

Public Document Pack

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Date: Tuesday, 30 August 2022

**** Physical Meeting**

While the meeting will take place in person at the Town Hall it will also be live broadcast on YouTube (see link below).

Should you wish to attend in person we ask that you notify the Contact Officer above at least 24 hours before the meeting as this will help us to manage the numbers wishing to attend.

Dear Sir or Madam

The Executive – Wednesday, 7 September 2022, 6.00 pm – New Council Chamber - Town Hall

A meeting of the Executive will take place as indicated above.

Please Note that any member of the press and public may listen in to proceedings at this meeting via the weblink below –

<https://youtu.be/gnMYcu0AkBI>

The agenda is set out overleaf.

Yours faithfully

Assistant Director Legal & Governance and Monitoring Officer

To: Members of the Executive

Councillors:

Steve Bridger (Chairman), Mike Bell (Vice-Chairman), Mark Canniford, Ashley Cartman, Catherine Gibbons, Steve Hogg, Bridget Petty and Mike Solomon.

All other Members of the Council (for information)

This document and associated papers can be made available in a different format on request.

Agenda

1. Addresses by Members of the Public (ESO 6)

The Executive, at the discretion of the Chairman, will hear up to four people, each of whom must be a resident or a business ratepayer or an elector, who wish to address it in accordance with the Executive Standing Orders, on matters that affect the area or its residents and over which the Executive has powers and duties. The Chairman will select the order of the matters to be heard. Each person will be limited to a period of three minutes and this part of the meeting must not exceed fifteen minutes.

Requests to speak must be submitted in writing to the Monitoring Officer, or the officer mentioned at the top of this agenda letter, by noon on the day before the meeting and the request must detail the subject matter of the address.

2. Apologies for absence

3. Declaration of Disclosable Pecuniary Interest (Standing Order 37)

A Member must declare any disclosable pecuniary interest where it relates to any matter being considered at the meeting. A declaration of a disclosable pecuniary interest should indicate the interest and the agenda item to which it relates. A Member is not permitted to participate in this agenda item by law and should immediately leave the meeting before the start of any debate.

If the Member leaves the meeting in respect of a declaration, he or she should ensure that the Chairman is aware of this before he or she leaves to enable their exit from the meeting to be recorded in the minutes in accordance with Standing Order 37.

4. Minutes - 22 June 2022 (Pages 5 - 12)

22 June 2022, to approve as a correct record

5. Non-Executive Councillors' Addresses

Non-Executive Councillors wishing to address the Executive are required to notify the contact officer mentioned at the top of this summons letter by noon on the day before the meeting. A total of fifteen minutes will be allocated to hear all addresses.

6. Matters referred to the Executive and not dealt with elsewhere on this agenda

None.

7. West of England Sub-Region: items not dealt with elsewhere on this agenda

8. Forward Plan dated 2 September 2022

(to follow)

- 9. Month 4 Budget Monitor** (Pages 13 - 50)
Report of Councillor Cartman (attached)
- 10. Medium Term Financial Plan (MTFP) and Revenue Budget 2023/24** (Pages 51 - 70)
Report of Councillor Cartman (attached)
- 11. Local Plan 2038 - Update following consultation on preferred options** (Pages 71 - 84)
Report of Councillor Canniford (attached)
- 12. Portishead Neighbourhood Plan** (Pages 85 - 244)
Report of Councillor Canniford (attached)
- 13. West of England Joint Committee Membership and Future Working Arrangements**
Report of Assistant Director Legal and Governance (to follow)
- 14. Q1 Performance Management Update** (Pages 245 - 258)
Report of Head of Business Insight, Policy and Partnerships (attached)
- 15. Oral reports of Executive Councillors**
Executive Councillors might report orally on matters in progress. Such reports will be for information only and no material decisions can be made arising from them.
- 16. Urgent business permitted by the Local Government Act 1972 (if any)**
For a matter to be considered as an urgent item, the following question must be addressed: "What harm to the public interest would flow from leaving it until the next meeting?" If harm can be demonstrated, then it is open to the Chairman to rule that it be considered as urgent. Otherwise the matter cannot be considered urgent within the statutory provisions.

Exempt Items

Should the Executive wish to consider a matter as an Exempt Item, the following resolution should be passed -

"(1) That the press, public, and officers not required by the Members, the Chief Executive or the Director, to remain during the exempt session, be excluded from the meeting during consideration of the following item of business on the ground that its consideration will involve the disclosure of exempt information as defined in

Section 100I of the Local Government Act 1972.”

Also, if appropriate, the following resolution should be passed –

“(2) That members of the Council who are not members of the Executive be invited to remain.”

Mobile phones and other mobile devices

All persons attending the meeting are requested to ensure that these devices are switched to silent mode. The chairman may approve an exception to this request in special circumstances.

Filming and recording of meetings

The proceedings of this meeting may be recorded for broadcasting purposes.

Anyone wishing to film part or all of the proceedings may do so unless the press and public are excluded for that part of the meeting or there is good reason not to do so, as directed by the Chairman. Any filming must be done as unobtrusively as possible from a single fixed position without the use of any additional lighting, focusing only on those actively participating in the meeting and having regard to the wishes of any members of the public present who may not wish to be filmed. As a matter of courtesy, anyone wishing to film proceedings is asked to advise the Chairman or the Assistant Director Legal & Governance and Monitoring Officer’s representative before the start of the meeting so that all those present may be made aware that it is happening.

Members of the public may also use Facebook and Twitter or other forms of social media to report on proceedings at this meeting.

Emergency Evacuation Procedure

On hearing the alarm – (a continuous two tone siren)

Leave the room by the nearest exit door. Ensure that windows are closed.

Last person out to close the door.

Do not stop to collect personal belongings.

Do not use the lifts.

Follow the green and white exit signs and make your way to the assembly point.

Do not re-enter the building until authorised to do so by the Fire Authority.

Go to Assembly Point C – Outside the offices formerly occupied by Stephen & Co

Minutes

of the Meeting of

The Executive

Wednesday, 22 June 2022

New Council Chamber - Town Hall

Meeting Commenced: 2.30 pm

Meeting Concluded: 3.38 pm

Councillors:

Councillors:

Steve Bridger (Chairman)
Mike Bell (Vice-Chairman)

Mark Canniford
Ashley Cartman
Catherine Gibbons
Steve Hogg
Bridget Petty
Mike Solomon

Also in attendance: Councillor Karin Haverson.

Officers in attendance: Jo Walker (Chief Executive), Amy Webb (Director of Corporate Services), Matt Lenny (Director of Public Health), Nicholas Brain (Assistant Director Legal & Governance and Monitoring Officer), Colin Medus (Head of Transport and Infrastructure) Jenny Ford (Head of Development and Placemaking), Alex Hearn (Assistant Director (Placemaking & Growth), Carl Nicholson (Integrated Transport Unit Manager) and Aaron Horner (Senior Projects Officer)

Partaking via Microsoft Teams:

Councillors: Phil Neve, Terry Porter, Caroline Cherry

Officers: Gemma Dando (Assistant Director Neighbourhoods and Transport), Hazel Brinton (Committee Services Manage) and Melanie Watts (Head of Finance)..

EXE Addresses by Members of the Public (ESO 6)

1

None received by the deadline.

EXE Declaration of Disclosable Pecuniary Interest (Standing Order 37)

2

None declared.

EXE Minutes - 27 April 2022

3

Resolved: that the minutes be approved as a correct record.

EXE Non-Executive Councillors' Addresses

4

At the invitation of the Chairperson, Councillor Haverson addressed the Executive on two items. She asked that the council lead by example and adopt the Covid19 Safety Pledge and that the Executive Member for Highways consider a proposal to support asylum seekers in the district with subsidised bus travel into Bristol.

The Executive Member for Corporate Services added that after consultation with the unions and employee representation groups, he could see no reason why the Covid19 Safety Pledge could not be adopted by the council.

The Executive Member for Highways thanked Councillor Haverson for her comments on subsidised travel and confirmed that he had contacted the Resettlement Team and that 3 months' free travel was already being offered but he would consider any further proposals made.

EXE Matters referred to the Executive and not dealt with elsewhere on this agenda

5

None.

EXE West of England Sub-Region: items not dealt with elsewhere on this agenda

6

None.

EXE Forward Plan dated 1 June 2022

7

Resolved: that the forward plan be noted.

EXE Bus Service Improvement Plan - Enhanced Partnership

8

Councillor Bridger invited Councillor Hogg to present the report.

Councillor Hogg summarised the main elements of the report and noted that the Bus Service Improvement Plan (BSIP) was a once in a generation funding stream that had the potential to be transformational in support of bus services in North Somerset. He added that the plan would also accelerate the council's decarbonisation plans and complement the Active Travel and Liveable Neighbourhood strategies. He noted that £48m of the funding was specific capital funding for North Somerset with an additional £58m was allocated jointly to the West of England Combined Authority and North Somerset Council.

He added that the sums involved recognised that North Somerset had proportionally more work to carry out on improving bus services than other parts of the country. The capital funding was for bus prioritisation measures to deliver supportive infrastructure whilst the revenue funding would be used to develop eye catching services and provide concessionary support to drive up patronage. The draft Enhanced Partnership was the delivery mechanism for the BSIP and would

involve partners entering legally binding commitments to making improvements to bus services. He drew members' attention to some of the outcomes of the funding package as noted in the report including demand responsive transport, more affordable services, and simplified fares.

As a result of the Department for Transport's (DfT) timescales, he informed members that as some of the decisions would need to be taken at pace, a level of delegation as set out in the report was required but he was committed to engaging with other Executive members and the scrutiny process.

The Head of Public Transport Transformation informed members that a recent meeting with the DfT indicated that the department was looking for a higher amount to support the fares reduction package so this was expected to be nearer £20m rather than the £9m initially proposed. This would mean that ambitions to deliver higher frequency services was likely to be curtailed but with the ongoing driver recruitment issue, this was more appropriate.

In commenting on the report members raised a number of key issues including whether parking charges were tied into the funding package; the support for community transport where there was no access to cars; that there should be a clearly articulated expectation in the partnership that operators properly consult with communities on any schedule changes; engagement with the town and parish councils; a focus on getting the basics right including updating bus stop information and ensuring reliability and frequency and making sure bus services were provided where needed and not just where wanted. They also noted the importance of the reliability of bus services to SEND learners and those who cannot drive.

Resolved:

That the Executive:

- (1) Noted the current iteration of the draft Enhanced Partnership Plan and Scheme as attached in Appendix 3 of the report and delegates to the Executive Member for Highways and Transport the authority to approve the final Enhanced Partnership Plan and Scheme on behalf of North Somerset Council
- (2) Agreed that the Executive member for Highways and Transport be delegated authority to determine any matters required by the Council in relation to the agreement of the final DfT funding offer including any changes to the spend profile in Appendix 2 of the report
- (3) Noted the Department for Transport (DfT) indicative BSIP funding allocations:
 - capital funding award of £47,983,473 allocated to North Somerset Council, and
 - the indicative revenue funding award of £57,505,498 allocated jointly to the West of England Combined Authority and North Somerset Council.
- (4) Noted the proposed outline BSIP delivery commissioning plan in Appendix 5 of the report to facilitate timely delivery of the Bus Service Improvement

Plan works programme across North Somerset commencing in autumn 2022.

And further that the Executive **recommended to Council:**

- (5) That Council approves the commissioning plan required to deliver the BSIP and
- (6) Approves the following:
 - An increase to the Capital Programme of £47,983,473 from 2022 in recognition of the outline DfT funding award.
 - Delegation to the Director of Corporate Services/ s151 officer to increase the 2022-23 Revenue Budget by up to £12m to be funded from BSIP grant allocation.

Reasons for the decision:

As set out in the report and discussed above.

Alternative options considered and rejected:

As set out in the report and discussed above.

EXE 9 Award of contract and authorisation to enter into a Joint Venture with the recommended development partner for land to the south of The Uplands, Nailsea (includes exempt appendix)

Councillor Bridger invited Councillor Canniford to present the report.

Councillor Canniford noted that the report was a culmination of a 2 to 3-year long process and that the result met all the council's objectives within its development programme. He added that the proposal would provide a development of flagship standard including 40% affordable housing and several adaptable houses including homes that were future proofed as people aged. They would be 10% larger than national standards. He added that the procurement process had engaged all local members with each stage and the scrutiny process. The land would be retained by the council until the development had been fully built and certified and where possible, the availability of the homes would be publicised first to local residents before others.

In discussing the report, members noted that the key to the delivery of the development would be a set of non-negotiable targets. Whilst this was new ground for the council and its contractors, there would be a need for monitoring and record keeping to facilitate learning for future projects. Members asked whether there would be an opportunity during the project for the Parent Carers Forum and other disability groups to be engaged around accessibility of the homes.

Councillor Canniford added that as this was the council's own land, it could set the standard.

Resolved:

That the Executive:

- (1) Approved the award of a contract for the development of Council's land south of The Uplands, Nailsea to Stonewood Partnerships Limited, The Stonewood House, West Yatton Lane, Castle Combe, Wiltshire, SN14 7EY (company registration no. 11645128).
- (2) Delegated authority to the Section 151 Officer, in consultation with the Executive Member for Placemaking and Economy, to enter into the contractual Joint Venture with the selected developer, subject to final due diligence and within the terms outlined in the report, including provisions for the transfer of the land and agreement on terms for the transfer of £480,028 One Public Estate funding for the delivery of enabling works.

Reasons for the decision:

As set out in the report and discussed above.

Alternative options considered and rejected:

As set out in the report and discussed above.

EXE 10 Month 12 Budget Monitor and Financial Update

Councillor Cartman introduced the report and noted that the council had balanced its budget in the last financial year with the underspend of £0.691m to be moved to General Reserves to support any unforeseen future risk. He added that Earmarked Reserves had increased by around £20m and drew members attention to the recommendations in the report.

The Director of Corporate Services added that it was pleasing to note that in spite of the challenges due to Covid19 to the council's services, there had been an underspend to transfer to General Reserves. Similarly, Earmarked Reserves used to support spending within the revenue or capital budget, smooth impacts across financial years or hold to cover future financial risks had increased by £20m.

Members noted the positive outcome for the council's budget last year and asked that any underspend be used to continue to deliver the council's service priorities should service areas require part of it.

Resolved:

That the Executive:

- i. noted the revenue and capital out-turn positions for 2021/22 as detailed within the report and the associated transfer of the underspend of £0.691m into the council's general revenue reserve as 31 March 2022
- ii. noted the transfer to / from earmarked and capital reserves as set out in Appendix 5 of the report
- iii. approved the amendments to the revenue budget as detailed in Appendix 1A of the report

- iv. approved the amendments to the capital programme as detailed in Appendix 7 of the report
- v. endorsed the indicative spending plans for 2022/23 and beyond in respect of the Discharge to Assess programme as shown in Appendix 9 of the report, funding for which is held in an earmarked revenue reserve
- vi. delegated authority to the Director of Adult Social Services, with advice from the Section 151 Officer, to increase the relevant expenditure and income revenue budgets in 2022/23 in line with the proposed spend as outlined in paragraph 3.14 of the report.

Reasons for the decision:

As set out in the report and discussed above.

Alternative options considered and rejected:

As set out in the report and discussed above.

EXE 11 Adoption of Heritage assets on to the North Somerset Local Heritage List

Councillor Canniford presented his report and noted that whilst the list currently focussed on Weston-super-Mare as nominations were not received from other areas of the district, work is being done to encourage nominations from outside of Weston-s-Mare. He highlighted that the numbers added at any one time were restricted as the panel considering nominations were volunteers. A series of outreach engagements for the rest of the district were planned. The intention was to add to the list on a 6 monthly basis.

The officer involved in the report and Councillor Crockford-Hawley were thanked for their time in constructing the report and advising the panel.

Resolved:

That the heritage assets being put forward in the report to the North Somerset Local Heritage List be adopted.

Reasons for the decision:

As set out in the report and discussed above.

Alternative options considered and rejected:

As set out in the report and discussed above.

EXE 12 Appointment to Outside Bodies (Executive)

The Assistant Director Legal and Governance highlighted the new nominations required as noted in his report. He advised that the North Somerset Partnership would pass to Councillor Bridger as the new Leader of the Council and all other appointments as listed to remain unchanged, subject to those appointments by designation to be updated to reflect the new Executive Member portfolios.

Resolved:

(1) that the appointments contained in the updated schedule attached as an appendix to these minutes be approved and adopted for the 2022/23 municipal year

(2) that the Leader and Deputy Leader confirm the nomination the PATROL (Parking and Traffic Regulations Outside London) Adjudication Joint Committee 2022-23 in due course

(3) that Councillor Canniford be nominated as the council's representative on the Visit West Board and

(4) that Councillors Gibbons and Canniford be nominated as the council's representatives to the West of England Combined Authority Business and Skills Board

Reasons for the decision:

As set out in the report and discussed above.

Alternative options considered and rejected:

As set out in the report and discussed above.

EXE 13 Oral reports of Executive Councillors

Councillor Solomon updated members on the Green Waste uptake for the new municipal year which now stood at a 73% renewal rate. He advised that it appeared the take up would be lower than the previous year.

Councillor Bridger noted the long service and retirement of two longstanding officers; Pam Kirby and Colin Medus and thanked them for their work for the council over many years.

Councillor Bridger also noted the third rail strike on the weekend may impact those intending to use public transport to attend the Weston Air Show, but Executive Members emphasised that the event was still going ahead.

Chairman

North Somerset Council

Report to the Executive

Date of Meeting: 7 September 2022

Subject of Report: Budget Monitor 2022/23 - Month 4

Town or Parish: All

Officer/Member Presenting: Ashley Cartman, Executive Member for Corporate Services

Key Decision: YES

Reason: Financial values contained within the report are in excess of £500,000

Recommendations

The Executive is asked to;

- i. Note the projected revenue and capital budget forecasts as detailed within the report and also the issues and assumptions that underpin the forecasts,
- ii. Approve the in-year amendments to the revenue and capital budgets as detailed in Appendices 1A and 4,
- iii. Note the financial risks being assessed by the council, which may have an impact on future monitoring reports,
- iv. Support the proposal to submit a report to Council in November to consider any changes that may be required to the approved revenue budget for the current financial year, to ensure that it can deliver against the core responsibility of being able to deliver a balanced budget by the year-end.

1. Summary of Report

This report provides a summary of the council's integrated revenue and capital financial positions after the first four months of the 2022/23 financial year and includes details relating to key issues and activities that are likely to have a significant impact on the council's finances during the year. The initial forecast of the new financial year reflects an **overspend of £4.8m**, which equates to 2.6% of the net revenue budget.

Clearly this is the first report of the new financial year and so efforts have focused upon material areas of the council's budget or those which have identified issues early in the year. The report therefore also includes details of some of the potential risks that have been identified at this point in time, as they may feature in future reports should their profiles increase, or the risks are realised and they become real pressures.

Recognising the serious impacts that the current economic climate is having on the council’s financial position, the report also provides a high-level overview of the potential solutions, options or decisions that could be considered in order to balance the budget in the current year.

2. Policy

The council’s budget monitoring is an integral feature of its overall financial and assurance framework, ensuring that resources are planned, aligned and managed effectively to achieve successful delivery of its aims and objectives.

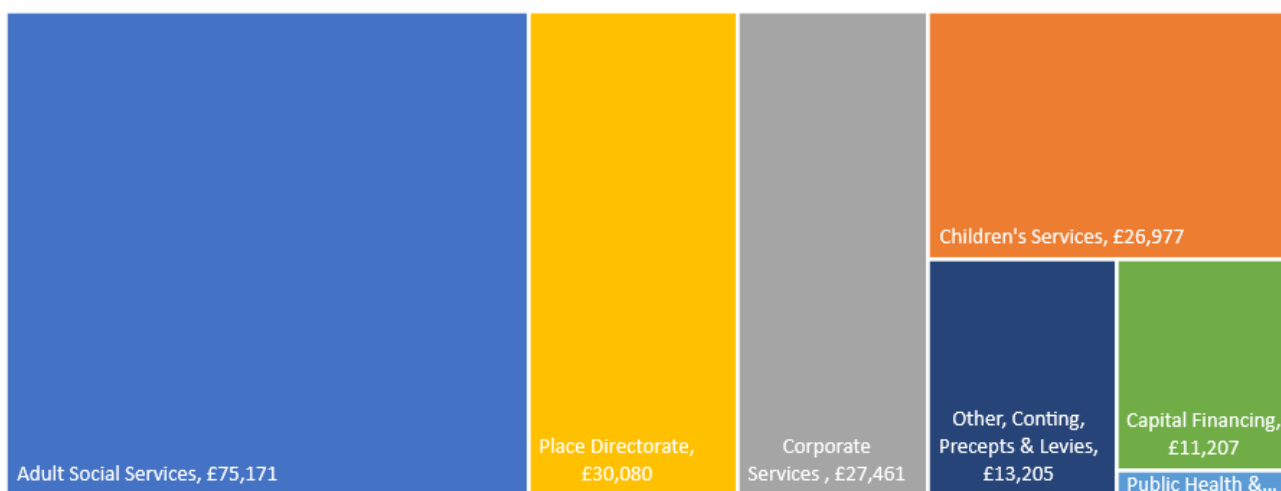
The significant financial risks and impacts associated with the current cost of living crisis, which have escalated rapidly over recent months, have meant that the financial consequences and reporting process have become more important, albeit more complex than before, particularly when combining both the increased demands for services with the uncertain inflationary pressures contained within many of our costs.

3. Details

3.1. Overview of the annual revenue budget

The council’s revenue budget for 2022/23 was approved in February 2022 and the graphic below depicts the size and shape of how this budget is shared across each of the directorates and spending areas. Further details of individual service budgets are provided at Appendix 1.

Net Revenue Budget 2022/23 - £185,475,430



It can be seen that a significant proportion of the council’s budget is allocated to services who provide much valued social care and support to those adults and children most in need within our communities.

The Place directorate holds budgets for many of the public facing services which are recognisable by residents and businesses within their daily lives such as leisure, libraries, waste, highways and sustainable transport and also areas such as planning, place-making and climate change, whereas the corporate services directorate delivers a combination of

revenues and benefits and customer services to the public as well as support services to internal customers.

The budgets for public health and regulatory services look fairly small on the chart, although are much larger in terms of gross expenditure; a large proportion of these services are funded through a specific public health grant which is ring-fenced and must be off-set against the associated expenditure.

The council's revenue budget also contains;

- £11m for capital financing; this is the council's way of setting aside money each year to repay costs associated with any borrowing that has been undertaken to fund investments in large capital projects
- £13m for other expenditure; this area of the budget largely contains elements that are not directly linked to specific services but are where the council is required to pay levies, precepts and joint arrangements, e.g. environmental agency levy, apprentice levy, magistrates court precept, town and parish council precepts and the contribution to the shared coroners and mortuary services.

This area of the budget also contains the council's corporate contingency budget of £1.5m, which is the only area of the budget without spending plans or calls against it at the start of the year. It forms part of the council's financial risk management mitigation plans and is essential given the many and varied assumptions included when setting the budget, any of which could change during the year.

3.2. Financial context

When preparing the budgets for the year ahead many assumptions and sources of data are used to ensure that resources are allocated to services that need them and at levels that are appropriate and relevant to the anticipated costs that are likely to be incurred during the year.

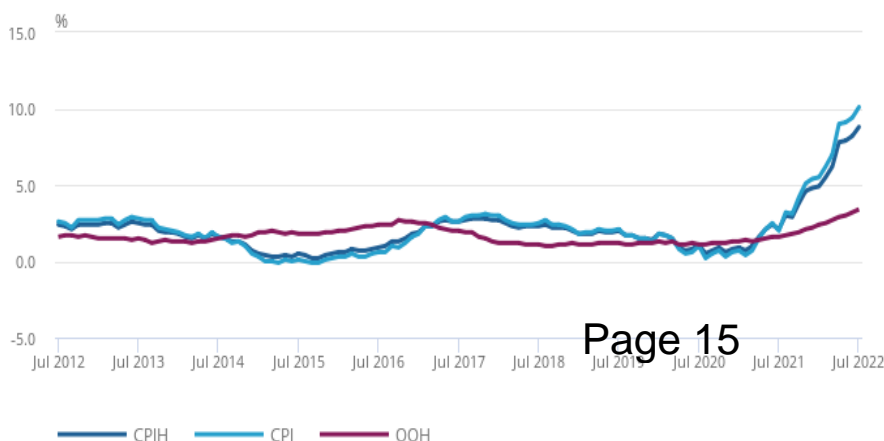
Assumptions will be made for both the **volumes of activity** that the council will need to provide, i.e. how many houses will need their waste to be collected, how many roads will need to be repaired or how many residents will need to be supported by social care teams. Assumptions will also be made about our future **costs**, i.e. how much the council will need to spend to deliver its services in the year ahead.

Managers will often look at existing cost profiles and then build on them using a range of indices that are relevant to the particular cost or the service area, although as much of this work is undertaken some time before the financial year actually starts, indices are estimated or use forecast datasets.

Other councils follow the same approach and for many years the process has worked well however, as noted above, the budget for the current financial year was approved in

February 2022, at a time when the economic backdrop for the country was much different than it is now.

Over the past six months inflation has risen rapidly, driving up the costs of things that we all buy in



our ever-day lives, notably things such as energy, fuel and food, as well as any services that we might use.

In many ways the council is no different to those individuals or businesses as the things that we need to buy to deliver our services, so is also being impacted by the same inflationary pressures, which means that our costs are increasing. Given the scale and size of our budget, the potential financial impacts can be much more significant.

Unfortunately the choices and options available to the council to overcome these pressures are limited because the majority of our income, i.e the money that we receive to fund the budget each year, is capped. The grants given by central government for the year were fixed in February 2022, as were the amounts of council tax and business rates that residents and business need to pay. This means that the council will have to look at other ways to balance its budget this year.

Whilst the council has often described its financial position as challenging in recent years, because it has had to deal with reductions in government funding at the same time as growing levels of demand for services, the current economic situation has magnified and exacerbated these challenges enormously.

The financial outlook for the 2022/23 financial year feels exceptionally difficult, and unfortunately all available sources of information seem to indicate that this is likely to continue beyond the end of the year and on into the medium-term, which means that the council will need to make some very difficult decisions in order to deliver both a balanced budget in this year and then to be able set a balanced budget for next year.

A further report on the council's medium term financial planning considerations has been prepared and is elsewhere on the agenda for this meeting, although many of the issues will be relevant to both reports as the council's financial planning and monitoring processes and the risk assessments that underpin them, are fully integrated.

3.3. Revenue budget summary – key headlines

| Revenue Budget Monitoring Summary 2022/23 | | | | | |
|--|-------------------------------------|--------------------------------|----------------------------|-----------------------------|--------------|
| | Original Net Revenue Budget £000 | Month 4 Forecast | | | |
| | | Revised Revenue Budget £000 | Projected Out-turn £000 | Forecast Projected Variance | |
| | | | | £000 | % |
| Service Expenditure Budgets | | | | | |
| Adult Social Services | 75,158 | 75,171 | 75,379 | 209 | 0.28% |
| Children's Services | 26,989 | 26,977 | 28,219 | 1,243 | 4.61% |
| Corporate Services | 27,553 | 27,461 | 27,727 | 266 | 0.97% |
| Place | 29,989 | 30,080 | 31,397 | 1,317 | 4.38% |
| Public Health & Reg Services | 1,374 | 1,374 | 1,360 | (14) | -1.01% |
| Capital Financing & Interest | 11,207 | 11,207 | 10,168 | (1,039) | -9.27% |
| Other Non Service Budgets | 13,205 | 13,205 | 13,260 | 55 | 0.42% |
| Incremental impact of pay offer | 0 | 0 | 1,603 | 1,603 | 0.00% |
| Impact of energy procurement | 0 | 0 | 1,207 | 1,207 | 0.00% |
| Total Net Revenue Budget | 185,475 | 185,475 | 190,322 | 4,847 | 2.61% |
| General Fund Financing Budgets | (185,475) | (185,475) | (185,475) | 0 | 0.00% |
| NET REVENUE BUDGET TOTALS | (0) | (0) | 4,847 | 4,847 | 2.61% |

Dedicated Schools Deficit - in-year

Dedicated Schools Deficit - Cumulative

13,447

3,841

17,288

Shown above is a summary of the council's financial forecast after the **first four months** of the year, using information provided by budget managers across the council. This indicates how much the council believes that it will spend on delivering its services by the end of the year, although given that we are only part of the way through the year, the figures will contain some estimated values.

The table is displayed in the council's standard financial monitoring template and depicts the reported position for each of the 'directorates' in turn, as well as portraying an aggregated picture of all council services.

Key messages and headlines that can be taken from the table are;

- The council's approved net revenue budget for the year totals **£185.475m** (white and blue shaded columns)
- Managers forecast that the council will spend **£190.322m** on delivering services by the end of the year (yellow shaded column)
- This is **£4.847m more** than the council has available to spend or had planned to spend when the budget was approved back in February.

Clearly, this is the first report to be prepared and shared in respect of the 2022/23 financial year and information has been gathered whilst managers are still trying to assess and quantify impacts to their service budgets, both operationally as well as in terms of changing costs.

It is important to recognise that these forecasts are likely to change over the coming months as more information is gathered, reviewed and assessed and so the financial reporting will continue to be updated and refreshed throughout the year.

The council has a legal requirement to balance its budget at the end of each year and so it must give consideration of how this overspend would be funded if the position remained unchanged.

Section 3.6 of the report describes some of the options and choices available to mitigate this position although given the scale of the initial overspend and the wider economic situation, the council understands that it may need to move relatively quickly in the coming months to ensure that appropriate decisions can be taken in a timely manner to enable preventative measures and mitigations to be implemented, so that they can make a positive impact on the budget before the end of the financial year.

3.4. Significant budget pressures included within the forecast

The council's financial monitoring processes are consistently applied and embedded across all directorates and service areas. Each month the finance service collaborates with senior managers who have been given specific financial responsibilities, to review and assess the key risks and issues being faced by services so that they can prepare a forecast which accurately portrays the financial performance likely to be achieved at the end of the financial year.

Reports are presented to each Director and their leadership teams so that they can review and assess the latest projections by their budget managers and identify and approve any actions arising or mitigations which may need to be implemented in the future.

An extract of the monthly reporting information from each Director is included within this report and can be found in **Appendix 2**. These summaries fulfil the requirements of the constitution as they provide a detailed breakdown of material financial variances when compared to the budget, that are forecast to occur within each service area.

These summaries do contain many operational challenges within the budgets and analysis of these variances would usually form part of the main body of the report. However, given that the council is forecasting a significant overspend of **over £4.8m**, this section of the report now provides focus on the **main factors** that are driving the overspend so that the core issues can be understood; it will be seen that these are largely outside of the council's control.

| Issue | £000 |
|--|-------------|
| Service related pressures | |
| Children's services – placement costs | 1,201 |
| Home to schools transport costs | 1,254 |
| Wider pressures affecting several / all services | |
| Inflation on contracts, including fuel | 1,000 |
| Inflation on pay (gross cost, up to £2.2m) | 1,603 |
| Inflation on energy | 1,207 |
| Material mitigations | |
| Increase in interest received on investments | -1,027 |

3.4.1. Specific service-related pressures

Children's services – placements

Over the past two years in particular, the council has had relatively low numbers of looked after children when compared with other similar authorities, and it has been very successful in managing the costs of those placements.

Net expenditure in 2021/22 (£7.8m) was 23% less than it was in 2019/20, largely because of lower numbers of children looked after, meaning that a £1.5m underspend was reported. As a result, and supported by the information held at the time, the 2022/23 budget for looked after children was reduced by £960k.

However, since the time that the budget was set, the number of looked after children has slowly risen (from 191 at the end of the calendar year, to 199 at the end of July). More notably, there has been a small number of new and unexpected placements in residential care, where the average unit cost of a placement is approximately £240,000 per annum. These placements partly relate to the complex needs of the young people concerned, but also reflect the lack of more cost-effective and appropriate placement options, such as in-house or independent fostering.

Detailed work is ongoing to develop plans for these young people and to ensure that the placements are "stepped-down" to more appropriate and cost-effective ones as soon as possible. However, even with these plans built into the financial forecasts, it is anticipated that there will be an overspend in the region of £1.2m in this area of the budget.

Home to school transport

The forecast overspend relating to home to school transport in the current financial year is £1.2m. This position is as a result of a number of factors.

Demand for transport for children and young people with Special Educational Needs and Disabilities (SEND) continues to increase and the transport packages are often expensive, especially if the placement is out of area.

There are a limited number of **providers** within the area who can offer the services required. Recent issues including driver shortages and fuel inflation are causing a 30% to 50% increase in contract tenders resulting in an increase in costs for the council.

For the past two years the council has received ring-fenced funding for Home to School Transport to help offset the incremental financial cost of providing Home to School Transport during the pandemic. Whilst the funding has now ceased, some of the **increased costs** have remained due to individual transport arrangements for some pupils.

It should be noted that although it is early in the financial year, the forecast position does include an estimate for new contracts and increased levels of demand which are due to start in the new academic year in September 2022.

The annual calculation of future demand levels is always difficult because it is based upon a series of assumptions regarding potential future numbers of children who may require transport, some of which could be within the area (although not all), all of which will have differing requirements and support. The base assumptions included within the budget for the current financial year were lower than needed and so work is underway between the Transport and SEND teams to share information in order to improve forecasting in the future.

It is also likely that we will see the financial position for Home to Schools Transport change later in the year once the actual costs of any new contracts and demand are known.

3.4.2. Broader pressures affecting all directorates

Inflation on contracts, including fuel

Many of the council's larger contracts include specific provision to ensure that costs are maintained at current prices after taking into account inflationary factors. Each contract includes a range of indices that are relevant to the specific area, for example, the waste contract is indexed for fuel, CPI and a pay award increase; the support services contract follows a similar approach in that approx 70% is uplifted for staffing increases, and the remaining 30% is uplifted by CPI, recognising the external drivers associated with third party cost increases.

Each directorate has included specific provision for the contracts within their areas but in total, it is estimated that the council will spend approximately £1m more on its contracts during 2022/23. It is important to recognise that most of this increase will become part of the established base position and so will also be an issue for future years.

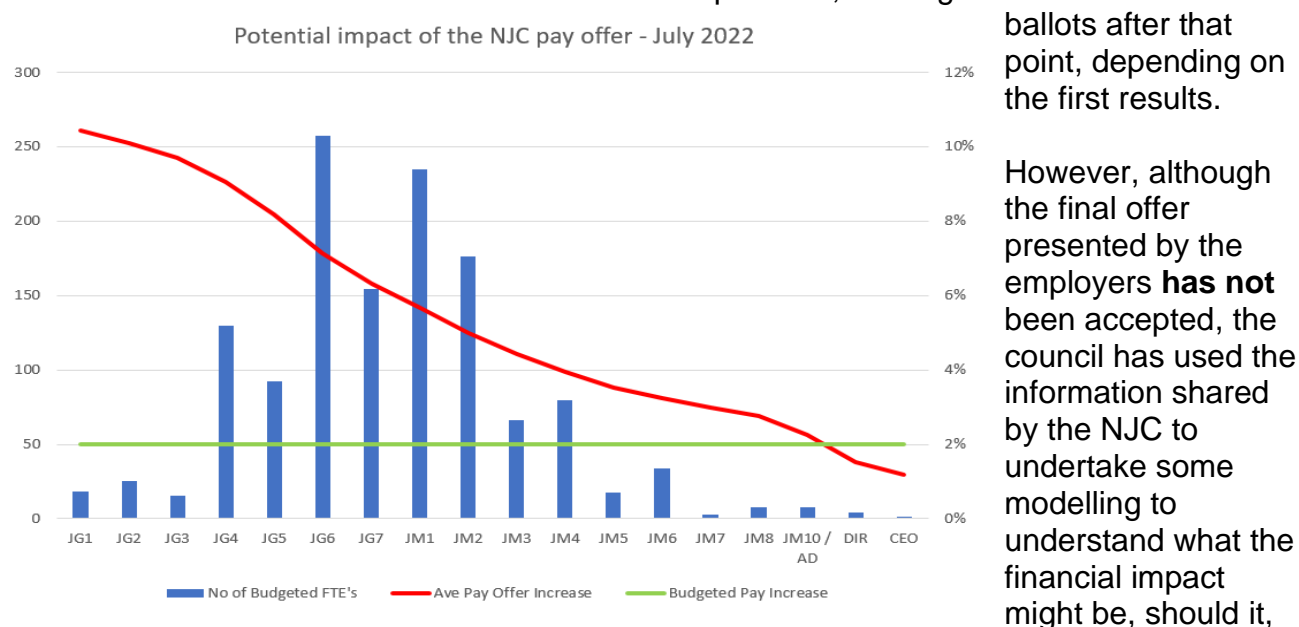
Inflation on pay - £1.6m

Staff working in local government have their pay and conditions determined by a negotiating body, the National Joint Council (NJC) for local government services. The NJC is made up of representatives from UNISON, other trade unions and the employers.

Each year the council includes provision within its budget to reflect a potential increase in its pay bill, although given that negotiations often take place after the budget has been set an estimate has to be used. The council's 2022/23 revenue budget includes provision equivalent to a **2%** increase in pay, which is similar to the assumptions used by many other councils at the time.

On 25 July 2022 the employers' side of the NJC made a final pay offer to local government employees, the main component of which is a **flat rate increase of £1,925** on all pay points with effect from 1 April 2022. The headline offer means that it will be worth a 10.5% increase to those at the lower end of the pay scale, reducing as a proportion of salary for those staff who are higher up the scale.

The exact timescales for reaching an agreement on this issue are not yet known as the trade unions are currently consulting with their members which will take some time, e.g. the initial Unison consultation is due to run until 19 September, although there could be other



ballots after that point, depending on the first results.

However, although the final offer presented by the employers **has not** been accepted, the council has used the information shared by the NJC to undertake some modelling to understand what the financial impact might be, should it,

or a similar offer be accepted in the future.

As the offer is a flat rate sum for each pay point, the impact for each council will be different depending on how many staff they have at each grade. The chart shows the staffing profile for North Somerset as well as the budgeted and offered increases and is clearly much higher than the base provision.

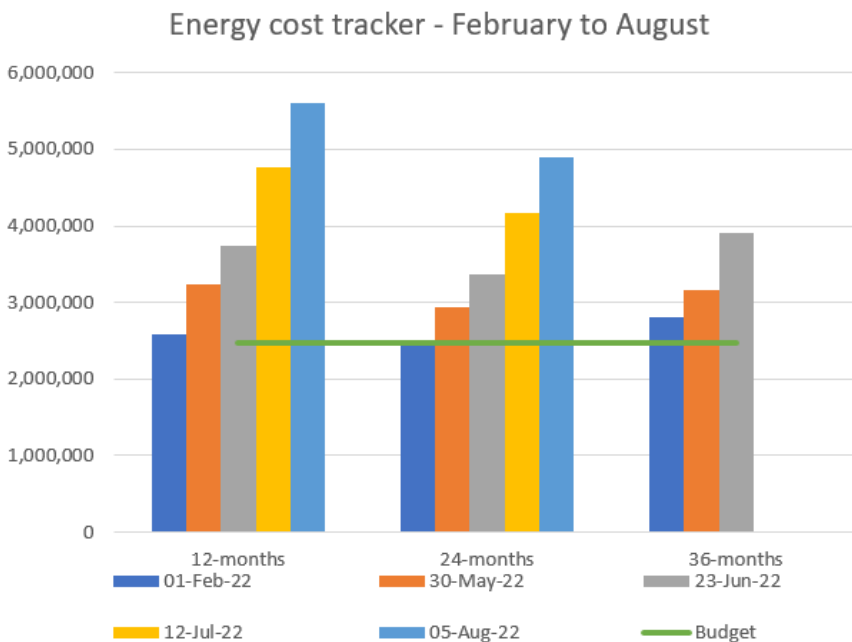
The **total cost** of the increase is estimated to be in the region of **£3.5m** per annum, although part of this is already funded because the council has provision for a 2% increase included within the 2022/23 base budget. It is assumed that some of the increase will be charged to other elements of the council's budget, which have specific funding sources of their own, such as schools, public health and capital projects. The council also has a small balance set aside in an earmarked reserve which it can release to fund any unbudgeted pay related pressures in the year because the final pay award last year was lower than budgeted. This means that if the pay award was agreed at the offer level, the council would incur an overspend of **£1.6m** in the current financial year.

This issue is more serious because the higher costs would continue into future years as they would become part of the council's base budget going forward. This means that it is necessary to add this cost as a new pressure within the medium term financial plan for 2023/24 onwards. Given that the earmarked reserve balance can only be used to fund costs once, the ongoing pressure would be **£1.8m**.

Inflation on energy

In May 2022 Council considered a commissioning and procurement report for new energy contracts, as the current ones are due to end at the end of September, with a recommendation for the new contracts to be from a net zero green energy source. The report noted that the council's budget currently include provision for £2.5m to fund electricity and gas energy costs, which are predominantly used in buildings and street lighting.

Recognising the pricing and volatility within the energy market over recent months the report approved giving delegated authority to the S151 Officer, in consultation with the Executive Member for Corporate Services and other officers to achieve the best price possible using support from the council's energy consultants, noting that a contract for 12-24 months was the best approach.



Since that time the market prices have been tracked by the energy consultants and shared with the S151 Officer and the procurement team so that a contract decision can be made, and the chart shows the latest position, along with the available budget.

Although no decisions have yet been made on what length of contract to enter into, or at a specific pricing point, it is clear to see that all options are significantly higher than the council's available budget.

The council could continue to monitor this area and hold it as a 'risk' rather than include a forecast overspend within its month 4 financial position however, considering the scale of the issue and the expiry dates of the current contracts, it is prudent to recognise these costs to enable it to be included within the mitigation discussions.

The latest monthly forecast assumes an annual contract cost of £4.9m, which is £2.4m higher than the current budget, part of which (i.e. at least **£1.2m**) will be incurred before the end of March 2023.

Rates will continue to be monitored and the forecast updated when final decisions are made, although there is a risk this could be at even higher levels than now. This issue could also continue into future year and so would need to be considered within the medium term financial plan.

Investment interest

Whilst the majority of economic impacts are creating pressures within the council's financial position, the increase in interest rates is having a positive impact on the amount of money that the council can earn on its surplus cash-flow balances. The month 4 position

anticipates that the council generate approximately £1m more than the approved budget this year and this is being used to offset some of the areas described above.

3.5. Significant risks being held and monitored, not included within the forecast

The council's financial monitoring processes not only capture and forecast projections of income and expenditure, they also assess areas of risk that may materialise at some point during the financial year, or document situations that may require the council to consider providing support or incurring additional expenditure at some point.

However, given that the council's budget for both the current and future years is not yet balanced, then any decisions to increase spending beyond approved or current levels would be deemed inappropriate and could contravene requirements within the Constitution. The only exceptions to this would be to ensure the continuation of statutory services, although even this would need to be a decision taken by Council, who would be required to identify areas where discretionary or non-essential spending should cease before the new spending is commenced. The following areas are currently being monitored as risks - although no additional spending for these items has been included within the forecast position.

Support to adult social care providers

With the CPI reaching 10.1% in July, the director of adult social care is considering what action might be needed to support residential care providers during the remainder of the year as they have seen their costs rise in recent months. Such a decision would not only increase the value of the council's overspend in the current financial year but would also likely continue into future years as they would be held within the base contract calculations.

It is worth noting that these cost increases are taking place at the same time as the Government mandated "Fair Cost of Care" exercise. As part of the Social Care Funding Reforms, councils have been asked to work with adult social care providers to determine the actual costs of delivering care, with a view that this will give context to a Market Sustainability Plan to be published later in the year. Any changes that may be proposed as part of the Social Care Reforms will in theory, be funded by additional government grant, although as funding for this area has yet to be confirmed, there is a high risk that there may be a short-fall in the future. This issue would be included within the MTFP risk register.

Support to other providers, e.g. bus services, supported bus routes, leisure providers

The current issues around energy prices and fuel prices are causing significant financial impacts for other contractors and providers who deliver services on behalf of North Somerset Council. Whilst contractually the council is not obliged to fund anything in addition to contractual inflation, the council may have to consider the consequences of not providing any additional support in these areas.

There is regular dialogue to understand the current situation and to work together to mitigate where possible, the most severely impacted are likely to be our Leisure providers due to the energy requirements associated with running swimming pool facilities, although bus and transport services are also affected by such pressures.

Further movement on current forecasts

Any of the issues described within sections 3.4 or 3.5 of the report, or indeed any of the budget variances included within the director summaries shown at Appendix 2, do have the capacity to change within future reports because the forecasts are based on a range of estimates and assumptions. There are very few parts of the council's budget that are fixed and unlikely to change however, every effort will be made by budget managers over the coming weeks to not only validate as many of the underlying forecasts as possible, but also to try and mitigate areas of overspending within their service areas.

No significant overspends are currently being reported in relation to adult social care. However, it should be noted that it is early in the financial year and there is a strong likelihood that costs will increase given the increases in demand that are being experienced. Delays in treatment and surgery, deterioration and de-conditioning during and since the Covid-19 pandemic and a lack of capacity are all leading to increases in need.

3.6. Options on how to close the budget gap

When setting the budget before the start of each year the council considers the robustness of the estimates and assumptions, as well as plans and strategies that could be used to deliver a balanced budget should unexpected pressures or events materialise.

The table shown in **Appendix 3** provides a range of options that are available for the council to consider, along with some commentary to enable a broader understanding of the implications for each area. In summary these are;

- Directors to manage their own areas of overspending through areas such as reviewing vacancy and recruitment decisions, reducing areas of non-essential or discretionary spending
- Release the council's contingency within the forecast
- Use of the corporate risk reserve and undertake a wider review of earmarked reserves
- Take some emergency budget decisions to reduce costs and generate more income
- Request additional resources
- Use of the general revenue reserve

Before making decisions to mitigate the overspend it is important to understand whether the issue is one-off in nature, or likely to continue into a future financial year. If the issue is one-off, then it may be appropriate to consider using a one-off mitigation measure in the current year. However, if the issue is likely to continue into future years' then a more sustainable funding solution must be found.

3.7. Impact on reserves and balances

3.7.1. General reserves

The council's general revenue reserve balance at the start of the year was £9.744m, having been increased slightly at the end of the last year following an underspend. This balance equates to 5.25% of the net revenue budget and whilst it was considered as acceptable in relation to the risks identified when setting the budget in February, it would no longer be seen as adequate when incorporating the level of inflationary risk currently being experienced.

Given that the forecast overspend is currently £4.8m, it is recommended that other actions are implemented as soon as possible to reduce the risk of the council needing to draw down funding from this reserve at the end of the financial year because the risks are likely to be maintained or grow and so a reduced balance would not be sustainable to support future years.

3.7.2. Earmarked reserves

The council’s earmarked reserves at the start of the year were higher than in the previous years and as a total can be considered as part of mitigating actions against one off budget pressures.

They do form part of the council’s overarching financial strategy to ensure that financial issues are smoothed across financial years where appropriate, and also to support the council’s longer-term financial sustainability, and so will therefore be used to; meet obligations agreed in previous years, support economic recovery, fund service plans, regeneration and place-making investments, deliver corporate plan priorities as well as provide against risk and uncertainty.

Although they could be considered as part of the overarching mitigation plans for the current financial year, it is important to understand why reserves are being held, along with the potential spending profiles and planned outcomes associated with each one.

3.8. Capital budgets

The capital programme covers the period up to 2026/27, with particular focus and attention given for the 3-year period 2022-2025. The programme covers all aspects of the councils’ services and has been built up in several phases following different stages of approval.

Appendix 3 provides details of all schemes currently included within the latest programme – the summary shows that the overall programme totals **£339.378m**, with £170.372m expected to be delivered during the current financial year.

A significant focus of the new Capital Programme, Planning and Delivery Board (CPPD) has been to ensure that spending plans are more accurately aligned within our financial reporting. This improvement within the governance framework not only enables readers to understand delivery plans, it also ensures that resources and the associated financial implications are fed through each of the council’s strategies. For example, more up to date spending plans improves the council’s cash-flow forecasts, which in turn could improve investment decisions. More focus on the accuracy of spending plans also improves the forecasting information, which is likely to reduce areas of overspending.

Over recent months the CPPD Board have introduced an assessment for each of the projects within the approved programme into its monitoring process, using the council’s risk management framework.

The latest assessments that have been shared by the project managers have been included within Appendix 3 to enable a greater understanding of how the projects are progressing. Those projects without an assessment at this stage are either yet to be started or are awaiting their

| | | Likelihood | | | | |
|--------|-----------------|------------|---------------|---------------|-------------|---------------------|
| | | 1 Rare | 2 Unlikely | 3 Possible | 4 Likely | 5 Almost Certain |
| Impact | 5 Critical | 5 | 10 | 15 | 20 | 25 |
| | 4 High | 4 | 8 | 12 | 16 | 20 |
| | 3 Medium | 3 | 6 | 9 | 12 | 15 |
| | 2 Low | 2 | 4 | 6 | 8 | 10 |
| | 1 Negligible | 1 | 2 | 3 | 4 | 5 |

assessment to be validated by CPPD and will be included within future reports.

Those schemes that have been assessed as Red are noted below;

Expansion of Flax Bourton Mortuary – the council's annual revenue budget includes a contribution towards the shared coroners and mortuary services, which are provided by Bristol City Council on behalf of the 4 local authorities within the West of England. The service, which utilises the mortuary building located in Flax Bourton, has identified that the storage facilities on the site are no longer fit for purpose and need to be upgraded. As an example, for the past five years additional storage space has been provided through temporary, prefabricated, refrigerated units sited outside of the main building within a gated compound adjoining, although this capacity is too small and needs to be expanded.

During 2021/22 Bristol City Council developed a capital scheme to expand the main building in order to meet the revised operational storage requirements. All four local authorities followed their individual governance routes and approved funding towards the scheme costs. At that time the total scheme costs were £1.254m, with the North Somerset share being £237k.

A recent report from the operational lead has advised that following a procurement exercise the projected costs have increased by over 61%, largely as a result of inflationary factors and scarcity of supplies. It is anticipated that the scheme will now cost £2.2m, which means that the amount that North Somerset will be required to pay will be £417k, an increase of £179k. The scheme has been scrutinised by the project managers and the revised cost includes value engineering decisions through changes to design scope and materials.

Given that there are statutory requirements associated with the delivery of this service, the section 151 officers of the four councils are in dialogue with their respective directors of public health to understand if there are any remaining funds held within the Covid COMF grant balances. If all councils are able to identify additional funding by September, then the scheme will be able to proceed at this cost price, although North Somerset's governance process would require approval for an increase in the capital programme to the revised level. If all councils are unable to identify funding, then the viability of the scheme may need to be reassessed as costs could continue to rise further, meaning that further options would need to be explored.

Metrowest Rail – there have been many issues associated with this major capital project which have not only been reflected within the risk assessment score discussed at CPPD, they have also been shared at Council through the reporting framework. It can be seen from the most recent report that risks associated with funding streams have reduced because additional resources have been identified and some of the expenditure related risks are also likely to reduce if the Department for Transport take responsibility for aspects of delivery risk. The project will continue to be closely monitored and further updates will be included within future reports.

Resources have been allocated for each of the schemes within the programme and records show that £223.7m will be financed by external grants and contributions, £103.7m by borrowing and the remaining £11.9m by other council resources, such as capital receipts and reserves.

