is not making any decisions – although the SWLP will, of course, need to make difficult decisions in due course.
- 1.4 It should also be noted that, although there are various rounds of formal consultation, preparation of the plan also includes ongoing engagement throughout. An example of this is the large map and toy brick exercises held over the summer with stakeholders that have helped shape the content of this document.
- 1.5 A key stage is Preferred Options (Stage 3), as this will be the first draft version of the actual plan itself. This then gets refined until we are ready to submit what we consider to be the final version of the plan for examination. The purpose of the Examination in Public is to test that the plan has been prepared properly and is fit for purpose (i.e. sound) in that it has been prepared positively to meet the development challenges facing the Districts. This point is important – whilst it is our plan, we do not have

a 'free hand'. The benefit of having a plan is that both Councils retain control of plan-making across South Warwickshire and can better ensure that development (that will happen regardless) reflects both Councils' aspirations, ambitions and objectives.

- 1.6 The SWLP is essential in delivering on both Councils' economic development aspirations to grow the economy post COVID-19 and capitalise on economic assets, including through the provision of additional high-quality jobs.

**Figure 1: Local Plan Refinement**



- 1.7 In preparing the SWLP, aside from the Joint Committee, there are three key groups. The first is the Member Advisory Group comprising cross-party members from both District Councils that meets regularly to provide a steer on the preparation of the SWLP. The second is the Officer Steering Group comprising officers from across both Councils and Warwickshire County Council. The third group is the Place Board and its associated infrastructure groups which acts as a forum for ongoing engagement, most recently the large map and toy brick exercises.

## Recommendation 1: Housing & Economic Development Needs Assessment (HEDNA)

- 1.8 A Housing & Economic Development Needs Assessment (HEDNA) has been prepared to support the work on the SWLP and it will be an important part of the evidence base for the Plan. The purpose of the HEDNA is to provide a joint and integrated assessment of the likely future needs for housing and employment land, taking into account the economic potential and needs of all households in South Warwickshire for the period up to 2050 (the proposed end date of the SWLP). It is good practice to commission such studies jointly with other authorities because housing needs should be considered across wider "Housing Market Areas". South Warwickshire lies in the Coventry & Warwickshire Housing Market Area. This HEDNA has therefore been commissioned jointly by all the local authorities across Coventry and Warwickshire. It has been undertaken by a team of independent consultants led by Icen Projects. A copy of the Executive Summary of the HEDNA is attached as Appendix 1(a) and the full report as Appendix 1(b) (combined as Appendix 1 to the report).
- 1.9 The key findings of the HEDNA are as follows.
- 1.10 It identifies a need for 345 ha of land for **office and general industrial development** in South Warwickshire to 2050. In addition, it identifies a sub-regional need for strategic warehousing/ logistics which will need to be met across the sub-region. This is shown in figure 2 below.

**Figure 2: Employment Land Needs 2021-2050 (ha)**

	Coventry	North Warks	Nuneaton & Bedworth	Rugby	Stratford-on-Avon	Warwick	Total
Office	10.0	7.0	3.0	6.5	7.2	15.8	49.5
General Industrial	214.0	81.4	66.0	218.2	240.9	81.4	901.9
Sub total	224.0	88.4	69.0	224.7	248.1	97.2	951.4
Strategic warehousing / distribution (B8)							709

- 1.11 It identifies a need for South Warwickshire to deliver **1,679 new homes** per year (868 for SDC and 811 for WDC) to meet both Councils' housing needs. This is shown in figure 3 below.

**Figure 3: Overall Housing Need (dwellings per annum)**

	Coventry	North Warks	Nuneaton & Bedworth	Rugby	Stratford-on-Avon	Warwick	Housing Market Area
2014-based Projections	3,188	176	435	516	564	675	5,554
HEDNA	1,964	119	409	735	868	811	4,906