Appendix 4 lists out all of the changes which have been reflected within the programme during the current financial year, which require retrospective approval from the Executive although a short summary is provided below.

| NORTH SOMERSET COUNCIL CAPITAL PROGRAMME SUMMARY | 2022/23 | 2023/24 | 2024/25 | 2025/26 | 2026/27 | TOTAL |
|--|----------------|----------------|----------------|----------------|----------------|----------------|
| | £000 | £000 | £000 | £000 | £000 | £000 |
| Original approved capital expenditure budget 2020/21 (@P9); | 94,798 | 99,181 | 17,978 | 0 | 0 | 211,957 |
| Movements approved during 2021/22 in quarter 4 (Jan-March) | 2,273 | 0 | 0 | 0 | 0 | 2,273 |
| Planned Additions to the capital Programme - Executive, Feb 2022 | 38,722 | 0 | 0 | 0 | 0 | 38,722 |
| Slippage of approved budgets from 2021/22 (Out-turn position) | 48,582 | 0 | 0 | 0 | 0 | 48,582 |
| Opening budgets for 2022/23 | 184,375 | 99,181 | 17,978 | 0 | 0 | 301,534 |
| Changes agreed April to June 2022; | | | | | | |
| Additions < £1m - per scheme | 2,858 | 0 | 0 | 0 | 0 | 2,858 |
| Additions > £1m - per scheme - Baytree school (April Executive) | 3,202 | 0 | 0 | 0 | 0 | 3,202 |
| Rephasing of the spend profile | (51,847) | 11,498 | 35,349 | 0 | 5,000 | 0 |
| Realignments / reductions | (4,456) | 0 | 0 | 0 | 0 | (4,456) |
| Revised budget at June 2022 | 134,131 | 110,679 | 53,327 | 0 | 5,000 | 303,137 |
| Changes agreed in July 2022; | | | | | | |
| Additions < £1m - per scheme | 661 | 0 | 0 | 0 | 0 | 661 |
| Additions > £1m - per scheme - MetroWest (July Council) | 35,580 | 0 | 0 | 0 | 0 | 35,580 |
| Revised budget at July 2022 | 170,372 | 110,679 | 53,327 | 0 | 5,000 | 339,378 |

A small number of these changes have been the subject of individual reports to the Executive in recent months due to their scale, for example the increase in the MetroWest Rail project, or as a result of procurement and commissioning plans, whilst others of a smaller scale have been through the director or Section 151 governance decision making process in accordance with financial regulations.

The most significant element of change in financial terms relates to the re-profiling of budgets, as noted above, to ensure that they are aligned to realistic spending plans.

A full list of all changes to the capital programme is therefore included within this report for completeness.

4. Consultation

The report has been developed through consultation with the council's corporate leadership team, and also with each of the departmental leadership teams. Discussions and briefings on financial matters are an established part of the relationships with directors and Executive Members.

5. Financial Implications

Financial implications have been included throughout the report.

The detailed values included throughout the report include all of the council's forecast expenditure, income receipts as well and any proposed transfers to or from reserves as this enables a more transparent representation of the council's finances to be shared should any funding decisions or further action required; the values therefore, exclude any technical accounting adjustments such as impairment or depreciation.

6. Legal Powers and Implications

The Local Government Act 1972 lays down the fundamental principle by providing that every local authority shall make arrangements for the proper administration of their financial affairs including balancing their budgets each year from within their own resource allocations, although further details and requirements are contained within related legislation.

The setting of the council's budget for the forthcoming year, and **the ongoing arrangements for monitoring** all aspects of this to ensure that the councils spending is within the approved limits, is an integral part of the financial administration process.

Further requirements are contained within the Local Government Act 1988, Section 114 (3) which provide for instances whereby the chief finance officer of an authority makes a judgement that the expenditure of the authority in a financial year is likely to exceed the resources available.

7. Climate Change and Environmental Implications

Both of the reports presented to the Executive at this meeting, in terms of **monitoring of the budget for the current year** and also setting budgets for future years, will be impacted by the increasing costs of energy, which does provide an opportunity to highlight these issues.

Whilst there are no specific climate related impacts to note at this stage, it is clear that climate and environmental related implications will be at the forefront of our thinking when considering underlying service policies, priorities and strategies associated with the revenue budget, as well as through formulating investment plans and determining options to make reductions in our energy usage and associated costs to ensure a more sustainable future.

8. Risk Management

The council's Strategic Risk Register includes two risks associated with the financial planning:

- Risk that we do not manage budgets effectively in-year, including by not implementing and delivering the savings or transformational projects required to meet the financial challenge.
- Risk that we are unable to deliver the priorities of the council by not planning to meet the Medium-Term financial challenge.

The council's Corporate Leadership Team routinely review the budget monitoring forecasts as well as significant risks which may emerge from within directorate risk registers or operational activities, which may also have a financial consequence.

In addition, the Corporate Leadership Team also have regular planned session to ensure that they can support the process to share options which will deliver a balanced budget for future years through the development of the Medium Term Financial Plan.

However, given the significant changes to the wider economic situation and the uncertainty that this is having on the council's own financial position, it is recognised that such risks have escalated over recent months. The financial risk register has been updated to reflect more inflationary factors and risks and work is being carried out to understand the impacts that this may bring so that appropriate mitigation can be implemented or alternative options considered.

9. Equality Implications

There are no specific equality implications with regard to the recommendations contained within this report although it should be noted that the council has utilised additional Government funding to support vulnerable residents whether appropriate, financial support to those providing essential services, and working in partnership with community groups.

Individual savings proposals incorporated into the revenue budget for the current financial year are supported by an Equality Impact Assessment.

10. Corporate Implications

The Corporate Plan and MTFP, along with the supporting financial monitoring processes and performance management framework are vital tools to help align effort across the organisation and ensure that services are all are focused on delivery to agreed community and organisational priorities.

With continuing financial pressures and demands for services, it is essential that the councils' limited resources continue to be prioritised and allocated in line with the identified priorities. The Corporate Plan continues to be reviewed in the light of emerging risks and pressures and steps are being taken to assess timeframes and monitor key outcomes.

11. Options Considered

None – the council is legally required to set a balanced budget and to implement a robust financial framework to ensure that spending is aligned to available resources and all available options to achieve this are considered within the details above.

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Appendices:

| | |
|------------|---|
| Appendix 1 | Revenue budget details for 2022/23 and summary of virements |
| Appendix 2 | Financial commentaries from each director |
| Appendix 3 | Options to close the budget gap |
| Appendix 4 | Capital budget monitoring for 2022/23 |
| Appendix 5 | Schedule of capital budget virements – to be approved |

Background Papers:

Exec Report – February 2022, Medium Term Financial Plan and Revenue Budget update
Council Report – February 2022, Council Tax Setting 2022/23

NORTH SOMERSET COUNCIL - 2022/23 REVENUE BUDGET MONITORING
FINANCIAL SUMMARY - AS AT 31 JULY 2022

| | REVISED BUDGET | | | | FORECAST OF PROJECTED OUT-TURN | | | | PROJECTED OUT-TURN VARIANCE | | | |
|---------------------------------------|--------------------|----------------------|---------------------|----------------------|--------------------------------|----------------------|---------------------|----------------------|-----------------------------|--------------------|--------------------|--------------------|
| | Expenditure £ | Income £ | Reserves £ | Net £ | Expenditure £ | Income £ | Reserves £ | Net £ | Expenditure £ | Income £ | Reserves £ | Net £ |
| Service Expenditure Budgets; | | | | | | | | | | | | |
| Adult Social Services | 114,854,661 | (38,760,546) | (923,481) | 75,170,634 | 115,612,451 | (38,200,368) | (2,032,865) | 75,379,217 | 757,790 | 560,178 | (1,109,384) | 208,584 |
| Children's Services | 42,128,489 | (14,534,612) | (617,289) | 26,976,589 | 45,202,108 | (16,206,626) | (776,386) | 28,219,096 | 3,073,619 | (1,672,014) | (159,098) | 1,242,507 |
| Schools & DSG Budgets | 52,470,994 | (52,470,994) | 0 | (0) | 56,311,734 | (52,470,994) | (3,840,740) | (0) | 3,840,740 | 0 | (3,840,740) | 0 |
| Children's Services | 94,599,483 | (67,005,606) | (617,289) | 26,976,588 | 101,513,842 | (68,677,620) | (4,617,127) | 28,219,096 | 6,914,359 | (1,672,014) | (3,999,838) | 1,242,507 |
| Corporate Services | 82,541,279 | (53,103,387) | (1,976,592) | 27,461,300 | 82,701,785 | (52,992,040) | (1,982,370) | 27,727,375 | 160,507 | 111,347 | (5,778) | 266,075 |
| Place Directorate | 60,436,395 | (25,318,145) | (5,038,283) | 30,079,967 | 64,525,176 | (26,655,414) | (6,472,748) | 31,397,014 | 4,088,781 | (1,337,269) | (1,434,465) | 1,317,047 |
| Public Health & Regulatory Services | 16,014,843 | (11,909,951) | (2,730,732) | 1,374,160 | 17,080,377 | (12,266,743) | (3,453,328) | 1,360,306 | 1,065,534 | (356,792) | (722,596) | (13,854) |
| Capital Financing | 15,350,590 | (4,143,590) | 0 | 11,207,000 | 15,339,031 | (5,170,639) | 0 | 10,168,392 | (11,559) | (1,027,049) | 0 | (1,038,608) |
| Precepts & Levies | 6,683,897 | 0 | 0 | 6,683,897 | 6,683,897 | 0 | 0 | 6,683,897 | 0 | 0 | 0 | 0 |
| Non Service Budgets | 7,818,264 | (1,296,980) | 0 | 6,521,284 | 8,087,802 | (1,399,787) | (111,633) | 6,576,382 | 269,538 | (102,807) | (111,633) | 55,098 |
| Incremental Impact of Pay Award Offer | 0 | 0 | 0 | 0 | 2,245,061 | (326,240) | (315,749) | 1,603,072 | 2,245,061 | (326,240) | (315,749) | 1,603,072 |
| Impact of Energy Procurement | 0 | 0 | 0 | 0 | 1,207,105 | 0 | 0 | 1,207,105 | 1,207,105 | 0 | 0 | 1,207,105 |
| Total Net Revenue Budget | 398,299,411 | (201,538,205) | (11,286,377) | 185,474,830 | 414,996,526 | (205,688,851) | (18,985,819) | 190,321,856 | 16,697,115 | (4,150,646) | (7,699,443) | 4,847,026 |
| General Fund Resources Budgets | 0 | (182,378,102) | (3,096,728) | (185,474,830) | 0 | (184,824,659) | (650,171) | (185,474,830) | 0 | (2,446,557) | 2,446,557 | 0 |
| Total Revenue Budget Resources | 0 | (182,378,102) | (3,096,728) | (185,474,830) | 0 | (184,824,659) | (650,171) | (185,474,830) | 0 | (2,446,557) | 2,446,557 | 0 |
| NET REVENUE BUDGET TOTALS | 398,299,411 | (383,916,307) | (14,383,105) | (0) | 414,996,526 | (390,513,510) | (19,635,990) | 4,847,026 | 16,697,115 | (6,597,203) | (5,252,886) | 4,847,026 |

**NORTH SOMERSET COUNCIL - 2022/23 REVENUE BUDGET MONITORING
FINANCIAL SUMMARY - AS AT 31 JULY 2022**

| | ORIGINAL BUDGET | | | | VIREMENTS | | | | REVISED BUDGET | | | |
|---------------------------------------|--------------------|----------------------|--------------------|----------------------|-------------------|--------------------|--------------------|-----------------|--------------------|----------------------|---------------------|----------------------|
| | Expenditure £ | Income £ | Reserves £ | Net £ | Expenditure £ | Income £ | Reserves £ | Net £ | Expenditure £ | Income £ | Reserves £ | Net £ |
| Service Expenditure Budgets; | | | | | | | | | | | | |
| Adult Social Services | 113,918,154 | (38,760,546) | 0 | 75,157,608 | 936,507 | 0 | (923,481) | 13,026 | 114,854,661 | (38,760,546) | (923,481) | 75,170,634 |
| Children's Services | 36,685,554 | (9,324,802) | (371,896) | 26,988,857 | 5,442,935 | (5,209,811) | (245,393) | (12,268) | 42,128,489 | (14,534,612) | (617,289) | 26,976,589 |
| Schools & DSG Budgets | 53,785,505 | (53,785,505) | 0 | (0) | (1,314,511) | 1,314,511 | 0 | 0 | 52,470,994 | (52,470,994) | 0 | (0) |
| Children's Services | 90,471,059 | (63,110,307) | (371,896) | 26,988,857 | 4,128,424 | (3,895,300) | (245,393) | (12,268) | 94,599,483 | (67,005,606) | (617,289) | 26,976,588 |
| Corporate Services | 80,194,547 | (52,824,240) | 182,500 | 27,552,807 | 2,346,732 | (279,147) | (2,159,092) | (91,507) | 82,541,279 | (53,103,387) | (1,976,592) | 27,461,300 |
| Place Directorate | 56,726,908 | (23,124,057) | (3,613,634) | 29,989,217 | 3,709,487 | (2,194,088) | (1,424,649) | 90,750 | 60,436,395 | (25,318,145) | (5,038,283) | 30,079,967 |
| Public Health & Regulatory Services | 16,014,843 | (11,909,951) | (2,730,732) | 1,374,160 | 0 | 0 | 0 | 0 | 16,014,843 | (11,909,951) | (2,730,732) | 1,374,160 |
| Capital Financing | 15,188,590 | (3,981,590) | 0 | 11,207,000 | 162,000 | (162,000) | 0 | 0 | 15,350,590 | (4,143,590) | 0 | 11,207,000 |
| Precepts | 6,683,897 | 0 | 0 | 6,683,897 | 0 | 0 | 0 | 0 | 6,683,897 | 0 | 0 | 6,683,897 |
| Non Service Budgets | 7,818,264 | (1,296,980) | 0 | 6,521,284 | 0 | 0 | 0 | 0 | 7,818,264 | (1,296,980) | 0 | 6,521,284 |
| Total Net Revenue Budget | 387,016,262 | (195,007,670) | (6,533,762) | 185,474,829 | 11,283,150 | (6,530,535) | (4,752,615) | 0 | 398,299,411 | (201,538,205) | (11,286,377) | 185,474,830 |
| General Fund Resources Budgets | 0 | (182,378,102) | (3,096,728) | (185,474,830) | 0 | 0 | 0 | 0 | 0 | (182,378,102) | (3,096,728) | (185,474,830) |
| Total Revenue Budget Resources | 0 | (182,378,102) | (3,096,728) | (185,474,830) | 0 | 0 | 0 | 0 | 0 | (182,378,102) | (3,096,728) | (185,474,830) |
| NET REVENUE BUDGET TOTALS | 387,016,262 | (377,385,772) | (9,630,490) | (1) | 11,283,150 | (6,530,535) | (4,752,615) | 0 | 398,299,411 | (383,916,307) | (14,383,105) | (0) |

These were the budgets approved by Council in Feb 22

These virements / budget changes have occurred in 2022/23

These are the current / revised budgets

Notable or significant budget virements between service areas during the year include;

- None

Notable or significant budget virements within service areas during the year include;

- Adults - Gross up the budgets for one-off project costs - funded from reserves
- Children's - Gross up the budgets for Homes for Ukraine scheme - increase in costs, funded by Government Grant
- Schools - Realignment of budgets following confirmation of Dedicated Schools Grants and carry forwards
- Corporate Services - Gross up the budgets for the Household Support Fund - increase in costs, funded by Gov Grant
- Place - Gross up the budgets for Community Renewal Funding - increase in costs funded by Government Grant

**FINANCIAL OVERVIEW OF THE ADULTS SOCIAL SERVICES DIRECTORATE
AS AT 31 JULY 2022**

| Directorate Summary | | | | | |
|---|--------------------------------|------------------|-------------------------------|----------------------------------|------------------------------------|
| | Original Budget 2022/23 | Virements | Revised Budget 2022/23 | Forecast Out-turn 2022/23 | Projected Out-turn Variance |
| | £000 | £000 | £000 | £000 | £000 |
| - Gross Expenditure | 113,918 | 937 | 114,855 | 115,612 | 758 |
| - Income | (38,761) | 0 | (38,761) | (38,200) | 560 |
| - Transfers to / from Reserves | 0 | (923) | (923) | (2,033) | (1,109) |
| = Directorate Totals | 75,158 | 13 | 75,171 | 75,379 | 209 |
| Forecast Out-turn Variance | | | | | 0.28% |
| - Individual Care and Support Packages | 70,236 | 0 | 70,236 | 70,361 | 125 |
| - Social Care Activities | 9,308 | 0 | 9,308 | 9,611 | 303 |
| - Information & Early Intervention | 978 | 0 | 978 | 1,004 | 26 |
| - Assistive Equipment & Technology | 420 | 0 | 420 | 500 | 80 |
| - Commissioning & Service Delivery Strategy | (6,453) | 13 | (6,440) | (6,770) | (330) |
| - Integrated Care S256 Agreements | 0 | 0 | 0 | 0 | 0 |
| - Covid Related Support | 0 | 0 | 0 | 0 | 0 |
| - Housing Services | 669 | 0 | 669 | 673 | 4 |
| = Directorate Totals | 75,158 | 13 | 75,171 | 75,379 | 209 |
| Forecast Out-turn Variance | | | | | 0.28% |

The first projected out-turn position of the 2022/23 financial year for the Adult Social Services directorate is a net **over spend of £0.209m** when compared to the budget of £75.171m that has been set for the year. However, it is important to note that this forecast has been made very early into the financial year, which means that only some of the more material risk areas have been reviewed at this time, although future reports will contain more information as other areas of the budget are reviewed in detail. It is also helpful to note that the forecast overspend included within this report, is actually the combined position for all Adult Social Care and Housing related services, and is made up from budget movements in several key areas of the directorate budget. Further detail and analysis can be seen below.

| Extract showing material variances compared to the revised budget | | | | | |
|--|--------------------------------|------------------|-------------------------------|----------------------------------|------------------------------------|
| Service area and provisional budget variance | Original Budget 2022/23 | Virements | Revised Budget 2022/23 | Forecast Out-turn 2022/23 | Projected Out-turn Variance |
| | £000 | £000 | £000 | £000 | £000 |
| Individual Care and Support Packages | | | | | |
| Expenditure - Long Term Care Packages (residential & nursing) | | | 47,702 | 47,800 | 98 |
| Client Income - Long Term Care Packages (residential & nursing) | | | (11,520) | (10,992) | 529 |
| Expenditure - Long Term Care Packages (non-residential) | | | 37,590 | 37,099 | (490) |
| Client Income - Long Term Care Packages (non-residential) | | | (4,518) | (4,059) | 459 |
| Expenditure - Short Term Care Packages | | | 6,403 | 6,399 | (5) |
| Client Income - Short Term Care Packages | | | (260) | (256) | 4 |
| Other income (including CCG contributions) | | | (5,440) | (5,552) | (112) |
| Other | | | 280 | (77) | (358) |
| Social Care Activities | | | | | |
| Centralised Safeguarding | | | 461 | 438 | (22) |
| Community Meals | | | (12) | 151 | 163 |
| Hospital Discharge & Access Team | | | 252 | 375 | 122 |
| Single Point of Access pressures | | | 1,128 | 1,196 | 68 |
| Temporary support to Homecare Providers re Fuel | 0 | 250 | 250 | 250 | 0 |
| Contribution from earmarked reserves | 0 | (250) | (250) | (250) | 0 |
| Commissioning & Service Delivery Strategy | | | | | |
| Supporting People Commissioning | | | 1,543 | 1,433 | (110) |
| Housing Services | | | | | |
| Housing Solutions - Emergency Accommodation | | | 15 | 94 | 79 |
| Housing Assessment Team | | | 53 | (35) | (88) |
| Sub total - material budget variances | | | | | 337 |
| Other minor variations to the budget | | | | | (129) |
| = Directorate Total | | | | | 209 |

| Areas of financial risk within the directorate budget | | |
|---|---|--|
| Service area and potential financial risk | Range / Scale of Risk Low - £0-£250k Medium - £250k-£500k High >£500k | Likelihood of Risk Occurring |
| Increase in pay award above 2% reflected within the budget Non delivery of planned MTFP savings Provider Cost Inflation calculated when CPI was 4.5%, now 9.4% Non collection of debt / rising debt balances / increase in write-offs Increase in demand for care packages, both numbers and complexity of care | Medium Medium Medium Low Medium | High Medium High Medium Medium |

**FINANCIAL OVERVIEW OF THE CHILDREN'S SERVICES DIRECTORATE
AS AT 31 JULY 2022**

| Directorate Summary | | | | | |
|---|---|---------------------------|--|---|---|
| | Original Budget 2022/23 £000 | Virements £000 | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| - Gross Expenditure | 36,686 | 5,443 | 42,128 | 45,202 | 3,074 |
| - Income | (9,325) | (5,210) | (14,535) | (16,207) | (1,672) |
| - Transfers to / from Reserves | (372) | (245) | (617) | (776) | (159) |
| = Directorate Totals | 26,989 | (12) | 26,977 | 28,219 | 1,243 |
| Forecast Out-turn Variance | | | | | 4.6% |
| - Children's Support and Safeguarding Assist Director | 21,843 | 97 | 21,940 | 23,300 | 1,360 |
| - Education Partnerships Assistant Director | 3,453 | 582 | 4,034 | 3,902 | (132) |
| - Children's Services Directorate | 1,693 | (691) | 1,002 | 1,017 | 15 |
| = Directorate Totals | 26,989 | (12) | 26,977 | 28,219 | 1,243 |
| Forecast Out-turn Variance | | | | | 4.6% |

| Extract showing material variances compared to the revised budget | | | | | |
|---|--|---|--|---|--|
| Service area and projected budget variance | Revised Budget 2021/22 £000 | Out-turn Variance 2021/22 £000 | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out- turn Variance £000 |
| Corporate Parenting | | | | | |
| Placements for children looked after | | | | | |
| Increased expenditure - higher volumes | 9,578 | (1,039) | 8,563 | 10,653 | 2,090 |
| Increased income (Educ and CCG contributions) | (212) | 126 | (312) | (771) | (459) |
| Increased income (Other including Govt grants) | 0 | (626) | 0 | (430) | (430) |
| Placements for children looked after miscellaneous support - lower spend | 515 | 280 | 365 | 150 | (215) |
| Placements for children looked after - unbudgeted uplift on statutory fostering allowances (e.g. SGOs / CAO / Adoption) | 0 | 0 | 154 | 154 | 0 |
| Family Support and Safeguarding | | | | | |
| Children with Disabilities Support - expenditure | 1,312 | 497 | 1,785 | 2,023 | 238 |
| Children with Disabilities Support - income (Educ /CCG) | (110) | (92) | (210) | (33) | 177 |
| Family Wellbeing - Programmes | | | | | |
| Supporting Families, Resettlement Schemes and Other Projects | | | | | |
| Expenditure | 724 | 221 | 5,746 | 5,806 | 60 |
| Income | (611) | (289) | (5,434) | (5,435) | (1) |
| Contribution into / (from) Reserves | (112) | 68 | (274) | (333) | (59) |
| Family Wellbeing - Maintained Nurseries | | | | | |
| Income - shortfall on private fees due to reduced capacity | (1,070) | 117 | (1,080) | (860) | 220 |
| Expenditure - salaries underspend due to vacancies | 1,090 | (107) | 1,116 | 895 | (221) |
| Directorate Wide | | | | | |
| Under spends on employee budgets (excl above) | 14,574 | (553) | 15,588 | 15,303 | (285) |
| Sub total - material budget variances | | | | | 1,115 |
| Other minor variations to the budget | | | | | 128 |
| = Directorate Total | | | | | 1,243 |

| Areas of financial risk within the directorate budget | | |
|--|---|---|
| Service area and potential financial risk | Range / Scale of Risk Low - £0-£250k Medium - £250k-£500k High >£1m | Likelihood of Risk Occurring |
| Number of children looked after increasing Non delivery of planned MTFP savings | Medium Medium | High High |

| Additional information integrating volumes / demand for services | | | |
|---|-----------------------------------|-----------------------------------|---------------------------------------|
| Service area | Costs 2022/23 £000 | Volume 2022/23 FTE | Unit Cost 2022/23 £000 |
| Placements for children looked after | 9,605 | 315 | 30 |

**FINANCIAL OVERVIEW OF THE CHILDREN'S SERVICES DIRECTORATE - SCHOOLS BUDGETS (DSG)
AS AT 31 JULY 2022**

| Directorate Summary | | | | | |
|----------------------------------|---|---------------------------|--|---|---|
| | Original Budget 2022/23 £000 | Virements £000 | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| - Gross Expenditure | 53,786 | (1,315) | 52,471 | 56,312 | 3,841 |
| - Income | (53,786) | 1,315 | (52,471) | (52,471) | 0 |
| - Transfers to / from Reserves | 0 | 0 | 0 | (3,841) | (3,841) |
| = Directorate Totals | (0) | 0 | (0) | (0) | 0 |
| Forecast Out-turn Variance | | | | | 0.0% |
| - Schools Block | 9,148 | (1,548) | 7,600 | 7,600 | 0 |
| - High Needs Block | 29,526 | (8) | 29,518 | 33,385 | 3,867 |
| - Early Years Block | 11,578 | 62 | 11,640 | 11,600 | (40) |
| - Central Schools Services Block | 1,670 | 0 | 1,670 | 1,684 | 14 |
| - DSG Funding | (51,922) | 1,493 | (50,429) | (54,270) | (3,841) |
| - Schools - Non DSG | 0 | 0 | 0 | 0 | 0 |
| = Directorate Totals | (0) | 0 | (0) | (0) | (0) |
| Forecast Out-turn Variance | | | | | 0.0% |

| Extract showing material variances compared to the revised budget | | | | | |
|--|--|---|--|---|---|
| Service area and projected budget variance | Revised Budget 2021/22 £000 | Out-turn Position 2021/22 £000 | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| High Needs Block | | | | | |
| Placements for children looked after | | | | | |
| Out of Authority Placements | 5,203 | 8,085 | 5,203 | 8,085 | 2,882 |
| Top Up Funding | 14,901 | 15,766 | 14,901 | 15,766 | 865 |
| Sensory Impairment Service - increase in joint arrangement | 248 | 303 | 248 | 337 | 89 |
| Transfer deficit into Dedicated Schools Grant Reserve | 0 | (3,821) | 0 | (3,836) | (3,836) |
| | | | | | 0 |
| Sub total - material budget variances | | | | | 0 |
| Other minor variations to the budget | | | | | 5 |
| Transfers to / (from) Dedicated Schools Grant Reserve | | | | | (5) |
| = Directorate Total | | | | | 0 |

| Areas of financial risk within the directorate budget | | |
|---|---|---|
| Service area and potential financial risk | Range / Scale of Risk Low - £0-£250k Medium - £250k-£500k High >£1m | Likelihood of Risk Occurring |
| Increase in the number of non-maintained independent out of area placements | Medium | High |

| Additional information integrating volumes / demand for services | | | |
|---|-----------------------------------|-----------------------------------|---------------------------------------|
| Service area | Costs 2022/23 £000 | Volume 2022/23 FTE | Unit Cost 2022/23 £000 |
| Independent Special Schools Out of Area Placements | 8,085 | 156 | 52 |

**FINANCIAL OVERVIEW OF THE CORPORATE SERVICES DIRECTORATE
AS AT 31 JULY 2022**

| Directorate Summary | | | | | |
|---------------------------------------|---|---------------------------|--|---|--|
| | Original Budget 2022/23 £000 | Virements £000 | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out- turn Variance £000 |
| - Gross Expenditure | 80,195 | 2,347 | 82,541 | 82,702 | 161 |
| - Income | (52,824) | (279) | (53,103) | (52,992) | 111 |
| - Transfers to / from Reserves | 183 | (2,159) | (1,977) | (1,982) | (6) |
| = Directorate Totals | 27,553 | (92) | 27,461 | 27,727 | 266 |
| Forecast Out-turn Variance | | | | | 1.0% |
| - Director of Corporate Services | 785 | 0 | 785 | 818 | 33 |
| - Assistant Director (Governance) | 2,704 | 0 | 2,704 | 2,721 | 17 |
| - Assistant Director (Transformation) | 217 | (0) | 217 | 157 | (60) |
| - Head of Business Insight & Policy | 1,054 | 19 | 1,073 | 1,097 | 24 |
| - Head of Communications | 312 | (16) | 296 | 302 | 6 |
| - Head of Peoples Services | 823 | 9 | 832 | 852 | 19 |
| - Head of Procurement | 323 | 0 | 323 | 473 | 150 |
| - Head of Support Services | 14,330 | (20) | 14,310 | 14,426 | 116 |
| - Head of Finance | 7,004 | (84) | 6,921 | 6,881 | (39) |
| = Directorate Totals | 27,553 | (92) | 27,461 | 27,727 | 266 |
| Forecast Out-turn Variance | | | | | 1.0% |

The first projected out-turn position of the 2022/23 financial year for the Corporate Services directorate is a net **over spend of £0.266m** when compared to the budget of £27.461m that has been set for the year. However, it is important to recognise that the directorate is forecast to overspend several areas of the budget or will not achieve planned income levels by much larger sums, and so has taken already decisive action to mitigate some of these areas where it can. Such efforts will continue over the next few months to further reduce the net overspend where possible. Further detail and analysis can be seen below.

| Extract showing material variances compared to the revised budget | | | |
|--|--|---|--|
| Service area and projected budget variance | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out- turn Variance £000 |
| Assistant Director (incl Transformation & Projects) | | | |
| Reduced expenditure relating to staffing vacancies | 293 | 206 | (87) |
| Head of Procurement | | | |
| Unachieved MTFP savings from 2020/21 | (70) | 0 | 70 |
| Shortfall in income required to fund additional staffing costs | (100) | (26) | 74 |
| Head of Support Services | | | |
| Shortfall in Housing Benefit Overpayment recoveries towards outstanding Debts | (1,760) | (1,156) | 604 |
| Increase in Summons Cost Recovery | (375) | (399) | (24) |
| Increase in Housing Benefits bad debt provision | 24 | 50 | 26 |
| Housing Benefit Administration costs | 165 | 218 | 53 |
| Rent Allowances - projected underspend in payments (net of subsidy) | 39,317 | 38,663 | (654) |
| Support Services Contract - unachieved MTFP savings from 2020-2022 | (179) | 0 | 179 |
| Support Services Contract - increased contract costs | | | |
| - inflation on core contract (yet to be confirmed as aligned to council pay award) | 191 | 282 | 91 |
| - new and unbudgeted post scanning service, and Safenet licence | 0 | 35 | 35 |
| - continued increase in ICT storage costs | 564 | 630 | 66 |
| - other minor overspends (various) | 0 | 12 | 12 |
| - mitigations - various, including interest generation | 0 | (92) | (92) |
| Shortfall in Carelink income | (500) | (463) | 37 |
| Contribution into revenue budget from Support Services Reserve | 0 | (237) | (237) |
| Head of Finance | | | |
| Commercial Investments | | | |
| Shortfall in Sovereign Centre car park income | (900) | (875) | 25 |
| Landlord contribution to cost of vacant units | 604 | 969 | 365 |
| Landlord subsidy for new workspace and cycle hub | 0 | 85 | 85 |
| Reduction in prudential borrowing costs | 275 | 27 | (248) |
| Contribution into revenue budget from Commercial Investment Smoothing Reserve | 300 | 51 | (249) |
| Other Corporate Costs | | | |
| Increase in Office Accommodation rental income from Castlewood | (556) | (899) | (343) |
| Increase in external insurance premium costs | 672 | 690 | 18 |
| Increase in external audit fees | 155 | 210 | 55 |
| Increase in postage fees | 165 | 173 | 8 |
| Increase in bank charges | 196 | 239 | 43 |
| Increase in telephone costs | 35 | 76 | 41 |
| Increase in 8*8 Licence costs | 89 | 149 | 60 |
| Increase in council-wide subscriptions and contributions | 62 | 74 | 12 |
| Directorate Wide | | | |
| Forecast over spend on employee budgets, largely relating to turnover provision | 8,722 | 8,853 | 131 |
| Sub total - material budget variances | | | 156 |
| Other minor variations to the budget | | | 110 |
| = Directorate Total | | | 266 |

| Areas of financial risk within the directorate budget | | |
|---|---|-------------------------------------|
| Service area and potential financial risk | Range / Scale of Risk Low - £0-£250k Medium - £250k-£500k High >£1m | Likelihood of Risk Occurring |
| Increase in the costs of the Support Services Contract because of inflation | Medium | High |
| Increase in the costs of the Support Services Contract because of other reasons | Medium | High |
| Short-falls in income levels compared to budget | Medium | Medium |

FINANCIAL OVERVIEW OF THE PLACE DIRECTORATE
AS AT 31 JULY 2022

| Directorate Summary | | | | | |
|--------------------------------|---|---------------------------|--|---|---|
| | Original Budget 2022/23 £000 | Virements £000 | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| - Gross Expenditure | 56,727 | 3,709 | 60,436 | 64,525 | 4,089 |
| - Income | (23,124) | (2,194) | (25,318) | (26,655) | (1,337) |
| - Transfers to / from Reserves | (3,614) | (1,425) | (5,038) | (6,473) | (1,434) |
| = Directorate Totals | 29,989 | 91 | 30,080 | 31,397 | 1,317 |
| Forecast Out-turn Variance | | | | | 4.38% |
| - Neighbourhoods & Transport | 27,909 | 114 | 28,023 | 29,175 | 1,153 |
| - Placemaking & Growth | 1,433 | 0 | 1,433 | 1,604 | 171 |
| - Directorate Overheads | 578 | (23) | 555 | 549 | (6) |
| - Special Expenses | 69 | 0 | 69 | 69 | 0 |
| = Directorate Totals | 29,989 | 91 | 30,080 | 31,397 | 1,317 |
| Forecast Out-turn Variance | | | | | 4.38% |

| Extract showing material variances compared to the revised budget | | | |
|--|--|---|---|
| Service area and projected budget variance | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| Environment and Safer Communities | | | |
| <u>Environmental Services & Enforcement:</u> | | | |
| NSEC - Surplus on recycling materials (income) | (1,599) | (2,536) | (937) |
| NSEC - Main contract (expenditure) - Inflationary increase | 10,314 | 10,423 | 109 |
| NSEC - Waste Receptacles | 142 | 244 | 102 |
| Waste Disposal Contract (net) - inflationary & tonnage increases | 6,292 | 6,611 | 319 |
| Garden Waste Charging Scheme (income) - shortfall on income target | (2,195) | (1,743) | 452 |
| Garden Waste Charging Scheme - use of compensation reserve | 0 | (350) | (350) |
| Garden Waste Charging Scheme - reduction in scheme costs | 235 | 135 | (100) |
| Litter enforcement - short-fall in contract income | 30 | (5) | (35) |
| <u>Safer Community Services:</u> - CCTV (includes historical £95k budget saving) | 238 | 327 | 89 |
| Use of Town Council receipt | 0 | (18) | (18) |
| Highway & Parking Operations | | | |
| Highway Electrical & ITS - Inflationary increases on new contracts 'materials' costs | 1,449 | 1,516 | 66 |
| Highway Network & Traffic Management - Road closures income above target | (82) | (240) | (158) |
| Materials testing Lab - expected shortfall on fee income | (321) | (210) | 111 |
| Libraries & Community | | | |
| Shortfall in Campus income | (359) | (240) | 119 |
| Shortfall in Somerset Hall income | (121) | (67) | 54 |
| Open Space, Natural Environment & Leisure | | | |
| <u>Leisure:</u> | | | |
| Loss of income - Profit share on Leisure Contracts | (439) | (349) | 89 |
| Agreed mitigation: planned use of reserves | 0 | (90) | (90) |
| <u>Parks & Seafront:</u> | | | |
| Bay Cafe: | | | |
| Income losses (some operations moved during SEE Monster - incl underlying pressure) | (418) | (57) | 361 |
| Forecast turnover share from temporary operator | 0 | (17) | (17) |
| Saving on expenditure budgets relating to mainly catering provisions & equipment | 261 | 119 | (142) |
| Saving on staffing costs whilst outsourced | 183 | 77 | (106) |
| The Bay & Seafront Events (limited events due to SEE Monster): | | | |
| Net expenditure budget (excluding staffing) | (175) | (15) | 160 |
| Saving on staffing costs whilst events not running | 79 | 28 | (51) |
| Mitigated by loss of income compensation from new Substance | 0 | (70) | (70) |
| Parks & Street Scene Contract: | | | |
| Glendale contract - Inflationary pressure on extended contract | 2,246 | 2,328 | 82 |
| S106 funding draw-down shortfall | (345) | (282) | 63 |

| Extract showing material variances compared to the revised budget (contd) | | | |
|---|--|---|---|
| Service area and projected budget variance | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| Transport Planning | | | |
| <u>Home to Schools Transport (HTST):</u> | | | |
| Home to School Transport - Baseline position re increased demand and costs | 4,725 | 5,656 | 931 |
| Draw down of S106 funding | (150) | (350) | (200) |
| Extended Rights to Free Travel Grant 2022/23 | (97) | (210) | (113) |
| Home to School Transport - Q Routes software | 0 | 24 | 24 |
| Home to School Transport - New inflationary pressures for 2022/23 | 0 | 286 | 286 |
| Use of Corporate risk reserve to fund new inflationary pressures | 0 | (286) | (286) |
| Home to School Transport - Anticipated new academic year demand | 0 | 300 | 300 |
| <u>Bus Services</u> | | | |
| Bus Services Improvement Plan - Staffing revenue pressure | 51 | 115 | 64 |
| Use of reserves (residual 2021/22 grant funding) | 0 | (25) | (25) |
| Placemaking & Development | | | |
| Community Renewal Fund - Remaining project spend (ending December 2022) | 0 | 1,504 | 1,504 |
| Funded by 'Receipt in Advance', grant payment received in 2021/22 | 0 | (701) | (701) |
| Funded by Final grant claim due in year | 0 | (802) | (802) |
| Economy Team staffing - Employer of Choice / Graduate posts | 71 | 230 | 159 |
| Funded by use of ear-marked reserves | (71) | (230) | (159) |
| Weston Business Quarter consultancy costs | 0 | 173 | 173 |
| Weston Quarry consultancy costs | 0 | 84 | 84 |
| Funded by Driving Growth reserves | 0 | (258) | (258) |
| Directorate salary position | | | |
| Shortfall on salary recharges to the capital programme (partially mitigated by vacancies within the | (2,966) | (2,361) | 605 |
| Capital projects delivery team (underspend relating to vacant posts) | 2,832 | 2,394 | (438) |
| Use of S38 income reserve | (68) | (68) | 0 |
| Sub total - material budget variances | | | 1,248 |
| Other minor variations to the budget | | | 69 |
| = Directorate Total | | | 1,317 |

| Areas of financial risk within the directorate budget | | |
|--|---|-------------------------------------|
| Service area and potential financial risk | Range / Scale of Risk Low - £0-£250k Medium - £250k-£500k High >£1m | Likelihood of Risk Occurring |
| Home to School Transport Inflation / Demand / Market conditions may cause increased costs | Medium | High |
| Waste - additional funding requested for fuel since the prices have continued to increase since April and the inflation in the contract does not cover the increases | Low | High |
| Waste - additional funding requested for property growth | Low | High |
| Leisure - providers forecasting significant losses due to energy costs, we may get a request for support | Low | High |
| Supported bus - request for additional funding for fuel pressures | Low | High |
| Supported bus - further potential routes de-registration | Medium | Medium |
| Planning income - on track to achieve target at P4 however income could drop | Low | Medium |
| Parking income - variable across the financial year and dependent on various factors | Low | Medium |
| Energy inflation - full impact not yet known | Medium | High |
| Other general inflation - further increased anticipated due to current inflation levels | Medium | High |

**FINANCIAL OVERVIEW OF THE PUBLIC HEALTH AND REGULATORY SERVICES DIRECTORATE
AS AT 31 JULY 2022**

| Directorate Summary | | | | | |
|---|---|---------------------------|--|---|---|
| | Original Budget 2022/23 £000 | Virements £000 | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| - Gross Expenditure | 16,015 | 0 | 16,015 | 17,080 | 1,066 |
| - Income | (11,910) | 0 | (11,910) | (12,267) | (357) |
| - Transfers to / from Reserves | (2,731) | 0 | (2,731) | (3,453) | (723) |
| = Directorate Totals | 1,374 | 0 | 1,374 | 1,360 | (14) |
| Projected Out-turn Variance | | | | | -1.01% |
| PHS Childrens Health | 3,880 | 0 | 3,880 | 4,059 | 178 |
| PHS Management & Overheads | (8,356) | 0 | (8,356) | (8,537) | (181) |
| PHS Obesity & Activity | 114 | 0 | 114 | 118 | 3 |
| PHS Other Public Health Services | 391 | 0 | 391 | 391 | 1 |
| PHS Public Health | 407 | 0 | 407 | 409 | 1 |
| PHS Sexual Health | 1,401 | 0 | 1,401 | 1,405 | 4 |
| PHS Substance Abuse & Smoking | 2,162 | 0 | 2,162 | 2,155 | (7) |
| Public Health Ring-Fenced Services | 0 | 0 | 0 | 0 | 0 |
| Regulatory Services | 1,374 | 0 | 1,374 | 1,360 | (14) |
| Covid Related Grants & Services | 0 | 0 | 0 | (0) | (0) |
| = Directorate Totals | 1,374 | 0 | 1,374 | 1,360 | (14) |
| Projected Out-turn Variance | | | | | -1.01% |

| Extract showing material variances compared to the revised budget | | | | |
|---|------|--|---|---|
| Service area and projected budget variance | | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| Childrens Health | | 3,880 | 4,059 | 178 |
| Increase in core contract for Agenda for Change uplift to staffing costs | 179 | | | |
| Underspend related to Schools Nurse realignment | (15) | | | |
| Management & Overheads | | 2,048 | 1,849 | (199) |
| Underspend on employee budgets | | | | |
| Increase in Public Health Grant beyond budgeted levels | | (9,779) | (9,879) | (100) |
| Reduced requirement to draw down from PH reserve to balance budget | | (625) | (516) | 109 |
| Regulatory Services | | | | (14) |
| Various - minor variances to expenditure levels, offset by increased income | | | | |
| Sub total - budget variances | | | | (26) |
| Other minor variations to the budget | | | | 12 |
| = Directorate Total | | | | (14) |

| Areas of financial risk within the directorate budget | | |
|--|---|-------------------------------------|
| Service area and potential financial risk | Range / Scale of Risk Low - £0-£250k Medium - £250k-£500k High >£1m | Likelihood of Risk Occurring |
| Increase in pay award above 2% reflected within the budget | Low | High |
| Increase in inflation within contract sums | Low | High |

**FINANCIAL OVERVIEW OF THE CAPITAL FINANCING & NON SERVICE
AS AT 31 JULY 2022**

| Directorate Summary | | | | | |
|-------------------------------------|---|---------------------------|--|---|---|
| | Original Budget 2022/23 £000 | Virements £000 | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| - Gross Expenditure | 29,691 | 162 | 29,853 | 30,111 | 258 |
| - Income | (5,279) | (162) | (5,441) | (6,570) | (1,130) |
| - Reserves | 0 | 0 | 0 | (112) | (112) |
| = Directorate Totals | 24,412 | 0 | 24,412 | 23,429 | (984) |
| Projected Out-turn Variance | | | | | -4.03% |
| - Capital Financing & Interest | 11,207 | 0 | 11,207 | 10,168 | (1,039) |
| - Non Service - Precepts & Levies | 6,684 | 0 | 6,684 | 6,684 | 0 |
| - Non Service - Contingency & Other | 6,521 | 0 | 6,521 | 6,576 | 55 |
| = Directorate Totals | 24,412 | 0 | 24,412 | 23,429 | (984) |
| Projected Out-turn Variance | | | | | -4.03% |

Financial Overview

As can be seen from the table below, the revised budgets for the Capital Financing & Non Service areas total **£24.412m**, and the initial forecast of the projected out-turn position at the end of the year reflects net spend of **£23.429m**, which means that there could be an **under spend of £0.984m** at the year-end assuming no other changes are made.

A further analysis of the budgets in this area has been provided to give greater clarity on the key elements although it will be seen that the under spend will arise from two key components;

- the first relates to an increase in investment income on the council's cash balances, and
- the second relates to the release of the council's contingency budget, so that it can relieve some of the other adverse variances being reported within other areas of the budget

| Extract showing material variances compared to the revised budget | | | |
|---|--|---|---|
| | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| Capital Financing & Interest Budgets | | | |
| Net reduction in capital financing costs (mrp, interest and rcco's) | 13,096 | 13,136 | 40 |
| Increase in investment interest generated on cash balances, from rising rates | (1,924) | (3,003) | (1,078) |
| Contingency Budget | | | |
| Release of the Council's contingency budget | 1,546 | 1,546 | 0 |
| Other Non Service Areas | | | |
| Increase in Coroners Service costs - backlog of cases following Covid | 471 | 531 | 60 |
| Sub total - budget variances | | | (993) |
| Other Minor Variances <£50k | | | 10 |
| = Directorate Total | | | (984) |

| Areas of financial risk within the directorate budget | | |
|---|---|-------------------------------------|
| Service area and potential financial risk | Range / Scale of Risk Low - £0-£250k Medium - £250k-£500k High >£1m | Likelihood of Risk Occurring |
| Change in assumptions re Contingency budgets | High | High |
| Change in assumptions re Covid budgets | Low | Low |
| Further increases in interest generated on cash balances | Medium | Medium |
| Change in internal capital financing costs | Medium | Low |
| Further increase in Coroners Service cost from Bristol City Council | Low | Medium |

| Movements to / (from) Earmarked Reserves | | |
|--|--------------------------|---------------------------------|
| | Budgeted £000 | Ad hoc Movement £000 |
| Use of the Covid-19 Emergency Costs Reserve b/fwd from 2021/22 | 0 | (112) |
| Sub total - movements to / (from) Earmarked Reserves | 0 | (112) |

**COMMENTARY ON THE COUNCIL'S FINANCING RESOURCES
AS AT 31 JULY 2022**

Financial Overview

As can be seen from the summary tables below, the budgets for the council's Financing Resources equal the Net Revenue Budget total of **£185.475m**. The forecast out-turn position for the end of the year is also projected to be £185.475m meaning that there is no variance compared to the budget.

A further analysis of the budgets in this area has been provided to give greater clarity on the key elements.

| Directorate Summary | | | |
|--|--|---|---|
| | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out-turn Variance £000 |
| - Gross Expenditure | 0 | 0 | 0 |
| - Income | (182,378) | (184,825) | (2,447) |
| - Reserves | (3,097) | (650) | 2,447 |
| = Totals | (185,475) | (185,475) | 0 |
| | Forecast Out-turn Variance | | 0.00% |
| - Precept on the Collection Fund - Council Tax | (123,889) | (123,889) | 0 |
| - Precept on the Collection Fund - Parish Precepts | (6,384) | (6,384) | 0 |
| - Precept on the Collection Fund - Business Rates | (26,949) | (26,949) | 0 |
| - Other Business Rate Income, Disregarded - Renewables & EA | (884) | (884) | 0 |
| - Other Business Rate Income, Central Govt share retained - Port Cumulo | (648) | (648) | 0 |
| - (Surplus) / Deficit on the Collection Fund - Council Tax re Prior Yr | 74 | 74 | 0 |
| - Council Tax Year-End Movement re Prior Yr | 0 | 537 | 537 |
| - Council Tax (Surplus) / Deficit re Current Yr | 0 | 0 | 0 |
| - Business Rates (Surplus) / Deficit Own Share re Prior Years | 4,163 | 4,163 | 0 |
| - Business Rates Year-End Movement re Prior Yr Own Share | 0 | (1,592) | (1,592) |
| - Business Rates (Surplus) / Deficit Own Share re Current Yr | 0 | 0 | 0 |
| - Other Business Rate Income, Disregarded - Renewables & EA Year-End Movement re | 0 | 184 | 184 |
| - Other Business Rate Income, Disregarded - Renewables & EA (Surplus)/Deficit re Curr | 0 | 36 | 36 |
| - Other Business Rate Income, Central Govt share retained - Port Cumulo - Year-End M | 0 | 33 | 33 |
| - Other Business Rate Income, Central Govt share retained - Port Cumulo - (Surplus)/De | 0 | (3) | (3) |
| - Revenue Support Grant | (2,250) | (2,250) | 0 |
| - New Homes Bonus Grant | (2,047) | (2,047) | 0 |
| - Services Grant | (2,191) | (2,191) | 0 |
| - Lower Tier Services Grant | (224) | (229) | (5) |
| - Adult Social Care Support Grant | (8,095) | (8,095) | 0 |
| - Market Sustainability and Fair Cost of Care Grant | (624) | (624) | 0 |
| - Business Rate Top-Up Grant | (2,652) | (2,652) | 0 |
| - Small Business Rate Relief Grant | (3,011) | (3,142) | (131) |
| - Business Rate Adjustment Grant (2% cap) | (3,182) | (3,275) | (93) |
| - Council Tax Family Annexe Discount Grant | 0 | (17) | (17) |
| - Other S31 Grant | (39) | (16) | 23 |
| - S31 Grant - Additional Retail and Nursery Discounts | (3,300) | (2,583) | 717 |
| - S31 Grant - Covid Additional Relief Fund | 0 | (2,168) | (2,168) |
| - Covid-19 grant - Collection Fund Losses | (246) | (246) | 0 |
| - Use of Collection Fund Smoothing Reserve re Grant (re 21/22 deficit) | (7,853) | (7,853) | 0 |
| - Contbn into the Contingency Budget | 2,236 | 2,236 | 0 |
| - Contbn into the Collection Fund Smoothing Reserve | 2,520 | 2,520 | 0 |
| - Use of Collection Fund Smoothing Reserve re PY Disregarded Surp/Def | 0 | (216) | (216) |
| - Contbn into the Collection Fund Smoothing Reserve re 21/22 BR Reliefs | 0 | 1,651 | 1,651 |
| - Use of Collection Fund Smoothing Reserve (re in-year variances) | 0 | 22 | 22 |
| - Tech Adj through the Movement in Reserves Statement | 0 | 1,022 | 1,022 |
| = Totals | (185,475) | (185,475) | 0 |
| | Forecast Out-turn Variance | | 0.00% |

Extract showing material variances compared to the revised budget

| Service area and projected budget variance | Revised Budget 2022/23 £000 | Forecast Out-turn 2022/23 £000 | Projected Out- turn Variance £000 |
|---|-----------------------------------|---|---|
| Council Tax Income | | | |
| Precepts and known prior year deficit | (130,199) | (130,199) | 0 |
| Current year forecast deficit | 0 | 0 | 0 |
| Business Rates Income | | | |
| Precepts, Top-Up grant and known prior year deficit | (26,970) | (26,970) | 0 |
| Current year forecast deficit | 0 | 0 | 0 |
| Current year disregarded deficit | 0 | 33 | 33 |
| (A statutory technical adjustment means these deficits have no effect in 2021/22, but the impact will need to be budgeted for in 2022/23) | | | |
| S31 grant funding for BR reliefs | (6,232) | (6,449) | (217) |
| S31 grant funding for additional Covid reliefs | (3,300) | (4,751) | (1,451) |
| (The council has a choice about the use of this net grant surplus, however it is likely to be transferred to the Collection Fund Smoothing Reserve to address the 2022/23 deficit noted above, which is largely due to the award of retail relief in the current year). | | | |
| Government Grants (Non-Covid) | | | |
| No material variance | (15,431) | (15,436) | (5) |
| Government Grants (Covid) | | | |
| No material variance | (246) | (246) | 0 |
| Reserves | | | |
| Budgeted use of Collection Fund Smoothing Reserve re prior year deficit | (7,853) | (7,853) | 0 |
| Use of Collection Fund Smoothing Reserve re prior year disregarded deficit | 0 | (216) | (216) |
| Contribution into Collection Fund Smoothing Reserve re in-year variances | 0 | 22 | 22 |
| Budgeted contribution into Collection Fund Smoothing Reserve re prior year surplus | 2,236 | 2,236 | 0 |
| Contribution into Collection Fund Smoothing Reserve re additional S31 grant | 0 | 1,651 | 1,651 |
| Statutory Collection Fund technical adjustments (through the CFAA / MIRS) | 0 | 1,022 | 1,022 |
| Statutory Collection Fund technical adjustments re prior year disregarded deficit | 0 | 216 | 216 |
| Technical Adjustments re Prior Years | | | |
| Prior year estimated to actual outturn movement (surplus) | 0 | 537 | 537 |
| Prior year estimated to actual outturn movement (surplus) | 0 | (1,592) | (1,592) |
| Sub total - material budget variances | | | 0 |
| Other minor variations to the budget | | | 0 |
| = Directorate Total | | | 0 |

Areas of financial risk within the directorate budget

| Service area and potential financial risk | Range / Scale of Risk Low - £0-£250k Medium - £250k-£500k High >£1m | Likelihood of Risk Occurring |
|--|--|------------------------------------|
| Delays in the completion of new dwellings (adverse) | Low | Low |
| Increase in Council Tax Exemptions and Discounts awarded (adverse) | High | High |
| Reduction in Council Tax Support caseload (favourable) | Medium | Medium |
| Reduction in Collection Rate and associated impact on Bad Debt Provision (adverse) | Medium | Medium |
| Increase in Appeals in respect of business rate liability (adverse) | High | Low |
| Loss of rateable value as economic contraction impacts on the bus rates (adverse) | High | Medium |
| Increase in Mandatory Reliefs awarded (adverse) | Medium | Low |

| MTFP Impact of Collection Fund (Surplus) / Deficit | Year of MTFP Impact | | |
|---|---------------------|-----------------|-----------------|
| | 2022/23 £000 | 2023/24 £000 | 2024/25 £000 |
| Nature and Originating Year of (Surplus) / Deficit | | | |
| Council Tax | | | |
| 2020/21 Estimated deficit (spread over three years) | 1,006 | 1,006 | 0 |
| 2020/21 Residual (Estimated to Actual) surplus | (556) | 0 | 0 |
| 2021/22 Estimated surplus at 31 December | (376) | 0 | 0 |
| 2021/22 Estimated to Actual deficit, January to March movement | 0 | 537 | 0 |
| 2022/23 Estimated surplus/deficit | 0 | 0 | 0 |
| | 74 | 1,543 | 0 |
| Business Rates | | | |
| 2020/21 Estimated deficit (spread over three years) | 142 | 142 | 0 |
| 2020/21 Residual surplus (Estimated to Actual) | (1,521) | 0 | 0 |
| 2021/22 Estimated deficit at 31 December from Covid Reliefs (S31 grant funded) | 7,595 | 0 | 0 |
| 2021/22 Estimated surplus at 31 December (other elements) | (2,053) | 0 | 0 |
| 2021/22 Est to Actual movement January to March re Covid Reliefs (S31 grant funded) | 0 | (2,005) | 0 |
| 2021/22 Est to Actual movement January to March re other elements | 0 | 413 | 0 |
| 2022/23 Estimated surplus / deficit | 0 | 0 | 0 |
| | 4,163 | (1,450) | 0 |

Collection Fund Narrative

Council Tax

In January 2022 prior to setting the budget for the year ahead, the council tax surplus for 2021/22 was estimated at £0.932m. This was made up of the residual surplus of £0.556m from 2020/21 (which is built into the MTFP in 2022/23) and the estimated in-year surplus of £0.376m at that time. The estimate to actual deficit movement (i.e. the movement that occurred between January and March 2022) was £0.537m and the council will budget for the impact of this in its 2023/24 budget. The council has also budgeted for the third and final year (£1.006m) of the 2020/21 deficit in the 2023/24 financial year.