- 1.12 It is important to understand the basis upon which the HEDNA has derived these figures. The Government has set out a standard method for assessing housing need. This takes 2014-based Household Projections (produced by the Office for National Statistics (ONS)) as its starting point. (The 2014-based Household Projections are household numbers based on long-term demographic trends over a 25-year period.) The standard method then uses a prescribed approach which applies an uplift to this based on the relative housing affordability position of individual local authorities. For cities such as Coventry, a further 35% uplift is also applied.
- 1.13 The standard method, as applied across Coventry and Warwickshire, is shown in figure 3 above. As can be seen, across the Housing Market Area, using the 2014-based projections, gives a higher overall housing figure than the HEDNA is projecting, however a lower figure for Stratford-on-Avon and Warwick Districts.
- 1.14 It would be normal to use the 2014-based projections as the basis for estimating housing need. The reason that the HEDNA has not done this is because recent initial outputs from the 2021 census have revealed that previous household projections produced by the Office for National Statistics, particularly as they relate to the population of Coventry, have overestimated the population of the city. As such, there are concerns about any projections of future population based on these old projections. The HEDNA has also applied more up-to-date (and therefore accurate) assumptions about fertility, mortality and household formation rates. The 2021 census is a more robust and reliable basis for considering population projections.
- 1.15 The HEDNA identifies a total need for **affordable housing** across South Warwickshire of c1,388 per year. This includes both those in need of social/affordable rented homes and those with affordable home ownership needs. This figure does not mean that the SWLP should seek to meet this need in full through new dwellings, as there are different ways in which this need can be met. It will provide a basis upon which further work can be done to explore how to deliver affordable homes through the SWLP to meet the needs of both Councils' communities.
- 1.16 The HEDNA also provides guidance on suggested **mix of houses** of different sizes, levels of **specialist housing need** and levels of **self and custom build housing**. It also considers the issue of the **student** population.
- 1.17 It should be noted that whilst the HEDNA looks at the issue of the need for employment and housing across all authorities in the sub-region, it does not make any assessment of whether those needs can be met within each local authority area. Currently part of SDC's overall housing requirement in the Core Strategy is to meet needs from the Greater Birmingham & Black Country Housing Market Area. Similarly, part of WDC's overall housing requirement in the current Local Plan is to meet Coventry's housing need. As part of preparing the SWLP, there will need to be further discussions with adjacent and other authorities to establish how any unmet needs in any authority area will be met in surrounding

authorities. This is part of the "Duty to Cooperate" process (see also later in this report).

- 1.18 Although the figures contained in the HEDNA are challenging for the SWLP, they do represent up-to-date evidence based, importantly, on the latest 2021 census. Whilst there will undoubtedly be questions that both councils, and many local stakeholders, will want to ask about the figures in the HEDNA, they do provide a credible basis on which to explore the issues and options that the SWLP will need to consider. Importantly, publishing the HEDNA alongside the Issues & Options paper will give an opportunity for all interested parties to comment on the HEDNA. The public consultation on the Issues & Options paper will invite anyone to provide their own evidence if they believe the HEDNA figures to be incorrect. This will allow further opportunity for both Councils to consider this issue.

### **Recommendation 2: Sustainability Appraisal/ Strategic Environmental Assessment**

- 1.19 Preparation of the plan is supported by a suite of technical studies, many of which have been undertaken by independent expert consultants. The technical studies which have informed the Issues and Options consultation include:
- Bus Accessibility Mapping
  - Climate Change Baseline Report
  - Climate Change Emissions Assessment
  - Equalities Impact Assessment
  - Habitat Regulations Assessment (HRA)
  - Heritage and Settlement Sensitivity Assessment
  - Housing and Economic Development Needs Assessment (HEDNA)
  - Strategic Flood Risk Assessment (SFRA) Part 1
  - Sustainability Appraisal (SA)
  - Urban Capacity Study
- 1.20 Officers have also undertaken technical work in respect of settlement connectivity, density, and accessibility to local services and facilities and this work was previously endorsed by the Joint Committee.
- 1.21 All the technical work is available to view on the website at [www.southwarwickshire.org.uk/swlp](http://www.southwarwickshire.org.uk/swlp). Further technical work will also be undertaken to support the next stage of plan preparation.
- 1.22 The three key pieces of technical evidence are the Housing and Economic Development Needs Assessment or HEDNA which considers how many jobs and homes both Districts may need to 2050 as well as issues such as housing affordability, mix and tenure (see separate report); the Climate Change Study and the Sustainability Appraisal/Strategic Environmental Assessment (SA/SEA).



- 1.23 Given the importance of embedding climate change mitigation and adaptation principles throughout the Local Plan, consultants have been appointed to collect a series of climate change related evidence. At this Issues and Options stage two reports have been prepared. Firstly, a baseline report which sets the context and starting point for the two authorities and identifies opportunities to embed climate change considerations into the Local Plan. In addition, an emissions assessment report explains how a carbon model has been developed to test and compare the emissions associated with the various options in the Issues and Options in relation to the different growth options and the potential locations for new settlements. The intention is for this model to be further developed as the Plan progresses and become more refined as the strategy evolves towards a preferred approach.
- 1.24 A Sustainability Appraisal/Strategic Environmental Assessment (SA/SEA) is an essential component in the production of the local plan, informing and influencing plan preparation to optimise its sustainable development performance. An SA/SEA is an iterative and ongoing process, and each stage of consultation will be accompanied by an SA/SEA report.
- 1.25 To help ensure that the Issues and Options document includes the most suitable planning policies and development allocations, the SA/SEA identifies, describes and evaluates a number of different reasonable alternative policies and development locations. The SA/SEA has been included as Appendices to this report: **Appendix 2(a)** is a non-technical summary, **2(b)** is the full SA/SEA report and **2(c)** contains the Appendices to the SA/SEA report (combined as Appendix 2 to this report). The SA/SEA explores the following reasonable alternatives:
- 5 Growth Options which provide details about where development should be distributed at a strategic scale across the South Warwickshire area
  - 7 New Settlement Locations for large-scale development of not less than 6,000 new homes and associated infrastructure
  - 32 Broad Locations which represents options for up to 2,000 homes located around the main settlements for medium scale development and associated infrastructure in any one Broad Location
  - 22 Small Settlement locations for intermediate scale development for between 50-500 homes in any one location, typically associated with smaller settlements and villages
  - 88 Policy alternative options for shaping the relevant policies. Examples of subjects include climate change, tourism and health.
- 1.26 The appraisal process uses a framework comprising 14 objectives assessed using the scoring matrix shown in Figure 4 to evaluate how the different reasonable alternatives perform against sustainability objectives. It provides a way in which sustainability effects can be described, analysed and compared.

**Figure 4 SA/SEA Scoring Matrix**

<b>Likely Impact</b>	<b>Description</b>	<b>Impact Symbol</b>
Major Positive Impact	The proposed option contributions to the achievement of the SA Objective to a significant extent.	++
Minor Positive Impact	The proposed option contributions to the achievement of the SA Objective to some extent.	+
Negligible Impact	The proposed option has no effect or an insignificant effect on the achievement of the SA Objective.	0
Uncertain Impact	The proposed option has an uncertain relationship with the SA Objective or insufficient information is available for an appraisal to be made.	+/-
Minor Adverse Impact	The proposed option prevents the achievement of the SA Objective to some extent. Mitigation solutions are achievable, and or complex, with a relatively low level of intervention.	-
Major Adverse Impact	The proposed option prevents the achievement of the SA Objective to a significant extent. Mitigation solutions are likely to be complex, if at all possible. A high level of intervention is required.	--

1.27 At this stage, it is difficult to identify stand out best performing options because they all perform best for different SA Objectives and rarely does one option emerge as a best overall option. Whilst the accompanying assessment matrices provide a helpful summary, they reflect a much broader assessment based on the 'lowest common denominator' and do not, at this stage, take into account any mitigation with could have the effect of minimising any adverse impacts.

**Recommendation 3: Duty to Co-operate**

1.28 Section 33A of the Planning and Compulsory Purchase Act requires Local Planning Authorities "to engage constructively, actively and on an ongoing basis" in respect of their plan-making activities. The Duty to Co-operate requirement is expanded on in the National Planning Policy Framework (NPPF) and accompanying Planning Practice Guidance (PPG). The Duty to Co-operate is a legal test that needs to be satisfied as part of the local plan examination process in order for a local plan to be found sound and adopted. Unlike other tests of soundness which can be amended or remedied as part of the examination, the Duty to Co-operate is considered to be a pass/fail test.