The current year forecast outturn is £0 (no surplus or deficit). However, there are risks within this which will be closely monitored:

1. Collection and Bad Debt Provision. The forecast out-turn impact in this area of the budget is based upon a combination of collection rates for in-year liabilities and historic arrears, the write-off of any arrears deemed uncollectible and the judgements made about the amount of outstanding debt that will not be collected (i.e. the provision). **The collection rate of in-year liabilities is currently similar to 2019/20 (pre-Covid) levels**, although there is significant concern that collection rates (both in-year and arrears) may suffer towards the Autumn period as household finances come under increasing pressure over the coming months (as a result of energy increases and the wider cost of living pressures, etc). Prudent bad debt assumptions have therefore been retained when calculating the provision.
2. Discounts and Exemptions. The council tax support caseload (i.e. the numbers of claimants) continues to reduce slightly each month and is likely to produce a favourable variance for the year. However, discounts and exemptions are currently showing a significant adverse variance of £0.668m to 31 July 2022. The largest component of this is the 25% single person discount (SPD), which has seen a steep increase in caseload (three times the rate of dwellings growth) over the last three years. A similar pattern has been seen nationally and in neighbouring authorities and may be due to ratepayers having a greater incentive to seek out available discounts in the light of financial pressures. The council has agreed with its Revenues partner that the annual review of SPD cases this autumn will be wider-reaching than in previous years.

Business Rates

In January 2022, the business rates deficit for 2021/22 was estimated at £4.021m. This was made up of the residual surplus from 2020/21 of £1.521m (which is built into the MTFP in 2022/23) and the estimated in-year deficit of £5.542m, which was largely the result of granting Covid-related reliefs to ratepayers. The council is compensated by Central Government for providing these reliefs, so the future year impact of the deficit is fully funded via the Collection Fund Smoothing Reserve. The estimated to actual surplus movement (between January and March) was £1.592m, which was the result of some Covid-related reliefs being granted in the 2022/23 financial year, rather than 2021/22.

The current year forecast outturn is £0 (no surplus or deficit). However, there are risks within this which will be closely monitored:

1. Collection and Bad Debt Provision. The collection rate of in-year liabilities is currently similar to 2019/20 (pre-Covid) levels, although - as with council tax - there is significant concern that collection rates (both in-year and arrears) may suffer as businesses experience a broad range of pressures over the coming months. There is a risk of an economic downturn following recent sustained interest rate increases and inflationary pressures, therefore prudent bad debt assumptions have therefore been retained when calculating the provision.
2. Appeals and Rateable Value Reductions. 2022/23 is the final year of the current (2017) valuation list; the Valuation Office Agency will implement a revaluation of all rateable values (RVs) at April 2023. It is anticipated that ratepayer "Checks and Challenges" against RVs will increase significantly over the financial year, before this opportunity is lost at 31 March 2023. Whilst the council's appeals provision is considered to be prudent and resilient enough to absorb potential business rates refunds resulting from any RV reductions, there remains a risk of unexpected losses relating to groups of large ratepayers, which might exceed the provision balance. Such RV losses could then have an ongoing impact for future years' business rates income.

OPTIONS TO CLOSE THE BUDGET GAP

| Option | | Range (£) | Pros | Cons |
|--------|---|----------------------|---|---|
| 1 | Directors to manage their own areas of overspending by identifying mitigating actions and in-year savings from within their own resources; Directors to also look to achieve whatever savings they can in order to release savings to the bottom line to support the overall position | Variable – up to £2m | <p>This is a core requirement within current financial regulations and should be looked at in the first instance;</p> <p>Allows control to be maintained by those leading the services rather than have rules enforced upon them;</p> <p>Encourages a one-council approach whereby all services actively work together to achieve the same aim</p> | <p>Some service issues may be too significant to be managed or contained within a single directorate and a more strategic approach would be better;</p> <p>Some budget managers may not fully participate and so will continue to overspend without any form of mitigation, which could potentially create friction and a perception of inequality and unfairness across the council</p> |
| 2 | Release the council's contingency budget to the bottom line | £1.5m | <p>This is an unallocated budget that was included within the base as a measure to mitigate financial risk that may occur within some of the estimates or assumptions;</p> <p>Using the contingency budget may alleviate the need to take other decisions</p> | <p>The contingency budget is £1.5m and although it would reduce the overspend, it would not remove it entirely and so would only be part of a series of measures;</p> <p>The report indicates that the council is not only forecasting an overspend, it is also holding some risks that could increase in future months which means that if the contingency is released too early in the financial year, then the council has the potential to be exposed to further movements or unknown statutory service risks later in the year</p> |
| 3 | Use of the corporate risk reserve and / or undertake a review of earmarked reserves | £2.7m | <p>The corporate risk reserve holds resources set aside to fund a range of financial risks and so already form part of the council's planned mitigation measures;</p> <p>Undertaking a review of earmarked reserves may provide an opportunity to release one-off sums into the corporate risk reserve, which could increase the council's ability to fund budget overspends or risks</p> | <p>Given that this is a reserve, the funding can only be used once; not appropriate for ongoing issues;</p> <p>If used or applied too early then the council could still be exposed to further movements or unknown risks within statutory services</p> <p>The review of reserves could stop or reduce planned investment activity and so all implications should be fully understood before decisions are made; it would also be important to protect any funding held jointly with partners to deliver agreed programmes</p> |
| 4 | Emergency budget decisions; i) to include in-year proposals to stop spending in some areas and / or increase income from non-statutory services; ii) also consider options to bring forward savings proposals from future years | Variable – up to £2m | <p>Shows clear leadership and governance through an awareness of financial controls and responsibilities;</p> <p>Ensures that resources are allocated to the most important service areas and priorities as noted within the Corporate Plan and enables the council to ensure that statutory services can still be delivered</p> <p>Allows issues to be considered across multiple financial years which is likely to mean more strategic decisions and better outcomes</p> <p>Decisive decision making from Members will reduce the risk of a S114 notice being required, which means that local Members still retain control of the council</p> | <p>Needs to be delivered within appropriate timescales to ensure that savings are deliverable;</p> <p>Could create mis-understandings, as well as anxiety within staff and partners if outcomes and decisions are not clearly communicated;</p> |
| 5 | Lobby government for more resources, either as part of a group network, or as an individual authority who has financial pressures | £tba | <p>Shows clear leadership and governance through an awareness of financial controls and responsibilities;</p> <p>Provides networking opportunity to meet with other councils facing similar issues and could share areas to consider;</p> <p>May prove more successful if evidenced-based examples are shared</p> | Government may be unwilling to support until every decision has been taken to reduce costs and / or maximise local resources, e.g. through consideration of sales, fees and charging powers and choices to support efficient services |
| 6 | Use of general revenue reserves | £tba | Would be a final option although would allow the council to balance its budget in the current financial year | <p>Values are uncertain because the reserve is currently held at £9.7m / 5.25% of the budget, which is already considered to be a baseline;</p> <p>Significant pressures would still exist and be ongoing for future years;</p> <p>Could potentially require a review of the S114 requirements</p> |

MONITORING OF 2022/23 CAPITAL PROGRAMME

APPENDIX 4

| APPROVED GENERAL FUND CAPITAL SCHEMES | RAG rating | APPROVED BUDGET | | | | | MONITORING TO 31 JULY 2022 | | | APPROVED FUNDING | | | | |
|---|------------|-------------------------|-------------------------|-------------------------|-------------------------|-----------------------|----------------------------|-------------------|------------------------|--------------------|------------------------|--------------------|-------------------|------------------------|
| | | 2022/23 Estimated Spend | 2023/24 Estimated Spend | 2024/25 Estimated Spend | 2026/27 Estimated Spend | TOTAL APPROVED BUDGET | Actual Spend | Orders | TOTAL COSTS IN 2022/23 | Borrowing | Grants & Contributions | Reserves & Revenue | Capital Receipts | TOTAL APPROVED FUNDING |
| | | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ |
| SUMMARY | | | | | | | | | | | | | | |
| Childrens Services | | 43,920,105 | 12,899,594 | 100,000 | 0 | 56,919,699 | 5,156,943 | 31,696,128 | 36,853,072 | 6,079,639 | 50,840,062 | 0 | 0 | 56,919,701 |
| Adult Social Services | | 1,163,087 | 300,000 | 300,000 | 0 | 1,763,087 | 97,759 | 94 | 97,853 | 0 | 1,763,087 | 0 | 0 | 1,763,087 |
| Housing | | 7,859,104 | 3,581,237 | 3,581,237 | 0 | 15,021,578 | 992,690 | 346,545 | 1,339,235 | 421,498 | 10,026,855 | 0 | 4,573,225 | 15,021,578 |
| Corporate Services Place | | 9,308,124 | 6,000,000 | 0 | 5,000,000 | 20,308,124 | 317,826 | 1,163,859 | 1,481,685 | 17,779,927 | 1,366,522 | 296,922 | 864,754 | 20,308,124 |
| | | 108,121,882 | 87,897,927 | 49,345,749 | 0 | 245,365,557 | 5,156,960 | 6,992,739 | 12,149,699 | 79,463,127 | 159,771,811 | 976,783 | 5,153,835 | 245,365,556 |
| AUTHORITY TOTAL | | 170,372,303 | 110,678,758 | 53,326,986 | 5,000,000 | 339,378,046 | 11,722,179 | 40,199,365 | 51,921,544 | 103,744,191 | 223,768,337 | 1,273,704 | 10,591,814 | 339,378,047 |
| CHILDRENS SERVICES | | | | | | | | | | | | | | |
| Breach Classes | | 625,000 | 2,625,000 | 0 | 0 | 3,250,000 | 0 | 0 | 0 | 0 | 3,250,000 | 0 | 0 | 3,250,000 |
| Parklands Primary School (FF&E) | G | 15,000 | 0 | 0 | 0 | 15,000 | 0 | 0 | 0 | 0 | 15,000 | 0 | 0 | 15,000 |
| New Yatton Primary School - Chestnut Park | G | 208,820 | 0 | 0 | 0 | 208,820 | 2,702 | 0 | 2,702 | 0 | 208,821 | 0 | 0 | 208,821 |
| St Josephs demountable | G | 13,060 | 0 | 0 | 0 | 13,060 | 11,757 | 0 | 11,757 | 0 | 13,060 | 0 | 0 | 13,060 |
| Banwell Primary School | A | 1,066,351 | 0 | 0 | 0 | 1,066,351 | 15,686 | 143,005 | 158,690 | 738,591 | 327,760 | 0 | 0 | 1,066,351 |
| Monitoring of Party Wall (REFCUS) | | 500,000 | 0 | 0 | 0 | 500,000 | 0 | 0 | 0 | 500,000 | 0 | 0 | 0 | 500,000 |
| Kewstoke - Roof and other school updates | A | 250,000 | 1,500,000 | 0 | 0 | 1,750,000 | 717 | 0 | 717 | 1,750,000 | 0 | 0 | 0 | 1,750,000 |
| Kewstoke - Flood Damage | | 60,000 | 0 | 0 | 0 | 60,000 | 0 | 0 | 0 | 60,000 | 0 | 0 | 0 | 60,000 |
| Golden Valley Primary - Fire escape & H&S | A | 60,000 | 0 | 0 | 0 | 60,000 | 173 | 0 | 173 | 60,000 | 0 | 0 | 0 | 60,000 |
| Churchill Primary - Fire Escape & Routes | | 60,000 | 0 | 0 | 0 | 60,000 | 0 | 0 | 0 | 60,000 | 0 | 0 | 0 | 60,000 |
| St Andrews Primary | G | 100,000 | 0 | 0 | 0 | 100,000 | 0 | 0 | 0 | 100,000 | 0 | 0 | 0 | 100,000 |
| Central Secondary | G | 307,927 | 250,000 | 0 | 0 | 557,927 | 0 | 0 | 0 | 0 | 557,927 | 0 | 0 | 557,927 |
| HIF - WHAE School | G | 19,078,050 | 7,599,594 | 0 | 0 | 26,677,644 | 3,555,370 | 20,388,196 | 23,943,566 | 0 | 26,677,645 | 0 | 0 | 26,677,645 |
| Gordale School - 2 * Yr7 Classes | G | 30,831 | 0 | 0 | 0 | 30,831 | 0 | 0 | 0 | 0 | 30,831 | 0 | 0 | 30,831 |
| Mendip Green - Upgrade demountable to Hub | G | 1,000 | 0 | 0 | 0 | 1,000 | 0 | 0 | 0 | 0 | 1,000 | 0 | 0 | 1,000 |
| Baytree Special School - Original Site | G | 100,000 | 0 | 0 | 0 | 100,000 | 0 | 0 | 0 | 0 | 100,000 | 0 | 0 | 100,000 |
| Baytree Special School - Brookfield Walk Cleve | G | 16,899,097 | 0 | 0 | 0 | 16,899,097 | 1,134,880 | 11,012,074 | 12,146,953 | 0 | 16,899,097 | 0 | 0 | 16,899,097 |
| SEMh - Churchill - relocation of low volatge po | G | 450,000 | 0 | 0 | 0 | 450,000 | 1,340 | 0 | 1,340 | 350,000 | 100,000 | 0 | 0 | 450,000 |
| SEMh - Churchill interim site at Nailsea | G | 671,552 | 0 | 0 | 0 | 671,552 | 10,030 | 118,385 | 128,416 | 408,160 | 263,392 | 0 | 0 | 671,552 |
| ASD Hubs School Clusters | | 300,000 | 0 | 0 | 0 | 300,000 | 0 | 0 | 0 | 300,000 | 0 | 0 | 0 | 300,000 |
| SEMh School Clusters | | 360,000 | 0 | 0 | 0 | 360,000 | 0 | 0 | 0 | 360,000 | 0 | 0 | 0 | 360,000 |
| Ravenswood Roof | A | 282,888 | 0 | 0 | 0 | 282,888 | 297,646 | 1,958 | 299,603 | 282,888 | 0 | 0 | 0 | 282,888 |
| VLC Milton project | G | 12,545 | 0 | 0 | 0 | 12,545 | 213 | 1,024 | 1,237 | 0 | 12,545 | 0 | 0 | 12,545 |
| SEN Hub (*3) | | 250,000 | 800,000 | 0 | 0 | 1,050,000 | 0 | 0 | 0 | 0 | 1,050,000 | 0 | 0 | 1,050,000 |
| Ravenswood replacement de-mountable | | 150,000 | 0 | 0 | 0 | 150,000 | 0 | 0 | 0 | 150,000 | 0 | 0 | 0 | 150,000 |
| Baytree (The Campus) - works including roof | G | 510,000 | 0 | 0 | 0 | 510,000 | 0 | 0 | 0 | 510,000 | 0 | 0 | 0 | 510,000 |
| Carlton Centre | G | 200,000 | 0 | 0 | 0 | 200,000 | 5,892 | 0 | 5,892 | 200,000 | 0 | 0 | 0 | 200,000 |
| Devolved Formula Capital | G | 294,959 | 0 | 0 | 0 | 294,959 | 109,949 | 0 | 109,949 | 0 | 294,959 | 0 | 0 | 294,959 |
| Statutory Compliance | A | 813,026 | 125,000 | 100,000 | 0 | 1,038,026 | 9,990 | 31,487 | 41,477 | 0 | 1,038,026 | 0 | 0 | 1,038,026 |
| Childrens Centre - Rolling Maintenance Progr | G | 250,000 | 0 | 0 | 0 | 250,000 | 600 | 0 | 600 | 250,000 | 0 | 0 | 0 | 250,000 |
| | | 43,920,105 | 12,899,594 | 100,000 | 0 | 56,919,699 | 5,156,943 | 31,696,128 | 36,853,072 | 6,079,639 | 50,840,062 | 0 | 0 | 56,919,701 |

| MONITORING OF 2022/23 CAPITAL PROGRAMME | | | | | | APPENDIX 4 | | | | | | | | |
|---|------------|-------------------------|-------------------------|-------------------------|-------------------------|-----------------------|----------------------------|------------------|------------------------|-------------------|------------------------|--------------------|------------------|------------------------|
| APPROVED GENERAL FUND CAPITAL SCHEMES | RAG rating | APPROVED BUDGET | | | | | MONITORING TO 31 JULY 2022 | | | APPROVED FUNDING | | | | |
| | | 2022/23 Estimated Spend | 2023/24 Estimated Spend | 2024/25 Estimated Spend | 2026/27 Estimated Spend | TOTAL APPROVED BUDGET | Actual Spend | Orders | TOTAL COSTS IN 2022/23 | Borrowing | Grants & Contributions | Reserves & Revenue | Capital Receipts | TOTAL APPROVED FUNDING |
| | | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ |
| ADULT SOCIAL SERVICES | | | | | | | | | | | | | | |
| Adult social care accommodation shift | | 187,024 | 0 | 0 | 0 | 187,024 | 0 | 0 | 0 | 0 | 187,024 | 0 | 0 | 187,024 |
| Aids & Adaptations Equipment | G | 300,000 | 300,000 | 300,000 | 0 | 900,000 | 97,246 | 0 | 97,246 | 0 | 900,000 | 0 | 0 | 900,000 |
| Housing & Technology Fund | G | 5,813 | 0 | 0 | 0 | 5,813 | 513 | 94 | 607 | 0 | 5,813 | 0 | 0 | 5,813 |
| Social Care Projects | | 670,250 | 0 | 0 | 0 | 670,250 | 0 | 0 | 0 | 0 | 670,250 | 0 | 0 | 670,250 |
| | | 1,163,087 | 300,000 | 300,000 | 0 | 1,763,087 | 97,759 | 94 | 97,853 | 0 | 1,763,087 | 0 | 0 | 1,763,087 |
| HOUSING | | | | | | | | | | | | | | |
| Disabled Facilities Grants | A | 2,929,031 | 2,081,237 | 2,081,237 | 0 | 7,091,505 | 490,506 | 288,987 | 779,493 | 0 | 7,091,505 | 0 | 0 | 7,091,505 |
| Other Private Sector Renewal | G | 38,225 | 0 | 0 | 0 | 38,225 | 0 | 6,933 | 6,933 | 0 | 0 | 0 | 38,225 | 38,225 |
| Social Housing Grants (LASHG) | G | 693,498 | 0 | 0 | 0 | 693,498 | 0 | 0 | 0 | 421,498 | 272,000 | 0 | 0 | 693,498 |
| Grant funding of affordable housing - West W | G | 1,422,750 | 0 | 0 | 0 | 1,422,750 | 0 | 0 | 0 | 0 | 1,422,750 | 0 | 0 | 1,422,750 |
| Insulation of park homes | G | 490,600 | 0 | 0 | 0 | 490,600 | 397,184 | 50,625 | 447,809 | 0 | 490,600 | 0 | 0 | 490,600 |
| Repurchase Leasehold Properties | G | 1,500,000 | 1,500,000 | 1,500,000 | 0 | 4,500,000 | 105,000 | 0 | 105,000 | 0 | 0 | 0 | 4,500,000 | 4,500,000 |
| First Time Buyer Loan Scheme | G | 35,000 | 0 | 0 | 0 | 35,000 | 0 | 0 | 0 | 0 | 0 | 0 | 35,000 | 35,000 |
| Technology Enabled Care | | 750,000 | 0 | 0 | 0 | 750,000 | 0 | 0 | 0 | 0 | 750,000 | 0 | 0 | 750,000 |
| | | 7,859,104 | 3,581,237 | 3,581,237 | 0 | 15,021,578 | 992,690 | 346,545 | 1,339,235 | 421,498 | 10,026,855 | 0 | 4,573,225 | 15,021,578 |
| CORPORATE SERVICES | | | | | | | | | | | | | | |
| ICT Replacement Programme | G | 572,067 | 0 | 0 | 0 | 572,067 | 24,195 | 37,178 | 61,373 | 572,067 | 0 | 0 | 0 | 572,067 |
| Devices Laptops (break fix & new starters) | G | 60,000 | 0 | 0 | 0 | 60,000 | 59,220 | 0 | 59,220 | 60,000 | 0 | 0 | 0 | 60,000 |
| Networks & Infrastructure | G | 400,000 | 0 | 0 | 0 | 400,000 | 0 | 328,435 | 328,435 | 400,000 | 0 | 0 | 0 | 400,000 |
| Security Tools | G | 50,000 | 0 | 0 | 0 | 50,000 | 0 | 0 | 0 | 50,000 | 0 | 0 | 0 | 50,000 |
| Windows 11 upgrade project | G | 50,000 | 0 | 0 | 0 | 50,000 | 0 | 0 | 0 | 50,000 | 0 | 0 | 0 | 50,000 |
| Change to ContrOCC - Adult Social Care sys | G | 250,000 | 0 | 0 | 0 | 250,000 | 0 | 0 | 0 | 0 | 250,000 | 0 | 0 | 250,000 |
| Jontec Carelink system | G | 140,000 | 0 | 0 | 0 | 140,000 | 0 | 138,555 | 138,555 | 140,000 | 0 | 0 | 0 | 140,000 |
| ICT Replacement Programme | G | 150,000 | 0 | 0 | 0 | 150,000 | 0 | 0 | 0 | 150,000 | 0 | 0 | 0 | 150,000 |
| LAS / Childrens system | G | 100,000 | 0 | 0 | 0 | 100,000 | 0 | 49,799 | 49,799 | 100,000 | 0 | 0 | 0 | 100,000 |
| Customer Services | G | 150,000 | 0 | 0 | 0 | 150,000 | 0 | 0 | 0 | 150,000 | 0 | 0 | 0 | 150,000 |
| GIS / Mapping system projects | G | 50,000 | 0 | 0 | 0 | 50,000 | 0 | 0 | 0 | 50,000 | 0 | 0 | 0 | 50,000 |
| ICT RLAS / Childrens system Replacement P | G | 105,000 | 0 | 0 | 0 | 105,000 | 0 | 0 | 0 | 105,000 | 0 | 0 | 0 | 105,000 |
| Council Chamber - Sound System | G | 100,000 | 0 | 0 | 0 | 100,000 | 0 | 0 | 0 | 100,000 | 0 | 0 | 0 | 100,000 |
| Corporate Asset Management Plan | G | 1,106,127 | 0 | 0 | 0 | 1,106,127 | 118,355 | 229,738 | 348,093 | 128,707 | 59,329 | 53,337 | 864,754 | 1,106,127 |
| Flax Bourton Mortuary | R | 218,522 | 0 | 0 | 0 | 218,522 | -1,049 | 219,571 | 218,522 | 0 | 0 | 218,522 | 0 | 218,522 |
| Leisure Asset Management Plan | A | 1,840,740 | 0 | 0 | 0 | 1,840,740 | 73,269 | 139,711 | 212,980 | 1,758,484 | 57,193 | 25,063 | 0 | 1,840,739 |
| Accommodation Strategy | G | 2,000,000 | 0 | 0 | 0 | 2,000,000 | 43,834 | 20,871 | 64,705 | 2,000,000 | 0 | 0 | 0 | 2,000,000 |
| Development Strategy | G | 1,000,000 | 0 | 0 | 0 | 1,000,000 | 3 | 0 | 3 | 1,000,000 | 0 | 0 | 0 | 1,000,000 |
| Commercial Investment Fund - Sovereign Centre | | 0 | 5,000,000 | 0 | 5,000,000 | 10,000,000 | 0 | 0 | 0 | 10,000,000 | 0 | 0 | 0 | 10,000,000 |
| Decarbonisation of heat (boilers) | | 0 | 1,000,000 | 0 | 0 | 1,000,000 | 0 | 0 | 0 | 0 | 1,000,000 | 0 | 0 | 1,000,000 |
| Energy efficiency buildings | | 865,669 | 0 | 0 | 0 | 865,669 | 0 | 0 | 0 | 865,669 | 0 | 0 | 0 | 865,669 |
| Rooftop solar pilot | | 100,000 | 0 | 0 | 0 | 100,000 | 0 | 0 | 0 | 100,000 | 0 | 0 | 0 | 100,000 |
| | | 9,308,124 | 6,000,000 | 0 | 5,000,000 | 20,308,124 | 317,826 | 1,163,859 | 1,481,685 | 17,779,927 | 1,366,522 | 296,922 | 864,754 | 20,308,124 |

MONITORING OF 2022/23 CAPITAL PROGRAMME

APPENDIX 4

| APPROVED GENERAL FUND CAPITAL SCHEMES | RAG rating | APPROVED BUDGET | | | | | MONITORING TO 31 JULY 2022 | | | APPROVED FUNDING | | | | |
|--|------------|-------------------------|-------------------------|-------------------------|-------------------------|-----------------------|----------------------------|---------|------------------------|------------------|------------------------|--------------------|------------------|------------------------|
| | | 2022/23 Estimated Spend | 2023/24 Estimated Spend | 2024/25 Estimated Spend | 2026/27 Estimated Spend | TOTAL APPROVED BUDGET | Actual Spend | Orders | TOTAL COSTS IN 2022/23 | Borrowing | Grants & Contributions | Reserves & Revenue | Capital Receipts | TOTAL APPROVED FUNDING |
| | | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ |
| PLACE | | | | | | | | | | | | | | |
| Clevedon Library | G | 286,729 | 0 | 0 | 0 | 286,729 | 7,573 | 244,306 | 251,879 | 34,331 | 252,398 | 0 | 0 | 286,729 |
| Banksy Pinwheel | G | 30,881 | 0 | 0 | 0 | 30,881 | 30,881 | 0 | 30,881 | 0 | 30,881 | 0 | 0 | 30,881 |
| Shop Front Enhancement | G | 204,994 | 0 | 0 | 0 | 204,994 | 81,000 | 41,757 | 122,757 | 0 | 204,994 | 0 | 0 | 204,994 |
| Heritage Action Zone | G | 1,606,383 | 30,500 | 0 | 0 | 1,636,883 | 137,176 | 18,833 | 156,009 | 0 | 1,636,883 | 0 | 0 | 1,636,883 |
| Campus Gym | | 0 | 184,143 | 0 | 0 | 184,143 | 0 | 0 | 0 | 0 | 184,143 | 0 | 0 | 184,143 |
| Churchill Leisure Centre | | 1,500,000 | 0 | 0 | 0 | 1,500,000 | 0 | 0 | 0 | 1,500,000 | 0 | 0 | 0 | 1,500,000 |
| Nailsea Library Relocation | G | 745,000 | 0 | 0 | 0 | 745,000 | 1,277 | 0 | 1,277 | 745,000 | 0 | 0 | 0 | 745,000 |
| Joint place-making initiatives - Birnbeck Pier | | 500,000 | 0 | 0 | 0 | 500,000 | 0 | 0 | 0 | 0 | 500,000 | 0 | 0 | 500,000 |
| Seafront Investments - (Lighting and Shelters) | G | 722,070 | 0 | 0 | 0 | 722,070 | 79,678 | 156,043 | 235,721 | 657,070 | 45,000 | 20,000 | 0 | 722,070 |
| Placemaking - District wide (Incl Clevedon, Nailsea) | | 125,000 | 0 | 0 | 0 | 125,000 | 0 | 0 | 0 | 125,000 | 0 | 0 | 0 | 125,000 |
| Maintenance Schemes 2020/21 | G | 369,990 | 0 | 0 | 0 | 369,990 | 0 | 0 | 0 | 0 | 369,990 | 0 | 0 | 369,990 |
| Pot Hole and Challenge Fund | G | 247,067 | 0 | 0 | 0 | 247,067 | 0 | 0 | 0 | 0 | 247,067 | 0 | 0 | 247,067 |
| City Deal - Transport | G | 1,102,094 | 0 | 0 | 0 | 1,102,094 | 0 | 0 | 0 | 0 | 1,102,094 | 0 | 0 | 1,102,094 |
| Integrated Transport Schemes | | | | | | | | | | | | | | |
| Public Transport Schemes | A | 275,317 | 0 | 0 | 0 | 275,317 | 91,788 | -80 | 91,708 | 0 | 275,317 | 0 | 0 | 275,317 |
| Walking | A | 226,579 | 0 | 0 | 0 | 226,579 | 49,136 | 36,303 | 85,439 | 0 | 226,579 | 0 | 0 | 226,579 |
| Cycling Programme | A | 132,059 | 0 | 0 | 0 | 132,059 | 1,029 | 11,265 | 12,294 | 0 | 132,059 | 0 | 0 | 132,059 |
| Safety & Travel Plans | A | 421,777 | 0 | 0 | 0 | 421,777 | -23,397 | 76,884 | 53,487 | 0 | 421,777 | 0 | 0 | 421,777 |
| Other Schemes | A | 311,429 | 0 | 0 | 0 | 311,429 | 57,143 | 69,619 | 126,763 | 0 | 311,429 | 0 | 0 | 311,429 |
| Programme Management | A | 6,742 | 0 | 0 | 0 | 6,742 | 0 | 0 | 0 | 0 | 6,742 | 0 | 0 | 6,742 |
| Cross Cutting | A | 653,119 | 0 | 0 | 0 | 653,119 | 28,335 | 152,444 | 180,779 | 0 | 653,119 | 0 | 0 | 653,119 |
| Parking | A | 70,000 | 0 | 0 | 0 | 70,000 | 0 | 0 | 0 | 0 | 70,000 | 0 | 0 | 70,000 |
| COVID Grant - Walking & Cycling (EATF) | A | 1,455,582 | 0 | 0 | 0 | 1,455,582 | 73,062 | 841,690 | 914,751 | 61,299 | 1,394,283 | 0 | 0 | 1,455,582 |
| Maintenance Schemes | | | | | | | | | | | | | | |
| Principal Roads | A | 1,264,923 | 0 | 0 | 0 | 1,264,923 | 229,911 | 989,156 | 1,219,067 | 645,504 | 619,419 | 0 | 0 | 1,264,923 |
| Non Principal Roads | A | 1,624,317 | 0 | 0 | 0 | 1,624,317 | 19,678 | 853,926 | 873,604 | 896,465 | 727,852 | 0 | 0 | 1,624,317 |
| Bridges & Structures | A | 1,622,571 | 282,189 | 0 | 0 | 1,904,760 | 26,729 | 86,357 | 113,085 | 810,695 | 1,094,066 | 0 | 0 | 1,904,761 |
| Street Lighting | A | 330,973 | 0 | 0 | 0 | 330,973 | 93,477 | 0 | 93,477 | 80,973 | 250,000 | 0 | 0 | 330,973 |
| Traffic Signals | A | 198,326 | 0 | 0 | 0 | 198,326 | 4,168 | -5,718 | -1,550 | 115,126 | 83,200 | 0 | 0 | 198,326 |
| Footways | A | 487,296 | 0 | 0 | 0 | 487,296 | -26,731 | 150,815 | 124,085 | 46,238 | 441,058 | 0 | 0 | 487,297 |
| Asset Officer | A | 120,173 | 0 | 0 | 0 | 120,173 | 0 | 0 | 0 | 35,173 | 85,000 | 0 | 0 | 120,173 |
| Drainage Schemes within LTP | A | 1,954,021 | 0 | 0 | 0 | 1,954,021 | 154,754 | 327,623 | 482,377 | 24,659 | 1,929,362 | 0 | 0 | 1,954,021 |
| Fencing | A | 81,376 | 0 | 0 | 0 | 81,376 | 0 | 59,285 | 59,285 | 81,376 | 0 | 0 | 0 | 81,376 |
| Road Restraint Programme | A | 33,721 | 0 | 0 | 0 | 33,721 | -11,499 | 0 | -11,499 | 33,721 | 0 | 0 | 0 | 33,721 |
| Other Highways & Street Lighting | | | | | | | | | | | | | | |
| NSC Capital Unclassified Roads | G | 2,216,706 | 0 | 0 | 0 | 2,216,706 | -189,847 | 780,234 | 590,387 | 778,127 | 1,438,579 | 0 | 0 | 2,216,706 |
| Safe Routes to Schools | | 181,419 | 0 | 0 | 0 | 181,419 | 0 | 0 | 0 | 0 | 0 | 181,419 | 0 | 181,419 |
| Wrington Flood Relief Scheme | G | 81,618 | 0 | 0 | 0 | 81,618 | 0 | 0 | 0 | 0 | 76,998 | 4,620 | 0 | 81,618 |
| A370 Yanley Viaduct | G | 24,665 | 0 | 0 | 0 | 24,665 | 0 | 0 | 0 | 0 | 24,665 | 0 | 0 | 24,665 |
| Summer Lane Flood Relief Scheme | G | 366,777 | 0 | 0 | 0 | 366,777 | -19,697 | 0 | -19,697 | 0 | 337,459 | 0 | 29,317 | 366,776 |
| Street Lighting Lamp Column Replacement | G | 244,996 | 0 | 0 | 0 | 244,996 | -78,056 | 735 | -77,321 | 244,996 | 0 | 0 | 0 | 244,996 |
| Winterstoke Rd Bridge | A | 2,434,828 | 9,256,267 | 0 | 0 | 11,691,095 | 177,284 | 93,138 | 270,422 | 0 | 11,691,095 | 0 | 0 | 11,691,095 |
| A371 Safer Roads | G | 0 | 0 | 0 | 0 | 0 | -107,477 | 41,158 | -66,319 | 0 | 0 | 0 | 0 | 0 |
| VMS Units and Barriers | G | 1,700 | 0 | 0 | 0 | 1,700 | 0 | 0 | 0 | 0 | 0 | 1,700 | 0 | 1,700 |
| Clevedon Sea Front Illuminations | G | 19,903 | 0 | 0 | 0 | 19,903 | 0 | 0 | 0 | 0 | 0 | 19,903 | 0 | 19,903 |
| South Bristol Link | A | 0 | 0 | 0 | 0 | 0 | 8,511 | 7,232 | 15,743 | 0 | 0 | 0 | 0 | 0 |
| SBL Consultation Team | A | 0 | 0 | 0 | 0 | 0 | 150 | 0 | 150 | 0 | 0 | 0 | 0 | 0 |
| South Bristol Link - Part 1 Claims | A | 905,342 | 0 | 0 | 0 | 905,342 | 6,608 | 8,727 | 15,335 | 0 | 569,785 | 335,557 | 0 | 905,342 |
| Metro West subtotal | R | 55,794,775 | 42,236,811 | 23,951,124 | 0 | 121,982,710 | 166,893 | 463,688 | 630,581 | 59,531,000 | 58,118,545 | 82,883 | 4,250,282 | 121,982,710 |
| North South Link | G | 626,871 | 0 | 0 | 0 | 626,871 | 15,947 | 27,140 | 43,087 | 0 | 626,871 | 0 | 0 | 626,871 |
| Land at Parklands Village | G | 889,238 | 0 | 0 | 0 | 889,238 | 7,245 | 0 | 7,245 | 0 | 889,238 | 0 | 0 | 889,238 |

MONITORING OF 2022/23 CAPITAL PROGRAMME

APPENDIX 4

| APPROVED GENERAL FUND CAPITAL SCHEMES | RAG rating | APPROVED BUDGET | | | | | MONITORING TO 31 JULY 2022 | | | APPROVED FUNDING | | | | |
|---|------------|-------------------------|-------------------------|-------------------------|-------------------------|-----------------------|----------------------------|------------------|------------------------|-------------------|------------------------|--------------------|------------------|------------------------|
| | | 2022/23 Estimated Spend | 2023/24 Estimated Spend | 2024/25 Estimated Spend | 2026/27 Estimated Spend | TOTAL APPROVED BUDGET | Actual Spend | Orders | TOTAL COSTS IN 2022/23 | Borrowing | Grants & Contributions | Reserves & Revenue | Capital Receipts | TOTAL APPROVED FUNDING |
| | | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ | £ |
| Utilities at Parklands Village | G | 674,917 | 0 | 0 | 0 | 674,917 | 0 | 29,116 | 29,116 | | 674,917 | 0 | 0 | 674,917 |
| Office for Low Emission Vehicles (OLEV) | G | 359,074 | 0 | 0 | 0 | 359,074 | 31,719 | 5,976 | 37,694 | 0 | 359,074 | 0 | 0 | 359,074 |
| HIF - Banwell Bypass & Infrastructure | A | 4,385,522 | 30,477,410 | 25,348,847 | 0 | 60,211,779 | 1,308,040 | -153,639 | 1,154,401 | 0 | 60,211,778 | 0 | 0 | 60,211,778 |
| LGF4 (Old LSTF) 2018/19 - sustainable transp | G | 156,778 | 0 | 0 | 0 | 156,778 | 2,272 | 0 | 2,272 | 84,994 | 71,784 | 0 | 0 | 156,778 |
| Weston to Clevedon Cycleway (Tutshill Sluice) | A | 1,816,661 | 0 | 0 | 0 | 1,816,661 | 860,554 | 830,546 | 1,691,099 | 125,479 | 1,691,181 | 0 | 0 | 1,816,660 |
| Metrobus Contingency/ AVTM | A | 700,000 | 0 | 0 | 0 | 700,000 | -510,610 | 0 | -510,610 | 700,000 | 0 | 0 | 0 | 700,000 |
| J19 Wyndham Way | | 0 | 0 | 0 | 0 | 0 | 487 | 0 | 487 | 0 | 0 | 0 | 0 | 0 |
| HTST Ravenwood School Parking | | 250,000 | 0 | 0 | 0 | 250,000 | 0 | 0 | 0 | 0 | 250,000 | 0 | 0 | 250,000 |
| Weston Transport Enhancement Scheme | G | 501,776 | 0 | 0 | 0 | 501,776 | -63,456 | 57,305 | -6,151 | 0 | 8,740 | 0 | 493,036 | 501,776 |
| Real Time Information | G | 5,220 | 0 | 0 | 0 | 5,220 | 0 | 0 | 0 | 0 | 5,220 | 0 | 0 | 5,220 |
| Bus Service Improvement Plan | G | 200,000 | 0 | 0 | 0 | 200,000 | 16,824 | 0 | 16,824 | 0 | 200,000 | 0 | 0 | 200,000 |
| J21 Northbound Slip | | 527,394 | 0 | 0 | 0 | 527,394 | 0 | 0 | 0 | 450,000 | 77,394 | 0 | 0 | 527,394 |
| Major Road Network (A38) | A | 1,009,186 | 1,116,703 | 0 | 0 | 2,125,889 | 34,124 | 27,418 | 61,541 | 236,324 | 1,889,564 | 0 | 0 | 2,125,888 |
| Festival Way / B3128 Crossing (Ashton Court) | G | 8,359 | 0 | 0 | 0 | 8,359 | 0 | 0 | 0 | 0 | 8,359 | 0 | 0 | 8,359 |
| Avonmouth Bridge Wayfinding | G | 101,241 | 0 | 0 | 0 | 101,241 | 10,424 | 90,418 | 100,842 | 0 | 101,241 | 0 | 0 | 101,241 |
| Low Emission Vehicle Provision - Match (gran | G | 45,000 | 0 | 0 | 0 | 45,000 | 0 | 0 | 0 | 45,000 | 0 | 0 | 0 | 45,000 |
| Beach Recycling Weston Bay | G | 3,050 | 0 | 0 | 0 | 3,050 | 0 | 0 | 0 | 0 | 0 | 3,050 | 0 | 3,050 |
| England Coast Path | G | 228,074 | 0 | 0 | 0 | 228,074 | -5,251 | 38,240 | 32,989 | 0 | 228,074 | 0 | 0 | 228,074 |
| Parks & Street Scene - vehicles & equipment | A | 23,682 | 818,126 | 0 | 0 | 841,808 | 3,750 | 126,639 | 130,389 | 841,809 | 0 | 0 | 0 | 841,809 |
| Weston Marine Lake - Dredging | G | 355,994 | 0 | 0 | 0 | 355,994 | 273,737 | 79,855 | 353,592 | 355,994 | 0 | 0 | 0 | 355,994 |
| Portishead Lakegrounds | G | 250,000 | 0 | 0 | 0 | 250,000 | 0 | 0 | 0 | 250,000 | 0 | 0 | 0 | 250,000 |
| Clevedon Marine Lake | G | 136,000 | 0 | 0 | 0 | 136,000 | 20,012 | 0 | 20,012 | 136,000 | 0 | 0 | 0 | 136,000 |
| Clapton Lane Pitches | G | 12,333 | 0 | 0 | 0 | 12,333 | 3,782 | 3,600 | 7,382 | 0 | 12,333 | 0 | 0 | 12,333 |
| Boardwalk Portishead | G | 500 | 0 | 0 | 0 | 500 | 0 | 0 | 0 | 0 | 500 | 0 | 0 | 500 |
| PROW - Gate | G | 59,718 | 0 | 0 | 0 | 59,718 | 0 | 0 | 0 | 0 | 59,718 | 0 | 0 | 59,718 |
| Play Areas - replacement and upgrade progra | G | 290,000 | 0 | 0 | 0 | 290,000 | 0 | 0 | 0 | 290,000 | 0 | 0 | 0 | 290,000 |
| Play Areas - Local Match Funding - Skate Par | G | 285,000 | 0 | 0 | 0 | 285,000 | 0 | 0 | 0 | 260,000 | 0 | 25,000 | 0 | 285,000 |
| Purchase of Land to support biodiversity net gain | | 300,000 | 0 | 0 | 0 | 300,000 | 0 | 0 | 0 | 300,000 | 0 | 0 | 0 | 300,000 |
| SuperPond | G | 150,000 | 0 | 0 | 0 | 150,000 | 0 | 0 | 0 | 150,000 | 0 | 0 | 0 | 150,000 |
| Sea Defences | G | 400,000 | 0 | 0 | 0 | 400,000 | 0 | 89,250 | 89,250 | 400,000 | 0 | 0 | 0 | 400,000 |
| Parking Schemes | G | 35,716 | 0 | 0 | 0 | 35,716 | 0 | 0 | 0 | 35,716 | 0 | 0 | 0 | 35,716 |
| Leigh Woods - Car Parking | G | 60,000 | 0 | 0 | 0 | 60,000 | -19,769 | 12,189 | -7,579 | 0 | 60,000 | 0 | 0 | 60,000 |
| Parking Review | G | 0 | 250,000 | 0 | 0 | 250,000 | 0 | 0 | 0 | 177,131 | 72,869 | 0 | 0 | 250,000 |
| Purchase of Vehicles - Place | G | 49,887 | 45,778 | 45,778 | 0 | 141,443 | 7,500 | 0 | 7,500 | -58,339 | 0 | 0 | 199,781 | 141,442 |
| Electric Cargo Bikes | G | 26,196 | 0 | 0 | 0 | 26,196 | 0 | 0 | 0 | 0 | 26,196 | 0 | 0 | 26,196 |
| Waste Depot | | 705,000 | 1,000,000 | 0 | 0 | 1,705,000 | 4,881 | 0 | 4,881 | 1,705,000 | 0 | 0 | 0 | 1,705,000 |
| Waste & Recycling - vehicles and electric veh | G | 3,203,000 | 0 | 0 | 0 | 3,203,000 | 560,500 | 0 | 560,500 | 3,203,000 | 0 | 0 | 0 | 3,203,000 |
| HWRG - Investment Programme | G | 350,000 | 0 | 0 | 0 | 350,000 | 3,598 | 0 | 3,598 | 350,000 | 0 | 0 | 0 | 350,000 |
| The Foodworks SW - Contract Retentions | G | 484,964 | 0 | 0 | 0 | 484,964 | 0 | 1,037 | 1,037 | 0 | 484,964 | 0 | 0 | 484,964 |
| Locking Parklands Health Centre | A | 3,513,654 | 0 | 0 | 0 | 3,513,654 | 996,334 | 15,201 | 1,011,535 | 0 | 3,513,654 | 0 | 0 | 3,513,654 |
| CDS - Connecting Devon & Somerset | | 0 | 200,000 | 0 | 0 | 200,000 | 0 | 0 | 0 | 0 | 100,000 | 100,000 | 0 | 200,000 |
| Weston General Stores | A | 702,617 | 0 | 0 | 0 | 702,617 | 453,871 | 170,469 | 624,339 | 378,265 | 0 | 324,352 | 0 | 702,617 |
| Land Release Fund - Churchill Avenue, Cleve | A | 350,000 | 0 | 0 | 0 | 350,000 | 0 | 0 | 0 | 0 | 350,000 | 0 | 0 | 350,000 |
| Land Release Fund - Uplands, Nailsea | G | 481,020 | 0 | 0 | 0 | 481,020 | 0 | 0 | 0 | 0 | 481,020 | 0 | 0 | 481,020 |
| Brownfield Release Sites - Walliscote Place | A | 1,075,000 | 0 | 0 | 0 | 1,075,000 | 9,713 | 36,111 | 45,824 | 0 | 1,075,000 | 0 | 0 | 1,075,000 |
| Tropicana, Magistrates and Wayfinding | | 600,000 | 2,000,000 | 0 | 0 | 2,600,000 | 61,198 | 450 | 61,648 | 2,600,000 | 0 | 0 | 0 | 2,600,000 |
| Weston Business Quarter | | 750,000 | 0 | 0 | 0 | 750,000 | 0 | 0 | 0 | 0 | 750,000 | 0 | 0 | 750,000 |
| | | 108,121,882 | 87,897,927 | 49,345,749 | 0 | 245,365,557 | 5,156,960 | 6,992,739 | 12,149,699 | 79,463,127 | 159,771,811 | 976,783 | 5,153,835 | 245,365,556 |

| | 2022/23 Capital Programme Budget £000 | 2023/24 Capital Prog Budget £000 | 2024/25 Capital Prog Budget £000 | 2025/26 Capital Prog Budget £000 | 2026/27 Capital Prog Budget £000 | Total Capital Prog Budget £000 |
|--|---|--|--|--|--|--|
| ORIGINAL APPROVED CAPITAL EXPENDITURE BUDGETS | 94,798 | 99,181 | 17,978 | 0 | 0 | 211,957 |
| Adj P10 - P12 | 2,273 | 0 | 0 | 0 | 0 | 2,273 |
| Budget as per P12 Out-turn | 97,071 | 99,181 | 17,978 | 0 | 0 | 214,230 |
| Planned Additions to the capital Programme - Exec, Feb 2022 | 38,722 | 0 | 0 | 0 | 0 | 38,722 |
| Slippage of approved budgets from 2021/22 | 48,582 | 0 | 0 | 0 | 0 | 48,582 |
| TOTAL ORIGINAL CAPITAL BUDGETS | 184,374 | 99,181 | 17,978 | 0 | 0 | 301,533 |
| AMENDMENTS TO THE PROGRAMME IN-YEAR; | | | | | | |
| Months 1-3 | | | | | | |
| Realignment - Duplication of grant funded schemes | (1,905) | 0 | 0 | 0 | 0 | (1,905) |
| Realignment - Duplication of scheme - Churchill | (325) | 0 | 0 | 0 | 0 | (325) |
| Realignment - Duplication of scheme - Churchill interim | (226) | 0 | 0 | 0 | 0 | (226) |
| Realignment - Duplication of scheme - VLC Ashcroft House | (5) | 0 | 0 | 0 | 0 | (5) |
| Realignment - Ravenswood Expansion KCE262 - Scheme Compl | (15) | 0 | 0 | 0 | 0 | (15) |
| Realignment - Duplication of scheme - Gordano Breach | (200) | 0 | 0 | 0 | 0 | (200) |
| Realignment - Duplication of scheme - WHAE | (1,653) | 0 | 0 | 0 | 0 | (1,653) |
| Realignment - Cycle Hub included as part of Weston General Sto | (65) | 0 | 0 | 0 | 0 | (65) |
| Realignment - Power BI - already included within revenue | (30) | 0 | 0 | 0 | 0 | (30) |
| Realignment - scheme complete Creative Hub | (32) | 0 | 0 | 0 | 0 | (32) |
| Additions - Digitalising Social Care (ASC001) | 670 | 0 | 0 | 0 | 0 | 670 |
| Additions - DFT increases to grant allocation since Feb Exec Ass | 829 | 0 | 0 | 0 | 0 | 829 |
| Additions - Nailsea Library Lease (DP097) | 425 | 0 | 0 | 0 | 0 | 425 |
| Additions - Leisure S106 spend (DP094) | 48 | 0 | 0 | 0 | 0 | 48 |
| Additions - Clevedon Library (DP096) | 0 | 0 | 0 | 0 | 0 | 0 |
| Additions - BSIP (DP098) | 200 | 0 | 0 | 0 | 0 | 200 |
| Additions - Seafront Shelters (DP112) | 45 | 0 | 0 | 0 | 0 | 45 |
| Additions - Seafront Shelters (DP112) | 20 | 0 | 0 | 0 | 0 | 20 |
| Additions - Insulation of Park Homes | 595 | 0 | 0 | 0 | 0 | 595 |
| Additions - Baytree School (April Exec) | 3,202 | 0 | 0 | 0 | 0 | 3,202 |
| Additions - Match Fund Play Areas | 25 | 0 | 0 | 0 | 0 | 25 |
| Rephase - Banwell Bypass | (20,086) | (5,262) | 25,349 | 0 | 0 | (0) |
| Rephase - Winterstoke Hundred Academy Extension (WHAE) | 4,658 | (4,658) | 0 | 0 | 0 | 0 |
| Rephase - Parking Review - Residents Parking Schemes | (250) | 250 | 0 | 0 | 0 | 0 |
| Rephase - Commercial Investment | (5,000) | 5,000 | (5,000) | 0 | 5,000 | 0 |
| Rephase - MetroWest | (15,000) | 0 | 15,000 | 0 | 0 | 0 |
| Rephase - Winterstoke Road Bridge | (6,835) | 6,835 | 0 | 0 | 0 | 0 |
| Rephase - Breach Classes | (1,000) | 1,000 | 0 | 0 | 0 | 0 |
| Rephase - Kewstoke School | (1,500) | 1,500 | 0 | 0 | 0 | 0 |
| Rephase - Central Secondary | (250) | 250 | 0 | 0 | 0 | 0 |
| Rephase - SEN Hubs | (800) | 800 | 0 | 0 | 0 | 0 |
| Rephase - Decarbonisation of heat boilers | (1,000) | 1,000 | 0 | 0 | 0 | 0 |
| Rephase - Campus Gym | (184) | 184 | 0 | 0 | 0 | 0 |
| Rephase - Bridge Scheme BS2223 | (282) | 282 | 0 | 0 | 0 | 0 |
| Rephase - Waste Depot | (1,000) | 1,000 | 0 | 0 | 0 | 0 |
| Rephase - Connection Devon & Somerset | (200) | 200 | 0 | 0 | 0 | 0 |
| Rephase - Tropicana & Magistrates | (2,000) | 2,000 | 0 | 0 | 0 | 0 |
| Rephase - A38 MRN | (1,117) | 1,117 | 0 | 0 | 0 | 0 |
| Month 4 | | | | | | |
| Additions - HTST Ravenswood KDT139 (DP152) | 250 | 0 | 0 | 0 | 0 | 250 |
| Additions - Weston General Stores KDP608 (DP180/DP509) | 284 | 0 | 0 | 0 | 0 | 284 |
| Additions - Metro West (DFT and WECA Funding) | 25,580 | 0 | 0 | 0 | 0 | 25,580 |
| Additions - Metro West (NSC Funding) | 10,000 | 0 | 0 | 0 | 0 | 10,000 |
| Additions - Highways Schemes External Funding - (DP139) | 127 | 0 | 0 | 0 | 0 | 127 |
| Virement - Baytree Special School Interim works - CY19 | 0 | 0 | 0 | 0 | 0 | 0 |
| Virement - Match Funded Play Areas | 0 | 0 | 0 | 0 | 0 | 0 |
| REVISED 2022/23 CAPITAL PROGRAMME | 170,372 | 110,679 | 53,327 | 0 | 5,000 | 339,378 |

North Somerset Council

Report to the Executive

Date of Meeting: 7 September 2022

Subject of Report: Medium Term Financial Plan 2023-2027

Town or Parish: All

Officer/Member Presenting: Ashley Cartman, Executive Member for Corporate Services

Key Decision: YES

Reason:

Financial implications within the report are in excess of £500,000 and impact on all wards and communities within North Somerset

Recommendations

The Executive is asked to note;

- i. The updated range of budget projections within the Medium Term Financial Plan (MTFP) as detailed within the report,
- ii. The process, next steps and timescales for finalising the MTFP for the period 2023 to 2027, and also for setting the revenue budget for the 2023/24 financial year.