1.29 In exercising this function, officers have commenced discussions with neighboring planning authorities in respect of the SWLP to understand if there are any strategic cross-boundary matters that the SWLP needs to address. These conversations will continue as the SWLP progresses. Conversations will also need to be held with other Duty to Co-operate bodies, as appropriate.

- 1.30 Importantly, the Duty to Co-operate is not a duty to agree *per se*, but local planning authorities must demonstrate that they have engaged constructively in respect of progress to addressing strategic cross-boundary matters. In particular, joint working should help to determine where additional infrastructure is necessary, and whether development needs that cannot be met wholly within a particular plan area could be met elsewhere.
- 1.31 Discussions have been ongoing with a number of organisations through the preparation of the SWLP. Most recently, officers have met with representatives from neighbouring authorities and the notes of these meetings are attached at **Appendix 3**:
- Birmingham
  - Cherwell
  - Cotswold
  - Coventry
  - Redditch and Bromsgrove
  - Rugby
  - Solihull
  - West Northants
  - Wychavon
  - Worcestershire
- 1.32 In addition, officers are represented on the Coventry, Solihull and Warwickshire and Greater Birmingham and Black Country Duty to Co-operate Groups.
- 1.33 The biggest issues raised through Duty to Co-operate relate to dealing with the housing shortfalls from both Birmingham and Coventry.
- 1.34 The issue of any shortfalls arising from Coventry are considered in the accompanying report on the Housing and Economic Development Needs Assessment (HEDNA).
- 1.35 In respect of Birmingham and the Black Country, in addition to the shortfalls identified for the period to 2031, Birmingham City Council has also commenced work on its Local Plan Review to 2042 and has published an Issues and Options consultation that identifies a shortfall in housing of 78,415 homes. Additional shortfalls may also be identified arising from the Black Country authorities. The SWLP will need to continue to work with these authorities to explore whether it is appropriate for South Warwickshire to contribute in helping address these shortfalls.

#### **Recommendation 4 & 5: Issues and Options (I&O) Document**

- 1.36 The I&O document is a long document; by its nature it has to be because it is seeking to deal with a large number of interconnected issues. The document is arranged over 13 chapters comprising over 100 questions, including an introduction, guidance on how to provide feedback and a glossary. The Issues and Options document is attached at **Appendix 5**. The main body of the document is as follows:

- Chapter 3 – sets out both Councils’ proposed vision and the five overarching strategic objectives, including addressing climate change
  - Chapter 4 – sets out different geographical/spatial approaches for meeting both Councils’ development needs to 2050, including infrastructure. This chapter also considers the use of brownfield land and urban capacity, the potential for existing settlements to expand, the potential for new settlements, and the role of the Green Belt
  - Chapter 5 – considers how both Councils might meet their economic development needs and achieve low carbon economic growth
  - Chapter 6 – sets out how both Councils might meet their housing development needs, including issues such as affordability and tenure
  - Chapter 7 – considers options for achieving a climate resilient and net zero carbon South Warwickshire, including issues such as flood risk
  - Chapter 8 – sets out approaches to achieving a well-designed South Warwickshire
  - Chapter 9 - sets out approaches to achieving a healthy South Warwickshire
  - Chapter 10 - sets out approaches to achieving a well-connected South Warwickshire
  - Chapter 11 - sets out approaches to achieving a biodiverse and environmentally resilient South Warwickshire
- 1.37 The main body concludes with Chapter 12 that considers the relationship with the existing local plan policies and the approach to preparing Part 1 and Part 2 plans.
- 1.38 Another Call for Sites exercise will be held alongside the Issues and Options consultation to seek further suggestions for land. Again, the benefit of this approach is one of transparency.
- 1.39 As part of the consultation, a summary and explanatory guide is being produced to help readers navigate through the document. Animated videos are also being produced which will be a key feature of the social media campaign. A series of face-to-face ‘drop-in’ sessions will also be undertaken at locations across South Warwickshire throughout the consultation period.
- 1.40 The vision and strategic objectives for the SWLP are proposed as follows, having been amended following the earlier scoping consultation. In particular, a fifth objective relating to design has been added.