1. Summary of Report

This report provides an update with regards to the assumptions which underpin the council's medium term financial plan, covering a new 4-year period to 2026/27, which was last considered by the Executive in February 2022. At that time the council had a budget gap of **£18m** across the 2-year period to 2024, with approximately **£9m** short-fall in each of those years.

The council has a well-established and embedded process to continually review and assess its financial performance and position, both in terms of the current financial year as well as across the medium-term. The latest financial modelling, which has been extended to cover a 4-year horizon, shows that the council's financial position has deteriorated over recent months as the budget gap has increased to over **£41m**, which a short-fall of **£17m in 2023/24**.

The council recognises the importance of aligning limited resources and allocating them to the priorities identified within the Corporate Plan, which means that it continually reviews all aspects of financial planning and considers new risks, issues and challenges as they emerge. This is essential given the uncertainties, pressures and impacts which have arisen as a result of the worsening economic backdrop and specifically the inflationary impacts driving the cost of living crisis, which is affecting many individuals, businesses and public sector bodies alike.

There is a legal requirement to prepare and approve a robust revenue budget for the 2023/24 financial year, along with relevant council tax bandings and rates. Ultimately the MTFP will work towards delivering these outcomes and will culminate in a report being presented to Council in February 2023.

2. Policy

The council has an annual net revenue budget of £185m for the 2022/23 financial year, which is supported by a rolling MTFP process. It also has a capital investment programme for the period 2022-2027 which totals £339m, which is based on the needs and ambitions described within the Capital Strategy.

The council's MTFP supports the on-going provision of services for the people of North Somerset, within the context of the priorities for the area, as set out within the approved Corporate Plan. It identifies the likely costs and pressures that the council will face and matches these against the anticipated income and resource allocations over the period. The MTFP integrates a range of financial strategies and highlights the key risks inherent within our budget planning processes.

3. Details

3.1. Reminder of the MTFP process and February 2022 position

The council follows a traditional incremental approach to its annual budgeting cycle whereby the approved revenue base budget is used as a starting point to build from and various factors and assumptions are considered and incorporated where they are deemed material in nature and aligned to delivery of statutory responsibilities or Corporate Plan priorities. A similar approach is adopted in respect of creating funding forecasts.

The integration of the council's in-year budget monitoring processes with medium term financial planning mean that information is consistently shared and reflected across both platforms reducing the risks that can feature if such reports and workstreams are prepared in isolation of each other. Therefore, the budget monitoring report considered elsewhere on the agenda for this meeting, is important in understanding some of the emerging issues within this report.

The council's financial plans were last approved in February 2022 and the table below provides a summary of the financial position at that time.

MTFP FINANCIAL SUMMARY

- Resources - Grants, Council Tax & Business Rates

- Current Budget - base spending position
- Budget pressures, increased spending and investment plans
- Remove Covid & other one-off impacts
- Savings proposals and increased income

- Revised Spending Base

- Budget Gap

| MTFP - COUNCIL, FEB 2022 | | | |
|---------------------------------|----------------|----------------|--|
| 2022/23 | 2023/24 | 2024/25 | |
| £000 | £000 | £000 | |
| 179,090 | 183,636 | 187,442 | |
| 171,317 | 179,090 | 183,636 | |
| 16,396 | 15,696 | 14,342 | |
| -4,466 | -1,553 | 0 | |
| -4,157 | -805 | -715 | |
| 179,090 | 192,428 | 197,263 | |
| 0 | -8,793 | -9,821 | |
| | -18,613 | | |

Core Assumptions for Council Tax Increase:

| | | | |
|-----------------------------------|-------|-------|-------|
| - North Somerset Council Services | 1.99% | 1.99% | 1.99% |
| - Adult Social Care Precept | 1.00% | 1.00% | 1.00% |

As can be seen, the MTFP reflected a balanced budget for 2022/23 although had residual short-falls in both of the following years, including a budget gap of **£8.793m in 2023/34** meaning that further work would be required to balance the MTFP across the period.

That in itself is not unusual because as is often the case, the forecasts relating to resources are not always as explicit as they need to be, as are largely dependent on receiving information from central government, which in recent years, has not been forthcoming due to other issues of national importance taking precedence, i.e. firstly Brexit and then the Covid pandemic.

3.2. Review of core assumptions

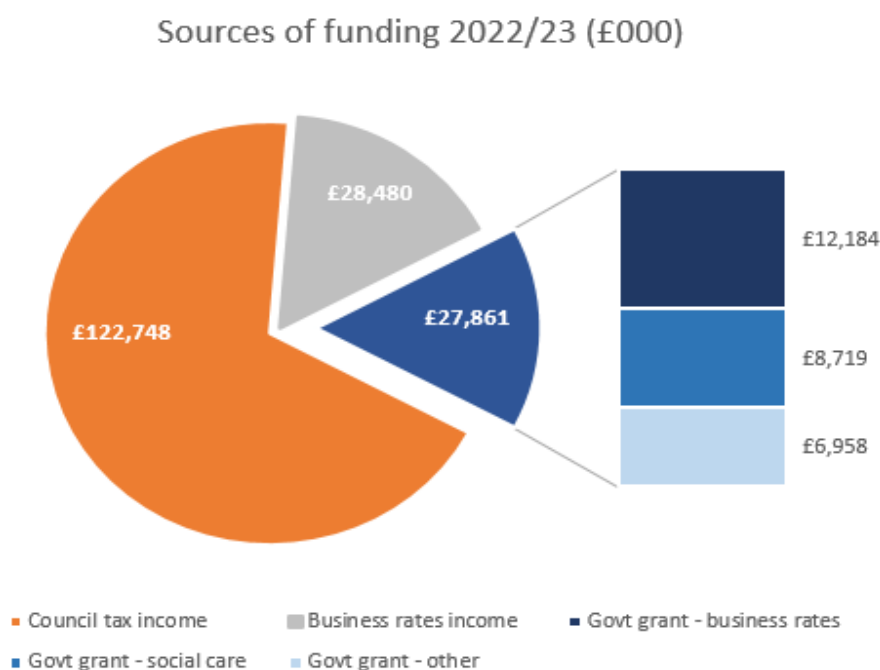
When developing financial plans across future years it is not possible for the council to forecast with complete certainty and so it has to rely on estimates, assumptions and judgement to support its plans. As these can be dependent on a range of variables or have a probability factor applied to them, then various potential MTFP outcomes are modelled.

Given the continuing uncertainties for the council in respect of both its funding envelope and its cost base these components are described within underlying working papers using the context of scenarios, showing a range of outcomes, with more refined values being used later within the process.

Work to review the underlying assumptions and update for material movements has started over recent months using information sources from within the organisation as well as broader external factors, and the following sections of the report provide an update on each of key areas.

3.2.1. Update on resources

In the current financial year the council has three main sources of funding which it uses to support its revenue budget, which are; council tax (£123m), business rates (£28m) and government grants (£28m) – all of which **total £179m** (excluding the £6m for town and parish precepts).



The government gives the council three types of grant;

- **£12m** - which is directly linked to business rate policy and activity;
- **£9m** - which is to help fund the cost of social care;
- **£7m** - the final category of grant is unallocated and can be used to support any area of the council's budget or spending plans, although does contain some time-limited elements.

Whilst the council holds a lot of information about the local income streams it generates each year and can forecast these, it often has to wait until much later in the process before it receives any indication from the government about future levels of funding that it will provide by way of grants.

In recent years the government has provided local government with annual grant allocations that have been fixed for a single year, rather than providing a settlement package that covers a multi-year period, which would better support financial planning.

However, in the Autumn of last year the government announced its Spending Review (SR2021), which covered a 3-year period to 2025. Councils were provided with their own specific grant allocations for the 2022/23 financial year and then headlines totals for the sector as a whole, for the following two years.

At the time the government indicated that it would proceed with some of the long-awaited changes to local government finance, such as the fair funding review or the levelling up agenda, as it is often now referred to. It was anticipated that this work would be started early in 2022 in readiness to influence the distribution of grant settlements to councils for years 2 and 3 of the SR2021.

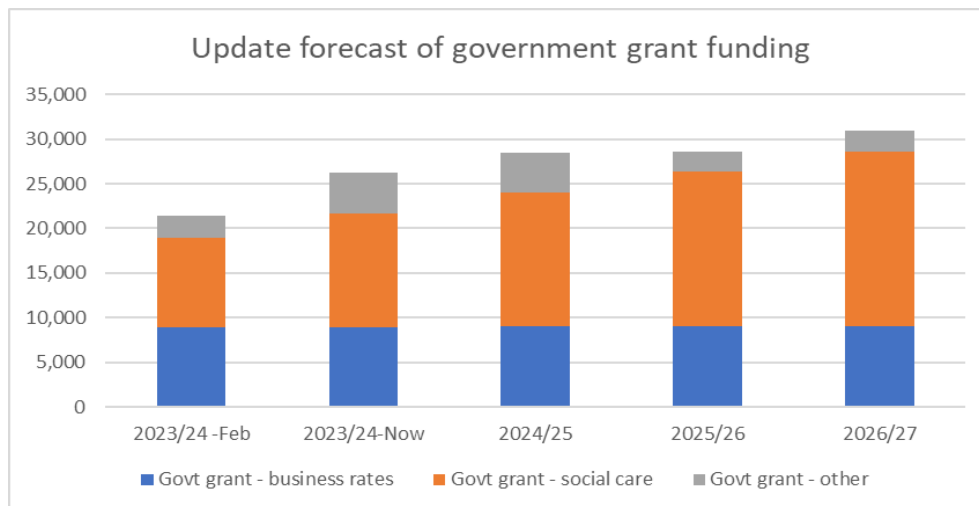
However, at this time no announcements on funding allocations or the long-awaited reforms have taken place as the government has been busy dealing with other priorities. Given that such reforms would take a long time to consult upon it is increasingly likely that they may be deferred, meaning that it is realistic to assume that the council will receive what is known as a rollover settlement, i.e. a funding package that has similar levels of funding to the current year, although inflated from the current baseline.

The council has therefore chosen to update the best-case scenario of its MTFP modelling earlier in the process and inflate some of the grant income streams that it expects to receive from the government at this point.

This approach is clearly a risk as there is no confirmation from the government to support these values however, prudent estimates have been based on a series of logical assumptions that are relevant to each specific grant, for example;

- **Revenue support grant** – rather than see this sum reduce as had previously been the case, the modelling recognises that this sum is included within the council's base funding level and so will continue into future years,
- **New homes bonus grant** – a similar approach has been taken to the revenue support grant, although actual numbers of new dwellings within the north somerset area have been reviewed to estimate a more realistic grant allocation,
- **Social care grant income for existing services** – these grants have been increased in each of the last 3 years at levels beyond inflation to take into account increased levels of demand and so rather than leave as a base level as is usually the case, it has been assumed that a similar increase will be applied in future years,
- **New grant for social care funding reforms** – last year the government confirmed that it would provide additional funding to councils in respect of new requirements associated with social care funding reforms. The MTFP currently assumes that the council will receive £2.3m more funding, which equates to the growth included within section 3.2 below and means that there is not a direct impact on the budget gap for next year. It should be noted, however, that this assumed £2.3m relates solely to estimated funding in relation to the "Fair Cost of Care" and the distribution mechanism

for this has not yet been agreed. In addition, the Council is expecting to receive an allocation from the published £771m in relation to the Care Cap and revised Means Test. Early indications are that this could be in the region of £3.8m. The MTFP will be updated in due course once further information is received.



The chart shows the impact of the council's updated modelling for government grant income within the MTFP which is an increase of approximately **£5m for 2023/24**, compared to the previous forecast included within the February 2022 projections.

The increased level of resources within the updated forecast will have a positive impact on the MTFP budget gap however, it does need to be recognised that this course of action will reduce the likelihood of the council receiving an unexpected 'windfall' or further increase in resources through the local government finance settlement when it is announced in December.

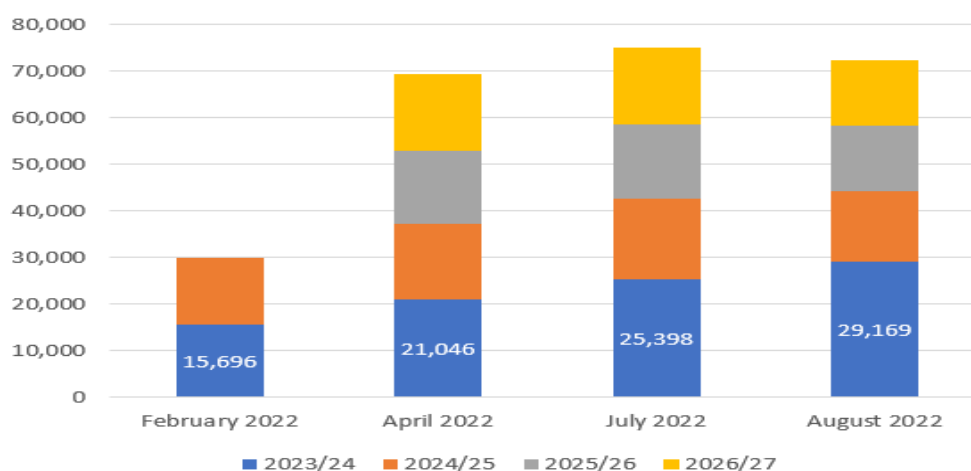
3.2.2. Update on pressures and additional spending - £29m

Assumptions have also made to forecast expenditure because whilst the council can control some of its costs by cash limiting areas of its budget, other elements are dependent upon national and economic drivers (such as inflation, interest rates, pay awards and pension charges) and also an ongoing and sustained demand for its services, as has been the case for areas like social care and home to schools' transport in recent years.

The budget monitoring report describes the impact of economic pressures such as inflation on the council's current year budget and given that many of these impacts are likely to continue into the medium term, they have also been reflected within the updated modelling shown here.

The council recognises that it has a degree of choice or flexibility in how it chooses to fund investment in priority areas or account for emerging risks however, after noting the significant impact that inflation has had on the updated forecasts, any opportunities to invest in anything other than core statutory services will be extremely limited and options so may need to be reconsidered at a later date.

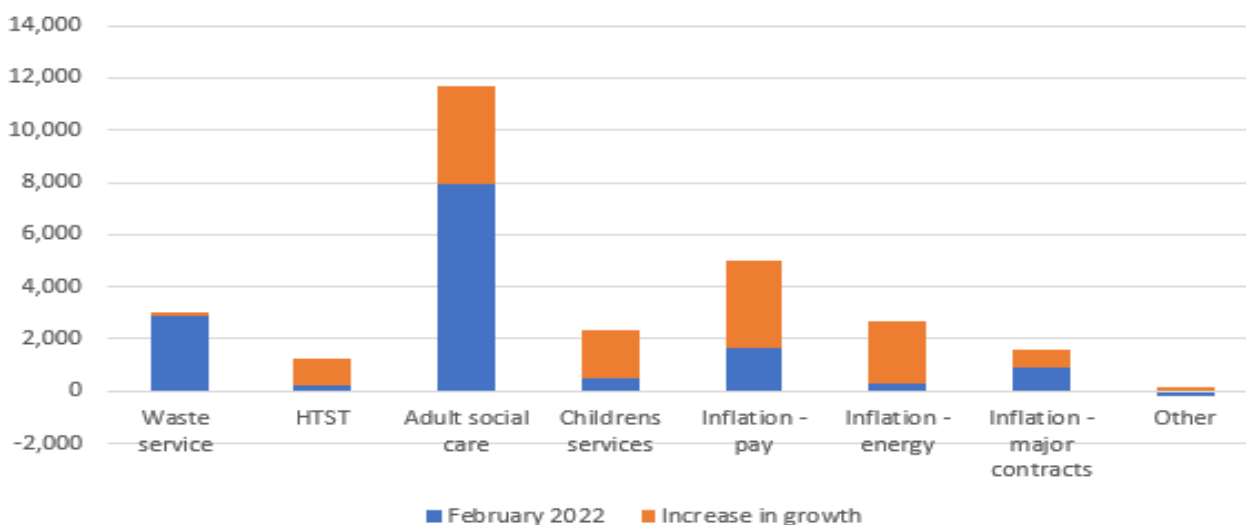
MTFP Growth Pressures



The chart shows how the council's modelling has been updated over recent months as it has reviewed each area of additional spending and risk. It can be seen that spending pressures have increased from an initial forecast of £16m in February, to over **£29m** now.

In order to provide an overview, the main elements of spending pressures that are currently reflected within the council's modelling are shown in the graph below. The blue shading denotes the items that were included within the MTFP in February and the orange shading indicates how the assumptions have changed over recent months.

MTFP - updated spending pressures



It is important to recognise that each of these items will continue to be reviewed on a monthly basis to ensure that they are fully supported by evidenced based calculations and assumptions wherever possible. If uncertainties remain then further modelling and sensitivity analysis will be undertaken to allow Members to feel confident that the budgets they consider for essential services for next year are robust.

The main areas of additional spending included within the MTFP are noted below.

Waste service - £3m

In September 2020, Council approved changes to the delivery model for its waste related services, moving away from an external contractor to instead creating its own local authority trading company, known as NSEC.

The business case supporting the decision and underpinning the Member briefings and reports, clearly recognised that that the costs of the new services would be higher than those paid to the previous contractor, although for a period of time they would be subsidised through a specific earmarked smoothing reserve.

The MTFP was updated to reflect these decisions and so for the last 2 years has recognised the increase costs of the new waste services within its spending plans. In previous years the service has delivered savings by way of increased recycling income and service efficiencies, which has helped to meet some of the additional costs and it is expected that further service related efficiencies will need to be included within the budget for 2023/24. It should be noted that these changes will be shown as savings plans against the base cost of delivery, to understand the decisions that will need to be taken to reduce the costs of delivering this service in the future.

Home to school transport - £1.2m

The latest forecasts show that the cost of delivering Home to School Transport services will increase again next year. The MTFP assumptions include a re-basing to reflect the increased demand not included within the base budget for the current year, further demand increases for children requiring placements from September 2022, an increase in contract costs for those contracts coming to an end within the next 6 months and a short-fall in the base budget for super inflation agreed in 2022/23.

Adult social care - £9.4m existing services (and £2.3m social care reforms)

A core component of the council's MTFP in recent years has been spending pressures in relation to Adult Social Care, which tend to fall into two main categories; increases in demand for our services and provider inflation. The latter is expected to be particularly significant in 2023/24, given the potential for an 8.6% increase in the National Living Wage, as well as the rising rates of general inflation.

Several new elements relating to the adoption of Social Care Reforms will be included within the council's MTFP for 2023/24 and will cover areas such as the implementation of the cap on care costs, the revised means test and also the "Fair Cost of Care". Whilst additional government funding will be provided for these additional responsibilities, the council is extremely concerned that the actuals levels of central government funding will be insufficient to cover our additional costs and lost income.

This is an extremely challenging situation as current levels of funding provided for existing adult social care needs are already insufficient.

Children services - £2.3m

The budget monitoring report being considered elsewhere on this agenda notes the forecast overspend in relation to children's placements. With much of these costs being on-going, they will need to be built into our considerations and planning for 2023/24.

Inflation on pay - £5m

When considering assumptions in respect of pay inflation over the medium term the council previously assumed an increase of 2%, an assumption that was similar to many councils across the country. However, that assumption now seems extremely low when compared to the seismic increase in inflation rates that have occurred over recent months. Although initially starting with energy, the economic situation has become a feature in many areas of the council's budget and is impacting on decisions relating to pay inflation.

The MTFP assumptions have therefore been updated to reflect an increase of 3% across the medium term, along with the short-fall in funding that will arise should the current pay offer for the 2022/23 financial year be accepted, as this is higher than the sum reflected within the base budget. These costs could increase further if the offer is rejected and revisions are made in the future.

Increase in energy prices - £2.7m

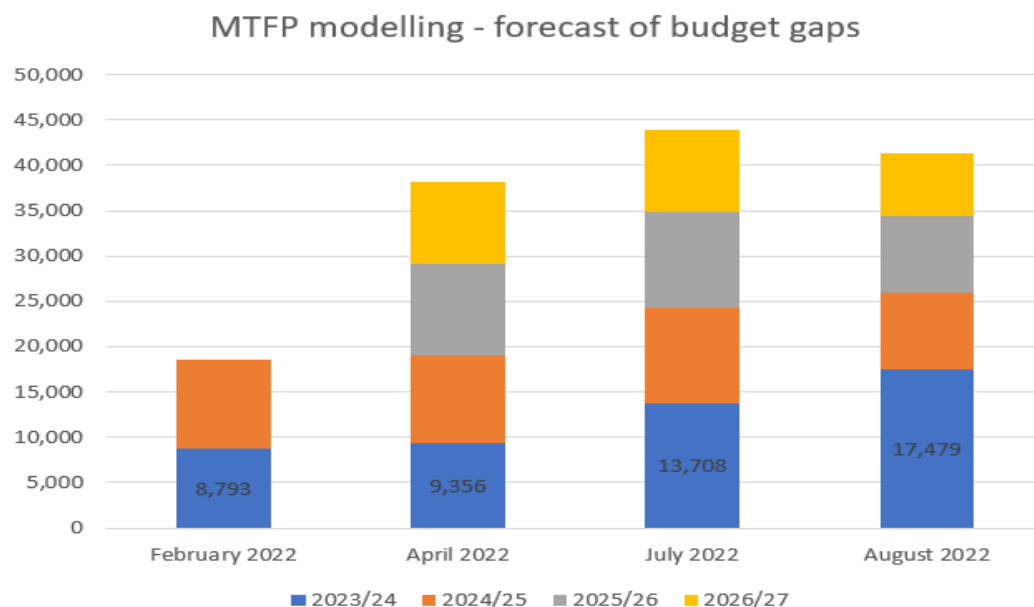
The updated MTFP modelling reflects the latest energy prices that are being tracked by the consultants through the procurement exercise, although they will be updated when a price has been agreed. This increase is substantial when compared to the base sums currently being paid and has the capacity to rise further if forecasts are to be believed.

Inflation on major contracts - £1.6m

Many of the indices used to calculation inflation provisions within existing contracts are significantly higher than rates published in February and whilst they continue to be challenged, the council must recognise its initial obligations. Some increases that have materialised during the current year may need to be reflected within the MTFP to cover any short-falls, although in areas such as fuel, it is hoped that some deflationary impacts may be realised. All rates will continue to be followed throughout the remainder of the year and updates fed into the MTFP.

3.3. Revised budget gap

Once the council has calculated its spending plans for the MTFP period then it can compare these to the resource forecasts it has developed to understand the scale of a potential budget gap. It is usual for councils to develop their financial plans in this way and also to describe their progress in terms of funding gaps.



The chart shows how the council's modelling has been updated over recent months and provides an indication of the latest budget gaps being considered across the revised period of the Plan.

A further and more specific analysis of this modelling is shown in the table below as individual elements of the projected budget forecasts are provided.

| MTFP FINANCIAL SUMMARY | MTFP - AUGUST 2022 | | | | |
|---|--------------------|----------------|----------------|----------------|----------------|
| | 2022/23 | 2023/24 | 2024/25 | 2025/26 | 2026/27 |
| | £000 | £000 | £000 | £000 | £000 |
| - Resources - Grants, Council Tax & Business Rates | 179,090 | 188,512 | 194,618 | 199,380 | 206,330 |
| - Current Budget - base spending position | 171,317 | 179,090 | 188,512 | 194,618 | 199,380 |
| - Budget pressures, increased spending and investment plans | 16,396 | 29,169 | 15,074 | 13,982 | 14,221 |
| - Remove Covid & other one-off impacts | -4,466 | -1,553 | 0 | 0 | 0 |
| - Savings proposals and increased income | -4,157 | -715 | -505 | -690 | -440 |
| - Revised Spending Base | 179,090 | 205,991 | 203,081 | 207,911 | 213,161 |
| - Budget Gap | 0 | -17,479 | -8,463 | -8,531 | -6,831 |
| | | | -41,304 | | |
| Core Assumptions for Council Tax Increase: | 2.99% | 2.99% | 2.99% | 2.99% | 2.99% |
| - North Somerset Council Services | 1.99% | 1.99% | 1.99% | 1.99% | 1.99% |
| - Adult Social Care Precept | 1.00% | 1.00% | 1.00% | 1.00% | 1.00% |

3.4. Approach to closing the budget gap

Budget reports over recent years have shown that the council has faced many difficult decisions as it has been necessary to balance its books and increase spending in areas of need and re-direct resources to fund costs associated with increased levels of demand for services, as well as the increased costs of core contracts, most notably in areas such as adult social care and home to schools' transport.

This has occurred at the same time as receiving marginal increases in funding from the government through annual settlements. Reviews show that the council has never been provided enough money to cover all of its financial pressures which has meant that savings plans or budget reduction ideas have had to be included within the budget.

The council's latest financial modelling shows that it is facing a similar situation for the year ahead, although arguably, the backdrop of the worsening economic position and spiralling inflation, means that the challenges have never been greater and so it is essential that robust financial strategies are put in place to ensure that the council can deliver balanced budgets in the future.

In the first instance one of the councils' main objectives is to reduce its budget gap and keep the need for savings at the lowest possible levels, and this has been achieved by operating a financial strategy which has included the following core principles;

- **Managing its biggest areas of demand-led spending**:- trying to reduce the rising costs of services where possible by challenging any budget increases. To make sure that we don't challenge too far, we continue to build budgets that are affordable, but also safe and robust as they are linked to business modelling projections. We have introduced 'cost and volume' models in areas such as social care, waste services and home to schools transport, as these can clearly link projected numbers and volumes of activity or service provision, with the costs that are paid to providers;
- **Reducing areas of choice or deferring non-essential spending** – the council will shortly be reviewing its capital investment plans to prioritise spending, focusing on those areas with the greatest need within our communities;
- **Maximising the income it can generate** – the Executive understands that it needs to take a commercial approach to decision-making in respect of the services that we deliver to the public. This means that we actively encourage and support changes that make sure that our services are delivered efficiently and economically as possible; and also that customers contribute a realistic price through any fees and charges that they may be required to pay.

We recognise that changes for our customers in these areas may be difficult to understand, but we can no longer afford to subsidise discretionary services when there are people who really do need to receive statutory services such as care in their homes or children who need to be protected and looked after;

- **Maximising local resources** – the council understands that it can develop sustainable local income streams by supporting and delivering economic prosperity within communities, specifically through the delivery of new homes and businesses within the area;

As there will inevitably still be a large budget gap after this process, the council will be required to introduce some savings plans in order to balance the budgets across the medium term.

Although the Executive have a clear aim in that they would like to continue to protect front-line services from direct cuts in service levels, they recognise that there will be some hard choices and decisions that need to be made, given the unprecedented levels of additional costs that the council is likely to face in the coming years.

Whilst the approach continues to be supported by both officers and Members, it clearly becomes ever more challenging as time goes on as the opportunities to deliver further savings from efficiencies reduces, which does mean that the council will need to identify other alternatives.

Over recent months the Corporate and Directorate Leadership Teams (CLT, and DLT's), have continued to work on closing the budget gaps across the period. This process initially included allocating savings targets to each of the directorates to ensure that all services and all areas of the council could help to contribute to the financial challenge in a fair and consistent way, although was later adapted to understand the potential impacts on the council if all areas of the council's budget were to change by 10% because of the deterioration in the council's medium term forecasts.

The outcome of this work is currently being assessed and validated to ensure that proposals are supported by evidenced based plans and are deliverable within the required timeframes and will be shared within the next update report.

3.5. Timetable and next steps

The formal and informal milestones associated with the MTFP process are as follows;

- Report to Council, November 2022 – emergency budget for 2022/23 – which may impact on the MTFP in terms of updated spending plans and savings proposals
- Report to Executive, December 2022 – updated financial summary incorporating draft savings proposals;
- Scrutiny – All Member sessions potentially planned for October and December
- Taxbase, December 2022 – Executive Member decision on the forward plan
- Provisional local governance finance settlement, December 2022
- Other engagement – December and January, including equalities forum
- Report to Executive, February 2023 – recommended balanced revenue and capital budgets for 2023/24 to Council; detailed Equality Impact Assessments; consideration of alternative budgets;
- Report to Council, February 2023 – approval of the 2023/24 revenue and capital budgets along with council tax levels and bandings

4. Consultation

The government, through its legislative framework, clearly expects that local authorities will be able to demonstrate that they have in place mechanisms to ensure that 'representatives of local

people' are being appropriately informed, consulted or involved in services, policies or decisions that affect or interest them.

There are many aspects of service delivery which impact on our residents, customers and other stakeholders and members of the public, and so we recognise that it is our responsibility to ensure that any changes we make to them through the budget, need to be considered and consulted upon. Failure to do so adequately could result in aspects of the budget being subject to legal challenge.

The council is fully committed to ensuring that residents, business and other stakeholders from across the district are included within its MTFP planning, through scrutiny, consultation and engagement plans.

The council has recently had discussions within the Department for Levelling Up, Housing and Communities (DLUCH) in order to share details of some of the financial issues that it is currently experiencing. During the meeting the council also shared the range of strategies and potential choices that it will need to consider in the future, in order to balance the budgets and stabilise its financial position.

As DLUCH provide specific support and advice to those councils experiencing difficulties, whether on an informal basis, or potentially more formally by issuing a S114 notice, they advised that they would recommend following a similar approach that the council has outlined and described in section 3.4 above.

They also advised that in the past they have actively encouraged other councils who were facing similar issues to ensure that they have fully utilised their local powers, specifically in relation to decisions surrounding maximising local income streams and improving service efficiency. Ultimately the governments financial assessment processes would firstly look at what steps local authorities have taken to minimise the severity of the impacts they are facing, before they consider what additional support or interventions that they could provide.

5. Financial Implications

Financial implications are contained throughout the report.

6. Legal Powers and Implications

The Local Government Act 1972 lays down the fundamental principle by providing that every local authority shall make arrangements for the proper administration of their financial affairs including balancing their budgets each year from within their own resource allocations, although further details and requirements are contained within related legislation.

The **setting of the council's budget** for the forthcoming year, and the ongoing arrangements for monitoring all aspects of this to ensure that the councils spending is within the approved limits, is an integral part of the financial administration process.

Further requirements are contained within the Local Government Act 1988, Section 114 (3) which provide for instances whereby the chief finance officer of an authority makes a judgement that the expenditure of the authority in a financial year is likely to exceed the resources available.

7. Climate Change and Environmental Implications

Both of the reports presented to the Executive at this meeting, in terms of monitoring of the budget for the current year and also **setting budgets for future years**, will be impacted by the increasing costs of energy, which does provide an opportunity to highlight these issues.

Whilst there are no specific climate related impacts to note at this stage, it is clear that climate and environmental related implications will be at the forefront of our thinking when considering underlying service policies, priorities and strategies associated with the revenue budget, as well as through formulating investment plans and determining options to make reductions in our energy usage and associated costs to ensure a more sustainable future.

8. Risk Management

In setting the revenue and capital budgets, the council must take into account the known key financial risks that may affect its plans and these will either be explicitly provided for within the base budget or be offset and held against the unallocated contingency budget or the council's general fund working balance.

The council recognises that known risks, together with the unconfirmed, but anticipated timeframes surrounding funding settlements, does attract a high degree of risk in terms of making specific decisions around its financial planning. However, it is important to recognise that the Corporate Plan and MTFP are vital tools to help align effort across the organisation to ensure that services are all pulling in the same direction so that it can be prepared for whatever the outcomes of national policy turn out to be.

Officers will continue to test the impact of varying key assumptions in the medium term financial strategy to assess the sensitivity of the ranges of indicative budget figures. This informs decisions about the level of working balances needed to provide assurance as to the robustness of the budget estimates.

An MTFP risk register is continually updated which reflects the most significant areas of the council's financial planning, although at this time some of the most significant risks are shown below;

- Uncertainty about levels of funding from central government in future years,
- Continued uncertainty about future reforms of local government finance and the impact this may have on the council's resources,
- Continued uncertainty about the long-term funding solution for adult social care, as well as the potential impacts that may arise in this area following the Social Care Reforms, especially potential short-falls in funding in relation to the "Fair Cost of Care", the Care Cap, and changes to the means test
- Ongoing uncertainty across a range of economic factors that are likely to drive up cost in key areas such as pay, energy and third-party contracts, as well as impact on the sustainability of providers and partners, e.g. notably those who provide social care services and also bus, transport and leisure related services,
- Potential increases in demand in areas which are difficult to control, including adult and children's social care and home to school transport (especially for children with special educational needs and disability SEND),
- Ability to facilitate economic and housing growth to increase income and generate wider economic benefits,
- Ability required to deliver change through transformation and innovation and capture the financial benefits,
- Impact of major capital projects,

In addition, there are specific concerns across the sector relating to the possible end of the statutory override period in relation to the Dedicated Schools Grant deficit. This is currently

set for the end of March 2023, although the Government is currently consulting with all councils about the potential impacts should that go ahead. Alongside this, the council is due to begin its “Safety Value” negotiation with the Government as to how, in the medium term, the high needs block of the DSG can be brought into in-year balance and how, as a consequence, the Government may contribute to reducing the historic deficit.

9. Equality Implications

In considering its vision, ambitions and financial planning the council is mindful of its Public Sector Equalities Duties to have due regard to the need to:

- eliminate unlawful discrimination
- advance equality of opportunity; and
- Encourage good relations between groups.

As per previous years, we will undertake thorough Equality Impact Assessments, (EIA), for all significant budget savings plans which will be incorporated within the relevant budget papers throughout the MTFP process.

10. Corporate Implications

The Corporate Plan and MTFP, along with the supporting financial monitoring processes and performance management framework are vital tools to help align effort across the organisation and ensure that services are all are focused on delivery to agreed community and organisational priorities.

With continuing financial pressures and demands for services, it is essential that the councils’ limited resources continue to be prioritised and allocated in line with the identified priorities. The Corporate Plan continues to be reviewed in the light of emerging risks and pressures and steps are being taken to assess timeframes and monitor key outcomes.

11. Options Considered

None at this stage – the council is legally required to set a balanced budget and to implement a robust financial framework to ensure that spending is aligned to available resources and all available options to achieve this are considered within the details shared above.

There will be opportunities later in the process to describe savings proposals that were considered as options to balance the budget for future years, although they were not progressed.

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Appendices:

Appendix 1 Glossary and Terminology

Background Papers:

Exec Report – February 2022, Medium Term Financial Plan and Revenue Budget update

Council Report – February 2022, Council Tax Setting 2022/23

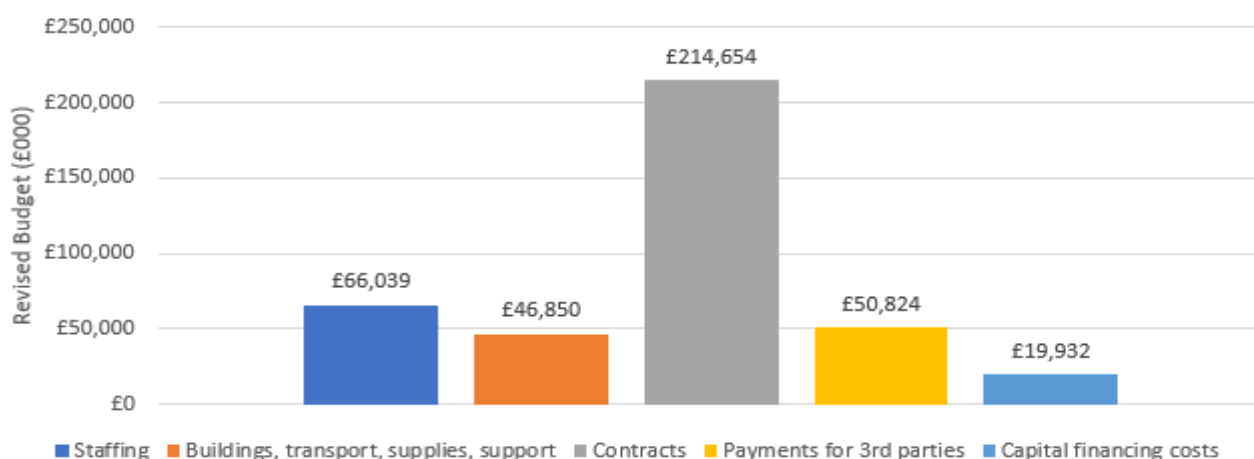
Appendix A - Glossary & Terminology

General Fund Revenue Budget - this covers expenditure and income relating to the day to day delivery of core services and functions. The table below shows that for 2022/23 this equates to £398.299m of gross spending across all of our services, with a net revenue budget of **£185.475m** including town and parish council precepts, or a net budget of **£179.090m**, excluding the £6.384m for town and parish precepts.

| | REVISED BUDGET | | | |
|---------------------------------------|--------------------|----------------------|---------------------|----------------------|
| | Expenditure £ | Income £ | Reserves £ | Net £ |
| Service Expenditure Budgets; | | | | |
| Adult Social Services | 114,854,661 | (38,760,546) | (923,481) | 75,170,634 |
| Children's Services | 42,128,489 | (14,534,612) | (617,289) | 26,976,589 |
| Schools & DSG Budgets | 52,470,994 | (52,470,994) | 0 | (0) |
| Corporate Services | 82,541,279 | (53,103,387) | (1,976,592) | 27,461,300 |
| Place Directorate | 60,436,395 | (25,318,145) | (5,038,283) | 30,079,967 |
| Public Health & Regulatory Services | 16,014,843 | (11,909,951) | (2,730,732) | 1,374,160 |
| Capital Financing | 15,350,590 | (4,143,590) | 0 | 11,207,000 |
| Precepts & Levies | 6,683,897 | 0 | 0 | 6,683,897 |
| Non Service Budgets | 7,818,264 | (1,296,980) | 0 | 6,521,284 |
| Total Net Revenue Budget | 398,299,411 | (201,538,205) | (11,286,377) | 185,474,830 |
| Total Revenue Budget Resources | 0 | (182,378,102) | (3,096,728) | (185,474,830) |
| NET REVENUE BUDGET TOTALS | 398,299,411 | (383,916,307) | (14,383,105) | (0) |

The chart below shows the type of expenditure included within the £398m gross revenue budget and what we spend this money on.

Types of expenditure planned for 2022/23 (£398m)



Income totalling **£202m** is received into the revenue budget during the year from a variety of sources and is used to offset gross expenditure in order to reach the 'net revenue budget'. This not only includes rental income, contributions, recoveries, reimbursements and interest, but also **£39m from fees and charges** for some of our services such as planning, building control, regulatory services, car parking, garden waste and adult social care. The income received from service users goes directly to the relevant budget and helps to defray the cost of providing the services.

One other income stream included within the net revenue budget is ‘grants’ and this is an important source of funding for the Council as we expect to receive **£137m of grant income** during the current financial year, which equates to 68% of the total income receivable during the year. Material sources of grant income are provided by Government departments and include the following;- £52m Dedicated Schools grant, £39m Housing Benefit grant, £10m Public Health grant, £11m Better Care Fund grant which is used to support adult social care related services.

Over recent years the Council has spent increasing amounts of money on social care activity reflecting the growing demand for these services as well as an increase in the complexity of needs for both adults and children. Associated pressures are Special Educational Needs and Home to Schools Transport services.

Original budget – this is the budget initially approved by Council in February 2022. The budget can be changed or updated throughout the year by way of a budget virement, often as a result of financial responsibility being transferred between service areas or to enable the Council to take into account new funding and spending opportunities. **Virements** are added to the Original Budget, and then form the **Revised Budget** throughout the financial year. The Council prepares a monthly review and analysis of budget forecasts during the year, which are shared with the Executive and the Corporate Leadership Team.

Funding Sources – these are also known as financing resources and are essentially income streams which the Council can use to fund the net cost of the services it provides, they include the following;

- **Council Tax Precept** – this is the annual charge levied by the Council on the Collection Fund and each year and is subject to ‘capping’, which is a term used to describe the maximum increase that the Government will allow councils to apply year-on-year.
- **Council Tax Income** – the Council can estimate how much council tax income it is likely to receive each year by understanding the following elements:
 - Council Tax Base – the overall total number of households in the area, the number of properties within each of the council tax bandings and also a forecast of housing growth
 - Council Tax Precept – annual charge per household, which is subject to a maximum annual increase
 - Discounts and exemptions – awarded to individuals in line with approved policies
 - Collection Rate – which is largely linked to how successful councils will be in collecting their council tax although also provides cover for changes in circumstances or timing differences in core assumptions
- **National Non-Domestic Rates (NNDR)** - this is also known as ‘Business Rates’ and is a national scheme whereby businesses pay an annual charge based upon the rateable value of their property and a national ‘multiplier’. Income is levied at a local level and councils are allowed to retain a share of the income it generates. For North Somerset this means the following;
 - **National system** – 49% of the income is retained by North Somerset Council; 1% is allocated to the Fire Authority and 50% is retained by Central Government
 - **City-Region Deal Pooling** – 100% of the business rates income generated within the ‘enterprise area’ is retained and pooled with other councils within the region. This income is redistributed back to the councils to fund strategic capital investment plans as well as support the revenue budget

- **Business Rate Income** - the Council can estimate how much business rate income it is likely to receive each year by understanding the following elements:
 - NNDR Tax Base – the total rateable value of business-related properties in the area, the type of businesses they are and also a forecast of potential growth
 - Multiplier – this is set nationally each year and drives a maximum annual price related increase
 - Reliefs, exemptions and appeals – awarded to businesses in line with national and local policies and guidance. The council may be compensated for reliefs awarded to businesses through national schemes
 - Collection Rate – which is largely linked to how successful councils will be in collecting their business rates although also provides cover for changes in circumstances or timing differences in core assumptions
- **Revenue Support Grant (RSG)** – this is received directly from Central Government and is based on the Settlement Funding Agreement which was determined following an analysis of spending requirements across all councils in England. The Settlement Funding Agreement can be set annually or for a longer period in line with national objectives. Clearly more certainty is provided within a medium-term outlook should the funding periods extend beyond one-year. A 3-year Spending Review was shared by the Government for the period 2022 to 2024, although this only provided confirmation of the Revenue Support Grant for the 2022/23 financial year.
- **New Homes Bonus Grant (NHB)** – this grant was introduced in 2011 and is paid to councils across the country to reflect and incentivise housing growth within their areas. Allocations are based upon new-build homes, conversions and long-term empty homes brought back into use and can be paid over multiple years. The Government has undertaken several reviews of the NHB scheme and has signalled its intention to change or remove the scheme in 2022/23.
- **Adult Social Care Support Grant** – the demands and costs associated with providing adult social care services have grown significantly over recent years and the Government has provided additional resources through a series of mechanisms to help fund these pressures;
 - Joint funding arrangements, e.g. the Better Care Fund
 - Locally generated decisions, e.g. levying an Adult Social Care Precept to taxpayers
 - Direct grant award – **Adult Social Care Support grant**

Direct national funding is allocated to councils on an annual basis as part of the Local Government Finance Settlement and distributed through the adult social care relative needs formula.

- **Section 31 Grants** – are made from Central Government, determined on an annual basis and confirmed through the Local Government Finance Settlement. The largest S31 grants for North Somerset Council in the current financial year relate to **Business rates**. These relate to the reimbursement from the government for reduced business rates income arising from national policy decisions, e.g. small business rate relief, rural services, transition grants.

Section 114 Notice (S114) – within the Local Government Finance Act 1988, Section 114 (3) dictates that: “the chief finance officer (CFO) of a relevant authority shall make a report under this section if it appears to him / her that the expenditure of the authority incurred

(including expenditure it proposes to incur) in a financial year is likely to exceed the resources (including sums borrowed) available to it to meet that expenditure”.

This means that the CFO has the power and responsibility to legally suspend spending for a period of time if they judge the Council does not have a balanced budget or the imminent prospect of one. It means that **no** new expenditure is permitted, with the exception of that spending which is linked to statutory services, including safeguarding vulnerable people. Existing commitments and contracts would continue to be honoured.

This would be a very serious matter and Councillors would have 21 days from the issue of a S114 notice to discuss the implications at a Full Council meeting. Mitigation measures could include a variety of options, for example; the establishment of spending panel to consider all items of expenditure, discussions with central government, stop delivering non essential services, stop delivering capital investment, appointment of external advisors to oversee strategic decisions and governance arrangements.

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North Somerset Council

Report to the Executive Committee

Date of Meeting: 7 September 2022

Subject of Report: Local Plan 2038 update following consultation on Preferred Options

Town or Parish: All

Member Presenting: Councillor Mark Canniford, Executive Member for Placemaking and Economy

Key Decision: No

Reason: Report is for information and discussion

Recommendations

- To consider the consultation response to the Local Plan Preferred Options Consultation and the comments of Place Scrutiny.
- To consider the main themes and issues to be addressed in the next stage of the Local Plan 2038.
- To confirm the approach to be taken and the plan timetable.

1. Summary of Report

- 1.1 Consultation on the Local Plan 2038 [Preferred Options](#) took place between 14 March and 29 April 2022. This report summarises the principal issues which emerged from the consultation and the implications for the next stage of plan making. These were considered by the Place Policy and Scrutiny Panel on 13 July and the draft minutes of the meeting included in this report.
- 1.2 The key challenge at the next stage of plan making is the identification of the housing shortfall in relation to the government's standard method. Accommodating this scale of growth given the constraints in North Somerset is extremely challenging, and there is also uncertainty around anticipated national planning changes.

2. Policy

- 2.1 The Local Plan will provide the land use framework for the delivery of the key aims and priorities of the Corporate Plan, including measures to help address the climate emergency and nature emergency.
- 2.2 The planning system is plan-led and local authorities must prepare up-to-date local plans to provide a positive vision for the future of the area; a framework for addressing housing needs, and other economic, social and environmental priorities and a platform for local people to help shape their surroundings.

- 2.3 Local Plans must be kept up to date and correctly reflect government guidance. The existing Local Plan which consists of the Core Strategy, Site Allocations Plan and Development Management Plan covers the period to 2026. This is currently being reviewed and updated. The new Local Plan will cover a fifteen-year time frame from 2023 - 2038.
- 2.4 Government has announced a review of national policy as part of the Levelling Up and Regeneration Bill introduced into Parliament on 11th May. A prospectus on revisions to the National Planning Policy Framework (NPPF) was expected in July but is now anticipated in September.

3. Details

- 3.1 Local Plan preparation is a statutory process requiring several stages of consultation and engagement. The process for drafting a new Local Plan for North Somerset was launched in March 2020. Later that year two high-level consultations were undertaken focusing on the challenges the Local Plan would have to address (Challenges for the Future) and the broad spatial options (Choices for the Future).
- 3.2 The response to the Challenges and Choices consultations and an assessment of emerging evidence enabled the formulation of a preferred spatial strategy which would provide the framework for the next stage. This was agreed by the Executive on 28 April 2021. The Preferred Option document was subsequently prepared in accordance with the agreed spatial strategy for consultation along with supporting documents which provided the evidence and justification for the policies and allocations within the emerging plan. It did not plan at that stage to seek to allocate land for the Council's full housing requirement but sought views on how that requirement might be met.
- 3.3 The Local Plan Preferred Options consultation document represented the first full draft of the new Local Plan. It contained:
- **Strategic Policies:** These are expected to set out the overall strategy for the pattern, scale and design quality of places and make sufficient provision for housing, employment and other uses, infrastructure, community facilities, conservation and the enhancement of the built and historic environment and address climate change and mitigation. These are high level policies which provide the framework for more detailed policies in the plan and for neighbourhood plans.
 - **Locational Policies:** These comprise land use allocations and other designations which are identified on the Policies Map.
 - **Development Policies:** These are the detailed development management policies which cover a wide range of issues including design, residential infilling, climate change, net zero construction, renewable energy, drainage, transport, economic development, town centres, green infrastructure, affordable housing, rural development and infrastructure delivery.

Consultation statement

- 3.4 The Preferred Options Consultation Statement has been published and describes how the engagement took place in terms of the exhibitions and other events, publicity (including press and social media) and consultation tools. Over 4000 comments were received from over 700 respondents. Around 500 people responded online whilst around 200 responded by email. Respondents included town and parish councils, individuals, developers or their agents, stakeholders such as Bristol Airport, Bristol Port, Bristol University, organisations such as the Woodland Trust and CPRE, local community groups such as Backwell Residents Association (BRA) and Churchill and Langford Residents Action Group (CALRAG), neighbouring authorities such as Bristol City Council and statutory consultees such as the Environment Agency, Historic England, English Highways and Natural England.
- 3.6 The responses were summarised in the report to the Place Policy and Scrutiny Panel on 13 July. Most comments (1,555) were submitted in relation to the Strategic Policies. The following summarises the main concerns and issues raised in relation to strategic policies as summarised in the Consultation Statement. There was quite a bit of overlap in relation to comments received on these policies given the interrelationships between them.

SP1: Sustainable development

There was broad support for the high level principles contained in the policy but some concern regarding how effective in practice they would be in terms of providing clear guidance and how they are reflected in the other policies and proposed allocations set out in the plan. While the delivery of sustainable development was accepted as being a fundamental principle, some felt that as this was already set out in government guidance, the policy was unnecessary.

Some representations considered that the policy should be redrafted to be more clearly related to the other policies and the requirements made more specific rather than being presented as a checklist. Others felt that the policy should be strengthened to emphasise the climate emergency and commitment to net zero commitment.

There was quite a bit of overlap between comments received to this and several other strategic policies, particularly SP2 climate change, SP3 spatial strategy and SP8 housing which demonstrated some confusion between the scope of each. A number of respondents used the policy to demonstrate how in their view it was not being consistently applied in terms of, for example, development in villages (especially Backwell), use of Green Belt and green field sites, and implications for car use and biodiversity.

SP2: Climate change

There was a clear distinction between those representations who supported the approach and felt that it should go further, and those who expressed concerns about its deliverability. Supporters of the policy emphasised the imperative to act on climate change, the importance of the net zero and links to the nature emergency and how this should lead to a fundamental reappraisal of the form and location of new development. Others, particularly from the development industry raised concerns about the lack of viability evidence and how this might impact on delivery. Others questioned the net zero approach and the need for local standards and whether the policy was justified given changes to building regulations. There were concerns that the policy provided insufficient flexibility and also that the policy requirements lacked detail.

SP3: Spatial strategy

Policy SP3 sets out the broad framework for where development should be located and the themes covered often overlap with other strategic policy areas. In respect of those respondents who indicated that they supported the policy with amendments, there were a range of views submitted in terms of the degree of support for the strategy and which aspects they had issues with. There was often a dichotomy of views presented on the principal objectives of the strategy depending on the perspective of the respondent, with largely the local community view contrasting with the development industry promoting sites.

Overall the spatial strategy was broadly supported as the framework for delivering sustainable development. The prioritisation of previously developed sites, urban sites and optimising densities were supported, as was the principle of wherever possible locating development which was easily accessible to services, facilities, jobs and good public transport. There was a general recognition that the scale of development at villages and in the rural areas should be relatively less, and that Green Belt should be considered last.

However, while there was broad high-level agreement on the principles, there was a wide range of views on how these should be interpreted in practice. In particular, what was the appropriate scale and location of development in villages and whether this could or should be restricted to 'local community needs', whether Green Belt release was appropriate and the scale and type of development which might be acceptable, and whether development on land at risk of flooding (with appropriate mitigation) was preferable to Green Belt.

These issues are bound up with the scale of the housing challenge facing North Somerset. The Preferred Options acknowledged that there was a significant shortfall in relation to the standard method target and much of the response from the development industry in particular was in relation to ways of increasing capacity.

SP6: Villages and rural areas

There was concern from many communities that the approach to development in rural areas was too permissive and was in conflict with the broader strategic principles relating to sustainable development and climate emergency. Many responses related to the need to resist speculative development pressures in villages and there was concern that the proposed allocations in the plan were inconsistent with the policy as set out in SP6. However, there was significant support from communities and residents for the new policy approach which no longer allows development sites to come forward adjacent to settlement boundaries. It was felt this give communities more certainty regarding what development will be coming forward and stop speculative development.

In contrast many developer representations felt the approach was too restrictive and that there should be more flexibility such as by retaining the approach which allowed development adjacent to settlement boundaries. Others felt we should be encouraging growth at sustainable villages to provide deliverable housing sites to meet local needs and to support local facilities.

SP7: Green Belt

The policy received strong views both for and against the use of Green Belt land. On the one hand there were representations questioning whether all available, achievable, and sustainable development options on non-Green Belt land had been fully considered, especially brownfield land, higher densities and areas at risk of

flooding (with suitable mitigation). It was not clear that exceptional circumstances had been demonstrated and that the proposed allocations had identified the most sustainable locations. Some argued that Green Belt release should be opposed given the climate change and nature emergencies and that these sites were important for reasons such as wellbeing and the retention of green infrastructure.

Others took the view that it was appropriate to use Green Belt. Some argued that using Green Belt should be sequentially preferable to development elsewhere, and several alternative Green Belt locations were proposed for development. These included employment sites such as at the Airport and Port.

There was a suggestion that the land lost should be replaced by new Green Belt, possibly extending to the Mendip Hills AONB, but also the view that if you didn't make allocations in the Green Belt, then there was no need to propose an extension at Nailsea/Backwell. Others responded with the view that the release of Green Belt sites should be phased, that new developments should exhibit exceptional sustainability credentials while remaining Green Belt should be used positively such as for biodiversity.

Where Green Belt releases were proposed there were strong objections raised by local communities.

SP8: Housing

There were many responses in relation to the overall housing target set out in the government's standard method. Many felt that the approach was flawed and should be challenged and wasn't appropriate given the constraints within North Somerset. Several responses from the development industry emphasised that the target was a minimum and recommended that this should be increased to reflect economic aspirations, support affordable housing delivery, provide flexibility and choice and take account of any unmet needs from Bristol (22,968 dwellings plus Bristol overspill was proposed).

The affordable housing target was both supported and challenged. There was general acknowledgement that there was a need for more affordable housing but concerns about the lack of viability evidence and the role of First Homes. Many comments related to the broad location of new housing. This included support for or opposition to development in the Green Belt or in areas at risk of flooding. There was much comment in relation to the amount of development which was appropriate within villages. Many communities felt that the balance was wrong and that there was too much growth proposed for the rural areas. Many developers argued that villages were sustainable locations and that more sites needed to be identified, particularly in order to provide a supply of easily deliverable sites.

The Preferred Options acknowledged that there was a shortfall in relation to the amount of housing required and a large number of representations were received either supporting the draft allocations or proposing alternative sites.

SP10: Transport

Many of the comments on this strategic transport policy related to proposed growth in key locations particularly proposed growth at Nailsea and Backwell, and the other strategic growth locations.

Many of the concerns centre on the existing congestion issues experienced in the area as well as the current propensity for car use. Whilst the principles enshrined

within the policy to promote more sustainable modes of travel were generally supported, there is some concern that these will not be delivered and what the impact of proposed growth will be.

General concern over the perceived absence of traffic assessment and detail regarding the transport strategy. Also concern over the deliverability of proposals including costing.

- 3.7 The locational policies received 933 comments across all the policies. The most comments were in relation to the policies relating to the strategic locations of Yanley Lane, Wolvershill and Nailsea/Backwell, as well as the Settlement Boundary and Green Belt policies. Below is a summary of the key concerns and issues raised in relation to some of these policies.

LP1: Strategic Location – Wolvershill (north of Banwell)

Some comments focus on the principle of development in this location including some suggestion that housing is preferable closer to Bristol, and that too much growth is proposed in this area. Conversely some support due to proximity to Weston-super-Mare, such as for employment access and infrastructure such as Worle train station.

Potential developers of the strategic site expressed broad support but questioned whether the number of dwellings should be expressed as a minimum, and whether there was potential for increased capacity on this site, and also to reduce the proposed scale of employment provision.

Some support for the principles of development as identified in draft Policy LP1 and features such as the proposed Strategic Gap between Banwell and the new development. Also support for the recognition of importance of green infrastructure, for habitat, environmental, and recreational benefit.

Significant concern over proposals related to transport and highway impacts. Traffic concerns include reference to the impacts of the Banwell Bypass on nearby communities, and also potential of closing Wolvershill Road to through traffic. Some comments referenced the need for additional transport mitigations including the J21 relief road. In general, with comments received to this, and other policies in the plan, there is support for active travel modes including cycling.

Some comments on the potential for impact upon sensitive species and habitats as well as the AONB to the south of the proposed development.

LP2: Strategic Location – Yanley Lane (Woodspring Golf Course)

Many respondents objected to the principle of building in the Green Belt as well as loss of wildlife, open space, recreation and impact of surrounding areas. Some felt the scale of development was too big whilst others felt there needed to be a longer time horizon given to the strategic sites in order to fully understand their requirements.

The impact on traffic was a strong concern especially on Colliter's Way and the A38 which many felt were already at capacity. There was considerable cynicism about the ability to create effective public transport with some suggesting the development would still be reliant on private cars. Others suggested Mass Transit was the key to changing travel habits.

The impact on Long Ashton and local character of Yanley Lane and Glebe Road was a concern. As was the impact on watercourses and from the Barrow tanks. A heritage impact assessment needs to be undertaken and understanding of the impact of increased recreation on local areas. Regarding the site itself, issues were raised about the boundary and whether it should include the area north of the railway or be closer to the Bristol edge along the new road.

The importance of the woodland, watercourses, green infrastructure on the site and ecological connectivity with the wider area was raised together with ensuring net positive biodiversity and importance of mitigations. Comments about density were mixed. Higher density would reflect optimal use and land and support for public transport whilst lower densities would be more akin to North Somerset. The need to ensure employment provision was voiced by some.

There was strong support from the potential developer of the strategic site for the proposed allocation, although they wanted to include the area north of the railway for a combined education and employment campus and see longer term safeguarding of land south of the A38. Support for the scheme cited the need for housing, the connections with employment and good transport links with Bristol and does not impact the existing villages. The need for further work and engagement with Bristol City Council, the wider region and local communities, as part of a detailed master plan, policy and design guidance was raised.

LP3: Nailsea and Backwell

A key concern is around the scale of proposed growth and the impact this will have on existing infrastructure, character and identity of the village. In this respect greater concern appears to focus on Backwell rather than Nailsea.

Key concerns centre on traffic impact both in terms of existing situation and the need to deliver new infrastructure. In addition, wider concerns around impacts on wildlife, agricultural land, landscape quality, and flood risk. Some responses question the justification for proposed release of land within the Green Belt.

Key focus on the importance of infrastructure, notably transport infrastructure and its deliverability. Some comments consider the lack of information at this stage to support the growth proposals. Despite a majority objection to the proposals, there is some support and recognition of the need for growth at a smaller scale, and for smaller units to meet local needs.

- 3.8 There are 64 policies in the development policies section of the plan grouped into the following sections: Design and Place-making, Transport, Economic Development, Historic and Natural Environment, Life Prospects, Countryside and Delivery. A total of 1,070 comments were received for this section of the plan. The Consultation Statement provides a summary of the main issues raised.

Principal issues to address

- 3.9 The response to consultation highlighted a number of critical issues which need to be considered as part of the next stage of plan making. Many of these issues had been identified through the previous consultations but were now being expressed in relation to the more detailed policies and allocations proposed in the Preferred Options document. These key issues were debated by Place Policy and Scrutiny Panel at its meeting on 13 July 2022. A summary of the issues discussed at that meeting is included in section 4 below.

Housing target

- 3.10 The scale of the housing requirement is the biggest challenge. The Preferred Options acknowledged that the potential 18,064 dwellings identified was short of the government's standard method target which is currently 20,880 dwellings, and that the Pre-submission plan would need to address this. The standard method is a minimum requirement, and the final local plan housing requirement may be higher. Several development industry representations have argued that the housing requirement should be more than 2,000 dwellings more.
- 3.11 There are currently changes proposed to the planning system and some speculation that the mechanism for determining the housing requirement may change. While this will be kept under review, the priority should be to progress the local plan as quickly as possible as adopting an up-to-date new local plan is the key to successfully managing speculative development pressure.
- 3.12 In terms of delivery, it is important to recognise that the local plan needs to provide a balance between short and long-term sites. If there is too much dwelling capacity tied up in strategic sites with complex infrastructure requirements and long lead in times then there would be pressure at examination to identify more sites which were capable of delivery in the short term.

Addressing the housing shortfall

- 3.13 The housing shortfall (using the current methodology) in the draft plan is a minimum of 2,834 dwellings. The agreed spatial strategy and sequential approach provide a framework for assessing additional potential sites. The sequential approach for identifying sites is as follows:
1. Maximise urban capacity.
 2. Town expansion (outside the Green Belt).
 3. Sites at larger villages with good public transport.
 4. Other villages locations.
 5. Other options.
 6. Green Belt.
- 3.14 In numerical terms there is sufficient capacity at sites put forward by landowners and developers to meet the shortfall under the current methodology. The local plan process needs to assess the opportunities to identify which opportunities will best reflect the plan's objectives, deliver sustainable development and meet the government's housing target. The starting point for this assessment is the sequential approach set out above. The following paragraphs outline the options.

Urban capacity

- 3.15 It is important to revisit the approach the approach to ensure that development opportunities at the towns is maximised particularly in relation to optimising density and use of brownfield sites.

- 3.16 The existing published evidence base is considered to be robust, but if other opportunities were identified such as through the placemaking studies at the towns then this should be recognised. For example, at Wyndham Way, Portishead there may be an opportunity to deliver more housing over the plan period than is currently identified.

Town expansion (outside the Green Belt)

- 3.17 There are a limited number of opportunities around Weston given flood zone constraints and easily accessible villages such as Locking which need to be reassessed given the scale of the shortfall. This includes potential sites currently designated as strategic gaps. There may also be some opportunity to include additional parcels as part of the strategic Wolverhill development.
- 3.18 Further growth at Nailsea in addition to existing allocations is very challenging given the need for strategic transport measures. The evidence supporting the Preferred Options indicated that a crossing of the railway to either the east or west was necessary to support the scale of new development proposed. Additional transport evidence is now indicating that the preferred transport solution is likely to be a new road crossing of the railway to the east. In addition, further growth to the south and west of Nailsea is difficult to mitigate in transport terms.

Larger villages with good public transport

- 3.19 These larger villages were identified as Yatton and Backwell. There are some additional sites at both locations to be assessed, but there are transport concerns related to the scale of overall growth in both areas.

Villages

- 3.20 The next largest, most sustainable villages are identified as Banwell, Bleadon, Churchill/Langford, Congresbury, Sandford, Winscombe and Wrington. There was a significant level of concern from rural communities that the balance in the local plan was wrong and that too much development was proposed at villages, or that the sites identified were inappropriate or unsustainable. There is also strong pressure from the development industry to provide a greater range and choice of sites in the plan by making additional allocations at villages such as these. The local plan must identify the appropriate proportion of overall growth at villages given the need to deliver a mix of development opportunities.

Other options such as land at risk of flooding or new settlements

- 3.21 There were representations received from promoters of sites which were relatively well-related to the towns but required flood mitigation that these should be included and prioritised above Green Belt locations. Development in areas at risk of flooding had taken place at Weston and Portishead in the past but given the climate emergency it is not proposed that similar sites are allocated in the new local plan.
- 3.22 No representations were received specifically promoting the proposed new settlement at Mendip Spring to address the shortfall.

Green Belt

- 3.23 The government attaches great importance to Green Belts whose fundamental aim is to prevent urban sprawl by keeping land permanently open. Once established, they should only be altered where exceptional circumstances are fully evidenced and justified. Representations were received arguing that exceptional circumstances had not been demonstrated, while others called for additional use of Green Belt land such as at Portishead and Nailsea.

- 3.24 When reviewing the Green Belt, government advice is that a local planning authority should, where necessary, identify areas of safeguarded land to meet longer term needs beyond the plan period. Representations were also received suggesting that safeguarded land should be considered on the Bristol fringe.
- 3.25 The sequential approach set out in the Preferred Options concluded that given the scale of the housing target, the exceptional circumstances did exist for amending the Green Belt in relation to creating sustainable communities adjacent to urban areas. With the exception of Backwell, this excluded development at the larger villages in the Green Belt on the grounds that the exceptional circumstances were unlikely to be met at these relatively less sustainable locations.

Infrastructure delivery

- 3.26 Delivery of the necessary infrastructure to support new jobs and homes is a key part of the Local Plan. An Infrastructure Delivery Plan (IDP) will accompany the Pre-submission Plan. It will set out what infrastructure in terms of transport, schools, parks and green spaces, leisure facilities, health services and other community facilities will be required to support new development over the plan period. Importantly the IDP will also set out how the infrastructure will be funded and when it should be delivered. In order to maintain progress in accordance with the published timetable, a clear indication will be needed as to the agreed allocations to make up the shortfall and the transport and other infrastructure required to facilitate them.

Employment

- 3.27 Delivering an attractive and vibrant place for business investment and sustainable growth is key corporate priority. The broad quantum of employment provision proposed in the plan is supported by the evidence and is considered to provide an appropriate mix of opportunities. Further work is required to explore the potential for new employment provision as part of the new strategic growth areas at Yanley Lane, Nailsea/Backwell and Wolvershill and how this can be facilitated with new infrastructure investment, particularly transport.
- 3.28 Additionally, settlement boundaries at villages have been amended to include rural employers allowing more flexibility for these businesses to expand and intensify over the plan period to support the rural economy. Representations were received from Royal Portbury Dock and Bristol Airport and it is important to take into account the role they play in the local and regional economy.

Placemaking

- 3.29 It is essential that the plan provides the mechanism to achieve high quality places where people want to live, work and spend their leisure time. There is a risk that the plan is portrayed as simply a means to meet a numerical housing requirement. The plan must deliver sustainable development which secures mixed and balanced communities and includes the necessary infrastructure with good masterplanning and high quality design.

Viability

- 3.30 Viability was a key issue raised across many policy areas including affordable housing, self-build, provision of older persons accommodation, net-zero construction, climate change adaptation and resilience, accessible and adaptable homes, biodiversity net gain and provision of infrastructure. The next stage of the plan-making process will be accompanied by a full plan viability assessment. This assessment will consider all the development requirements set out in the policies

and conclude whether the plan is viable or recommend where choices may need to be made in order to make the plan viable.

Next steps

- 3.31 The next published stage of the plan making process is the preparation of the Pre-submission document at the end of the year. This is the version of the plan which the Council intends to submit for examination and will be subject to consultation. This will need to identify how the housing shortfall will be addressed and will require either the identification of additional sites in accordance with the spatial strategy or broad locations to be considered in more detail when the plan is reviewed. However, the potential changes to the planning process through the Levelling Up and Regeneration Bill and related policies such as amendments to the NPPF could have a significant bearing on this process. The implications of any national changes will be closely monitored and further updates provided as and when appropriate.

4. Consultation

- 4.1 The subject of this report is the response received to the Local Plan 2038 Preferred Options consultation. It followed the Challenges and Choices Consultations which took place in 2020. The next stage of consultation on the Local Plan is the Pre-submission stage and is currently timetabled for the end of 2022. A Consultation Statement for the Preferred Options consultation which sets out how we consulted, who we consulted and a comprehensive summary of the responses to each policy is available to view.
- 4.2 The Pre-submission Stage (Regulation 19) is the consultation on the Council's final version of the plan that is intended to be submitted to the Planning Inspectorate for examination. At pre-submission stage the consultation focuses on whether the plan complies with relevant legal requirements. Consultation is for six weeks and the responses received to the pre-submission stage are submitted to the Inspector to consider as part of the examination process.
- 4.3 Place Policy and Scrutiny Panel considered the response to consultation on 13 July 2022. The summary of their discussion taken from the draft minute is as follows:

In discussion, the following points were raised:

- *The importance of infrastructure planning such as transport, schools, health and community facilities alongside new development.*
- *The concerns from many communities over the nature and scale of development proposed, particularly at villages. Was the amount of development proposed in rural areas too high and leading to unsustainable development patterns? There was a need to ensure that the plan contained an appropriate range and mix of sites, including locations which could be delivered in the short term.*
- *The importance of identifying how the full housing requirement would be addressed in the plan before submission for examination. If sites were to be removed, then these would need to be replaced.*
- *The need to consider potential locations in terms of the spatial strategy and sequential approach.*
- *Whether it was probable that the standard method formula for calculating housing numbers would be changed.*

- *The weight in national policy terms of protecting Green Belt as opposed to considering areas at risk of flooding. The government attached great importance to Green Belts and their role was to retain openness and prevent urban sprawl. If development was proposed in flood risk areas, then this could be seen as being contrary to the climate change objectives while the additional costs of flood mitigation could impact on resources for other aspects of infrastructure development.*

5. Financial Implications

5.1 The Local Plan will be progressed using existing budgets.

Costs

The estimated cost of preparing the Local Plan, including the supporting evidence, is anticipated to be around £442,000 over 5 years. It should be noted that the Council must also pay the costs of the examination process including the Inspector.

Funding

The plan is progressed using existing budgets and reserves.

6. Legal Powers and Implications

6.1 The Local Plan is being progressed under the Town and Country Planning Act 1990 (as amended) and related Regulations. There is a requirement for all local planning authorities to have an adopted local plan in place.

7. Climate Change and Environmental Implications

7.1 The new local plan will play an important role in defining and delivering the Council's response to the climate emergency. It will set out the approach to climate change and environmental issues in terms of, for example, the location and form of development, renewable energy, minimising car use, encouraging green infrastructure and biodiversity, avoiding sensitive areas such as areas at flood risk and minimising waste.

8. Risk Management

8.1 The absence of an up-to-date development plan incurs risks related to the uncertainty of future investment decisions and speculative development proposals potentially leading to increased planning appeals and less sustainable development solutions.

9. Equality Implications

9.1 An Equalities Impact Assessment accompanied the Preferred Options consultation. Feedback from the consultation will inform the next stage of the plan.

10. Corporate Implications

10.1 The new Local Plan 2038 will be a significant tool in delivering the Corporate Plan vision and objectives and has significant implications for a wide range of Council services in terms of, for example, the future location of population, jobs and infrastructure.

11. Options Considered

11.1 The Local Plan preparation process requires various strategic development and policy options to be considered as set out in the background papers. Not preparing a Local Plan will expose the Council to significant risks from speculative development; increased planning appeals; and other potential interventions.

11.2 There are a number of options which have been considered in relation to the housing requirement in the new local plan. These are whether:

- To plan on the basis of the standard method housing requirement but as an alternative to fully allocating all sites it is possible to identify some longer term 'broad locations for growth' to be considered when the plan is reviewed.
- The constrained nature of North Somerset means that it is inappropriate to plan for the full requirement given nationally important designations such as Green Belt, AONB, habitats sites and land at risk of flooding. This means it is very challenging to accommodate the growth required in sustainable locations. Government guidance is that authorities should follow the standard method 'unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals' (NPPF paragraph 61).
- To revise the plan's timetable to enable the outcome of the national planning reforms and possible changes to the standard method to be considered.

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Appendices:

None

Background Papers:

Preferred Options consultation document:

[North Somerset Local Plan 2038, Consultation draft, Preferred Option \(n-somerset.gov.uk\)](https://www.n-somerset.gov.uk/sites/default/files/2020-07/Local%20Plan%202038%20-%20Preferred%20Options%20Consultation%20Document.pdf)

Challenges for the future consultation document.

<https://www.n-somerset.gov.uk/sites/default/files/2020-07/Local%20Plan%202038%20-%20Challenges%20for%20the%20Future.pdf>

Challenges for the future consultation statement.

<https://www.n-somerset.gov.uk/sites/default/files/2020-10/Local%20Plan%202038%20Consultation%20Statement%20October%202020.pdf>

Choices for the future consultation document.

<https://www.n-somerset.gov.uk/sites/default/files/2020-11/North%20Somerset%20Local%20Plan%202038%20challenges%20and%20choices%20part%20two%20-%20Choices%20for%20the%20future.pdf>

Choices for the future consultation statement.

<https://www.n-somerset.gov.uk/sites/default/files/2021-02/Choices%20Consultation%20Statement.pdf>

Preferred Options Consultation Statement.

[Preferred Options Consultation – 2022 | North Somerset Council \(n-somerset.gov.uk\)](#)

North Somerset Council

Report to the Executive

Date of Meeting: 7 September 2022

Subject of Report: Portishead Neighbourhood Plan

Town or Parish: Portishead

Officer/Member Presenting: Cllr Mark Canniford Executive Member for Placemaking and Economy

Key Decision: Yes

Reason: The Neighbourhood Plan relates to Portishead which comprises more than one ward

Recommendations

It is recommended that:

(i) Executive resolve that the Portishead Neighbourhood Plan meets the necessary conditions in accordance with Schedule 4B of the 1990 Town and Country Planning Act (as amended) and that it can proceed to examination following the requisite six-week period of public consultation.

(ii) The Executive member for Placemaking and Economy be given the authority to agree North Somerset Council's comments on the submitted Plan, and that these be passed to the examiner.

1. Summary of Report

- 1.1 The Portishead Neighbourhood Plan was submitted to North Somerset Council for Examination on Monday 8 August by Portishead Town Council who are the qualifying body.
- 1.2 The Portishead Neighbourhood Plan meets the conditions necessary (under the criteria set out in Schedule 4B of the 1990 Town and Country Planning Act (as amended)) to go forward to examination. Officers can therefore arrange a period of consultation on the submitted plan and pass any resulting comments, including those of North Somerset Council to the examiner. The person undertaking the examination will be appointed by North Somerset Council with the agreement of the qualifying body.

2. Policy

- 2.1 A Neighbourhood Plan is prepared by the local community (with help and advice from North Somerset Council and other bodies as necessary). The Neighbourhood

Plan group have been assisted in preparing the neighbourhood plan by Place Studio in Bristol. This plan has been prepared within the context of the North Somerset Core Strategy which has a timespan until 2026 but will be superseded before then by the emerging Local Plan 2038. The Portishead Neighbourhood Plan once 'made' (adopted) will have the status of a development plan and the policies will sit under the strategic policies contained in the North Somerset Council Core Strategy. The intention is to undertake a review of the Neighbourhood Plan once the Local Plan is adopted to bring it into line with the new strategic policies.

- 2.2 Policies in the Neighbourhood Plan will have the same status as other plans prepared by North Somerset Council such as the Development Management Policies Plan and the Site Allocations Plan. If there is a conflict with existing development plans, the Neighbourhood Plan once made will take precedence as it will be a more recent plan. Where the Neighbourhood Plan is silent on an issue however then North Somerset Council's planning policies will be used for making planning decisions.
- 2.3 Once the plan is 'made' then the local Parish Council (Portishead Town Council) is entitled to 25% of the CIL receipts from development within the neighbourhood area. This is more than the usual 15%.

3. Details

Background to and content of the plan

- 3.1 The Neighbourhood Area was approved by North Somerset Council in October 2019. The Neighbourhood Area is the area which will be covered by the Neighbourhood Plan and is the parish boundary of Portishead.
- 3.2 A neighbourhood plan is the opportunity for local people to look in more detail at planning issues of concern to them than is possible in a local plan produced by North Somerset Council. So long as the policies are in general conformity with the strategic policies of North Somerset Council's development plan then there is much flexibility in terms of what the plan can cover.
- 3.3 Ultimately whether a neighbourhood plan becomes approved is decided by a local referendum within the area covered by the Plan (neighbourhood area). Before that can happen however the Plan needs to be assessed at examination. An independent examiner must assess the plan based on a number of fixed criteria – these are referred to as the 'basic conditions' which state that the plan must:
 - be appropriate having regard to national policy
 - contribute to the achievement of sustainable development
 - be in general conformity with the strategic policies in the development plan for the area
 - be compatible with human rights requirements
 - be compatible with EU obligations in that it is not likely to have a significant effect on a European site (as defined by the Conservation of Habitat and Species regulation 2010 (d)). (this currently remains the case irrespective of Brexit)

A Basic Condition Statement (BCS) has been submitted along with the Plan to demonstrate how these criteria have been met. This will be assessed by the examiner, not North Somerset Council.

Does the submitted Plan meet the necessary criteria to go forward to examination?

3.4 Before North Somerset Council can organise an examination it is necessary for Executive to decide whether the plan meets the following criteria:

(i) Whether the Town Council is authorised to act (ie is the parish council for that area)

(ii) Whether the proposal and accompanying documents:

a) are the correct documents under regulation 15 of the neighbourhood planning regulations 2012 (ie a plan of the neighbourhood area, basic condition statement, consultation statement, the proposed plan).

b) meets the definition of a neighbourhood development plan.

c) meets the scope of provisions (ie specifies the period for which it is to have effect, doesn't include excluded development, doesn't relate to more than one neighbourhood area).

(iii) Whether the Town Council has undertaken the correct procedures in relation to consultation and publicity.

3.5 The Portishead Neighbourhood Plan meets all of these obligations and more detail on (iii) is set out below.

Consultation Statement

3.6 The Consultation Statement submitted with the Plan sets out how the community has been involved in the development of the plan from July 2019.

3.7 A formal period of consultation (known as Regulation 14 consultation) has to be undertaken on the draft Plan before it can be submitted to North Somerset Council. This took place between 28 March and 8 May. The statement sets out who was consulted, how they were consulted and how the feedback was addressed,

3.8 The Consultation Statement contains the necessary information to demonstrate that the consultation requirements were carried out in accordance with the Regulation 14 requirements with regards to publicity and consultation.

3.9 As the Plan meets all the necessary criteria it can now proceed to a minimum six-week period for publicity and then to examination.

North Somerset Council's response to the plan

3.10 North Somerset Council officers have provided advice and technical support throughout the plan's preparation. Many suggestions have been incorporated into the submitted plan and there are therefore few remaining areas on which comment is needed. Further engagement on the submitted plan will take place with teams across North Somerset Council including ecology, heritage, transport and others with all further comments agreed by the Executive Member before forwarding to the

examiner.

- 3.11 North Somerset Council has encouraged the neighbourhood plan group to prepare the Plan alongside the emerging Local Plan 2038, to align with the most up to date strategic policy context. However, the NDP group has decided to progress it under the Core Strategy. This means that any differences between the Neighbourhood Plan policies and the strategic policies of the Core Strategy need to be supported by new evidence of either a change in national policy/guidance or evidence gathered by the neighbourhood planning group.
- 3.12 The Government encourages neighbourhood plans to allocate housing sites and to contain policies about design in order to boost housing supply. Neighbourhood plans which contain a site for housing and are within 2 years of being 'made' can benefit from paragraph 14 of the NPPF. This means that when considering planning applications for housing on North Somerset Council only needs to demonstrate a 3 year supply of land for housing rather than 5 year supply. The decision was taken by Portishead Town Council not to make housing land use allocations.
- 3.13 The neighbourhood plan references the placemaking work currently in progress within the Wyndham Way area of Portishead. North Somerset Council is working in partnership with the Town Council and the principal local landowners with the involvement of local people, businesses and other stakeholders to agree a framework which can act as a tool to co-ordinate development in this area. This will help unlock the potential for better connectivity and more effective use of land in the longer term. It is anticipated that the finished work will inform the emerging North Somerset Local plan and be adopted as Supplementary Planning Guidance.

Conclusion

- 3.14 As the Plan meets all the necessary criteria it can now proceed to a minimum six-week period for publicity and then to examination.

4. Consultation

- 4.1 A period of formal consultation was undertaken by the Town Council from 28 March to 8 May. The methods and timings of this are set out in the consultation statement which was submitted along with the neighbourhood plan. North Somerset Council is satisfied that consultation has been carried out in accordance with the regulations.
- 4.2 North Somerset will now undertake a formal six-week (minimum) period of consultation on the plan. This will involve statutory bodies, local and national organisations and the local community.

5. Financial Implications

- 5.1 North Somerset Council can retrospectively claim £20k following a successful examination and the date being set for a referendum. Payments will be made under section 31 of the Local Government Act 2003 and can be applied for quarterly.

Costs

The cost of the six-week formal consultation period, instructing an independent examiner and holding a referendum within Portishead are incurred by North Somerset Council, however in accordance with para 5.1 above £20k will be claimed and awarded retrospectively.

Funding

See above

6. Legal Powers and Implications

- 6.1 The Portishead Neighbourhood Plan is being prepared under the provisions of the Localism Act 2011 which were brought into effect in April 2012 by the Neighbourhood Planning (General) regulations.
- 6.2 North Somerset Council has a duty to consider whether (under the criteria set out in Schedule 4B of the 1990 Town and Country Planning Act (as amended)) the Neighbourhood Plan can go forward to examination

7. Climate Change and Environmental Implications

- 7.1 The Neighbourhood Plan contains policies to help tackle climate change through the promotion of renewable and reduced energy, active travel, green and blue infrastructure and wildlife habitat and landscape conservation. A Strategic Environmental Assessment screening exercise and Habitat Regulation Assessment screening (SEA/HRA screening) exercise was undertaken with the conclusion that no full assessments were needed.

8. Risk Management

- 8.1 There is potential for the Plan to be unsuccessful at examination should the examiner consider that the plan is not capable of meeting the basic conditions even with specified modifications. In this case the Council would not be able to claim the £20k funding under the above act. In practice it is very rare occurrence and officers consider that the Plan's preparation and content is sufficiently robust to pass examination (potentially with modifications).

9. Equality Implications

The Portishead Neighbourhood Plan is considered to have met the necessary Human Rights Articles and it is not considered that there are any equality impact considerations arising from the Plan.

10. Corporate Implications

- 10.1 There are no direct implications in relation to highways/transport as the plan supports measures rather than proposing specific schemes. There may be future implications in relation to some areas of service delivery most notable through the development of the two sites for residential uses on an existing employment site and as an exceptions site. In this case there may be implications in relation to education and other service delivery should residential development be delivered.

11. Options Considered

- 11.1 As the submitted Plan is considered to meet the requirements to proceed to examination there is no option but to progress the Plan.

Author:

Celia Dring, Principal Planning Officer, Place Directorate, 01934 426244

Appendices:

Portishead Neighbourhood Plan submission version

Background Papers:

The Basic Conditions Statement and Consultation Statement can be viewed on [North Somerset Councils webpage](#) along with the Portishead Neighbourhood Plan.

These and all other background papers can also be accessed on the [Neighbourhood Plan webpage](#). They will also be published on the NSC website at the start of consultation.



2022 - 2038
SUBMISSION DRAFT
SUMMER 2022

Together with its associated documentation this Neighbourhood Plan is to be used for its intended purpose only.

Related information and the Neighbourhood Plan evidence base can be found at:

www.portishead.gov.uk

For questions and further information please contact:

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Special thanks to Bailey's Balloons for aerial photography.

This document was produced by the Portishead Neighbourhood Plan Steering Group with assistance from consultants Place Studio

place

www.placestudio.com

Place Studio is a community planning and design consultancy which seeks to enable local communities to harness their local knowledge and objectives to produce sound and robust planning and design documents.

Thank you to Celia Dring, our North Somerset Council Link Officer, who has provided valuable support throughout the preparation of this Neighbourhood Plan.

FOREWORD

Portishead is a vibrant community of 27,000 people which has experienced a 60 percent population growth over the last 20 years. It has a relatively young population and a strong community ethic. We believe that Portishead deserves a Neighbourhood Plan that supports a sustainable, prosperous and healthy future for our children and grandchildren.

The Portishead Neighbourhood Plan was prepared on behalf of the residents of Portishead by a Steering Group and working groups made up of local community volunteers and Portishead Town Council. We are very grateful for the work of community volunteers who have brought a range of knowledge about Portishead and expertise to help create this Plan. We would also like to thank the hundreds of people who have responded to Neighbourhood Plan surveys or provided input in other ways.

Our approach has been to develop a Plan for the people of Portishead, by the people of Portishead.

The membership of the Steering Group has changed a number of times since its formation. However, the following people have at some time played an active role on the committee:

Patricia Sterndale, Paul Gardner, Robert Bull, Nigel Chapman, Patrick Heaton-Armstrong, Rachel Nash, Tanya Slatter, Nicola Holland, Paul Davis, Ben Aldridge, Polly Shepperdson, Paul Thurston, Lin Sargent and Sarah Jackson.

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HOW TO READ THIS NEIGHBOURHOOD PLAN

1.1 The Neighbourhood Plan should be read as a whole, but we have colour coded each section with the aim of making it easier to follow.

1.2 Part One introduces the Neighbourhood Plan and 'sets the scene' for why it has been produced and what it will achieve. This part includes the draft vision and objectives of the Plan, setting out how we can harness the town's assets and opportunities in order to 'Create a Modern Sustainable Town of the Future'.

1.3 Part Two covers different theme and topic areas, setting out local level planning policies and practical community actions. This part is structured around the three themes of Environment, Wellbeing and Prosperity. These themes are the three that support Portishead Town Council's strategy to 'Create a Modern Sustainable Town of the Future'.



**PORTISHEAD
NEIGHBOURHOOD
PLAN**

**PART ONE
INTRODUCTION**

1. INTRODUCTION

WHAT IS A NEIGHBOURHOOD PLAN?

1.4 How can the local community have a say in the future of Portishead? We face many challenges, as we emerge from the pandemic and look ahead to a future shaped by climate change. We need to protect our valued and loved environment and heritage whilst balancing the local need for jobs, housing, community facilities and other infrastructure that contributes to making Portishead a great place to live.

1.5 This document is the Portishead Neighbourhood Development Plan ('NDP', 'Neighbourhood Plan' or 'Plan'), and it is one of the tools we have to shape the future of the town. It builds on the views of the community and on research undertaken by local volunteers, and presents a vision for Portishead, looking ahead to 2038.

1.6 This Neighbourhood Plan is an opportunity for local people to have more control over the future of the town.

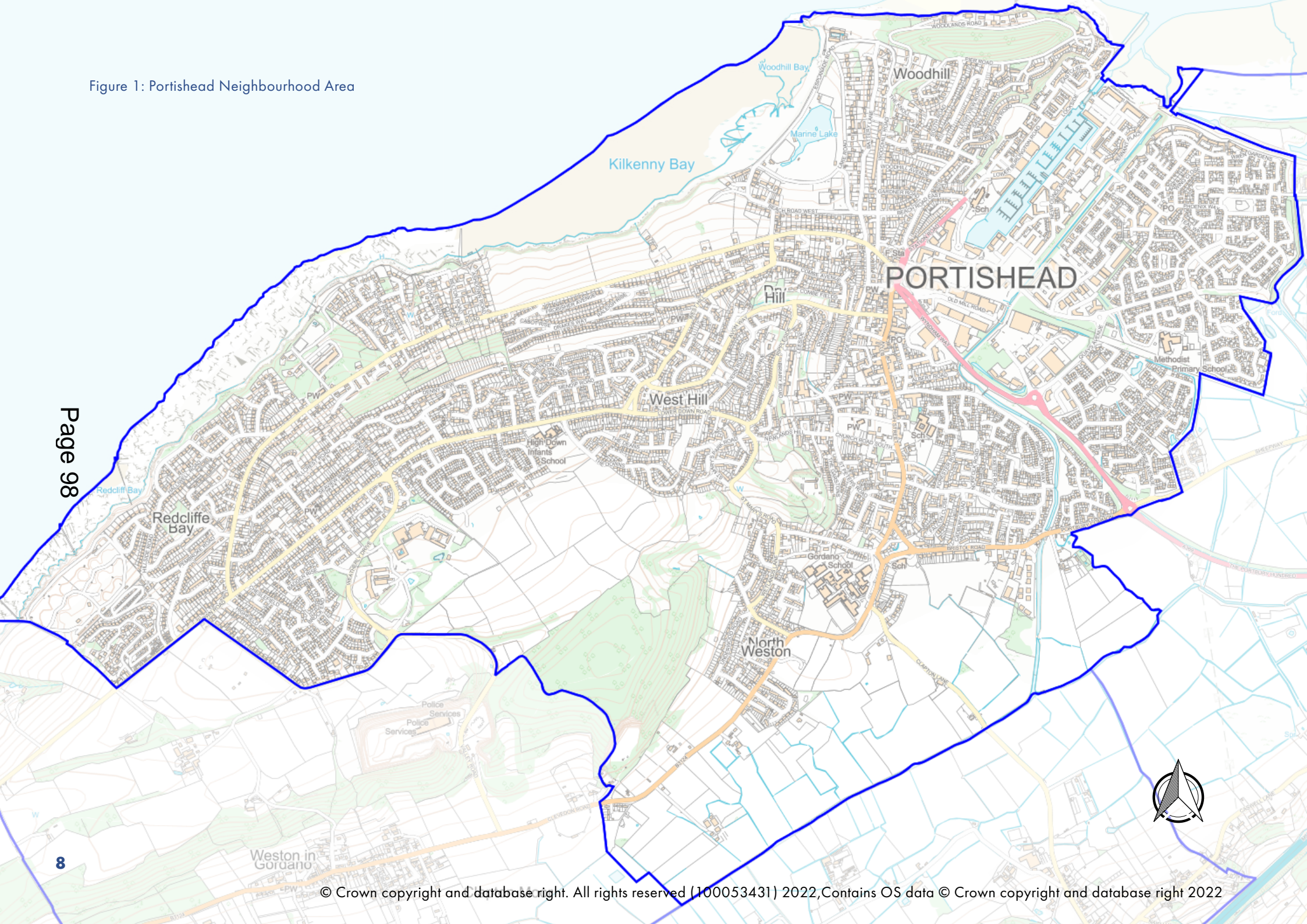
1.7 Neighbourhood Plans work alongside existing legislation and policy by providing developers and assessors with criteria that must be met, and detail on what the local community has told us they want and expect from development in their area to guide and inform future change in Portishead.

1.8 Once formally in place, the Portishead Neighbourhood Plan will become part of the statutory local development plan, and will be used to inform decisions on planning applications within Portishead.

1.9 The Neighbourhood Area that this document relates to is shown on Figure 1. The boundary for the Neighbourhood Area follows the Portishead Town Council administrative boundary.



Figure 1: Portishead Neighbourhood Area



WHY PREPARE A NEIGHBOURHOOD PLAN FOR PORTISHEAD?

1.10 In 2011, the [Localism Act¹](#) gave communities the power to produce their own Neighbourhood Plan, and develop a shared vision for their area. Neighbourhood Plans can shape, direct and help to deliver sustainable development, by influencing local planning decisions as part of the statutory development plan ([National Planning Policy Framework \(NPPF\), 2021](#))².

1.11 Before 2011 it was only local authorities who could produce planning documents, so Neighbourhood Plans are a significant opportunity which communities can choose to take up.

1.12 Once it has passed through a number of required stages, the Portishead NDP will become part of the Development Plan for North Somerset to be used to guide and inform both those proposing development, and those who consider and decide upon planning applications at North Somerset Council.

1.13 The planning system in England is based on legislation, planning policy and guidance. Policies are instructions that inform what development can and can't do. National planning policies are set by the government for the whole of England ([NPPF, 2021](#))² and by Local Planning

Authorities for their local areas (in our case, North Somerset Council). The Neighbourhood Plan gives local people greater ownership of the plans and policies that affect their area.

1.14 Through the Portishead Neighbourhood Plan, we can set out what we expect from any new development and, importantly, what we want protected and what is deficient.



HOW HAS THE NEIGHBOURHOOD PLAN BEEN PREPARED, AND HOW DOES IT REPRESENT COMMUNITY VIEWS?

1.15 The preparation of the Neighbourhood Plan has been led by the Portishead Neighbourhood Plan Steering Group. The Steering Group is formed of representatives of Portishead Town Council and people from the local community.

1.16 Throughout 2019 and 2020, effort was put into explaining to local communities what the Plan involved, what challenges were facing the area, and how preparation of the Plan would proceed. Initial consultation in December 2019 revealed the key issues for the community. During 2020 and 2021, work moved onto evidence collection on these key issues.

1.17 Throughout the preparation of the Plan, the Neighbourhood Plan Steering Group has used a range of methods to collect the local community's views. The Steering Group has used online consultation portal Commonplace (<https://portisheadplanconsult.commonplace.is/>) to collect a range of local evidence, as well as share progress on plan preparation.

1.18 The Steering Group has also regularly updated the community on progress on the Neighbourhood Plan website (www.portisheadplan.uk).

1.19 Regulation 14 consultation (the first round of formal consultation on the draft Neighbourhood Plan) was held over April - May 2022. This is the submission version of the draft Neighbourhood Plan, which has been updated to reflect comments made by the local community during Regulation 14 consultation.

1.20 A summary of the consultation undertaken throughout the preparation of the Plan is included within the formal Consultation Statement, which is submitted with the Neighbourhood Plan and is available to view at www.portishead.gov.uk.

1.21 The NDP is based on research and evidence. The Local Evidence Base List in [Appendix 1](#) is a summary of the evidence collected and referred to from studies, investigations and the various consultation exercises undertaken. The Evidence Base is available to view at www.portishead.gov.uk.

WHERE ARE WE IN THE PROCESS?

1.22 The NDP must go through a series of required stages to ensure people who live, work and have an interest in Portishead have a say in the Plan. It must also be examined by an independent examiner in order to make sure it is positively prepared and meets prescribed 'basic conditions'.

1.23 If the NDP passes examination, it will be put to a referendum and local people can vote for or against the Plan. If the majority vote in favour of the NDP it will become part of the overall development plan for North Somerset to guide developers, planning officers and councillors when considering planning applications in the Neighbourhood Area.

NP PROCESS



- Defining the NDP area
- Preparing the Plan
- Formal 6 week consultation (Reg.14)
- Make changes and revisions in response to the consultation
- **Submit to North Somerset Council**
(We are here)
- Formal 6 week consultation (Reg.16)
- Examination
- Referendum
- Legal Force

POLICY CONTEXT

1.24 Although the [Localism Act \(2011\)](#)¹ gives communities a way to decide what goes on in their towns, The Portishead Neighbourhood Plan is an opportunity to positively help to shape the future of our town, ensuring that local needs and aspirations are taken into account in future environmental and development projects.

1.25 Legislation and [National Planning Practice Guidance](#) sets out rules, conditions and limitations. Neighbourhood Plans cannot be used to prevent development; they cannot say no to more houses when there is a national and regional shortage of housing.

1.26 As well as being set within the context of the [National Planning Policy Framework \(NPPF\)\(2021\)](#)², and the latest National Planning Practice Guidance, the Portishead Neighbourhood Plan must also be in 'general conformity' with the strategic planning policies of North Somerset Council (our Local Planning Authority).

1.27 North Somerset Council is currently reviewing its adopted policy framework, to produce an updated Local Plan to

cover the period until 2038. A review is required because the Government requires local planning authorities to revisit their Local Plan every five years and review as necessary. The updated Local Plan for North Somerset will set out an overall strategy to meet housing, employment, leisure and other needs up to 2038, as well as management, conservation and enhancement policies for the built and natural environment.

1.28 The Portishead Neighbourhood Plan is being prepared in parallel with the emerging North Somerset Local Plan. To meet requirements set out by National Planning Policy and Guidance, the draft Neighbourhood Plan has been prepared to be in general conformity with the current adopted policy framework, which is the Core Strategy. However, as required by National Planning Policy, the Neighbourhood Plan looks ahead over the next 15 years, to anticipate and respond to long term needs. In doing this, it is intended that the Neighbourhood Plan policies are 'future-proofed' and capable of extending beyond the adopted Local Plan period.

1.29 Once the new North Somerset Local Plan is adopted, it is anticipated that this Neighbourhood Plan will be reviewed to fully align it with the new Local Plan policies. This should involve only minor changes such as updating policy references.

ABOUT PORTISHEAD

1.30 Portishead is a vibrant community of c.27,000 people which has experienced around 60% population growth over the last 20 years. It has a relatively young population and a strong community ethic.

1.31 The town is located on the Severn Estuary, about 8 miles to the west of Bristol and 6 miles north east of Clevedon along the coast. The built environment of Portishead is surrounded by locally valued landscape and biodiversity features; Portishead Down and Weston Big Wood, the Gordano Valley, East Wood, Kilkenny Fields and the Golf Course, and the Severn Estuary itself, which is an internationally important wildlife site.

1.32 Portishead town centre is home to a number of successful local businesses, with the High Street catering to a range of retail needs, including specialist stores that draw people to the town from elsewhere.

1.33 Local residents value Portishead's views and spectacular sunsets, but also the Lake Grounds, Eastwood, Battery Point, the varied architecture and shopping. Community spirit abounds and residents and visitors alike enjoy annual events such as the Christmas Victorian event under the

magically lit High Street, the Carnival in June and the Portishead Summer Show in July.

1.34 The Marina area has a rich history as a deep-water dock in the 1800s and then as home to a major coal-fed power station. The power station closed in 1980, and during the early 2000s the area was redeveloped, providing a range of residential and commercial uses, as well as a world-class sailing and leisure craft facility.

1.35 More information on the history of Portishead is available in the Portishead Community Character Statement, which is part of the Neighbourhood Plan's evidence base.



A BRIEF HISTORY OF PORTISHEAD

1.36 Portishead has always been much admired for its scenery and the wide reaching views of the River Severn. Its proximity to Bristol has meant that large swathes of its acreage have been owned by the Bristol Corporation from as early as the 1600s but long before this there is a brief mention of Portishead in the Domesday Book of 1086. At that time, it was part of the Portbury Hundred, with Portbury itself being the largest and most populated as well as the chief town of the Hundred. Portishead was its poor neighbour; there weren't many animals or men to tend them. Most important at that time though was the mill which probably stood near to the site of the White Lion/Old Mill pub in the High Street, itself a tidal mill until 1810. The White Lion/Old Mill stands at what was the head of the old pill (or creek) which meandered in for about half a mile from the River Severn right up to the northern tip of the High Street.

1.37 The early population of Portishead made their homes on the rising ground that had a water supply and was sheltered from most winds on the rectangle of land between Church Road North and Church Road South. Next to the fine St Peter's

Parish Church with its traditional North Somerset tower lies Courthouse Farm which has its origins in the Tudor period and was once the manor house for this part of Portishead.

1.38 An ancient way runs from the settlement at St. Peter's Church, along Slade and Battery Lanes, out to Battery Point just above the most northerly of the Somerset Levels called Rodmoor. This was dug out by the unemployed of Bristol in 1910 to form the Lake Grounds, now considered to be the jewel in Portishead's crown. Previous to this in the mid-1890s, an esplanade had been built along the seashore from Battery Point to Beach Road



West that enclosed the old marshland. Springs can still be seen seeping along the edge of the lake.

1.39 The wide street that became the High Street (formerly known as Mill Street and Duck Street) was once lined with apple and pear orchards. From the 1860s onwards shops were gradually built mostly in Victorian times with some Edwardian additions and an assortment of 20th century builds.

1.40 The topography of Portishead helped to disguise the industry that was coming to the dock area from the mid-19th century. Tourists were also arriving to admire the scenery and views. The old pill was converted into a dock: two railways arrived – the GWR branch line from Temple Meads and the Weston, Clevedon and Portishead Light Railway (access to which was through the archway of the White Lion/Old Mill pub) and a pier was built just along from the Royal Pier Hotel. Industry grew alongside the docks, the first being the Mustad nail factory in 1911. In 1926, construction began on the first of two coal fired power stations. Some local coal produced in the Somerset coalfields was delivered by train, but the main supply

of coal was imported by boat from South Wales. Further factories followed providing jobs for the majority of Portishead residents.

1.41 During the latter part of the 20th century and now in the 21st century, the population of Portishead has grown rapidly. The industry on the dock area and beyond (the Power Stations, Phosphorus plant, and Petroleum industry) has completely disappeared and the huge brown field site has become an area of considerably varied housing. It is hard now to believe that the agricultural and fishing community of 1801 numbered just about 300.

1.42 In the last twenty years the population has grown by 10,000 from 17,000 to 27,000. With traditional local industrial employment opportunities now mostly gone, most local jobs are in the service sector (where the Avon and Somerset Police headquarters is a major local employer), the creative sector and micro-businesses with many people working from home. These employment opportunities do not match the local population growth. Some of the reduction in employment land in Portishead is due to revised government

planning advice which gave preference to residential use over employment use. There have also been site allocations for employment development within the Local Plan which have not been delivered. This has resulted in many people commuting to Portbury and Avonmouth docks, Bristol or further afield to find employment. Portishead has become a commuter town.

1.43 Recent housing development was not accompanied by the necessary level of infrastructure investment, and there is a large infrastructure deficit in Portishead, which is particularly acute in transport as well as community facilities. Development



continues to put a lot of pressure on remaining green spaces and the natural green and blue environment.

1.44 The totemic example of inadequate infrastructure is the planned re-opening of the Bristol to Portishead railway line which has been promised for 25 years or more but still has no firm delivery date. Portishead is famously known as the largest cul-de-sac in Europe, its geography, location and the lack of public transport means that currently, people rely almost exclusively on car transport despite the inadequate road infrastructure into and out of the Town.



OVERARCHING ISSUES FOR THE NEIGHBOURHOOD PLAN

THE CLIMATE CRISIS AND PORTISHEAD

1.45 The Climate Change Act 2008 (2050 Target Amendment) Order 2019³ (which is an update to the Climate Change Act 2008) commits the UK to a carbon emission reduction target of 100% by 2050 compared with a 1990 baseline. The 2050 commitment necessitates radical changes in how we live and how we plan our settlements to ensure our energy and transport systems are decarbonised.

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1.46 In February 2019, North Somerset Council declared a 'climate emergency' in light of evidence that illustrates how urgent it is that action is taken, seeking to make the district of North Somerset carbon neutral by 2030. The since published [North Somerset Climate Emergency Strategic Action Plan](#)⁴ lists a series of actions to contribute towards this aim.

1.47 Like the rest of the world, we also are facing a biodiversity crisis as well as a climate emergency.

1.48 In Portishead, flooding is a major area of concern. The local coastline has one of the largest tidal ranges in the world, sometimes as great as 15m, and Portishead is susceptible to storm surges caused by the coincidence of a high tide and low-pressure

systems from the south-west, the prevailing wind direction. A deep low-pressure system can add 1 to 2m to an expected high tide. Portishead suffered significant storm surge flooding in December 1981 and February 1990. Fortunately recent storm surges have coincided with lower tides. The local rhynes are tidal so rainwater can back up at high tide causing localised flooding in some parts of the town on a regular basis. Climate change is predicted to increase the frequency and severity of this flooding problem.

1.49 Portishead is fortunate to be home to Salt Marshes on part of its coastline. Salt marshes are more effective than rainforests in their ability to store carbon and must be protected for this reason notwithstanding that they also support rare and endangered wildlife.

1.50 We are fortunate to also have ancient woodlands and wetlands within the settlement boundary. Although still viable, many local species, flora and fauna have declined over the last 25 years. It is a priority to protect and sustain these areas for the future, helping them to regenerate naturally through the process known as Rewilding.

1.51 The warming of the climate is evidenced locally by the fact that small leaved lime trees in Weston Big Wood are now flowering and seeding again after an interval of probably thousands of years during which time they have only propagated by growing out of old fallen down trees.

PRE-APPLICATION COMMUNITY ENGAGEMENT

1.52 The importance and benefit of community engagement is widely acknowledged as key to shaping good places to live. Early discussion between planning applicants and the Portishead local community, as well as with Portishead and North Somerset Council, from the earliest stages enables a more collaborative approach to the process of preparing a development proposal that will need to balance many factors as the design evolves.