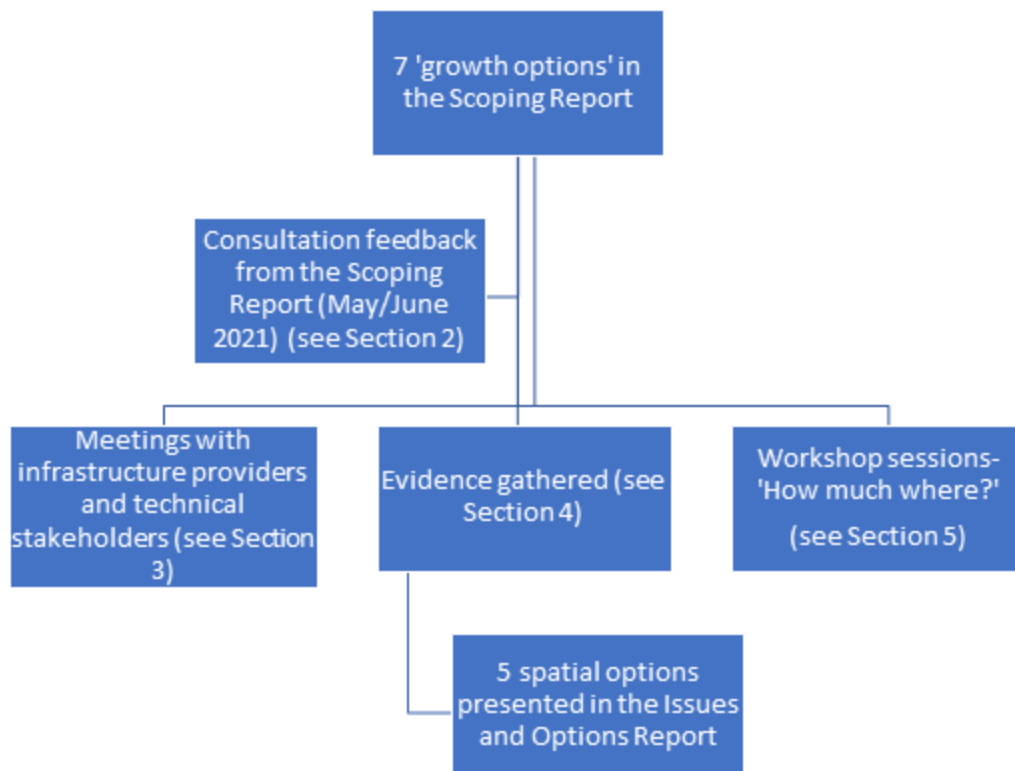
*The vision is to meet South Warwickshire’s sustainable development needs to 2050, while responding to the climate emergency. Where appropriate and agreed, this could include unmet need from neighbouring authorities. The plan will provide homes and jobs, boost and diversify the local economy, and provide appropriate infrastructure, in suitable locations, at the right time. Five overarching principles will determine how this*

development is delivered:

- *A climate resilient and Net Zero Carbon South Warwickshire – adapting to the effects of climate change and mitigating against its causes, while avoiding any further damage that might arise from development*
- *A well-designed and beautiful South Warwickshire – creating spaces where people want to be, which respect and reflect the existing beauty and heritage of the area*
- *A healthy, safe and inclusive South Warwickshire – enabling everyone to enjoy safe and healthy lifestyles with a good quality of life*
- *A well-connected South Warwickshire – ensuring that development is physically and digitally connected, provided in accessible locations, and promotes active travel*
- *A biodiverse and environmentally resilient South Warwickshire – strengthening green and blue infrastructure and achieving a net increase in biodiversity across South Warwickshire*

1.41 Whilst climate change sits at the core of the SWLP, the starting point of the plan has been green and blue infrastructure and the desire to tie the plan into the local nature recovery agenda. Officers have prepared a Topic Paper (attached at **Appendix 4**) setting out how the strategy for distributing economic and housing growth has then emerged, as presented in five spatial options. Figure 5 is a 'route map' to those five options.