1.53 Portishead Town Council supports the notion that 'Applications that can demonstrate early, proactive and effective engagement with the community should be looked on more favourably than those that cannot' (NPPF, para. 132). The Portishead Pre-Application Community Engagement Protocol (see Appendix 2) is intended to facilitate a structured approach to enable effective, positive and early involvement of the local community in outline and full planning applications.



VISION & OBJECTIVES

1.54 The draft vision, and related objectives, are based on issues raised during consultation and highlighted through evidence gathering work. They have been refined by the Neighbourhood Plan Steering and Working Groups, and form the basis of the Portishead Neighbourhood Plan.

1.55 The vision is the long term goal describing what we want Portishead to be at the end of the Neighbourhood Plan period (2038). The objectives set out what needs to be achieved in order to reach our vision.

VISION

Our vision is for a healthy, green, inclusive and prosperous community, met through sustainable change.

Over the Neighbourhood Plan period, Portishead will see sustainable development in line with the underpinning principle of all planning and development.

This means a town with:

- **A protected and enhanced natural green and blue environment, which provides a network and space for local wildlife, biodiversity and people to thrive;**
- **Sustainable growth that prioritises using brownfield land; responding positively to the climate emergency, and mitigating its local impacts;**
- **Valued local facilities, infrastructure and housing that are sufficient to meet local needs;**
- **An inclusive and green local transport network that provides everyone with safe opportunities for active travel;**
- **A mixed economy that supports our local businesses, town centre and High Street, and**
- **An outstanding and locally distinctive built environment.**

OBJECTIVES

Environment

01 To protect Portishead's locally valued views, landscape setting and valued relationship with the Gordano Valley, and maintain the separation of Portishead from other villages and towns.

02 To protect and enhance the multi-functional blue-green (water and green) spaces of our town and the links between them, recognising the importance of these areas for health and wellbeing.

03 To protect, maintain and expand Portishead's distinctive treescape and woodland areas such as Weston Big Wood.

04 To protect and enhance the biodiversity of our area, recognising the important sites in Portishead that act as carbon sinks and sustain species under threat, including our small locally valued green spaces, nationally designated Sites of Special Scientific Interest, and internationally designated RAMSAR site and associated Salt Marshes.

05 To ensure that development protects and reinforces Portishead's character and distinctiveness, and encourages the highest standards of building, public space and landscape design and sustainability.

06 To ensure that new development is sympathetic to our local heritage, including its maritime and industrial history.

Wellbeing

07 To deliver sustainable development which prioritises brownfield land, responds positively to the climate crisis, reduces our carbon footprint and energy demand, and mitigates the local impacts of climate change.

08 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

09 To protect and improve health, wellbeing, leisure and recreation opportunities for residents of all ages and abilities by protecting and expanding community facilities and spaces for community activities to ensure that Portishead is a welcoming, safe and accessible place for everyone.

010 To ensure all residents have easy access to local green, blue and open spaces, and to promote environments and transport networks that offer all individuals and communities the greatest potential to lead active and healthy lifestyles.

Prosperity

011 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

012 To deliver a connected, accessible, inclusive, attractive, vibrant and distinctive town centre at the heart of Portishead's community and economic life.

013 To deliver an integrated, sustainable, accessible and inclusive transport network that encourages active travel and reduces congestion within Portishead.

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**PORTISHEAD
NEIGHBOURHOOD PLAN**

**PART TWO
DRAFT PLANNING POLICIES
AND COMMUNITY ACTIONS**

PART 2 PLANNING POLICIES AND COMMUNITY ACTIONS

INTRODUCTION TO THIS SECTION

2.0 The planning policies and community actions on the following pages will be used to help determine planning applications within the Portishead Neighbourhood Area. Each policy relates back to at least one objective, which in turn links to the overall vision.

2.1 Government guidance sets out that that a policy in a Neighbourhood Plan should be: 'clear and unambiguous... it should be concise, precise and supported by appropriate evidence. It should be distinct to reflect and respond to the unique characteristics and planning context of the specific neighbourhood area for which it has been prepared' ([National Planning Practice Guidance 2020](#)⁵).

2.2 The Neighbourhood Plan contains a total of 41 policies. These are organised around the three themes of the Town Council's strategy to 'Create a Modern Sustainable Town for the Future': Environment, Wellbeing and Prosperity.

2.3 The Neighbourhood Plan also contains a fourth planning policy section that includes area based policies for Portishead Town Centre.

UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS

2.4 The purpose of the planning system is to contribute towards the achievement of 'sustainable development', which is defined by the United Nations as 'meeting the needs of the present without compromising the ability of future generations to meet their own needs'⁶.

2.5 As a member of the United Nations, the UK has agreed to pursue the [17 Global Goals for Sustainable Development](#)⁷ in the period to 2030. These goals address environmental protections, social progress and economic wellbeing. These are priorities which are mirrored by Portishead Town Council's three themes of Environment, Wellbeing and Prosperity that support its strategy to 'Create a Modern Sustainable Town of the Future'.

2.6 The Portishead Neighbourhood Plan is drafted to link into the UN's Sustainable Development Goals. In doing so, we can contribute towards delivering and translating the high level goals of sustainable development into real local level action in Portishead.

2.7 The Sustainable Development Goals are threaded throughout the Neighbourhood Plan. At the beginning of

each theme we set out which of the goals are contributed towards by the planning policies and community actions within the following pages.

2.8 An overview of the goals can be seen below and clicking the goals will take you to an in depth description on the UN website:



STRUCTURE OF PART 2

INTRODUCTION TO THIS SECTION

We have colour coded this section to make it easier to navigate.

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- 139 Policy PTC5: Shopfronts and Signage

ENVIRONMENT POLICIES

The following section of the neighbourhood plan contains policies related to the environment:

Natural Environment

- Policy PEN1: Landscape Setting and Views
- Policy PEN2: Portishead's Green and Blue Infrastructure
- Policy PEN3: Flood Risk and Natural Flood Management
- Policy PEN4: Biodiversity
- Policy PEN5: Trees, Hedgerows and Woodland
- Policy PEN6: Designation of Local Green Spaces
- Policy PEN7: Other Green Spaces

Built Environment

- Policy PEB1: Locally Distinctive, High Quality Design
- Policy PEB2: Small and Infill Development
- Policy PEB3: Local Heritage
- Policy PEB4: Sustainable Design, Construction and Retrofitting

Renewable Energy

- Policy PER1: Supporting Renewable and Low Carbon Energy Schemes in Portishead

UN SDGs

The policies in this section contribute to the following United Nations Sustainable Development Goals:



ENVIRONMENT: INTRODUCTION

PORTISHEAD'S NATURAL ENVIRONMENT

3.0 Portishead has a rich blue and green environmental heritage. Located on the southern shore of the Severn Estuary at the mouth of the River Avon, the town has a line of cliffs, beaches and salt marsh along its northern and eastern fringes, opening into the watercourses known as rhynes which drain the low-lying Somerset Levels to the south. The whole of Portishead's coastline has various statutory protections due to its significant biodiversity and scientific value. There are also expanses of ancient and protected hillside woodland at East Wood and Weston Big Wood.

3.1 Since 2001, Portishead has undergone population growth of approximately 60%, with a significant expansion in the number of residential dwellings and a large increase in the size of the built area of the town. Whilst the availability of land for development has greatly reduced, the demand for housing in Portishead has remained strong and therefore the remaining areas of open space in and around the town are important to protect.

3.2 Portishead's location on the northernmost edge of the Somerset Levels, between the Gordano Valley and Rodmoor, means that there is continuing

pressure to encroach further onto the floodplain and into the rural fringes of the town which are part of the green-belt.

3.3 At present, Weston Big Wood dominates the slopes of the valley to the south and south west of Portishead, with the built area of the town lying behind the ridge of the hill. Around Weston Big Wood there are natural buffer areas of fields which consist of unimproved and improved grassland, hedgerows, shelterbelts (which act as windbreaks) and trees. These serve as vital wildlife links with the surrounding Gordano Valley. Even small amounts of development around the fringes of this woodland will significantly impact on the biodiversity of the area as well as the visual appearance of the wood from the valley.

3.4 The inter-relationships and inter-connections between the woodland, rhynes, grassland and agricultural land are what sustain the Woods, the Valley, its beauty, flora and fauna.

BUILT ENVIRONMENT

3.5 The character of Portishead has been shaped over the years by a series of factors including landscape, the town's coastal location, its industry and the routes into and within the town. There is a wide variety of architectural styles and built characteristics across the town that contribute to a rich and diverse character

3.6 Portishead was a small village prior to the late Victorian era and the subsequent growth related to the dock. A number of buildings are currently designated through the listing system, including the nationally important former National Nautical School (now Fedden Village).

3.7 The Neighbourhood Plan identifies a number of buildings and heritage assets which are of value to the local area that are not currently listed. It also identifies features of the town which have a specific character related to the town's industrial past, including the rows of dock workers' housing adjacent to the High Street. In a post-industrial town with a relatively young population, many of whom have moved to the town from outside of the area in the last twenty years, the preservation and interpretation of aspects of the town's past, whilst looking forward to new uses, is essential.

RENEWABLE ENERGY

3.8 Work undertaken by the Centre for Sustainable Energy to support the Neighbourhood Plan concluded that immediate opportunities for developing renewable energy sources within the town are limited. Geography and urbanisation preclude wind and large-scale solar energy solutions. Other potential technologies such as tidal and micro-tidal solutions would potentially be viable within the area and may be a future solution but are not currently mature enough for full consideration, however we want to

encourage the use of new technologies as they become available. The recent start-up of a powerful tidal-powered turbine generating electricity in Orkney and the investment of billions of pounds in a tidal lagoon project with underwater turbines in Swansea Bay suggests that the capability to harness tidal power will soon become commercially viable. The introduction of some form of micro-tidal power generation in Portishead could play a crucial role in achieving our ambition to become carbon neutral by 2030.

3.9 Renewable Energy Community Interest Companies such as Low Carbon Gordano (Solar) and Channel Green Energy (Wind) are active in the town and in the wider area and we are keen to encourage these companies to develop further local renewable solutions.



PLANNING POLICIES: NATURAL ENVIRONMENT

LANDSCAPE SETTING AND VIEWS

Context

3.10 The character and quality of landscape is key to maintaining a strong sense of place which is an important objective in the National Planning Policy Framework. Portishead has a distinct and varied landscape setting⁸ which is cherished by residents and visitors.

3.11 The Portishead Community Character Statement (2022) has been prepared as part of the evidence base to the Neighbourhood Plan. The Community Character Statement has been prepared by a working group of local people with the support of expert Plan consultants. It describes and analyses important and locally distinctive features of the town as a whole and in the landscape setting.

3.12 As set out in the Community Character Statement, the landscape setting to the town plays a vital role in the distinct and separate identity of Portishead. There are four distinct areas to the landscape setting, from the higher ground of Portishead Down, with its extensive and valued views and the ancient woods of Weston Big Wood. The ridge of Portishead Down then dips and rises again further to the east at East Wood. To the west is Portishead

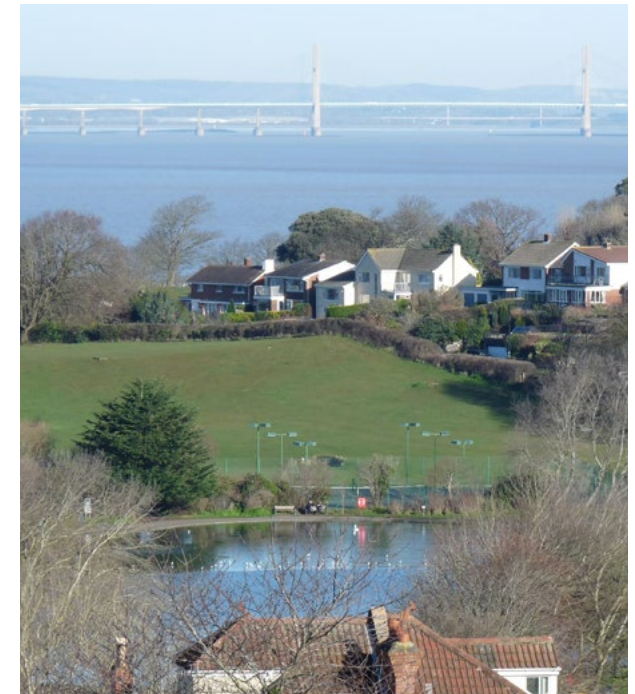
Bay, culturally and historically important to the town and its sense of place, again with wide expansive views. To the east of the town is the open flat landscape of the Gordano Valley.

3.13 These distinct areas that contribute to the distinct and highly valued setting of the town have been assessed and categorised into different character areas, both at a national level and by North Somerset Council. [The North Somerset Council 'Landscape Character Assessment' \(2018\)](#)⁸ supplementary Planning Guidance has identified different character types and areas in North Somerset. It is used to inform and guide planning decisions. The areas can be seen on Figure 2.

3.14 The last remaining open spaces, particularly the area around Weston Big Wood and farmland and floodplain outside the settlement boundary, are valued as settings to the town and for their role as local green spaces. They also deliver multiple ecosystem services and benefits (as set out in the Portishead Green and Blue Infrastructure Evidence Base Report 2022) and consequently should never be built on. Any future development needs to be carefully managed to protect and safeguard Portishead's assets, which

from the coastline to the ancient woodland, are unique assets that provide much value to the wellbeing of residents, the quality of the environment and the distinct character and visual amenity of Portishead.

3.15 As part of the character assessment work, the working group also identified key local views that should be protected. These are shown in detail in the Portishead Local Key Views Report (2021) also prepared as part of the evidence base to support this Plan.



Relevant Objective

O1 To protect Portishead’s locally valued views, landscape setting and valued relationship with the Gordano Valley, and maintain the separation of Portishead from other villages and towns.

Local Policy Context

| | |
|------|--|
| CS5 | Landscape and the historic environment |
| CS6 | North Somerset’s green belt |
| DM10 | Landscape |
| DM12 | Development within the green belt |

POLICY PEN1 – LANDSCAPE SETTING AND VIEWS

Any development should seek to conserve and enhance the landscape setting of Portishead and its landscape character, views and features, including those identified on Figure 2.

Development proposals will be expected to:

- i. integrate natural features such as groups of trees and the local rhyme system that contribute to both the landscape character and setting of the development; and
- ii. demonstrate that the whole scheme, including hard landscape and planting proposals, draws on local landscape characteristics and features through reference to relevant existing landscape and historic landscape assessments, the Portishead Community Character Statement, as well as any additional site specific assessments; and
- iii. respond sensitively to the transition between settlement edge and surrounding countryside and green belt, respecting the tranquillity of the landscape, and avoid any adverse impact on irreplaceable habitats such as Weston Big Wood and East Wood.

Development proposals that are likely to affect any of the local key views shown on Figure 3, and described in the Portishead Local Key Views Report, should assess the effect of the proposals on the view(s) and demonstrate how any adverse effects have been addressed.

The North Somerset Council 'Landscape Character Assessment' (2018) supplementary Planning Guidance has identified different character types and areas in North Somerset. Shown on the map and table below:



| Landscape Character Area | Strategy | Character | Condition |
|---------------------------------|----------------------------------|-----------|-----------|
| E4 Portishead Ridges and Combes | Conserve and Enhance | Moderate | Declining |
| A2 Clapton Moor | Conserve/ Enhance and Strengthen | Moderate | Good |
| L4 Clevedon and Portishead Bays | Conserve | Strong | Good |

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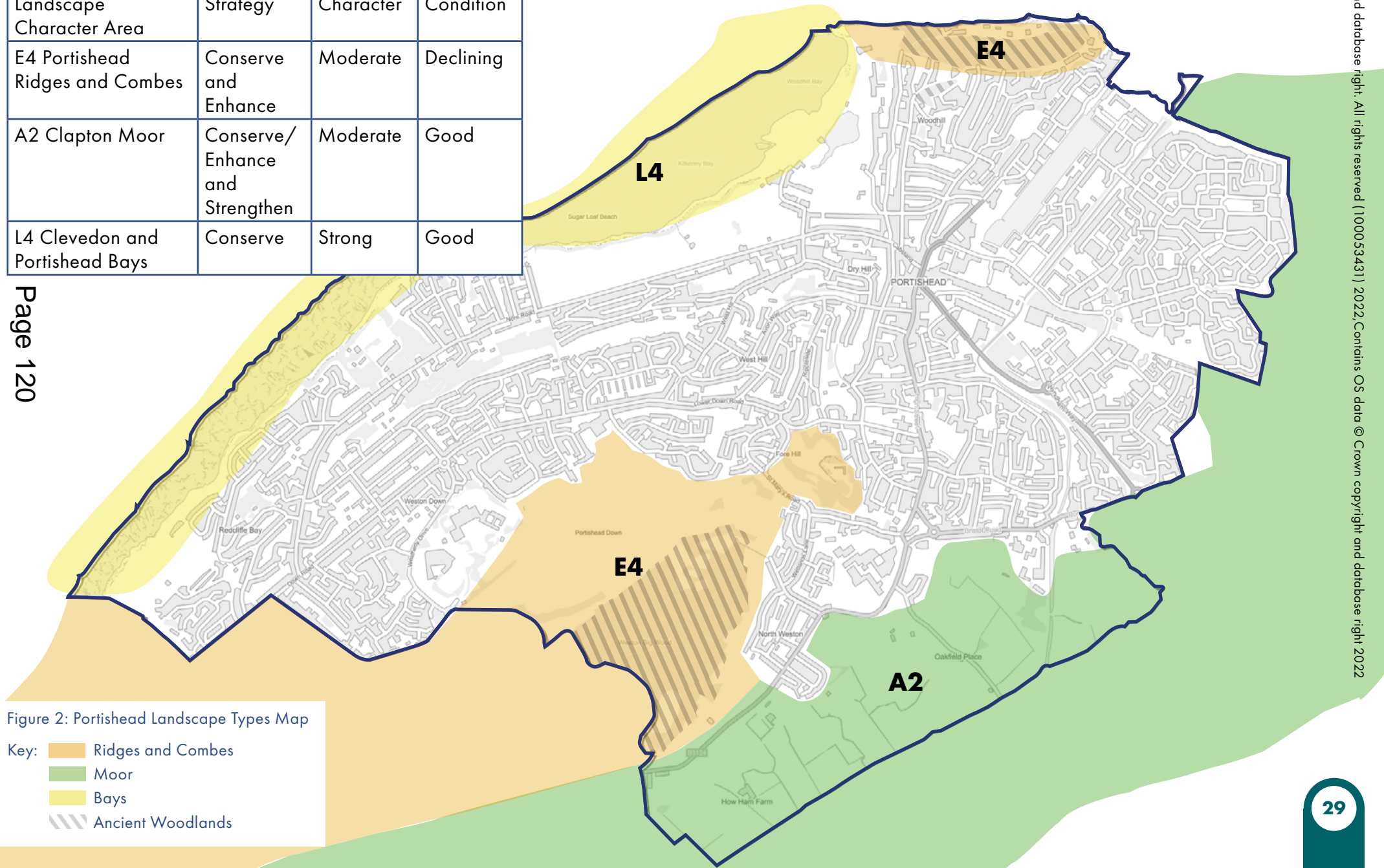


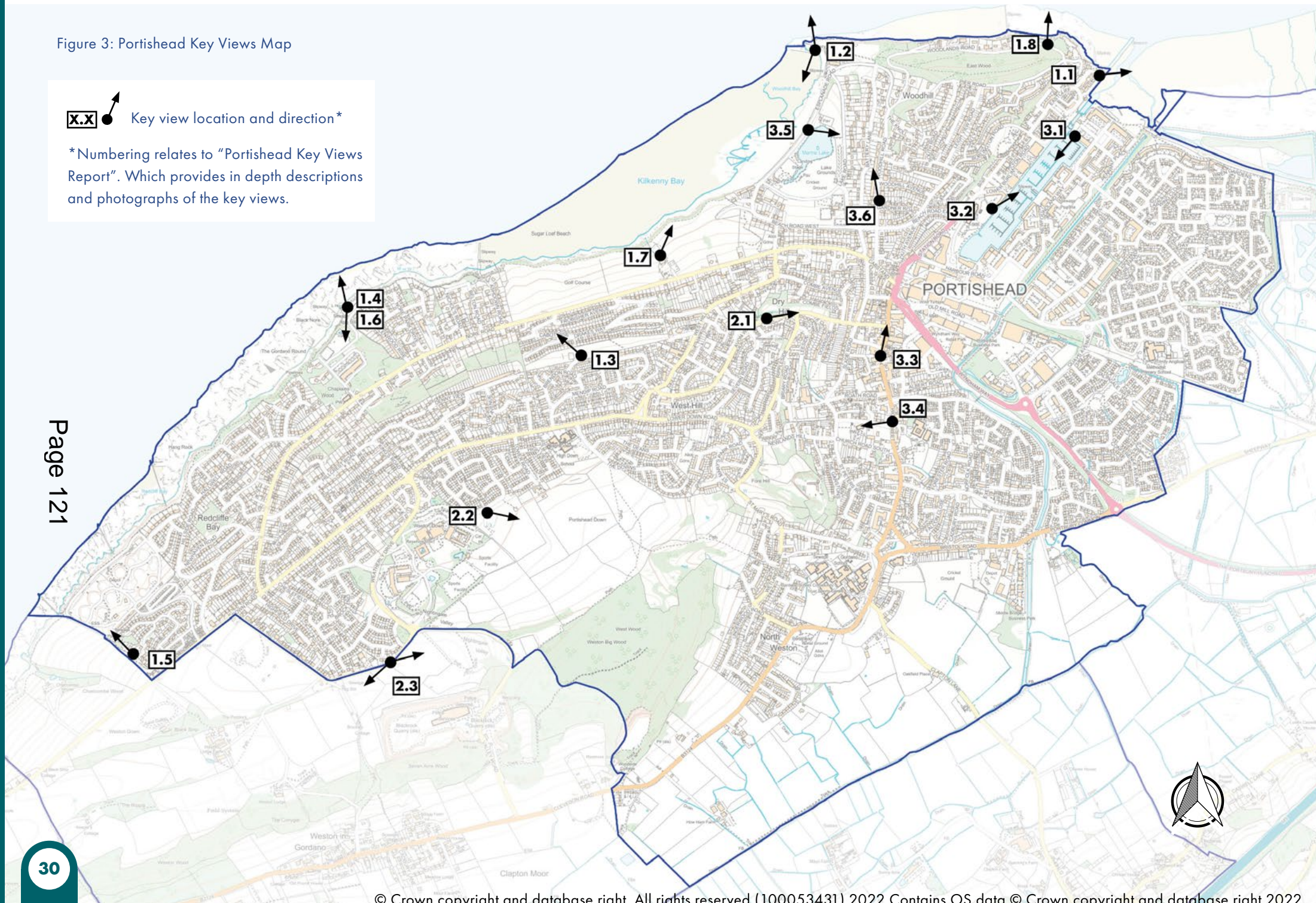
Figure 2: Portishead Landscape Types Map

- Key:
- Ridges and Combes
 - Moor
 - Bays
 - Ancient Woodlands

Figure 3: Portishead Key Views Map

X.X ● ↗ Key view location and direction *

*Numbering relates to "Portishead Key Views Report". Which provides in depth descriptions and photographs of the key views.



GREEN AND BLUE INFRASTRUCTURE

Context

3.16 Green and blue infrastructure encompasses the network of multifunctional green and blue spaces, and other natural features such as trees, verges and lakes, that give us a wide range of benefits for nature, climate and community wellbeing.

3.17 Green and blue infrastructure (GBI) in Portishead provides a huge range of 'ecosystem services'. From flood management at Portbury Ditch, to recreation opportunities at the Lake Grounds, through to supporting the local pollinator network in the Portishead in Bloom planters on the High Street; the green and blue infrastructure network in Portishead is multi-functional as well as integral to the quality of place of the town.

3.18 Portishead's green and blue assets are part of a network of green and blue infrastructure that is locally, regionally, nationally and internationally important. Figure 4 illustrates diagrammatically the key strategic green and blue infrastructure in the Neighbourhood Area to be protected and enhanced. The Severn Estuary has a number of designations recognising its local and international importance:

- The Severn Estuary Special Area of Conservation (SAC)
- Severn Estuary Special Protection Area (SPA)
- Severn Estuary Wetland of International Importance under the Ramsar Convention (Ramsar Site)
- Severn Estuary Site of Special Scientific Interest (SSSI).

3.19 More detail on Portishead's green and blue infrastructure, can be found in the Portishead Green and Blue Infrastructure Evidence Base Report (2022). Below an aerial shot looking north towards Severn Estuary with Weston Big Wood in the foreground.

WHAT ARE 'ECOSYSTEM SERVICES'?

Ecosystem services are the multiple benefits that the natural environment provides. Ecosystem services make human life possible and include - to name just a few - the production of food and water, flood regulation, space for recreation, air quality regulation and maintenance of biodiversity. A key aim of draft policy PEN2 is to support and diversify the range of ecosystem services provided by Portishead's green and blue infrastructure network.



3.20 North Somerset Council's [Green Infrastructure Strategy \(2020\)](#)⁹ provides a framework for protecting and enhancing the green and blue infrastructure network across the District. Using objectives from the Strategy, the Portishead GBI Evidence Report includes an assessment of how key GBI areas currently perform at various ecosystem services, as well as specific recommendations about how this performance could be improved. Proposals that affect Portishead's GBI network are expected to refer to the Portishead GBI Evidence Report and demonstrate how they protect and enhance the quantity and quality of the network, referring to the specific findings of the Report and priorities identified in Policy PEN2. Information included in the GBI Evidence Report, together with site specific analysis required for site proposals, will inform the content of the Climate Change Adaptation Statement which is required to be submitted by North Somerset Council's emerging Local Plan Policy DP5.

3.21 The [North Somerset Green Infrastructure Strategy](#)⁹ highlights the importance of the need to develop several linked policies that cover the full range of functions that green and blue infrastructure

covers. Policy PEN2 is therefore linked to other NDP policies on biodiversity, trees and woodland and open spaces. The protection and enhancement of Portishead's green and blue infrastructure network is threaded throughout further policies in the NDP, reflecting the GBI network's integral role in placemaking, wellbeing and mitigating the effects of the climate emergency.



Relevant Objective

O2 To protect and enhance the multi-functional blue-green (water and green) spaces of our town and the links between them, recognising the importance of these areas for health and wellbeing.

Local Policy Context

| | |
|------|--|
| CS1 | Addressing climate change and carbon reduction |
| CS4 | Nature conservation |
| CS9 | Green infrastructure |
| DM19 | Green infrastructure |

POLICY PEN2 - PORTISHEAD'S GREEN AND BLUE INFRASTRUCTURE

The integrity, multi-functionality, quality and connectivity of the strategic Green and Blue Infrastructure (GBI) network will be protected, enhanced and managed. Development that will result in the creation of new green and/or blue infrastructure (GBI) and/or contribute to the protection, management, enhancement and connectivity of Portishead's existing GBI network, as illustrated diagrammatically on Figure 4, and detailed in the Portishead GBI Evidence Base Report, will be supported.

Proposals for developments must, where relevant to the proposed development:

- i. identify the existing GBI within and around the development site; and
- ii. demonstrate how GBI has been incorporated into the proposal, with particular reference to the Objectives and Recommendations included in the Portishead GBI Evidence Base Report; and
- iii. assess and address how the proposal will benefit a range of ecosystem services that the GBI network provides; and
- iv. assess and address how the proposal will benefit connectivity of GBI through the site and beyond; and
- v. demonstrate that GBI in the proposal has been designed to promote and enhance local diversity and distinctiveness, referring particularly to the Portishead GBI Evidence Base Report and the Key Positive Design Characteristics identified in the Portishead Community Character Statement.

RELATED COMMUNITY ACTIONS

Joined up working for a joined up strategic GBI network

The Portishead Neighbourhood Area is part of key strategic Green and Blue infrastructure corridors that sweep beyond the Neighbourhood Area and across North Somerset. It is key that Green and Blue Infrastructure assets in Portishead are managed appropriately and in collaboration with neighbouring parishes to ensure benefits to the strategic network. Portishead Town Council already works collaboratively with its neighbouring parishes and is committed to continuing this in relation to green and blue infrastructure where needed.

Greening the Grey

Identify opportunities for 'greening the grey' within the built area e.g. green roofs, walls and planting in built up areas where the opportunities to provide new open space is limited. Development around the Marina has been identified as an area where this could be particularly beneficial. Portishead Town Council owns a number of bus shelters around the town and a toilet block – these have been identified as potential green roofs.

Key:

Neighbourhood Boundary

Statutory Designations:

RAMSAR/Special Protection Areas/ Special Areas of Conservation (SAC)

Sites of Special Scientific Interest (SSSI)

Green Belt

Local Nature Reserves

Local Wildlife Sites

Ancient Woodland

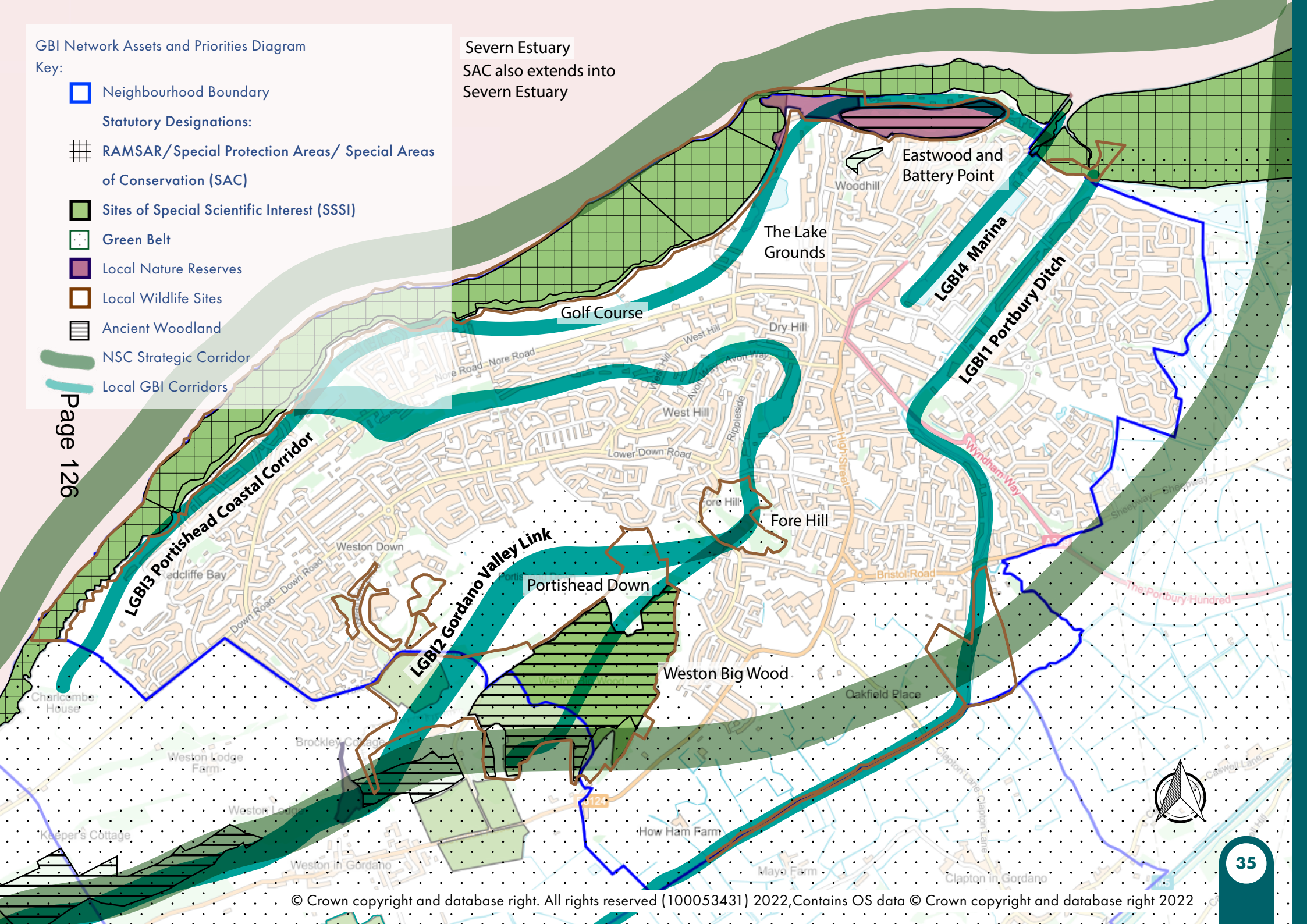
NSC Strategic Corridor

Local GBI Corridors

Severn Estuary

SAC also extends into Severn Estuary

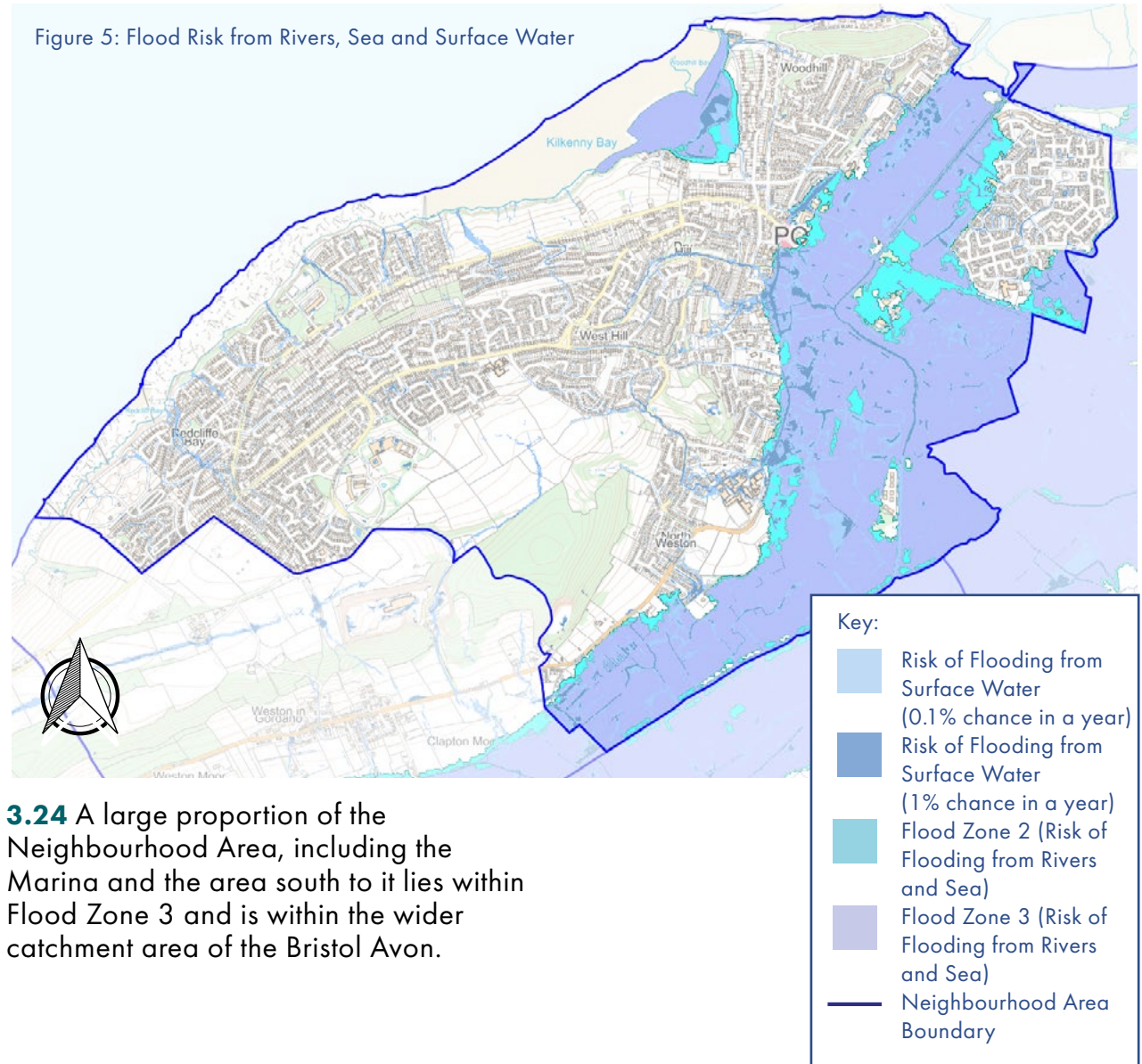
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FLOOD RISK AND NATURAL FLOOD MANAGEMENT

3.22 During the preparation of this Plan, the wider community highlighted strong concerns over flood risk, including concerns over rising sea levels, risk of flooding from the local rhynes, particularly around Lipgate Place, Bristol Road and Clevedon Road and the risk of surface water flooding in more recent development around the Marina. *The North Somerset Strategic Flood Risk Assessment*¹⁰ identifies Portishead as susceptible to groundwater flooding, with more than a quarter of the town considered at risk.

3.23 One of the major impacts of a changing climate is a further increased risk of flooding. The UK Met Office predicts that in a business-as-usual scenario, Britain could experience a decrease in summer rainfall by up to 47%, and up to 35% more rain in winter by 2070¹¹. This flood risk is exacerbated by the presence of the tidal Portbury Ditch within the Neighbourhood Area. The regular combination of high tides and high rainfall means that rainwater draining off the surrounding hills effectively has nowhere to go for the period of time around the high tide, particularly during spring tides.



3.24 A large proportion of the Neighbourhood Area, including the Marina and the area south to it lies within Flood Zone 3 and is within the wider catchment area of the Bristol Avon.

3.25 Bristol Avon Rivers Trust (BART) is a local charity which delivers education, land and river management advice and practical river restoration work throughout the Bristol Avon catchment. One particular area of focus for the charity is Natural Flood Management (NFM), the ‘soft engineering’ of water on a landscape scale, in order to contribute towards “slowing the flow”. NFM projects are designed to complement existing flood projects that are being delivered by other organisations already working in the area. Natural Flood Management involves working with nature to try and ‘slow the flow’ of water through a landscape. There are a variety of techniques and land-based interventions that can be used, including; subsoiling, cross drains, earth bunds, leaky ponds, cover crops, hedge planting, tree planting and grass buffers.

3.26 In terms of new development, and the important task of ‘managing rainfall’ in Portishead, drainage should be designed to match natural routes, infiltration rates and discharge rates as far as possible. Therefore the aim must be for water to be discharged as high up the drainage hierarchy¹² as possible:

1. into the ground (infiltration);
2. to a surface water body;
3. to a surface water sewer, highway drain, or another drainage system;
4. to a combined sewer.

3.27 The National Planning Policy Framework and Planning Practice Guidance together with the North Somerset Local Plan highlight the importance of development taking place in areas at least risk of flooding where possible, as well as the need to manage the flow of surface rainwater. North Somerset Council Development Advice Note ‘[Development](#)



and Flood Risk Issues’¹³ provides further guidance for those applying for planning permission in the Neighbourhood Area. Draft policy PEN3 adds local detail to the North Somerset Council policies.

Photos below show flooding arounds Lippgate Place.



Relevant Objective:

O7 To deliver sustainable development which prioritises brownfield land, responds positively to the climate crisis, reduces our carbon footprint and energy demand, and mitigates the local impacts of climate change.

Local Policy Context

- CS3 Environmental impacts and flood risk management
- DM1 Flooding and drainage

POLICY PEN3 - FLOOD RISK AND NATURAL FLOOD MANAGEMENT

Natural flood management works to conserve and enhance the ecological flood storage value of the water environment, including watercourse corridors, such as the rhyne system and catchments will be supported.

Major development should include provision of Sustainable Drainage Systems (SuDs), where appropriate, as part of the Natural Flood Management approach and the wider Green and Blue Infrastructure network of Portishead, paying particular attention to the Green and Blue Infrastructure Assets and Priorities shown on Figure 4 and the Objectives and Recommendations included in the Portishead GBI Evidence Base Report.

Where development proposals are in areas with known surface water flooding issues, they should include appropriate mitigation and construction methods.

Development in the neighbourhood area should also demonstrate adherence to the National Design Guide (2019), which includes guidance on integrated water management that enhances the character of a place and makes it more resilient to impacts of climate change.

BIODIVERSITY

Context

3.28 The Neighbourhood Area is host to a range of wildlife sites and features. From the internationally important Severn Estuary RAMSAR site (also a designated Site of Special Scientific Interest and Special Area of Conservation) through to nationally important sites of ancient woodland, such as Weston Big Wood, as well as local nature reserves at Fore Hill and East Wood and Battery Point, Portishead's wildlife sites and features support a rich overall wildlife network which contributes towards the wellbeing of wildlife and residents alike. However, we are also aware that human activity impacts on our local biodiversity such as with light pollution, and greater pressure on our ancient woodland, as demonstrated in the Portishead GBI Evidence Base Report (2022).

3.29 A record of habitats and biodiversity information has been obtained from Bristol Regional Environmental Records Centre and from local group Wild Portishead, who are using online tool iNaturalist to map and record wildlife in Portishead. This information is also included in the GBI Evidence Base Report.

3.30 Emerging North Somerset Local Plan Policy DP32 (Nature Conservation) outlines the emerging approach to nature and biodiversity conservation in the District. The GBI Evidence Base Report sets out detailed information on the existing biodiversity assets and nature conservation in Portishead. Proposals should pay particular attention to the objectives and recommendations set out in the Portishead GBI Evidence Base Report to help ensure that biodiversity improvement benefits local ecosystems and improves the range of ecosystem services that the GBI network provides.

3.31 Policy PEN4 is consistent with paragraph 174(d) of the NPPF, which requires a minimum 10% biodiversity net gain in new schemes. The emerging North Somerset Local Plan looks to deliver this at the North Somerset level through emerging policy DP33 (Biodiversity Net Gain). The biodiversity net gain approach follows on from the Government's aim to 'leave the environment in a better state than we found it' in its 25 Year Environment Plan.

3.32 Policy PEN4 states that proposals that are within or outside a Site of Special

Scientific Interest will not normally be permitted. For instance, this would apply to proposals which could affect the sensitive bird species and other habitats and species of the Severn Estuary. All designated SSSIs in the Portishead Neighbourhood Area are shown on Figure 4.

3.33 Paragraph 179(b) of the NPPF states that 'plans should promote the conservation, restoration and enhancement of priority habitats, ecological networks and the protection and recovery of priority species; and identify and pursue opportunities for securing measurable net gains for biodiversity'.



POLICY PEN4 - BIODIVERSITY

Development proposals will be expected to deliver a minimum of 10% net gain in biodiversity, including the enhancement and creation of ecological networks within and, where relevant, connecting with those beyond the Plan Area (see Figure 4). Proposals that exceed the minimum requirement of 10% biodiversity net gain will be particularly supported.

Protection, connection and enhancement of statutory and non-statutory nature conservation sites (as shown on Figure 4) is a priority for the Neighbourhood Area and development proposals must demonstrate sensitive responses to these sites where necessary, such as accommodating a buffer zone to protect sensitive habitats, or demonstrating that opportunities to reduce indirect impacts, such as light pollution, have been taken. Specific attention for priority habitats, as identified on Figure 6, and protected species should also be demonstrated.

Development that will adversely affect the integrity of sites of international importance for wildlife, including Special Areas of Conservation, Special Protection Areas and Ramsar sites, will not be permitted.

Any proposals that could affect sites of international importance for wildlife, including Special Areas of Conservation, Special Protection Areas and Ramsar Sites must carry out screening for Habitats Regulations Assessment (HRA).

Development which is likely to have an adverse effect on an Site of Special Scientific Interest (either individually or in combination with other developments), will not normally be permitted.

Development which could harm, directly or indirectly, species which are legally protected, or species and habitats that have been identified as Species or Habitats of Principal Importance in England (also known as Section 41 or 'Priority' species and habitats) will not be permitted unless the harm can be avoided or mitigated by appropriate measures.

Relevant Objective

O4 To protect and enhance the biodiversity of our area, recognising the important sites in Portishead that act as carbon sinks and sustain species under threat, including our small locally valued green spaces, nationally designated Sites of Special Scientific Interest, and internationally designated RAMSAR site and associated Salt Marshes.

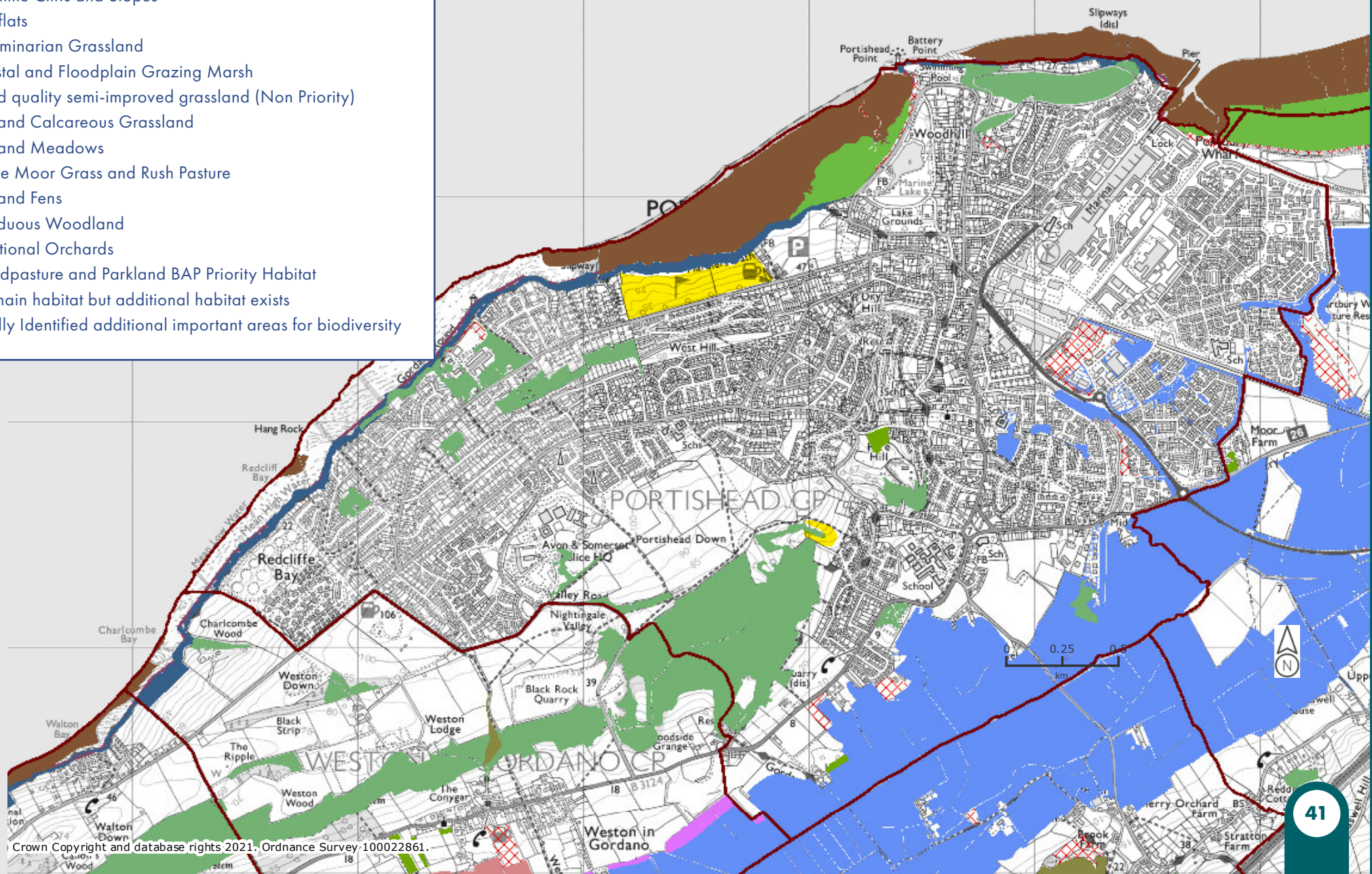
Local Policy Context:

CS4 Nature conservation
DM8 Nature conservation
CS9 Green infrastructure

Figure 6: Priority Habitats

Key:

- Parishes (GB)
- Coastal Saltmarsh (England)
- Maritime Cliffs and Slopes
- Mudflats
- Calaminarian Grassland
- Coastal and Floodplain Grazing Marsh
- Good quality semi-improved grassland (Non Priority)
- Lowland Calcareous Grassland
- Lowland Meadows
- Purple Moor Grass and Rush Pasture
- Lowland Fens
- Deciduous Woodland
- Traditional Orchards
- Woodpasture and Parkland BAP Priority Habitat
- No main habitat but additional habitat exists
- Locally Identified additional important areas for biodiversity



RELATED COMMUNITY ACTIONS

- *Expand rewilding management regimes in order to increase biodiversity.* Portishead Town Council support appropriately designed rewilding projects within the Town, understanding 'rewilding' as the 'large-scale restoration of ecosystems to the point where nature is allowed to take care of itself'¹⁷. In Portishead, it is important that potential rewilding projects are well communicated with the nearby community and informed by community engagement to inform the type of project (including species etc.) that is suitable in each particular location. Recent NSC-led projects for tree planting in Portishead have had mixed results as a number of the saplings did not survive, either through lack of watering/care and/or accidental damage or vandalism due to trees being planted in the wrong locations. Better collaboration with knowledgeable local partners would help to ensure that appropriate projects are brought forward. There may be an opportunity for appropriate rewilding projects on the Portishead Town Council-owned land at the football fields on Bristol Road. This would need to be carefully managed to ensure that the recreation function of this important green space was protected and enhanced where possible.
- *Reduce pesticide usage and/or go pesticide free in some areas.* Portishead Town Council supports this and has already banned the use of Glyphosate herbicide by Portishead Town Council in Portishead.
- *Encourage and support wildlife friendly gardening.* Wild Portishead promotes this through campaigns such as the Metre Meadow¹⁸ which encourages people to leave a 1 m² unmown area of their garden and keep a note of how it develops; the species it attracts etc. Portishead in Bloom is another relevant local partner that already does a lot of good work to promote biodiversity.

PROMOTING PORTISHEAD'S BIODIVERSITY NET GAIN

The recently passed legislation in the Environment Act requires developments to increase biodiversity value on site by at least 10%. This is a positive step towards nature recovery, but it relates only to sites that are being developed.

North Somerset Council recently declared an ecological emergency, recognising that the survival of our society and economy relies on the health of the natural environment and ecosystems.¹⁴ We need to do all that we can to increase biodiversity in Portishead, not just in areas where development is taking place.

There is opportunity for us to improve the wildlife value of our public realm and spaces; improving, rewilding and restoring natural habitats, increasing the range of ecosystem services they provide to improve health and wellbeing of residents as well as of ecological networks. These local community assets are within our management and have potential to secure biodiversity gains well in excess of 10%.

Portishead Town Council will work with local organisations and community groups to identify the best opportunities. This should be informed by Nature Recovery Network and Opportunities mapping from the West of England Nature Partnership and North Somerset Council's rewilding map. These projects identify particular areas for biodiversity improvements, as well as the type of habitat most appropriate.

TREES, HEDGEROWS AND WOODLAND

Context

3.34 Portishead has a distinctive treescape, with large areas of woodland visible from within the built environment as well as locally valued significant trees located within and around the town. The number and diversity of street trees is an important feature of the town (many of which are protected with Tree Protection Orders) and the Neighbourhood Area is also home to large areas of Ancient Woodland - nearly 45 hectares in total.

3.35 Ancient Woodlands are our richest land-based habitat for wildlife. According to the Woodland Trust they are home to more threatened species than any other habitat. Ancient Woodland covers a significant proportion of the land in the town area at around 4.7%, which is significantly higher than the national average of 2.5%¹⁹ - much of this Ancient Woodland is within Weston Big Wood outside the settlement in the green belt, but also includes East Wood and Wood Hill within the town.