**Figure 5: Route Map to the Five Spatial Options**



- 1.42 The five growth options represent alternative scenarios for distributing, at a strategic scale, development across the South Warwickshire area. At this early stage, they remain conceptual and further detailed technical work is required to assess particular locations.
- 1.43 In formulating the growth options, consideration has been given to various locations across South Warwickshire, including 32 'main settlements' as well as 22 smaller settlements. In addition, consideration has also been given to seven potential broad locations for large scale new settlements.
- 1.44 At this early stage, the above work includes Green Belt locations. If, as a result of this consultation, there is a desire to further explore such locations, a Green Belt Study will need to be undertaken to inform which locations, if any, the Green Belt will need to be reviewed. That study will then confirm whether any potential Green Belt locations should be released. The study could also make recommendations in respect of 'greening' the Green Belt (to improve its environmental quality) and/or extending the Green Belt, including to potentially compensate for any Green Belt loss.
- 1.45 Also at the forefront of the Issues and Options consultation is the need to address the concerns relating to the provision of infrastructure. It was to this end that the Place Board was established, with a number of infrastructure groups, to act as a forum for stakeholders and infrastructure providers to engage with the SWLP. In preparing the Issues and Options consultation, officers have met with infrastructure providers to discuss how their plans and strategies may impact on or be impacted by the proposals in the SWLP. These discussions are ongoing and will need to be ramped up as we progress the SWLP.
- 1.46 The Issues and Options consultation also poses questions about how we fund infrastructure through the use of the Community Infrastructure Levy (CIL) charge.
- 1.47 Notwithstanding the fact that a considerable amount of work has gone into preparing this document, it is likely that minor changes will need to be made as the report is prepared for public consultation. For this reason, recommendation (5) above asks that the respective Portfolio Holders for Place (Stratford-on-Avon District Council) and Planning & Place (Warwick District Council), in consultation with the respective Head of Development and Head of Place, Arts & Economy, be authorised to make any final editorial amendments prior to commencement of the consultation.

## **2 Options available to the Joint Cabinet/Executive Committee**

- 2.1 There are two substantive recommendations in this report: the first in respect of the accompanying SA/SEA and the second in respect of the Issues and Options consultation document itself.
- 2.2 Please note, substantial changes to the SA/SEA could have a bearing on the I&O document and whether any further work is required in advance of consultation.
- 2.3 There are potentially two options available to Members: the first is to not support the recommendations with a view to not proceeding with the

consultation and the second is to seek changes to the document beyond the scope of any editorial amendments.

- 2.4 The first alternative option would indicate that there is no desire to prepare a joint Local Plan for South Warwickshire. The second would significantly delay the consultation, which, owing to purdah, would then take place in Summer 2023.
- 2.5 Both options are not recommended. The Issues and Options document is very much an ideas paper where questions are asked regarding how we can collectively deal with the challenges facing South Warwickshire. Publishing and consulting now puts the two Councils in control of the planning agenda and demonstrates that together we are trying to address the difficult challenges that we all face rather than pretending that those challenges don't exist or 'kicking the can down the road'.

### **3 Ward Councillors and Portfolio Holder Members' Comments**

- 3.1 The two Portfolio Holders for Place (SDC) and Planning & Place (WDC) have been fully involved throughout this process and are supportive of the recommendations. The SWLP Member Advisory Group, which includes a number of Ward Councillors, meets monthly and is supportive of the proposed approach.

## **4 Implications of the proposal**

### **4.1 Legal/Human Rights Implications**

- 4.1.1 The South Warwickshire Local Plan is a Development Plan Document and as such, when adopted, will form part of the statutory Development Plan for both Districts. As such, its preparation has to comply with a number of statutory requirements including public consultation, regard to national policy, the achievement of sustainable development and fulfilment of the Duty to Co-operate. As a Development Plan document, it will be subject to independent scrutiny through an examination in public to ensure that it is 'sound' (fit for purpose) and satisfies all necessary legal requirements. This includes ensuring that residents and stakeholders can engage meaningfully in the process.