3.36 Weston Big Wood is also home to the rare Round-leaved Whitebeam. The Round-leaved Whitebeam is only found within the Neighbourhood Area, within the

Avon Gorge and over the Severn Estuary in the Forest of Dean. The Round-leaved Whitebeam is classed as 'vulnerable' on the IUCN Red List of Threatened Species.²⁰

3.37 The Standing Advice from Natural England and the Forestry Commission²¹ relating to buffers for ancient woodlands, is that the proposal should have a buffer zone of at least 15 metres from the boundary of the woodland to avoid root damage (known as the root protection area). In their 'Planners' Manual for Ancient Woodland and Veteran Trees' (2019) the Woodland Trust state in relation to providing adequate buffers, "Although there is no 'one size fits all' with buffer design, each one should be designed to fulfil the specific requirements of its location and the type of proposed development. In order to protect Weston Big Wood as an irreplaceable habitats in Portishead, the biggest possible buffers should separate ancient woodland and any development that comes forward. As a precautionary principle, a 50-150 metre buffer should be maintained between a development and the ancient woodland, including through the construction phase, unless the applicant can demonstrate very clearly how a smaller buffer would suffice. Weston Big Wood is designated as a Site of Special

Scientific Interest (SSSI). SSSI impact risk zones around the wood are used as a tool to make an assessment of any development proposals - the first risk zone around the wood extends to 50meters (and there is currently no development within this zone) and the second to 150m.

3.38 Overall tree canopy coverage in Portishead in 2020 is estimated to be an average of 20% which has been mapped to date using the i-tree canopy tool²². The Woodland Trust recommend an increase in UK woodland cover from its current 13% of land area to 19% by 2050 to tackle this country's biodiversity and climate crises.²³ The Urban Forestry and Woodland Advisory Committee Network²⁴ advise that 'a minimum standard for tree canopy cover is set for a local area, with evidence showing that 20% is a good aspiration'. It is therefore considered necessary and achievable, for any development proposals in Portishead to continue to deliver 20% tree canopy coverage.

3.39 Trees in Portishead have a range of functions, be it contributing towards biodiversity and amenity value, providing shade and helping with other adaptations to the effects of climate change. There

are a significant number of trees with Tree Protection Orders (TPOs) reflecting the importance of trees and woodland in and around this town, which are highly valued by the local community. Existing Tree Protection Orders can be viewed on North Somerset Council’s online planning map.²⁵

3.40 Inspired by work on the NDP, a group of local people started the Significant Trees of Portishead project which aims to record, map and collect key data on the trees in the Neighbourhood Area, with a view to protect valuable trees and sustainably increase the overall tree cover in Portishead. The aim of the project was to work with ecologists, arboriculturalists and local people to ensure the appropriate species and size of tree are planted in the right places to maximise their chance of survival and ensure that the overall GBI network is protected and enhanced through tree planting. The project used *iNaturalist*²⁶ – an online mapping tool – to map and record data. Detail and analysis of the treescape in Portishead is included in the Portishead GBI Evidence Base Report (2022), with key features shown on Figure 7.

3.41 As stated in North Somerset Council’s adopted policy framework, retaining trees and hedgerows can influence both the design and layout of any development, and

arrangements for their protection should be made during the construction phase. Designs should also take account of the long term setting for important trees and how they will relate to the use of the area in the future. It is important to note here that a Neighbourhood Plan in itself cannot protect a tree from being felled, unless it is protected by a Tree Preservation Order or is within a Conservation Area.

3.42 Hedgerows, like trees, can make an important contribution to the character and can also be important historically as indications of land use and previous ownership. They also contribute significantly to biodiversity and amenity value of the natural and, in places, built environment. Trees will also help with adaptation to the effects of climate change.

3.43 Where tree loss is unavoidable, a Tree Replacement Standard can be used to inform the number of replacement trees for the loss in canopy cover.

3.44 Whilst a particular site or design approach to trees will inform the number and approach to tree planting, the standard below is an established methodology to underpin discussions on the replacement of these key assets.

3.45 The Neighbourhood Area is located within the Forest of Avon, which is part of a national programme of Community Forests across England, delivering more trees and woodlands. In 2021, the Forest of Avon published its *Tree and Woodland Strategy for the West of England*²⁷, which the NDP Community Actions aim to contribute towards. Looking ahead, the aim is to ensure that the city’s tree cover is, at the very least, protected and maintained in keeping with SDG 15 – Life on Land.

| Trunk Diameter of Tree lost to development (cm measured at 1.5 metres above ground level) | Number of Replacement Trees |
|---|-----------------------------|
| Less than 15 | 0 - 1 |
| 15 - 19.9 | 1 |
| 20 - 29.9 | 2 |
| 30 - 39.9 | 3 |
| 40 - 49.9 | 4 |
| 50 - 59.9 | 5 |
| 60 - 69.9 | 6 |
| 70 - 79.9 | 7 |
| 80 + | 8 |

Table 1: Tree Replacement Standard (based on the Bristol Tree Replacement Standard (known as BTRS – see page 21 of Bristol City Council’s Planning Obligations Supplementary Planning Document)

Relevant Objective

O3 To protect, maintain and expand Portishead's distinctive treescape and woodland areas such as Weston Big Wood.

Local Policy Context

CS4 Nature conservation
 CS9 Green Infrastructure
 DM8 Nature Conservation
 DM9 Trees and Woodlands
 Biodiversity and Trees SPD



POLICY PEN5 – TREES, HEDGEROWS AND WOODLAND

Ancient and Veteran Trees

Development proposals will be expected to demonstrate no loss, or deterioration of the irreplaceable habitats of Ancient Woodland (as shown on Figure 7). Development proposals directly or indirectly affecting Ancient Woodland and ancient trees or veteran trees identified in the Neighbourhood Plan Area will be resisted. A 50 - 150metre buffer should be maintained between any development and the Ancient Woodland of the SSSI Weston Big Wood, including during the construction phase, in order to avoid adverse impacts on this irreplaceable habitat, unless the applicant can demonstrate very clearly how a smaller buffer would be acceptable.

Any ancient or veteran trees must be retained within a development site, including a root protection area and appropriate buffer zone, which should be whichever is greater of, either an area which is a radius of 15 times the diameter of the tree with no cap or (b) 5 metres beyond the crown.

Other Existing Trees, Hedgerows and Woodland

Existing trees and hedgerows on development sites should be considered throughout the design process to be retained and incorporated as placemaking features in new development.

Development proposals affecting other existing trees or hedgerows should ensure that there is no damage, or loss of value, to those which demonstrate good arboricultural, biodiversity value nor to the Locally Identified Significant Trees identified on Figure 7 (and as part of the ongoing Significant Trees of Portishead project). Protection before and after development should be in accordance with British Standard BS5837.

Where there is an unavoidable loss of trees on site, the number and type of replacement trees should be informed by the quality and size of the lost trees.

cont.

POLICY PEN5 – TREES, HEDGEROWS AND WOODLAND CONTINUED

New Trees

New tree planting, in development proposals and throughout the built and natural environments of the Plan area, will be supported to maintain and increase the overall tree canopy cover of the Neighbourhood Area, and to provide gateway and landmark trees that contribute to local distinctiveness. This should be informed by relevant ecology and arboricultural assessment and should have regard to the advice set out in the Portishead GBI Evidence Base Report - with a preference for native, large-canopied and orchard species.

Tree Canopy Cover

Proposals should clearly set out what the future tree canopy coverage of a site will be with a target of 20% of the site area on sites outside of the town centre and greater than 0.5 ha in size. This will principally be achieved through retention and planting of trees, but where it can be demonstrated that this is impractical, the use of other green infrastructure (e.g. green roofs) can be used to deliver equivalent benefit. On residential development sites, some of this tree canopy cover will be expected to be met through new trees on streets as well as within gardens.

SIGNIFICANT TREES OF PORTISHEAD PROJECT

During the preparation of the Neighbourhood Plan, members of the Environment Working Group took part in a project to log significant trees in Portishead to catalogue key information such as their species, size, health, function and location. Part of the project's aim was to identify trees with potential for tree preservation orders (TPOs) and / or for listing on the Woodland Trust's Ancient Tree Inventory²⁸, which would grant them further protection.

Figure 7 shows those that have been identified as part of the project, although there will be many more within the Neighbourhood Area.

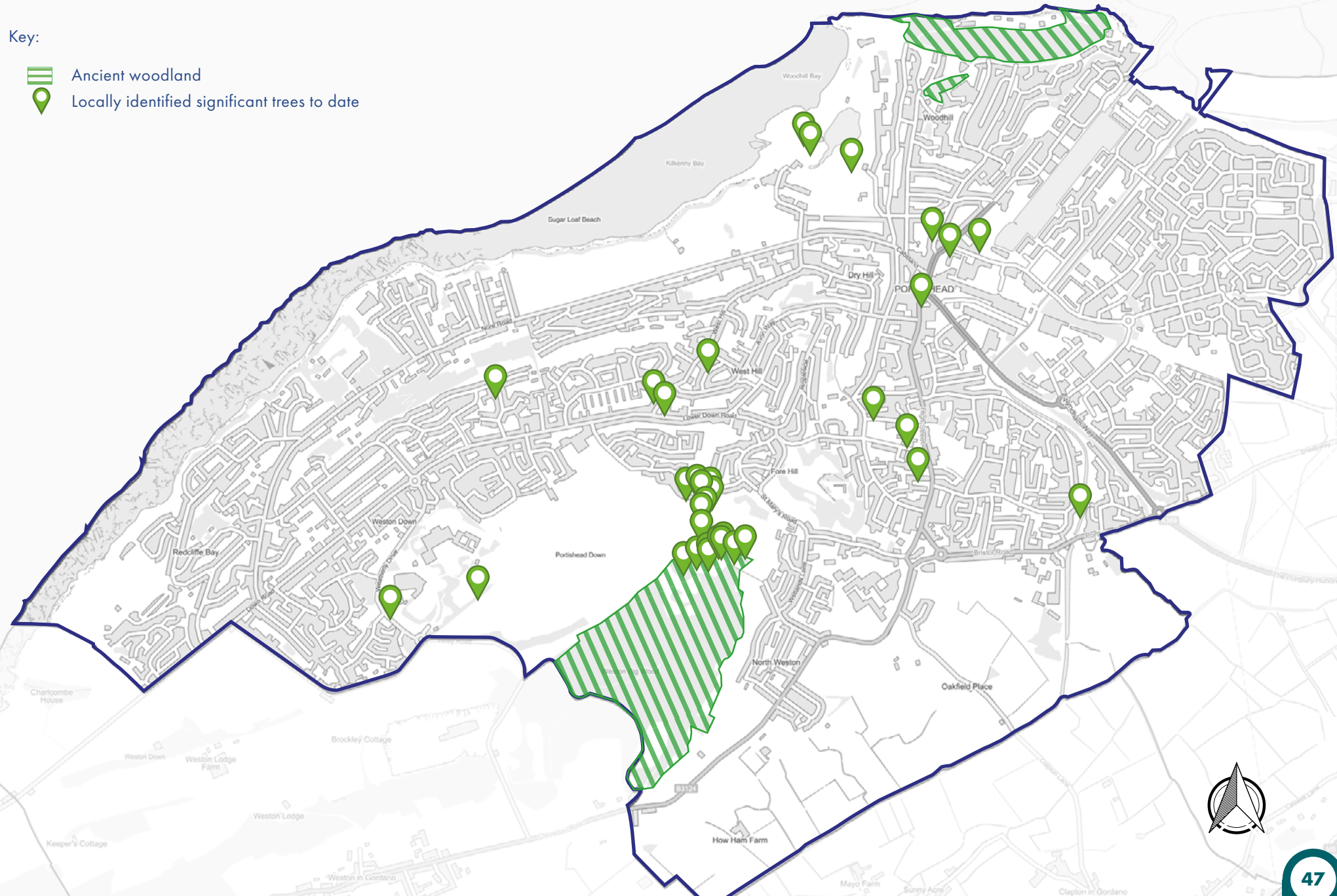
Nominations and suggestions for significant trees were made directly from the community via online engagement and other methods.

The project builds evidence around what makes a tree valuable and successful in particular places in Portishead, locations for potential tree planting; useful to inform rewilding projects within the Neighbourhood Area to help ensure that the 'right trees are planted in the right places' (NPPF paragraph 131).

Figure 7: Ancient Woodland, Locally Identified Significant Trees

Key:

-  Ancient woodland
-  Locally identified significant trees to date



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DESIGNATION OF LOCAL GREEN SPACES

Context

3.46 The Neighbourhood Plan proposes the designation of Local Green Spaces. The designation, introduced by the NPPF, provides special protection against development for green areas of importance to communities. The designation can be used:

- where the green space is in reasonably proximity to the community it serves
- where the green area is demonstrably special to a local community and holds a local significance, for example because of its beauty, historic significance, recreational value (including as a playing field), tranquillity or richness of its wildlife.
- where the green area is local in character and is not an extensive tract of land.

Local Green Spaces do not have to be publicly accessible, and do not need to be in public ownership.

3.47 North Somerset Council's Sites and Policies Plan Part 2 document designates Local Green Spaces in Portishead. These designations are carried forward into the emerging Local Plan (specifically

emerging policy LP14 Local Green Space). The Neighbourhood Plan identifies further spaces for designation that are particularly special to Portishead's local community.

3.48 A full explanation of the methodology, evidence and justification to support the designation of the nominated Local Green Spaces is set out in the Portishead Local Green Space Evidence Base Report (2022).

3.49 Local policy for managing development on a Local Green Space should be consistent with policy for Green Belt. This means 'inappropriate development of the space would not be allowed except for in very special circumstances'. (NPPF 2021, para 147)². It is possible that limited development affecting a Local Green Space could be acceptable, for example new / replacement facilities relating to the functions normally associated with the space (e.g. changing rooms for recreation spaces). Development and uses unrelated to those functions, such as residential development, would not normally be acceptable and would need to meet the exception test requiring 'very special circumstances'

3.50 Only those spaces which meet the Local Green Space criteria above are included in the draft designations in Policy PEN6. The Portishead Neighbourhood Plan Steering Group has also identified a wider network of undesignated green spaces which spans the whole town and encompasses the spaces which do not fit the Local Green Space criteria and so cannot be included as Local Green Space. NDP Policy PEN7 (Other Green Space) includes more information on this network of spaces.

North Somerset Council Sites and Policies Plan para 4.38-9 <https://www.n-somerset.gov.uk/sites/default/files/2020-03/site%20allocations%20plan.pdf>

Relevant Objective

O9 To protect and improve health, wellbeing, leisure and recreation opportunities for residents of all ages and abilities by protecting and expanding community facilities and spaces for community activities to ensure that Portishead is a welcoming, safe and accessible place for everyone.

O10 To ensure all residents have easy access to local green, blue and open spaces, and to promote environments and transport networks that offer all individuals and communities the greatest potential to lead active and healthy lifestyles.

Local Policy Context

SA5 Local Green Space

SA6 Undesignated Green Space

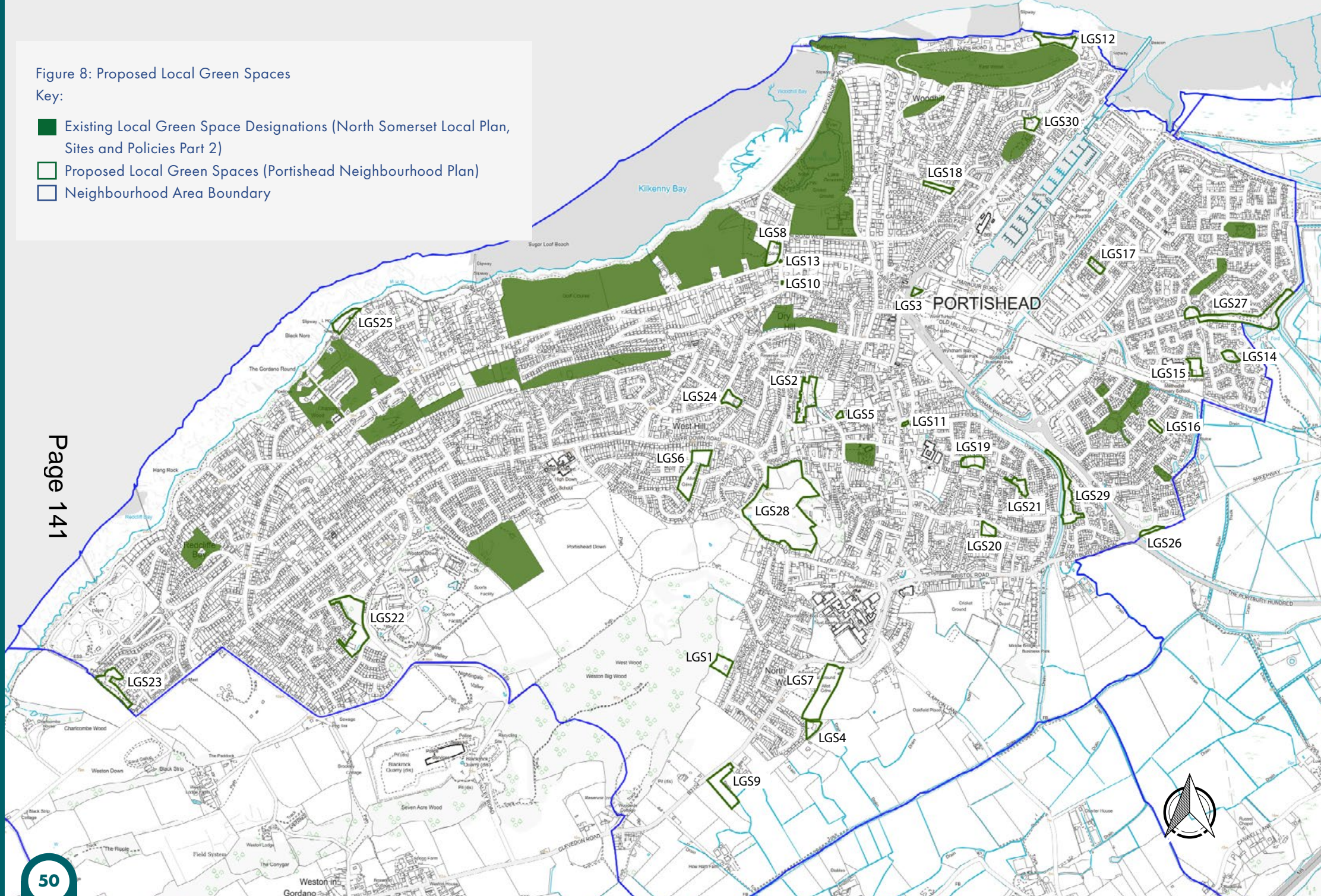
POLICY PEN6 – DESIGNATION OF LOCAL GREEN SPACES

In accordance with NPPF paragraphs 101-103, planning permission will not be granted except in very special circumstances for development which adversely affects a designated Local Green Space as shown on Figure 8 and detailed in the Local Green Space Evidence Base Report, particularly regarding the characteristics underpinning its designation, such as beauty, historic importance, recreational value, tranquillity or richness of wildlife.

Figure 8: Proposed Local Green Spaces

Key:

- Existing Local Green Space Designations (North Somerset Local Plan, Sites and Policies Part 2)
- Proposed Local Green Spaces (Portishead Neighbourhood Plan)
- Neighbourhood Area Boundary



OTHER GREEN SPACES

Context

3.51 Green spaces within and around the built environment are a key component of Portishead's GBI network. Increasing development pressure on the town has highlighted the importance of nearby and accessible open spaces in Portishead for the local community; a sentiment that has only increased throughout the pandemic.

3.52 North Somerset policy SA6 recognises the value of open green spaces which are not designated as Local Green Spaces in making worthwhile contributions to the townscape, character, setting and visual attractiveness of a place. The policies require development proposals that affect undesigned open spaces to not have a detrimental impact on green infrastructure by adversely affecting spaces that make this worthwhile contribution. In Portishead, our undesigned open spaces have a range of functions and provide a range of ecosystem services, for example providing space for recreation and play, providing an important community value, local food production, contributing towards the townscape and distinctive character of an area, and providing space for biodiversity to thrive through rewilding projects.

3.53 The Portishead GBI Evidence Base Report (2022) includes an audit of open spaces in Portishead, which includes identification of spaces and their function and value, as well as opportunities for improvement where appropriate. The open space audit and Policy PEN7 adds local detail to North Somerset policy by identifying the open spaces in Portishead and their valued functions and contributions. The open spaces are identified on Figure 9.

3.54 Some of the undesigned green spaces in Portishead are identified as Community Open Spaces. These green spaces are where limited development is supported, so long as it is in keeping with the existing use and community value of the site. For example, a school may wish to build a sports pavilion on its playing field, or a medical centre may need to build additional healthcare facilities on its land.

3.55 Throughout the preparation of the Neighbourhood Plan, Slade Road open area has been highlighted as an important open green space for the local community. In planning terms, two distinct areas make



up this space. The first is the western, wooded area, which this Neighbourhood Plan proposes to designate as a Local Green Space (see policy PEN6 above), to be protected from development in line with Green Belt policy.

3.56 The second area is the eastern, more open area, which local people value for its recreation and biodiversity. The space is used informally for bmx and other activities, and there is an informal footpath that crosses the area.

3.57 This eastern area is allocated for residential development in North Somerset's Local Plan Policy SA1. This is an allocation that is brought forward into emerging Local Plan material from North Somerset. The Neighbourhood Plan cannot be used to block development, so it is not appropriate for the Neighbourhood Plan to identify this space in PEN7. However, it is important that the recreational and biodiversity value of this space is noted.

3.58 The Other Green Spaces map and policy should be read in conjunction with draft Neighbourhood Plan Policy PEN6.



Relevant Objectives:

O2 To protect and enhance the multi-functional blue-green (water and green) spaces of our town and the links between them, recognising the importance of these areas for health and wellbeing.

O10 To ensure all residents have easy access to local green, blue and open spaces, and to promote environments and transport networks that offer all individuals and communities the greatest potential to lead active and healthy lifestyles.

Local Policy Context

- CS9 Green infrastructure
- SA5 Local Green Space
- SA6 Undesignated Green Space

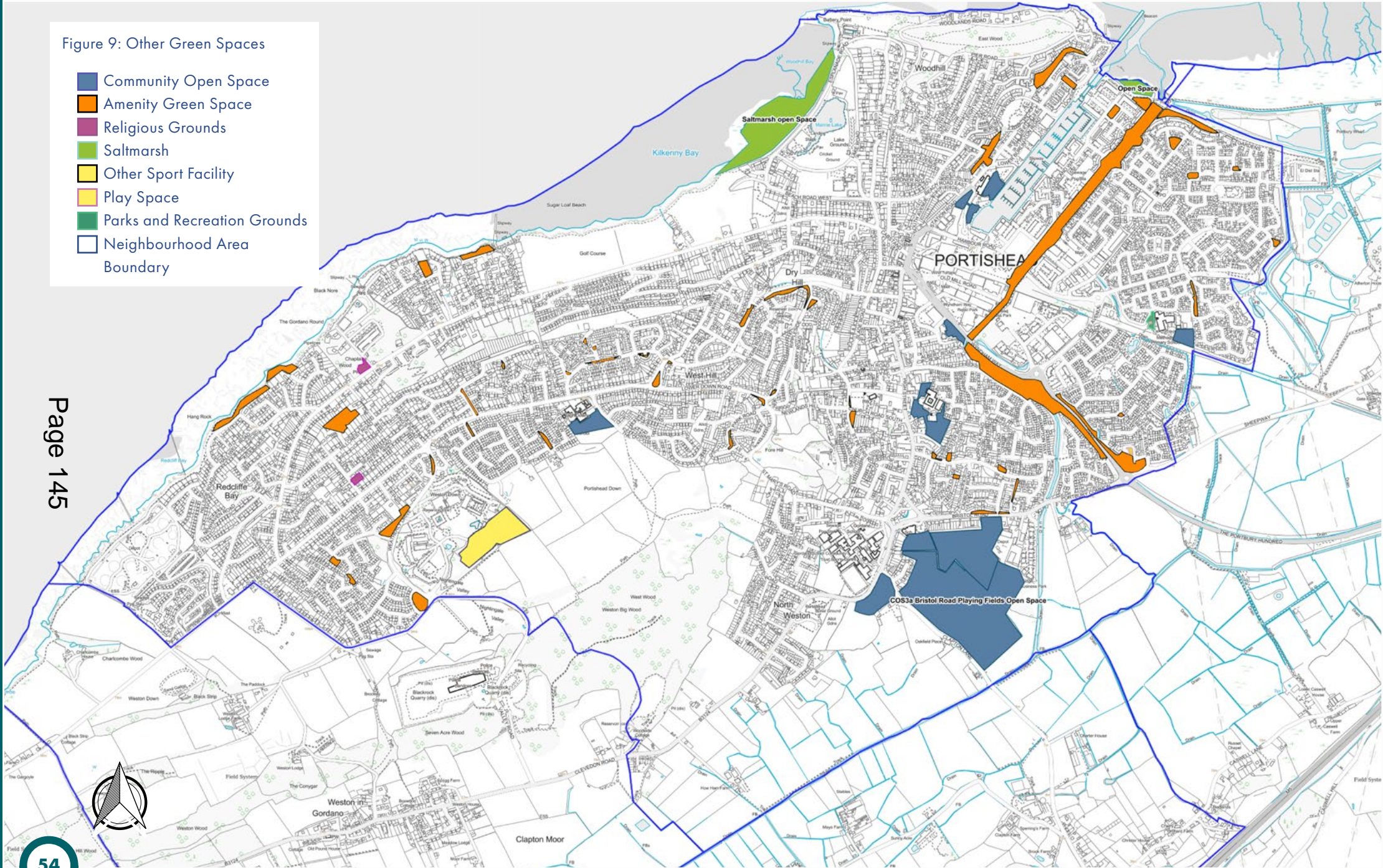
POLICY PEN7 - OTHER GREEN SPACES

Development proposals affecting green spaces, not designated as Local Green Spaces, as identified on Figure 9, will only be acceptable provided they:

- do not have a detrimental impact on green infrastructure by adversely affecting spaces which provide an important community and/or biodiversity value, and/or make a worthwhile contribution to amenity and/or the townscape, character, setting, visual attractiveness of the settlement, and
- demonstrate from an assessment of open space provision, using the quantity and access standards for open space as set out by North Somerset Council²⁹, that there is a surplus in the catchment area of open space beyond that required to meet both current and forecast need, and full consideration has been given to all functions that the open space performs, or
- demonstrate that a replacement open space (or enhancement of the remainder of the existing site) provides a net benefit to the community in terms of the quantity, quality and accessibility of the open space including by walking and cycling.
- Any proposed development on school playing fields must be for education purposes or where the Department for Education is satisfied that the land is no longer required for school use and its loss would not result in a shortfall in recreational open space/playing pitches for the local community.

Figure 9: Other Green Spaces

- Community Open Space
- Amenity Green Space
- Religious Grounds
- Saltmarsh
- Other Sport Facility
- Play Space
- Parks and Recreation Grounds
- Neighbourhood Area Boundary



PLANNING POLICIES: BUILT ENVIRONMENT

LOCALLY DISTINCTIVE, HIGH QUALITY DESIGN

Context

3.59 In 2019 the Government published a 'National Design Guide'³⁰ which highlights the importance of understanding and responding to local character. In early 2021 a National Model Design Code³¹ was introduced as part of the government's planning practice guidance. It expands the National Design Guide and reflects the government's priorities and provides a common overarching framework for design.

3.60 The 2021 update of the NPPF also underscores the importance of high quality design: "the creation of high quality, beautiful and sustainable buildings and places is fundamental to what the planning and development process should achieve."³²

3.61 The NPPF sets out that "Neighbourhood planning groups can play an important role in identifying the special qualities of each area and explaining how this should be reflected in development".³³

3.62 An in-depth survey and analysis of the locally distinctive character and design of the built and natural environment is summarised in the Portishead Community

Character Statement (2022), which forms a key part of the evidence base for our Neighbourhood Plan. It has been produced by the Steering Group with guidance from Plan consultants. The core of this document is a description and analysis of important and locally distinctive features of the town as a whole and the distinctive areas within it.

3.63 The Portishead Community Character Statement complements and informs our Neighbourhood Plan. It reflects local aspirations and sets out how the identified special qualities and locally distinctive characteristics should be reflected in development proposals. The combination of Portishead's distinctive landscape setting that ranges from coastal to ridges with areas of ancient woodland, to pastoral farmland in the Gordano Valley, and its diverse settlement pattern, as well as a rich variety of building forms and architectural styles contribute to a rich and diverse character.

3.64 The Community Character Statement should be used at the earliest possible stages of design and as part of early pre-application community engagement.

3.65 Policy PEB1 includes requirements for 'major' development proposals. 'Major' development is generally defined as development where 10 or more homes will be provided, or where the site has an area of 0.5 hectares or more.

3.66 Policy PEB1 encourages developments to take note of the twelve design quality considerations in *Building for a Healthy Life*³⁴ which cover the themes of 'integrated neighbourhoods', 'distinctive places' and 'streets for all'. If developments achieve nine out of twelve 'green' indicators within these themes, they can secure a Building for a Healthy Life commendation.

POLICY PEB1 - LOCALLY DISTINCTIVE, HIGH QUALITY DESIGN

High quality development proposals which protect, conserve and enhance the built and natural environment of Portishead and deliver locally distinct places and high quality design where people can live well will be supported.

All new development must be based on thorough site and context appraisal, and must draw upon positive and distinctive features of Portishead's built and natural character and heritage.

Any proposals for major development must demonstrate how the proposed development layout, density, access proposals and building design approach complement and extend the positive characteristics of the immediate area, wider settlement and landscape of Portishead.

In addition to having regard to the National Design Guidance and North Somerset Council design policy, development proposals must demonstrate how they have been informed by the Portishead Community Character Assessment, and therefore how they have responded positively to the history and characteristics of the area in which the site is located.

Major development scheme proposals with a residential component should be shaped using the Building for a Healthy Life design assessment tool or similar, and have regard to National Design Guidance and Secured by Design standards. Major residential development schemes that demonstrate that they achieve nine out of twelve 'green' indicators, securing Building for a Healthy Life Commendation, will be supported.

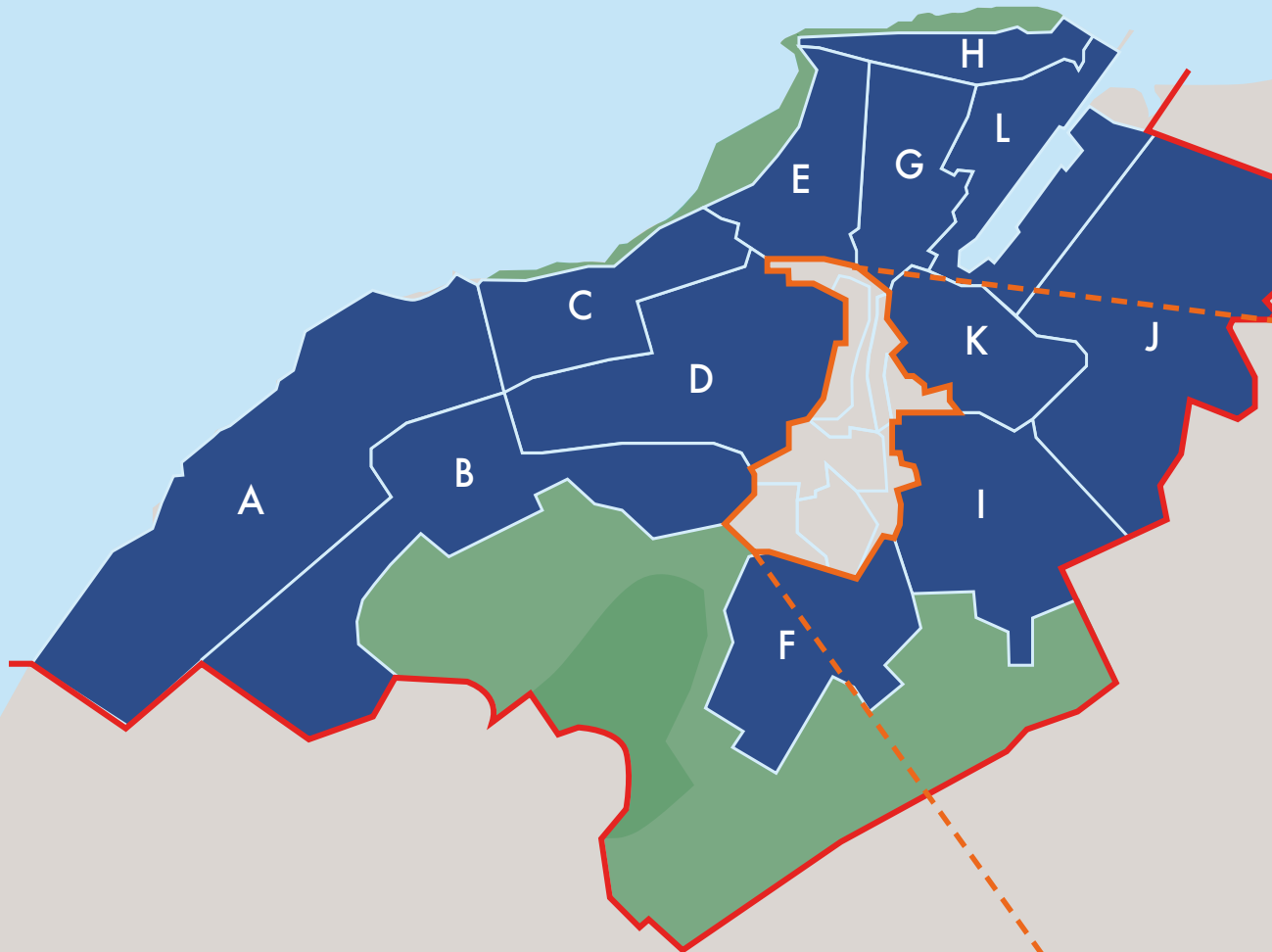
Relevant Objective

O5 To ensure that development protects and reinforces Portishead's character and distinctiveness, and encourages the highest standards of building, public space and landscape design and sustainability.

Local Policy Context

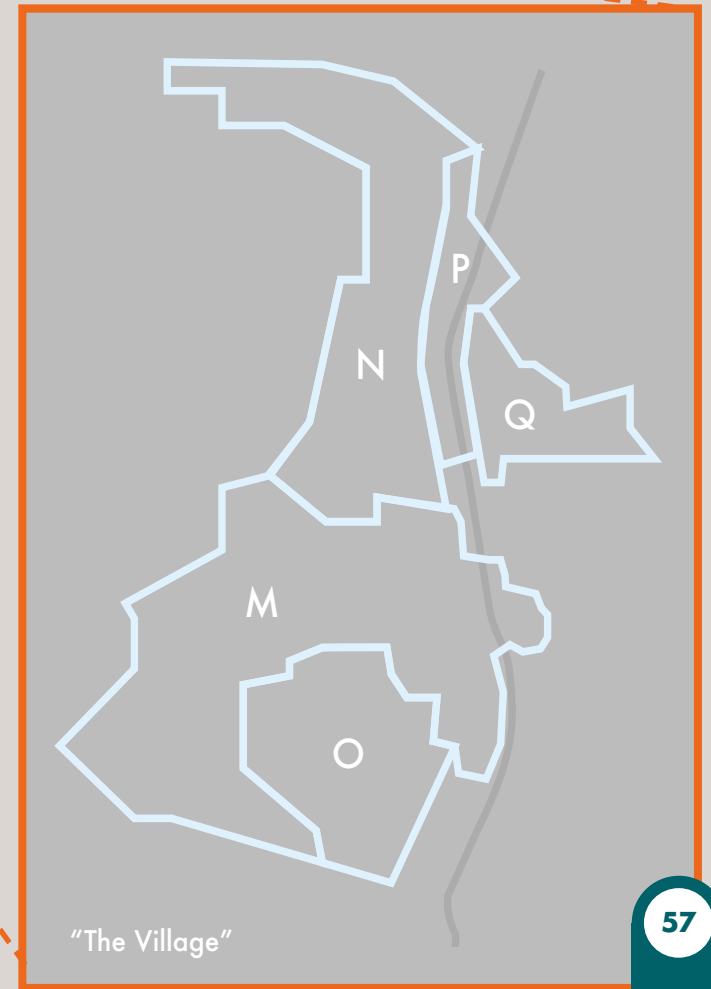
- CS12 Achieving High Quality Design and Placemaking
- DM32 Quality Design

Figure 10: Character Areas



Key:

- | | |
|-------------------------------------|----------------------------------|
| A. Nore Road and Redcliffe Bay | J. The Vale & Village Quarter |
| B. Down Road | K. Wyndham Way |
| C. Kilkenny Fields and Raleigh Rise | L. The Marina |
| D. West Hill | M. Court House Farm |
| E. The Lake Grounds | N. Slade Road |
| F. North Weston and St Mary's Road | O. St Peters Road |
| G. Woodhill | P. High Street |
| H. East Wood | Q. Albert Road & Victoria Square |
| I. Brampton Road & Bristol Road | |



SMALL AND INFILL DEVELOPMENT

Context

3.67 Adopted North Somerset policy SA2 identifies Portishead's settlement boundary, within which residential development is acceptable in principle (subject to the other detailed policies of the Local Plan). The built area of Portishead has a tightly drawn settlement boundary, outside of which is either the Severn Estuary or current Green Belt land – see Figure 11.

3.68 During the preparation of the Neighbourhood Plan and its associated Community Character Statement, the community highlighted concerns over levels of development pressure on land within the Settlement Boundary and the impact of this being instances of residential development 'squeezed into' inappropriate locations which do not reflect the character of nearby existing development, for example, there has been strong and successful resistance to any change to the status quo on the large section of open grassland at Portishead Golf Course.

3.69 Local Plan policies SA2 (Settlement Boundaries) and DM37 (Residential development within existing residential areas) set criteria for acceptable

residential development within existing residential areas. NDP Policy PEB2 below sets out Portishead-specific criteria for how this should be delivered within the Neighbourhood Area. It also broadens the scope of this topic to include criteria for infill development to provide other land uses such as employment opportunities or new facilities.

3.70 Infill development is defined as the filling of a relatively small gap between existing buildings³⁵.

3.71 A priority objective of the Core Strategy is to maximise brownfield opportunities in Portishead. Brownfield land is defined as land that has been 'previously developed'; this definition excludes agricultural or forestry buildings and gardens.

3.72 Local planning authorities, including North Somerset Council, are required to publish a brownfield land register for their area which sets out previously developed land that a local planning authority considers suitable for residential development. Whether a brownfield is

considered 'suitable' will be decided by North Somerset Planning officers taking into account considerations such as biodiversity, highways and identified local needs.

3.73 During the preparation of the Plan, local people highlighted the key concern that infrastructure in Portishead must be improved in order to support any new residential development. Any proposals for infill residential development in Portishead should ensure that they do not negatively impact on local infrastructure provision, particularly health and education services.



Relevant Objectives:

O7 To deliver sustainable development which prioritises brownfield land, responds positively to the climate crisis, reduces our carbon footprint and energy demand, and mitigates the local impacts of climate change.

O5 To ensure that development protects and reinforces Portishead's character and distinctiveness, and encourages the highest standards of building, public space and landscape design and sustainability.

Local Policy Context

SA2 Settlement boundaries
 CS14 Distribution of new housing
 CS31 Clevedon, Nailsea and Portishead
 DM37 Residential development in existing residential areas
 Residential Design Guide SPD

POLICY PEB2 - SMALL AND INFILL DEVELOPMENT

Proposals for new or improved local employment opportunities, small housing developments for up to and including 9 units, and / or new services and facilities that contribute to the continued and sustainable growth of Portishead will be supported in principle provided that development is located within the Settlement Boundary and accords with the limits of development provisions set out in the North Somerset Local Plan (policies SA2 and DM37).

Small and infill development within the Settlement Boundary that ensures the regeneration of previously developed land, or conversion and/or refurbishment of existing premises will be supported in principle, subject to compliance with other policies in the development plan.

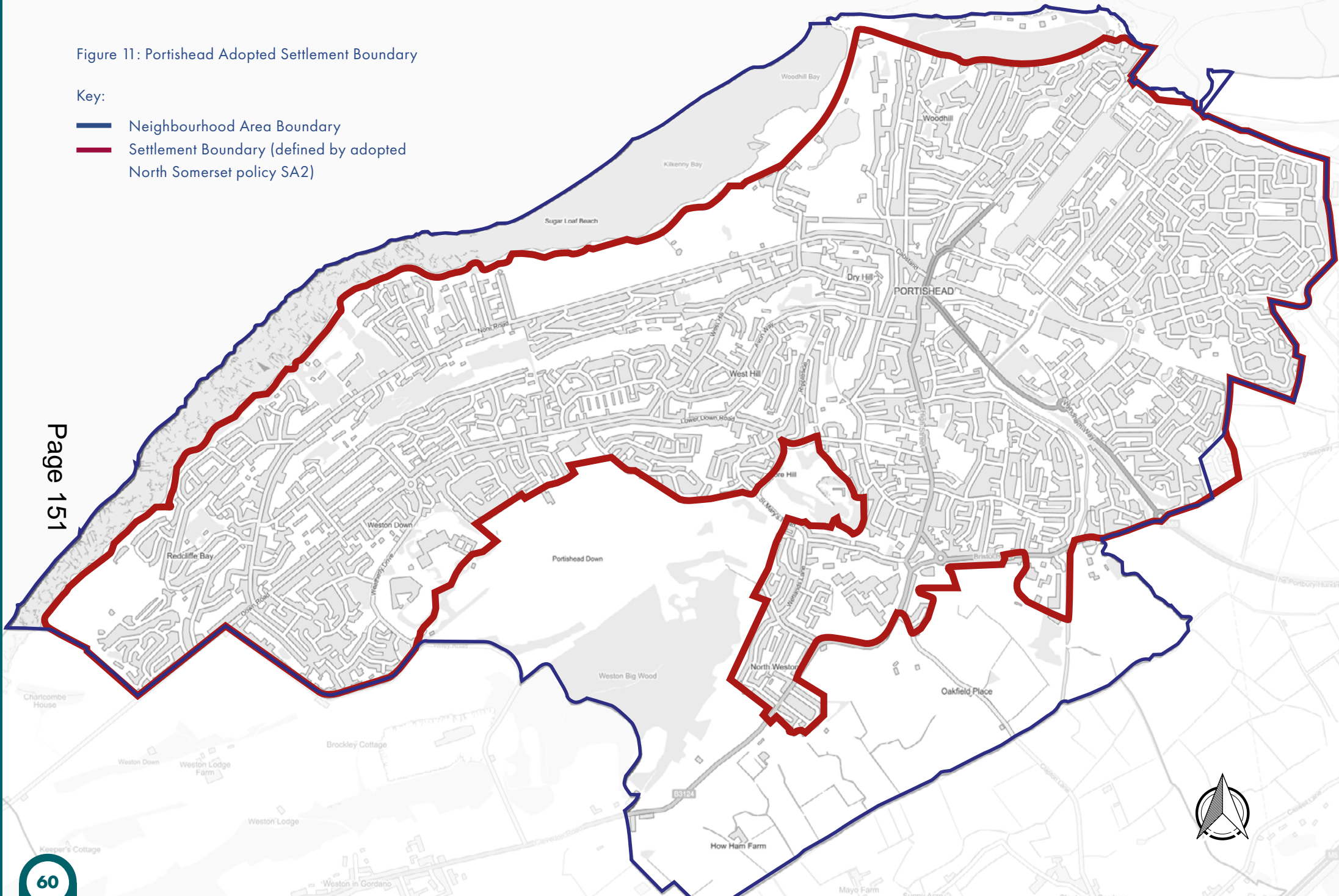
Any small and infill development should:

- Not adversely affect the character of the area, paying particular attention to the rhythms of existing plot sizes and the volumes of houses, as identified in the Portishead Community Character Statement; and
- Deliver an improvement in biodiversity within and, where appropriate, beyond the site, with particular reference to policy PEN4 in this Neighbourhood Plan, where an improvement of over 10% in net gain in biodiversity will be particularly supported.

Figure 11: Portishead Adopted Settlement Boundary

Key:

- Neighbourhood Area Boundary
- Settlement Boundary (defined by adopted North Somerset policy SA2)



LOCAL HERITAGE

Context

3.74 Portishead is rich in local heritage and has an active local history group – The Gordano Civic Society. There are 39 listed buildings in the town, as well as one scheduled ancient monument, and four Conservation Areas, as shown on Figure 12.

3.75 A Conservation Area is an area of special architectural character and historic interest which is protected by law against certain changes. Unlike listed buildings, which are designated by Historic England, Conservation Areas are appointed and managed by the Local Authority - in this case North Somerset District Council. [The Listed Buildings and Conservation Areas Act 1990 \(Part II section 72\)](#)⁶⁰ requires planning authorities to pay special attention to the 'preserving or enhancing the character or appearance' of a Conservation Area.

3.76 National policy states that, in determining applications, local planning authorities should require an applicant to describe the significance of any heritage assets affected, including any contribution made by their setting. This should be a thorough assessment of impact proportionate to the significance of the heritage asset which can range from the Conservation Area itself to specific

buildings or structures. Heritage statements are a method of ensuring that this work is undertaken as part of any development procedures.

3.77 There are also many more buildings, and structures in Portishead that play a role in collective heritage and identity of the town even though they do not meet the listing criteria for nationally significant heritage assets for Grade I or II listing (such as the grade II listed Fedden Village/ National Nautical School), are valued as part of the local heritage story. Their heritage value places them in the category of 'buildings of local interest', otherwise called 'non-designated heritage assets'. Through research and consultation, a number of such locally valued non-designated heritage assets have been identified. Some of these are also recorded on the North Somerset Historic Environment Record. These are shown on Figure 12 and detailed information is set out in the Portishead Locally Valued Non-designated Heritage Assets Report (2022) which is part of the evidence base to the Neighbourhood Plan.

3.78 By identifying buildings and structures of local interest, the local community has the chance to recognise buildings or other heritage assets that are of importance to

the sense of place and local heritage and that these need to be regarded with care in planning decisions. This will benefit both owners and developers regarding better understanding of opportunities and constraints of the local area.

3.79 North Somerset Council are working in collaboration with Historic England to launch a Local Heritage List for North Somerset. The Local Heritage List for the district has a nomination and assessment process. Buildings and structures of local interest identified in this Neighbourhood Plan may be nominated for consideration for the North Somerset List and are considered to be strong candidates having been identified locally using Historic England guidance and have also been through a rigorous public consultation process.

"There are a number of processes through which non-designated heritage assets may be identified, including the local and neighbourhood plan-making processes and conservation area appraisals and reviews. Irrespective of how they are identified, it is important that the decisions to identify them as non-designated heritage assets are based on sound evidence."

Paragraph 40 Historic Environment PPG⁶²

POLICY PEB3: LOCAL HERITAGE

A. Designated Heritage Assets

Development will be expected to preserve and where appropriate enhance the character, appearance, special interest and setting of:

- the four Conservation Areas in Portishead, existing open green space, including private gardens, should be protected from unsympathetic development where this would have an adverse impact on the historic character of a Conservation Area; and
- Listed buildings and structures across the town.

B. Non-designated Heritage Assets

Development proposals that affect non-designated Heritage Assets (including buildings or structures of local interest as shown on Figure 12) will be required to take into account the character, context and setting, including important views towards and from the building or structure. Development proposals must demonstrate that appropriate consideration has been given to:

- i. the significance of the heritage asset;
- ii. its most distinctive and important features;
- iii. the elements of its setting and immediate surrounds that contribute to its significance; and,
- iv. the contribution the asset and its setting makes to the character of the local area (whether in a Conservation Area or not).

A heritage impact assessment should accompany planning applications in Portishead which have the potential to impact upon heritage assets (designated and non-designated) and/or its setting.




Relevant Objective:

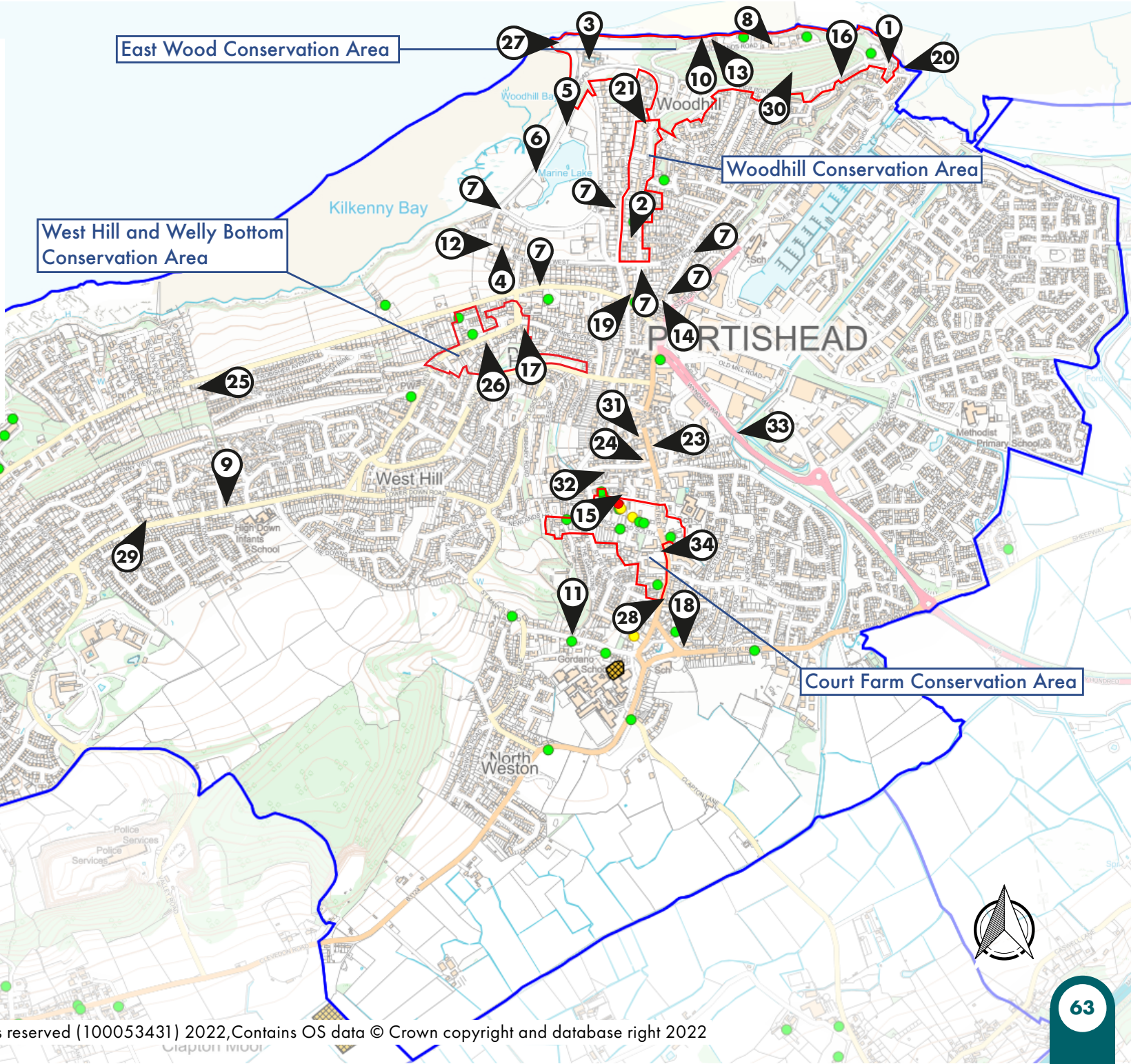
O6 To ensure that new development is sympathetic to our local heritage, including its maritime and industrial history.

Local Policy Context

| | |
|-----|--|
| CS5 | Landscape and the Historic Environment |
| DM3 | Conservation Areas |
| DM4 | Listed Buildings |
| DM5 | Historic Parks and Gardens |
| DM6 | Archaeology |
| DM7 | Non-designated Heritage |

Figure 12: Local Heritage Assets

- Listed Buildings
- Grade I
- Grade II*
- Grade II
-  Scheduled Ancient Monuments
-  Parish Boundary
-  Buildings and structures of local interest



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BUILDINGS AND STRUCTURES OF LOCAL INTEREST

1. Historic Building (House): The Dock Master's House
2. Historic Building (House): The Abbey' Woodhill Road
3. Swimming Pool: Portishead Open Air Pool
4. Historic Building (House): Mariners Cottage
5. Street Furniture: Street Lamps*
6. Street Furniture: Street Benches*
7. Street Furniture: Ventilation Columns*
8. Historic Buildings (House): Woodlands and Holmleigh
9. Historic Building (House): The Upper Lodge
10. Historic Building (Salt Water Bathhouse): The Saltings
11. Historic Building (House): The Cot
12. Historic Building (House): Myrtle Cottage
13. Historic Building (House): Anchorage
14. Historic Building: "The old police station" **
15. Historic Building (House): Church Cottage
16. Street Furniture: Fencing and Gates: Power Station original Fencing
17. Historic Building (House): Avon View House & Annex
18. Historic Building (Public House): The Albion **
19. Historic Building (Church): United Reform Church **
20. Historic Pier and Building: Lifeboat station, Slipway and Pier **
21. Historic Building (House): 71-73 Woodhill Road
22. Historic Building (Church): Methodist Church **
23. Historic Building (Public House): The Plough **
24. Historic Building (Public House): The Poacher **
25. Historic Building (House): Nore Lodge
26. Historic Building (Converted Church/Dwelling): Moose Hall **
27. Historic Lighthouse: Battery Point Lighthouse
28. Historic Building (House): Clarence House
29. Historic Building (House): Down House
30. Iron Age Hill Fort: East Wood **
31. Historic Building: Former Portishead Post Office
32. Historic Building: Roath Road Chapel **
33. Historic Bridge: Weston, Clevedon and Portishead Light Railway bridge
34. Historic Building (Lodge House): Clarence House Lodge

Note: planning policy only has an impact where planning consent is needed. There will be little control over street furniture which is covered instead by the Highways Act unless it is actually fully listed (Grade I, Grade II or Grade II listed).