### **4.2 Financial**

- 4.2.1 The estimated cost of producing and getting the South Warwickshire Local Plan in place is £2.2 million, excluding staff costs. This cost is to be shared equally between Stratford-on-Avon and Warwick District Councils. Stratford-on-Avon has £1.3 million in place within the Core Strategy Funding Reserve to fund its share. Warwick currently has £0.5 million allocated, including £0.3 million as part of the 2022/23 Budget. Further funding from Warwick will need to be agreed as part of future Budgets.

### **4.3 Environmental/Climate Change Implications**

- 4.3.1 Tackling Climate change and responding to the Climate Emergencies that both Councils have declared is at the heart of the South Warwickshire Local Plan. In order to maximise opportunities for climate change adaptation and mitigation, and to meet net carbon zero targets, it is critical that the evolving Plan is informed by assessments on its impact on climate change. As such, consultants have been appointed to prepare these assessments and ensure that all aspects of climate change are

considered as part of the SWLP. The Programme Director for Climate Change is directly involved in this work.

#### 4.4 **Council Plan**

4.4.1 As a Development Plan Document, the South Warwickshire Local Plan will help Stratford-on-Avon District Council achieve all five objectives of the Council Plan. Arguably, the Local Plan is the most important policy document that the Council prepares as it represents the spatial expression of the Council's vision and ambitions.

4.4.2 In respect of the Warwick District Business Plan, the following comments can be made:

##### 4.4.3 **External impacts of proposal(s)**

**People - Health, Homes, Communities** – The SWLP will have a major impact on the Council's ability to meet its housing needs, including the provision of affordable housing, and to provide sports, recreation, leisure, community and cultural facilities to serve its population.

**Services - Green, Clean, Safe** – The SWLP will have a major impact on all the Council's "green, clean and safe" aspirations. It will support the Council's ability to meet its climate change targets through the planning policies it puts in place regarding the location of new development and standards for new buildings. Policies in the Local Plan will also support safer communities.

**Money- Infrastructure, Enterprise, Employment** – The SWLP will have a major impact on the Council's ability to support the local economy through providing appropriate and affordable places of work in the right locations and by other policies to support the economy, including within the district's town centres.

##### 4.4.4 **Internal impacts of the proposal(s)**

**People - Effective Staff** – It will be integral to the success of the SWLP that staff are properly trained and supported to undertake a wider range of tasks. As this is a joint Local Plan, then the councils will need to work together to ensure that proper training and support is given to staff across both councils.

**Services - Maintain or Improve Services** - Good stakeholder engagement and public consultation are key to ensuring the success of the SWLP.

**Money - Firm Financial Footing over the Longer Term** - It is anticipated that the SWLP will save costs over each authority undertaking its Local Plan review separately. This will be kept under close review throughout the process.

#### 4.5 **Analysis of the effects on Equality**

4.5.1 An Equalities Impact Assessment is required and will be undertaken at various stages of the SWLP to ensure that strategies and policies contribute towards eliminating discrimination, promoting equality and fostering good relations.



#### 4.6 **Data Protection**

4.6.1 Both Councils will ensure that all data protection requirements are adhered to. This will particularly be the case in respect of personal or commercially sensitive information that is provided to the Council through public consultations.

### **5 Risk Assessment**

5.1.1 There are many risks associated with undertaking a Local Plan review. These are financial, reputational and, sometimes, legal. All local authorities are required to prepare Local Plans and both Councils are experienced in managing these risks. All stages of the Local Plan are subject to Councillor advice, scrutiny and approval, so there is plenty of opportunity for Councillors to have proper oversight of the technical work and procedures that are being undertaken.

5.1.2 There are additional risks in undertaking a joint Local Plan review with another local authority, as is being undertaken here. These are largely political and relate to the willingness of both Councils to continue to work together to approve the document.

5.1.3 Ultimately, as local planning authorities, both Stratford-on-Avon and Warwick District Councils are obliged to prepare and keep an up to date Development Plan for their area. The SDC Core Strategy was adopted in 2016 and the WDC Local Plan in 2017. Whilst both plans remain up to date, it is prudent to start to consider now planning for the period post 2031/2029 when those plans expire. It is also timely, in light of the COVID pandemic, to use the Development Plan process to support economic growth and the rebuilding of the South Warwickshire economy.

#### **Background papers:**

None

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