** Non-designated heritage assets also recorded on the North Somerset Historic Environment Record.

SUSTAINABLE DESIGN, CONSTRUCTION AND RETROFITTING

3.80 The emissions from the UK's buildings account for 26% of the UK's total emissions. 18% of this total is from our homes (32% in Portishead) (Centre for Sustainable Energy, 2021)³⁶. This is not only bad for the planet, it is bad for the occupants; new homes need to be designed and built to use significantly less energy (which also means they would cost a lot less to run) (Net Carbon Toolkit, 2021)³⁷.

3.81 The Climate Change Act 2008 (2050 Target Amendment) Order 2019³⁸ commits the UK government by law to reducing greenhouse gas emissions to 'net zero' by 2050, and constitutes a legally binding commitment to end the UK's contribution to climate change. 'Net zero' refers to the balance between the amount of greenhouse gas produced and the amount removed from the atmosphere.

3.82 North Somerset Council's Climate Emergency Strategic Action Plan³⁹ sets out the Council's aim to become a carbon neutral area by 2030 and is updated every year. Every redevelopment project or new build in Portishead provides an opportunity to make a difference and a contribution towards meeting North Somerset's climate change targets for 2030 and beyond.

3.83 Achieving an energy efficient built environment is a key theme in North Somerset Council's Climate Emergency Strategic Action Plan, including the aim for all new homes and commercial space to be carbon neutral or carbon neutral plus. Addressing climate change and carbon reduction (Policy CS1), and delivering sustainable design and construction (Policy CS2) are leading policies within North Somerset Council's adopted Local Plan. Policy PEB4 is part of Portishead Town Council's local response to the climate emergency.

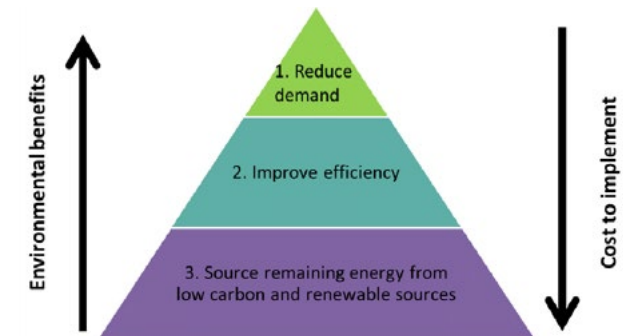
3.84 Responding to the climate emergency is also a priority in North Somerset Council's emerging Local Plan (see footnote links). Evidence underpinning emerging Local Plan Policy DP6 (Net Zero Construction) is particularly relevant to NDP policy PEB4; this evidence illustrates the need for the measures set out in policy PEB4, as well as their deliverability and viability.

<https://www.n-somerset.gov.uk/sites/default/files/2022-03/net%20zero%20new%20build%20policy%20evidence%20December%202021.pdf>

<https://www.n-somerset.gov.uk/sites/default/files/2022-02/Operational%20Carbon%20non-domestic%20Jul21.pdf>

3.85 The Net Zero Carbon Framework (2021) is a key reference for NDP policy PEB4. The Framework has been created to make Net Zero carbon new build and retrofit more accessible. The Framework is for use by building professionals (developers, contractors, architects and engineers) and is also relevant to self-builders, planning officers and other housing professionals. The UK Green Building Council also provides a framework definition to help guide the implementation of net zero building.

3.86 The energy use of existing buildings in Portishead represents a large proportion of our total carbon emissions. The sensitive retrofitting of these buildings is supported. The [LETI Climate Emergency Retrofit Guide](#)⁴⁰ provides some further key guidance on how we can retrofit our homes to make them fit for the future and support our net zero targets.



The Energy Hierarchy

POLICY PEB4: SUSTAINABLE DESIGN, CONSTRUCTION AND RETROFITTING

Development should be designed to reduce carbon emissions and energy demand in response to Climate Change, and must follow the principles of the energy hierarchy. High standards of sustainable design and construction will be supported, and it should achieve measures such as:

- a. sustainable construction techniques, with measures to minimise energy use and maximise renewable energy production. Both new build and refurbishment of existing homes should seek to meet energy use targets as set out in the [Net Zero Carbon Toolkit \(2021\)](#)⁴¹;
- b. opportunities to maximise green infrastructure to sequester carbon and provide other benefits such as shade;
- c. good connections to existing services and facilities, and/or a mix of uses in the proposed development that minimises the need to travel by car;
- d. addressing the potential for overheating, all new development should include a recognised overheating risk assessment ([Home Quality Mark \(HQM\)](#)⁴² or equivalent);
- e. conservation of water resources through incorporation of water efficiency and water reuse measures minimising vulnerability to flooding.
- f. use of sustainably sourced materials during construction (HQM or equivalent); and
- g. minimising waste and maximising recycling waste generated during construction.

The retrofit of existing and heritage properties/assets is encouraged to reduce energy demand and to generate renewable energy where appropriate, providing it safeguards historic and/or positive distinctive characteristics (as identified in the Portishead Community Design Statement) and development is done with engagement and permissions of relevant organisations.

For major applications, applicants are encouraged to use appropriate sustainability assessment tools such as the [Building Research Establishment's Environmental Assessment Method \(BREEAM\)](#)⁴³, [Home Quality Mark for residential Development and/or CEEQUAL](#)⁴⁴ (or equivalents) for infrastructure development.

Relevant Objective

O5 To ensure that development protects and reinforces Portishead's character and distinctiveness, and encourages the highest standards of building, public space and landscape design and sustainability.

Existing Local Policy Context

- CS1 Addressing climate change and carbon reduction
- CS2 Delivering sustainable design and construction

RELATED COMMUNITY ACTIONS

- The Town Council should encourage and stimulate improvement of the energy efficiency of the existing housing stock

PLANNING POLICIES: RENEWABLE ENERGY

SUPPORTING RENEWABLE AND LOW CARBON ENERGY SCHEMES IN PORTISHEAD

Context

3.87 Strategic policies in the emerging North Somerset Local Plan (particularly policies SP1 Sustainable Development and SP2 Climate Change) require, where appropriate, development proposals to demonstrate how they address the climate emergency and contribute towards the aim of a carbon neutral North Somerset by 2030. One of the key methods to do this is maximising, supporting and encouraging decentralised renewable energy generation in new development.

3.88 Government advice requires that 'the planning system should support the transition to a low carbon future in a changing climate. It should help to shape places in ways that contribute to radical reductions in greenhouse gas emissions... including (supporting) ...renewable and low carbon energy and associated infrastructure' (NPPF paragraph 152⁴⁵).

3.89 Emerging North Somerset Policy DP7 supports development for renewable energy generation in principle, and identifies particular 'areas of search' within Portishead where this might be appropriate.

3.90 During the preparation of the Neighbourhood Plan, the Centre for Sustainable Energy produced the Portishead Renewable Energy Study (2021), exploring the potential for renewable energy generation in Portishead. The Study concluded that currently, opportunities for developing large-scale renewable energy projects in the Neighbourhood Area, such as solar or wind, are limited, largely due to Green Belt constraints.

3.91 However, Portishead's location on the Severn Estuary presents an opportunity to harness its huge tidal range. The recent start-up of a powerful tidal-powered turbine generating electricity in Orkney⁴⁶ and the investment of billions of pounds in a tidal lagoon project with underwater turbines in Swansea Bay⁴⁷ suggests that the capability to harness tidal power will soon become commercially viable. The introduction of some form of tidal power generation in Portishead could play a crucial role in achieving our ambition to becoming carbon neutral by 2030.

3.92 Tidal and micro-tidal solutions would potentially be viable within the Neighbourhood Area and may be a future solution. These ideas and technologies are not currently developed sufficiently for full consideration, however NDP policy PED5 supports innovative thinking around this approach and encourages projects harnessing this potential.

3.93 The exploration and delivery of alternative renewable energy generation, such as solar and wind, is supported by the Town Council and NDP policy PER1. There are active local renewable energy Community Interest Companies in Portishead, such as Low Carbon Gordano (solar) and Channel Green Energy (wind). These groups are active in the town and the wider area and explore the delivery of renewable and low carbon energy developments that are led by and/or meet the needs of the local Portishead community. These developments are particularly supported by NDP policy PER1.

Related Objective

O7 To deliver sustainable development which prioritises brownfield land, responds positively to the climate crisis, reduces our carbon footprint and energy demand, and mitigates the local impacts of climate change.

Local Policy Context

CS1 Addressing climate change and carbon reduction

CS2 Delivering sustainable design and construction,

CS3 Environmental Impacts and Flood Risk Management

Solar photovoltaic array SPD

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RELATED COMMUNITY ACTIONS:

- In principle, the Town Council supports the installation of solar photovoltaic panels on residential properties - and is exploring opportunities for undertaking a project to map areas of opportunity.

POLICY PER1 - SUPPORTING RENEWABLE AND LOW CARBON ENERGY SCHEMES IN PORTISHEAD

Decentralised renewable and low carbon energy schemes will be supported and encouraged, and will be approved where their impact is, or can be made, acceptable.

Particular support will be given to local renewable and low carbon energy generation developments that:

- are led by local renewable energy groups, and/or meet the needs of the local community;
- provide energy storage opportunities
- provide solar canopies over surface car parks
- harness the tidal energy stemming from the tidal range of the Severn Estuary
- harness Portishead marina for the use of water source heat pumps.

In determining applications for local renewable and low carbon energy generation developments, the following issues will be considered:

- i. the contribution of the proposals, in light of North Somerset Council's aim for a carbon neutral North Somerset by 2030, to cutting greenhouse gas emissions and decarbonising our energy system; and
- ii. the impact of the scheme, together with any cumulative issues, on landscape character, visual amenity, water quality and flood risk, heritage significance, local character and distinctiveness (as identified in the Portishead Community Character Statement), recreation, biodiversity and, where appropriate, agricultural land use, aviation and telecommunications; and
- iii. the impact on users and residents of the local area, including where relevant, shadow flicker, glint and glare, air quality, vibration and noise.

Any proposals that could affect the sensitive bird species and other habitats and species of the River Severn Estuary must carry out screening for Habitats Regulation Assessment.

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WELLBEING POLICIES

The following section of the neighbourhood plan contains policies related to wellbeing:

Community Facilities and Infrastructure

- Policy PWC1: Protection of Existing Community Facilities and Infrastructure
- Policy PWC2: New Community Facilities and Infrastructure

Housing

- Policy PWH1: Protection of Portishead’s Existing Housing Stock
- Policy PWH2: Retaining Existing Valued Smaller and Accessible Housing Stock
- Policy PWH3: New Housing to Meet Local Needs in Portishead
- Policy PWH4: Making Housing Available to Local People in Housing Need
- Policy PWH5: First Homes Discount in Portishead
- Policy PWH6: Homes for Elderly, Disabled and Vulnerable People
- Policy PWH7: Adaptable New Homes
- Policy PWH8: Alterations to make Existing Homes Accessible
- Policy PWH9: Community Led Development Projects
- Policy PWH10: Self Build and Custom Build Housing
- Policy PWH11: Sub-divisions and Conversions of Larger Residential Property

UN SDGs

The policies in this section contribute to the following United Nations Sustainable Development Goals:



WELLBEING: INTRODUCTION

COMMUNITY FACILITIES AND INFRASTRUCTURE

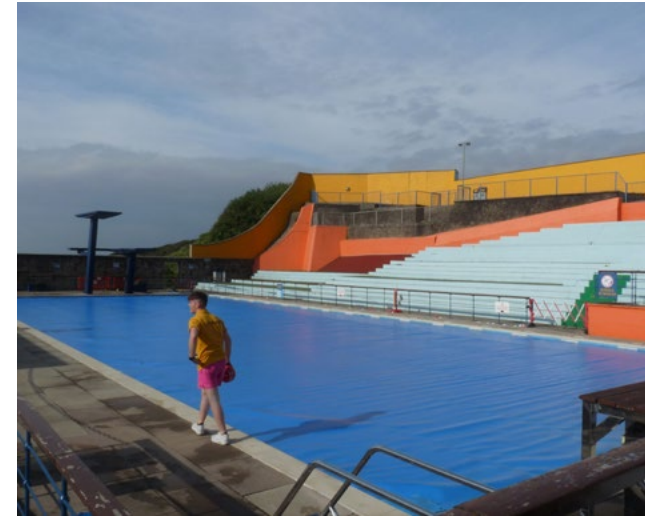
4.0 Portishead has a strong community spirit which is supported by a range of facilities and infrastructure that provide for its health, welfare, social, educational, spiritual, recreational, leisure and cultural needs.

4.1 Whilst Portishead has pockets of deprivation, it is generally classified as being in the top 20% of the least deprived areas in England.⁴⁸

4.2 The Town is subject to the same national trends as the rest of the country. COVID-19 and the national lockdowns have seen a great increase in the use of and appreciation of Portishead's local facilities and amenities.

4.3 Portishead has in recent years undergone rapid growth, with a significant expansion of the number of residential dwellings and an increase of around 25% in the size of the built area of the town. The population has increased by 60% since 2011 to total more than 27,000. There is a general feeling in the town that infrastructure investment has not kept up with the huge increase in housing that Portishead has seen over the last 20 years.

4.4 Older areas of Portishead such as the West Hill Area in the Portishead West Ward have been left behind in terms of investment as much focus has been on the new developments situated on the old docks now known as the Marina area. Portishead West Ward is the largest Ward in North Somerset but has very limited community facilities. Merlin Park is one of the few in the area.



HOUSING

4.5 Despite the issues with poor infrastructure, Portishead remains a highly desirable place to live with a continued strong demand for housing.

4.6 Housing availability and affordability is a very significant issue for Portishead. The local Housing Needs Assessment carried out for this Neighbourhood Plan has evidenced that it suffers from a severe lack of smaller and affordable rented housing and market housing. Households now need an annual income of £90,000 to afford to buy a house in Portishead, meaning that young people and those with an average annual income of c.£46,000 cannot afford to live in Portishead and are forced to move out and find accommodation in neighbouring towns where housing is less expensive.

4.7 We have a growing community of older people. This is forecast to rise by more than 65% during this plan's lifetime. We therefore need to plan positively to provide comfortable accommodation for our ageing population.

4.8 The opportunity for further development is constrained, and there are a number of factors that affect this:

- Nearly all undeveloped land within the Portishead settlement boundary is either part of the Green Belt or on the flood plain or both.
- Portishead's geography and position, surrounded on one side by the Bristol Channel and on the other by a SSSI and the regionally important ecosystem of the Gordano valley.
- Whilst a number of highway improvements are now in place at Wyndham Way and Junction 19 to address peak traffic flow, there is only one major road between Portishead and the M5, meaning that any issues nearby on the motorway can cause the town to be congested and gridlocked. It is not without good reason that Portishead has been dubbed the "largest cul-de-sac in Europe".
- Public transport is variable. There is a bus service between Bristol and Portishead that runs every 30 minutes, however the service is often unreliable and relatively expensive. Public transport services are affected by congestion both within Portishead and at Junction 19 of the M5.
- The long-promised reinstatement of rail services is currently forecast for late 2024 but even if the railway does finally arrive, the limited frequency and carrying capacity of services is not expected to

have a major positive impact, unless the railway line capacity of the rail link to Bristol is increased.

- There is a lack of community infrastructure, even such basic facilities such as semi-permanent storage for community groups or rooms and venues to hold functions are lacking, the facilities that do exist are invariably booked up far in advance. There are no entertainment, cultural or arts venues. Community infrastructure that does exist is often "tired" and of poor quality due to a lack of maintenance and underfunding over recent decades.

PLANNING POLICIES: COMMUNITY FACILITIES AND INFRASTRUCTURE

PROTECTION OF EXISTING COMMUNITY FACILITIES AND INFRASTRUCTURE

Context

4.9 Portishead's vibrant community is supported by a range of facilities and infrastructure that provide for its health, welfare, social, educational, spiritual, recreational, leisure and cultural needs. The existing community facilities in Portishead are highly valued by the community, and need to be protected.

It is important that our range of community facilities is accessible to, and meet the needs of, everyone in our community. Policy PWC1 should be considered particularly through the lens of UN SDGs 5 (Gender Equality), 10 (Reduced Inequalities) and 11 (Sustainable Cities and Communities), which are about inclusivity across gender, age, background, and ability.

4.10 North Somerset Council policy DM68 protects educational, sporting, leisure, cultural, health and community facilities from change of use. Policy PWC1 adds local detail by identifying those in Portishead. The Portishead Community Facilities Evidence Base Report (2022) details the existing facilities in the Neighbourhood Area, including detail on Assets of Community Value and healthcare provision.

4.11 For the purposes of policy PWC1, land or buildings which are considered 'community facilities' include the following:

- Use class F1, such as schools, museums, libraries and places of worship
- Use class F2, such as community meeting places, community halls, parks or sports pitches
- Use class E(e), such as healthcare and childcare facilities
- Pubs, cinemas, cemeteries and allotments
- Utilities and telecommunications infrastructure
- Registered Assets of Community Value (currently one in Portishead - the Potager Garden).

4.12 Recent changes to the planning system mean that it is now easier for some community facilities such as doctor's surgeries or nurseries to change use into shops or restaurants, or into homes, without planning permission. This change in legislation makes it even more important that the Portishead Neighbourhood Plan identifies the existing facilities in our community to protect, as far as possible within the possibilities of the planning system, to ensure that our town continues



to provide for our social, cultural and recreational needs.

4.13 The majority of facilities identified in Figure 13, and protected by policy PWC1, fall under the new Use Class F – Local Community and Learning. These facilities are protected from change of use without planning permission by legislation.

4.14 Insofar as planning permission is required, Policy PCW1 aims to protect our identified community facilities from change of use. The Town Council will only support redevelopment of existing community facilities for non-community use as a last resort and where all other options have been exhausted.

4.15 There is a growing international interest in creating '20-minute communities'. In 2021, the Town and Country Planning Association published '[20-Minute Neighbourhoods](#)'⁶¹ which is about creating compact and connected places that offer a range of services to meet most people's daily needs. This involves the creation of attractive, safe, walkable environments that invite people of all ages to travel actively for short distances to use day-to-day facilities such as shops,

school, community, employment and health and wellbeing facilities. The 'catchment area' of a facility is therefore generally understood to be within a 20 minute walk. In Portishead, particular attention must be paid to the impact of our hills on the time it takes to walk around the town.



Relevant Objective

O9 To protect and improve health, wellbeing, leisure and recreation opportunities for residents of all ages and abilities by protecting and expanding community facilities and spaces for community activities to ensure that Portishead is a welcoming, safe and accessible place for everyone.

Local Policy Context

- CS25 Children, young people and higher education
- CS26 Supporting healthy living and the provision of health care facilities
- CS27 Sport, recreation and community facilities
- DM68 Protection of sporting, cultural and community facilities

POLICY PWC1 – PROTECTION OF EXISTING COMMUNITY FACILITIES AND INFRASTRUCTURE

Where planning permission is required, development proposals that involve the loss, in whole or part, of a community facility (as identified in Figure 13 and/or detailed in the Community Facilities Report) must demonstrate that:

- i. adequate alternative provision of at least equivalent community benefit exists or will be provided in an equally or more accessible location, including by walking and cycling, within the catchment area of the facility; or
- ii. the site or building is genuinely redundant / surplus to requirements for community uses and does not comprise open space or undeveloped land with recreational or amenity value; or
- iii. if relevant, the partial development of the site will secure the retention and improvement of the remainder of the site for community use; or
- iv. it would not be possible (economically viable, feasible or practicable) to retain the building or site for use as a community facility.

RELATED COMMUNITY ACTIONS:

- Publish a compendium of community facilities in Portishead, to include name, function, location and contact details, for the community to use.
- Continued financial and other support by Portishead Town Council to community organisations.

COMMUNITY FACILITIES LIST

The community facilities identified in the Community Facilities Report are listed below and mapped on the following page:

Schools

- 1 Gordano School
- 2 High Down School
- 3 Portishead Primary School
- 4 St Joseph's School
- 5 St Peter's School
- 6 Trinity School

Nurseries / pre-schools / children's centres

- 7 Brampton Way Pre-school
- 8 Busy Bees Nursery
- 9 Honey Tree Nursery
- 10 Lakehouse Nursery
- 11 Stationhouse Nursery
- 12 The Academy Nursery School
- 13 The Nursery

Halls / Community Centres

- 14 The Folk Hall
- 15 Jubilee Hall
- 16 North Weston Village Hall
- 17 Redcliffe Bay Hall
- 18 Somerset Hall
- 19 Clarence House
- 58 Portishead Youth Centre

Places of Worship

- 20 Bristol Quakers
- 21 Portishead Methodist Church
- 22 Redcliffe Bay Methodist Church
- 23 Roath Road Chapel
- 24 St Joseph's Roman Catholic Church
- 25 St Peter's Church
- 26 St Nicholas' Church / Portishead United Reformed Church

Allotments and Community Growing Spaces

- 27 Beach Hill Allotments
- 28 Gertie Gales Allotments
- 29 Lower Down Road Allotments
- 30 North Weston Allotments
- 31 Town Potager Garden

Health Care Facilities

- 32 Combe Road Dental Practice
- 33 The Dental Clinic
- 34 Evolve Dentistry
- 35 Harbourside Surgery
- 36 Lime Tree Dental Practice
- 37 Living Strong Chiropractic
- 38 Moose Hall Chiropractic & Wellness
- 39 Portishead Chiropractic Clinic
- 40 Portishead Dental Practice
- 41 Portishead Medical Centre
- 42 The Reinge Clinic

- 43 Walnut Grove
- 44 Woodburn Cottage Dental Clinic

Leisure & Sports Facilities

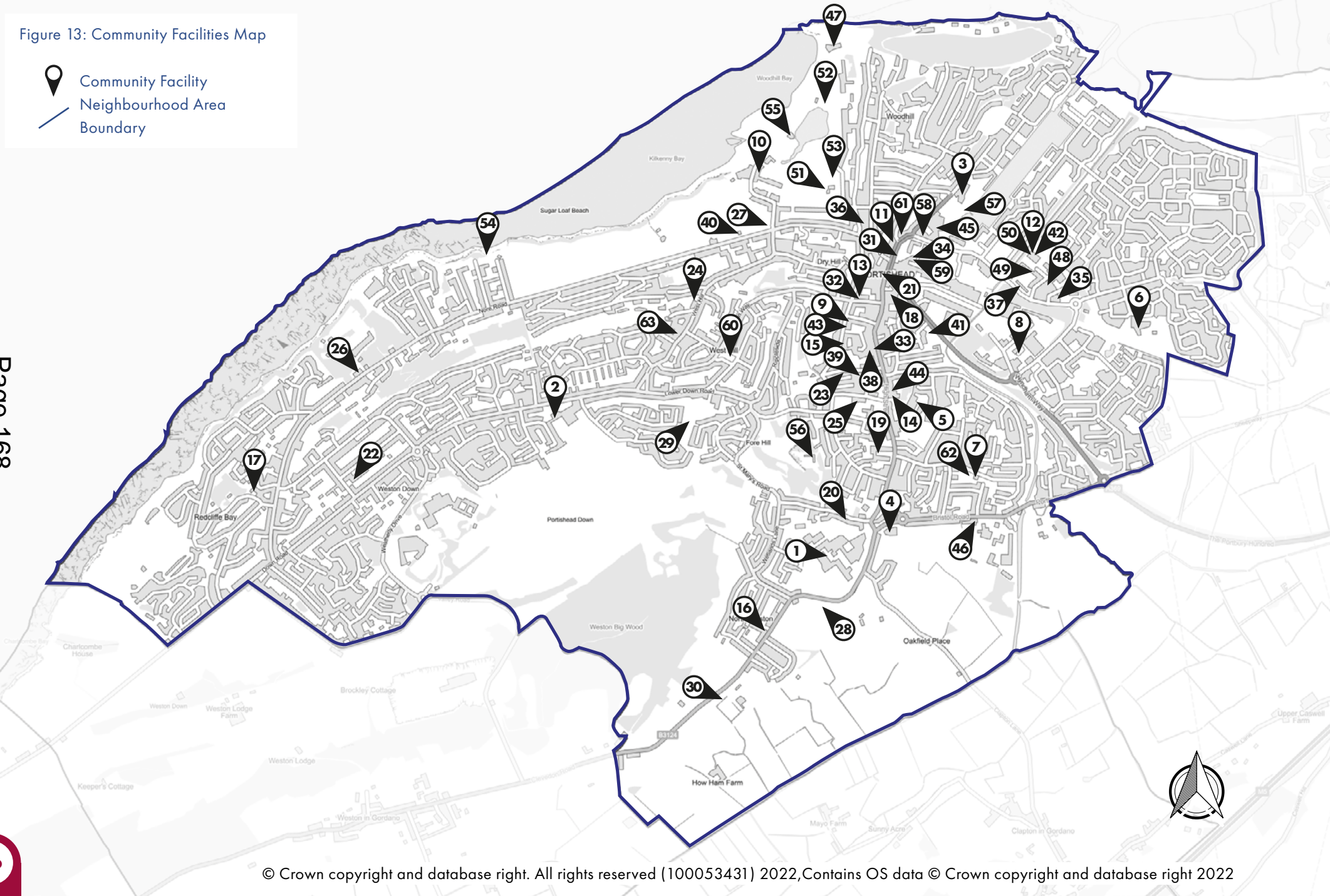
- 45 Parish Wharf Leisure Centre
- 46 Portishead Town Football Club
- 47 Portishead Open Air Pool
- 48 Epic Gym
- 49 Pure Results Fitness
- 50 The Academy of Gymnastics
- 51 Portishead / British Legion Bowls Clubs
- 52 Portishead Tennis Club
- 53 Portishead Cricket Club
- 54 Portishead Sailing Club
- 55 Lake Grounds Boat House
- 56 Portishead Shooting Club
- 57 Portishead Gig Club

Youth & Other Facilities

- 59 Portishead Library
- 60 2nd Portishead Scout Group Headquarters
- 61 1st Portishead Scouts
- 62 Portishead Air Cadets / Army Cadets
- 63 St Barnabas Children's Centre

Figure 13: Community Facilities Map

-  Community Facility
-  Neighbourhood Area Boundary



NEW COMMUNITY FACILITIES AND INFRASTRUCTURE

4.16 During the preparation of the Neighbourhood Plan, residents made it clear that they felt there is a lack of provision of particular types of community facilities, and in particular areas.

4.17 Portishead has an active and vibrant community with a range of clubs, societies and groups that meet regularly. However, there is a lack of space within the town for these groups to hold events and meetings or use for storage; the few facilities that do exist are often booked up far in advance. Our surveys also identified a local demand for spaces for creative arts activities and health care facilities.

4.18 A key issue that arose through our community surveys was the need for more facilities for young people, and tackling this is a priority for the Town Council. Policy PWC2 supports the provision of facilities for young people, in particular a wheels and skate park, which is currently being planned for at the Lake Grounds.

4.19 As with policy PWC1, it is important any new community facilities are accessible to, and meet the needs of, everyone in our community. Policy PWC2 should therefore be considered particularly through the

lens of UN SDGs 5 (Gender Equality), 10 (Reduced Inequalities) and 11 (Sustainable Cities and Communities), which promote inclusivity across gender, age, background, and ability.

4.20 Comments received throughout the preparation of the plan also indicated that the community feel there is a particular shortage of community facilities in older areas of Portishead (such as West Hill, Redcliffe Bay and Avon Way) as well as The Vale.

4.21 In line with North Somerset Local Plan policy DM69, the provision of new community facilities and infrastructure is supported within the settlement boundary where the facility is well related to the community, is in a sustainable and genuinely accessible location, does not negatively affect living conditions of neighbouring properties, and is designed to facilitate combining community needs (where appropriate).



Relevant Objective

O9 To protect and improve health, wellbeing, leisure and recreation opportunities for residents of all ages and abilities by protecting and expanding community facilities and spaces for community activities to ensure that Portishead is a welcoming, safe and accessible place for everyone.

Local Policy Context

- CS25 Children, young people and higher education
- CS26 Supporting healthy living and the provision of health care facilities
- CS27 Sport, recreation and community facilities
- DM69 Location of sporting, cultural and community facilities

POLICY PWC2 – NEW COMMUNITY FACILITIES AND INFRASTRUCTURE

Development proposals within the settlement boundary that improve the quality and range of community infrastructure shall be supported where the development:

- a. has appropriate regard to the Portishead Community Character Statement, and
- b. is genuinely accessible by a choice of modes of sustainable and active travel modes and to disabled, elderly and vulnerable people, and
- c. will not result in unacceptable traffic movements or impact on residential amenity, and
- d. will achieve North Somerset Council multi-modal parking standards for staff and visitors.

Specifically, development leading to the improvement of the quality or additional provision of the following community infrastructures should be looked at favourably:

- Places to meet and socialise
- Facilities for young people, for example a wheels and skate park
- Improvements to Parish Wharf Leisure Centre
- Improvements to the Lake Grounds
- Additional health services and facilities
- Facilities for the creative arts, particularly places to showcase art e.g. galleries, performance spaces.

PLANNING POLICIES: HOUSING

PROTECTION OF PORTISHEAD'S EXISTING HOUSING STOCK

Context

4.21 Portishead's existing range of homes is the foundation for our community's quality of life and opportunities for lifetime living in the town.

4.22 The range of existing homes in Portishead provides open market housing to buy and rent, affordable social rented housing, discounted market shared ownership homes and supported living choices for older and disabled residents. Whilst this goes part of the way to meeting current needs, the 2021 Portishead Housing Needs Assessment and survey undertaken for the Neighbourhood Plan has established that there is an existing shortage of smaller and affordable one, two and three bedroom and accessible homes to buy or rent.

4.23 Portishead contains a higher proportion of larger properties than the national average. Local analysis of housing within Portishead suggests that 3 bedroom properties (48%); followed by 2 bedroom homes (32%); plus a smaller number of 1 bedroom properties (15%) are most needed to be built over the plan period.

4.24 North Somerset Core Strategy Policy CS14 establishes that Portishead is classified

as a local service centre where development should be of a locally significant scale and take place within or abutting the settlement boundary, but not in the Green Belt.

4.25 Between 2005 and 2015 Portishead accommodated more than 2780 new homes, rapidly expanding the population. Due to the town's significant expansion and environmental and infrastructure constraints to development, capacity for future growth at Portishead is severely limited. The draft North Somerset Local Plan indicates that a further c.570 homes may need to be delivered in Portishead between 2023 and 2038. This is an average of 38 homes delivered per annum, below that of the major focus of growth at Weston Super Mare.

4.26 With an evidenced need for smaller and accessible homes, previous significant housing expansion and highly constrained capacity for future growth throughout the lifetime of the Neighbourhood Plan, it is especially important that the foundation of the existing stock of smaller homes at Portishead is protected from loss to enable it to continue to meet the housing needs of our community.



Relevant Objective

O8 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

Local Policy Context

- CS14 Distribution of New Housing
- CS15 Mixed and Balanced Communities

POLICY PWH1 – PROTECTION OF PORTISHEAD'S EXISTING HOUSING STOCK

Development proposals that retain existing one, two and three bedroom residential property in Portishead will be supported. Support will not be given to proposals that would result in the loss of existing residential use.

RETAINING EXISTING VALUED SMALLER AND ACCESSIBLE HOUSING

Context

4.27 Smaller homes provide the opportunity for our younger people to build their long term future in Portishead and enable local down-sizers to continue to secure homes in their community that meet changing needs.

4.28 The Portishead Housing Needs Assessment (2021), produced to support the Neighbourhood Plan, identifies an existing shortfall and a growing demand for smaller single, double and triple bedroom homes in Portishead within the open market and affordable housing sectors.

4.29 There is an existing shortage of accessible homes that enable older and disabled local people to live more active lives at home for the optimum period. The 2011 census found that 18.5% of the North Somerset population had a limiting long-term illness (LLTI) and that 33% of households in the district contained one or more persons with a LLTI. There is forecast to be a 54% increase in Portishead's community of people over the age of 65 during the lifetime of the Neighbourhood Plan.

4.30 Existing bungalows provide Portishead with a distinct opportunity for accessible housing, where larger and two storey houses do not. It is important that Portishead retains this choice of smaller and single storey housing.

4.31 Bungalows and areas of smaller houses make a distinct contribution to Portishead's townscape, as identified in the Portishead Community Character Statement (2021). Older neighbourhoods including Albert Road and Victoria Square are unable to appropriately accommodate intensified residential use.

4.32 The cumulative effect of adding floorspace and storeys randomly to smaller houses may cause harm to the distinct character of neighbourhoods identified in the Portishead Community Character Statement (2021), where single storey homes create a distinct and positive contribution to the town. Enlargement of smaller homes within our neighbourhoods including at North Weston and St Mary's Road has eroded its character and denuded the existing stock of accessible homes.

4.33 National permitted development rights set parameters that enable extensions and additions to houses that can add bedrooms and intensify use without the need for planning consent and outside of the power of the Neighbourhood Plan.

4.34 North Somerset Development Management Policy DM37 (Residential development in existing residential areas) and DM38 (Residential extensions) set criteria to assess acceptable proposals to replace, infill or extend properties to protect existing neighbourhood character, the amenity of existing residents and require the adherence to current residential parking standards.

4.35 Intensification of the residential use brings additional traffic and car parking needs, but often without the infrastructure to accommodate it, overloading parking and highway infrastructure to a point where it is well below [North Somerset's Residential Parking Standards \(2021\)](#) causing risk and obstructions to emergency and service vehicles, impacting resident access and other road users and pedestrians.

Relevant Objective

O8 To protect Portishead’s stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead’s distinct character and maintains resident amenity and highway safety.

Local Policy Context

- CS15 Mixed and Balanced Communities
- CS12 Achieving High Quality Design and Place-Making
- CS11 Parking
- DM37 Residential development in existing residential areas
- DM38 Extensions to Dwellings
- North Somerset Parking Standards SPD

POLICY PWH2 – RETAINING EXISTING VALUED SMALLER AND ACCESSIBLE HOUSING STOCK

Proposals to enlarge or add residential floorspace to existing residential properties will only be supported where it can be demonstrated that the proposed development would:

- Meet criteria set out in North Somerset Core Strategy Policy CS12 (Achieving high quality design) and Development Management Policy DM38 (Extensions to dwellings) and
- Comply with North Somerset Parking Standards SPD (2021) and
- Demonstrate how it has protected and complimented the distinctive residential character and appearance of the host neighbourhood identified within the Portishead Community Character Statement (2021).

NEW HOUSING TO MEET LOCAL NEEDS IN PORTISHEAD

Context

4.36 One of the most important priorities of the Neighbourhood Plan is to help meet the housing needs of Portishead's community. In preparing the Neighbourhood Plan, the Steering Group has combined evidence gained from both technical housing needs analysis and local engagement.

4.37 Whilst there has been very significant housing development in the last decade, house prices in Portishead have risen by more than 50%. In 2021, the average UK house price was £250,000, similar to the average price in Weston Super Mare. The average house in Portishead now costs in excess of £400,000 (Rightmove 2022). The Portishead Housing Needs Assessment 2021 has identified that a household income of at least £90,000 is required to afford repayments on a market home in Portishead. However, the average total household income before housing costs locally was £46,833 in Portishead in 2018 (ONS). It provides distinct evidence that buying a home is impossible for single people and households even on average incomes. As a result there has been a significant growth in market renting in Portishead. Whilst this is affordable to average income households,

this option remains too expensive for many below this.

4.38 The 2021 proposal to convert the "Marina Gardens" retirement development to 127 studio, one and two-bedroom affordable and shared ownership homes, which was supported by North Somerset Council, demonstrates the need and demand for smaller affordable homes in Portishead.

4.39 North Somerset Core Strategy policy CS15 (Mixed and balanced communities) seeks to ensure a genuine mix of housing types within existing and future communities. Within this balance, policy CS16 (Affordable housing) requires at least 30% of the homes provided on applicable sites, including those of more than 10 homes, are provided as on-site affordable housing. This policy identifies the tenure split between social rented housing and intermediate, discounted market housing. The balance of tenures and house types may be adjusted on individual sites to address distinct and changing local needs and delivery viability.

4.40 North Somerset Council's Affordable Housing Supplementary Planning Document

(2013) provides housing providers with further detailed criteria guidance which should be read in conjunction with meeting housing policies.

4.41 The Neighbourhood Plan and associated local needs evidence aims to add the local housing needs detail to increase the effectiveness of adopted North Somerset affordable housing policy framework to deliver the right types of housing to help local people secure a home that meets their needs, whether through open market or through subsidised pathways.

4.42 Throughout the lifetime of the Neighbourhood Plan strategic housing policy and local needs may change. Proposals for housing development will be assessed against the adopted policy and guidance at the time of an application.

WHAT IS AFFORDABLE HOUSING?

Affordable housing is a planning term that is applied to very specific types of discounted housing which is available to people who meet qualifying criteria.

Through the NPPF, the Government requires developers to provide or fund affordable housing as a proportion of what is given planning permission. North Somerset Core Strategy Policy CS15 (Mixed and Balanced Communities) and development management policy DM 34 states proposals on strategic housing sites of 100+ houses should include a range of building types and tenures.

Affordable housing can be broadly broken into social rented housing and discounted affordable housing to buy. The Portishead Housing Needs Assessment 2021 provides a picture of how effective each is for Portishead, and how local criteria to maximise their benefit for local people may be applied.

Social Rented Housing

Social Rented housing provides homes at rents that are below the market rate. They are managed by registered social landlords like housing associations or community housing trusts. Social rental homes are the most affordable route into housing for eligible people on the local housing list and who are not able

to afford to buy. It meets acute need and is undersupplied. Therefore Social Rented housing should represent 75% of all affordable homes provided through developer contributions.

Discounted Market Housing

Discounted market housing provides a discounted route into home ownership. Discounted market homes are most often leasehold and maintained within the discounted market sector in perpetuity. This is provided through:

Shared Ownership

This allows buyers to purchase a share of a home – usually between 10% and 75%. Purchasers will pay a mortgage on the share that they own, and a below-market-value rent on the remainder to a housing association, along with any service charge and ground rent. Shared ownership at a 10-25% equity share makes housing affordable to average Portishead household incomes.

First Homes

This is a newer government-backed product. It offers:

- A discount of a minimum of 30% against the market value;

- Sale price no higher than £250,000 after the discount is applied, and in perpetuity;
- Restriction to first-time buyers with a household with a combined annual income of less than £80,000.

A local connection requirement based on current residency may be imposed on the initial 3 months of first home purchase. Local criteria can be applied where this is justified by evidence. A deeper minimum discount of either 40% or 50% may be set. In Portishead, the Housing Needs Assessment 2021 has identified that a discount of 50% will be required to begin to make First Homes affordable for households on average income. A household income of £45,000 is required to be able to afford repayments on a 50% discounted First home.

Rent to buy

This provides the option of buying your house after a leased period of renting runs out. In some cases, a percentage of the rent is applied to the purchase price. The income required is the same as that to afford market rents and affordable to average household incomes, but without a deposit.

Relevant Objective

O8 To protect Portishead’s stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead’s distinct character and maintains resident amenity and highway safety.

Local Policy Context

CS15 Mixed and Balanced Communities Replacement
CS16 Affordable Housing

POLICY PWH3 - NEW HOUSING TO MEET LOCAL NEEDS IN PORTISHEAD

Proposals for new housing development will be supported where:

- Proposals are in conformity with adopted North Somerset Core Strategy Policies CS14; Mixed and Balanced Communities and CS16; Affordable Housing, or subsequent adopted Local Plan Policy
- All affordable housing provided through developer contribution will be expected to contribute to meeting the specific affordable housing needs of Portishead’s community as set out in the Portishead Housing Needs Assessment 2021.
- Market housing prioritises the delivery of housing types that contribute to meeting Portishead’s specific housing needs, and
- Schemes are in conformity with related Neighbourhood Plan sustainable construction, active travel and sustainable transportation objectives, protect Portishead’s local heritage assets and enhance Portishead’s distinctive character and environment and community wellbeing.

MAKING HOUSING AVAILABLE TO LOCAL PEOPLE IN HOUSING NEED

Context

4.43 The local Portishead Housing Needs Assessment has identified that there remains a significant proportion of our community who cannot afford market housing in Portishead, and who are more likely to be forced to move away from family, employment and their associations with Portishead to find suitable housing. Portishead's more acute housing affordability issues require a distinct approach to help local people secure affordable housing within Portishead.

4.44 The Neighbourhood Plan cannot control the allocation of affordable rented housing. However, the Town Council wishes to maximise the opportunity for people with a housing need, who have an existing association with Portishead, to be able to secure suitable new open market or discounted market homes through encouraging providers to offer a reasonable short initial period of exclusive home marketing.

4.45 The Government's latest "First Homes" discounted market affordable housing

product can enable local criteria to be applied to require an initial marketing period of three months for qualifying local people. The Town Council will support this being applied to the sale of First Homes in Portishead. First Homes may not be the only discounted housing provided. Shared ownership is the more commonly applied discounted market housing approach within North Somerset. To maximise the responsiveness to meeting Portishead's distinct housing needs, the Town Council will support and encourage housing providers to extend this criteria to all intermediate affordable market housing types.

4.46 The Town Council will also encourage and welcome open market house-builders offering a similar initial three month "off-plan" marketing period to people within Portishead who may wish or need to move to meet their changing needs either to accommodate a growing family or relative or to down-size to a more manageable and accessible home.

Relevant Objective

O8 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

Local Policy Context

CS16 Affordable Housing
North Somerset Affordable Housing SPD
(2013)

POLICY PWH4 - MAKING HOUSING AVAILABLE TO LOCAL PEOPLE IN HOUSING NEED

Encouragement will be given to housing providers where open market, First Homes and all other discounted market housing provided within Portishead Neighbourhood Area is offered for an initial three month marketing period exclusively to local people who fall into any of the following categories (in order of priority stated):

- i. Either the prospective applicant or buyer has continuously lived in Portishead for a minimum of 3 years immediately preceding the date of bidding or offer, in the case of Shared Ownership housing;
- ii. Either the applicant or partner has previously lived in Portishead for 10 years continuously, not more than 5 years ago, immediately preceding the date of bidding or offer, in the case of Shared Ownership housing;
- iii. Either the applicant or partner has been continuously employed in Portishead for at least 12 months immediately preceding the date of bidding or offer in the case of Shared Ownership housing, in work of a non-casual nature;
- iv. Either the applicant or partner has a close relative that lives in Portishead and has done so for at least 5 years immediately preceding the date of bidding or offer in the case of Shared Ownership housing.

House builders are encouraged to market all new open market housing for an initial three month period at the commencement of marketing, exclusively to residents of Portishead.

FIRST HOMES DISCOUNT IN PORTISHEAD

Context

4.47 A minority proportion of affordable housing provided through developer contribution is likely to be offered as intermediate discounted market housing. North Somerset Council's preferred approach is that this is through "shared ownership". This enables a home buyer to purchase a percentage share of a leasehold home and pay a subsidised rent to a social landlord on the remainder. The house should remain as shared ownership in perpetuity.

4.48 First Homes is a recent government backed affordable housing product. It offers:

- A discount on the purchase price of a minimum of 30% against the market value;
- Sale price no higher than £250,000 after the discount is applied in perpetuity;
- Restriction to first-time buyers with a household with a combined annual income of less than £80,000.

4.49 Where justified by local evidence of affordability, a deeper minimum discount of up to 50% may be set.

4.50 In 2021, The UK average house price was £250,000. This is similar to the average price in Weston Super Mare. An

average house in Portishead now costs in excess of £400,000 (Rightmove 2022). The Portishead Housing Needs Assessment (2021) has identified that a household income of at least £90,000 is required to afford repayments on a market home in Portishead. The average total household income before housing costs locally was £46,833 in Portishead in 2018 (ONS).

4.51 The assessment concluded that households on an average income in Portishead would not be able to afford a 50% share of a First Home if the standard 30% discount was applied. In Portishead, acquiring a First Home product would only be likely to be affordable for people on an average income if a discount of 50% is applied.

Relevant Objective

O8 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

Local Policy Context

CS15 Mixed and Balanced Communities
CS16 Affordable Housing

POLICY - PWH5 FIRST HOMES DISCOUNT IN PORTISHEAD

Where First Home discounted market housing is provided within Portishead, all First Homes provision will be offered at a discount of 50% of market value in perpetuity, subject to viability.

HOMES FOR ELDERLY, DISABLED AND VULNERABLE PEOPLE

Context

4.52 18.5% of the North Somerset population and 33% of households in the district contain one or more persons with a long term illness. There is forecast to be a 54% increase in people over the age of 65 in Portishead during the Neighbourhood Plan period. Aging and illness bring changing mobility needs and the highest possible proportion of our new homes need to be designed to make it possible for local people to live in homes that enable them to lead inclusive and active lifestyles that meet changing needs.

4.53 North Somerset Core Strategy policy CS15 (Mixed and balanced communities) recognises the importance of providing a choice of housing to meet changing needs of the community. Development management policy DM40 (Retirement accommodation and supported independent living for older and vulnerable people) enables supported living developments in accessible locations meeting the needs of older people. It also requires developments of more than 100 homes to consider the accommodation needs of older people. The emerging North Somerset Policy DP47 (Older persons accommodation) continues to support

supported living choices for older people to meet changing needs. All new supported living development for older people should be sustainably located close to local facilities and carers. It should be of a quality of space and design to provide a good standard of healthy living for all residents.

4.54 To help respond to Portishead's forecast age profile, support will be given to schemes that make a positive contribution to meeting Portishead's particular supported living needs subject to being in accordance with Development Management policy DM40 and any adopted replacement Local Plan policy. Due to Portishead's recorded shortage of housing, proposals must not result in the loss of existing smaller and affordable housing, which is protected by Neighbourhood Plan policies PWH1 and PWH2.

4.55 The Portishead "Wyndham Way Placemaking Study" being led by North Somerset Council, in partnership with Portishead Town Council, aims to guide the future development of the Wyndham Way area to create a new mixed use community at the heart of the town. This

highly sustainable and well-connected area provides an opportunity within Portishead to deliver new supported housing.



Relevant Objective

O8 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

Local Policy Context

- CS15 Mixed and Balanced Communities
- CS26 Supporting Healthy Living and the provision of health care facilities
- DM40 Retirement accommodation and supported independent living for older and vulnerable people
- DM41 Nursing and care homes for older people and other vulnerable people

POLICY PWH6 - HOMES FOR ELDERLY, DISABLED AND VULNERABLE PEOPLE

Proposals for age restricted housing for older people, extra care housing (Class C3) and residential nursing home facilities (Class C2) will be supported where they:

- Are in conformity with North Somerset Development Management Policy DM40, and
- Do not result in the loss of existing housing contrary to Neighbourhood Plan Policy PWH1: Protecting Portishead's Existing Housing Stock, and
- Are within 10 minutes safe and convenient walking distance of community facilities, shops, green space and public transport facilities and minimise the need for residents to use cars.

ADAPTABLE NEW HOMES

Context

4.56 The Government's reform of Health and Adult Social Care is underpinned by a principle of sustaining people at home for as long as possible. This has been reflected in recent changes to building regulations relating to adaptations and wheelchair accessible homes published in the [Building Regulations 2010 Approved Document Part M: Access to and use of buildings](#)⁴⁹.

4.57 Part M states that local authorities should identify the proportion of dwellings in new developments that should comply with the requirements for accessible and adaptable homes based on the likely future need for housing for older and disabled people (including wheelchair user dwellings) and taking account of the overall impact on viability.

4.58 Planning Practice Guidance for Housing expects local authorities to plan for households with specific needs.

4.59 The [North Somerset Housing Needs Assessment](#)⁵⁰ identifies that the number of households over the plan period living with an existing illness or disability that affects their housing need will be 16,647,

of which 960 are households likely to need wheelchair adapted housing.

4.60 It identifies that the population of North Somerset aged 75+ is likely to increase by around 10,092 between 2023 and 2038, and there is already a shortfall in the provision of housing for elderly people of just over 4,500 in North Somerset. The proportion of older people in Portishead is predicted to increase by 54% during the lifetime of the Neighbourhood Plan period. The Portishead Local Housing Needs Assessment has evidenced the projected increase in the proportion of older people living in Portishead by 54% by 2038. It is therefore locally necessary that residential developments now provide accessible housing in accordance with the levels and qualities set out in draft policy DP44 (Accessible and adaptable homes).

4.61 The proportions of new accessible homes set out in Neighbourhood Plan Policy PWH7 reflect projected need for accessible and adaptable homes over the plan period. The higher requirement for affordable homes reflects the Portishead Housing Needs Assessment's conclusion that *'the rates of limiting long-term illness or disability affecting housing needs are much*

higher in the affordable tenures (affordable tenures are more than three times more likely to need an adapted home), the evidence supports consideration of a high proportion of affordable homes being built to at least M4(2) standards where viability allows, perhaps as much as 100%.'

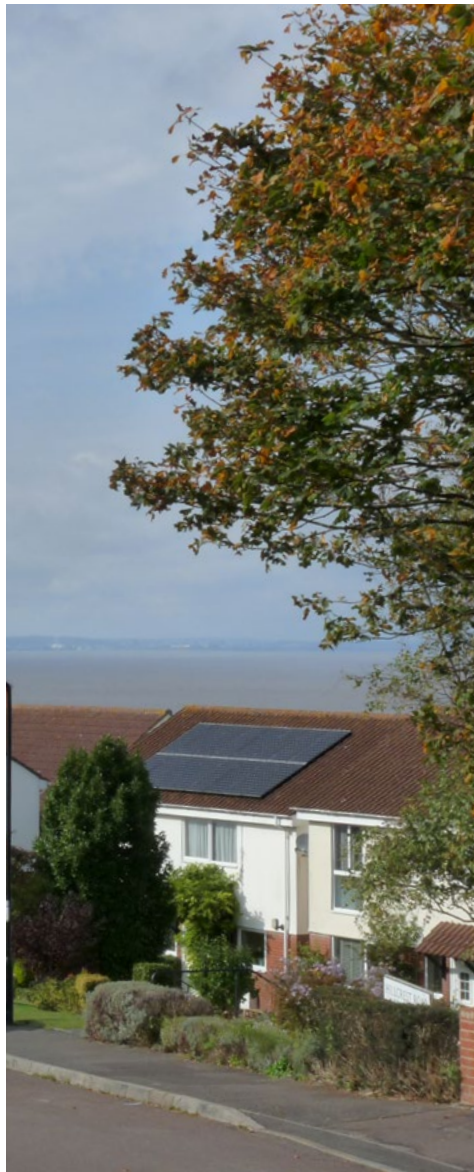
4.62 North Somerset Development Management Policy DM42 (Accessible and adaptable housing) seeks to deliver accessible and adaptable homes and expects development proposals to provide accessible and adaptable homes built to Category 2 standards where practical and viable.

4.63 Emerging draft North Somerset Local Plan policy DP44 (Accessible and adaptable homes) reflects increased standards for the provision and specification of accessible housing to meet both forecast needs and current building regulations. Upon adoption, policy DP44 will replace existing North Somerset policy DM42. It will strengthen the requirement to provide accessible and adaptable homes - as currently drafted, policy DM42 states:

"on residential development sites of 10 dwellings or more the following proportions

of accessible and adaptable homes will be required:

- For market housing within a scheme 50% of homes will be required to meet Building Regulations M4 (2) category 2 standard (to be 'accessible and adaptable dwellings') and a further 10% will be required to meet Building Regulations M4 (3) category 3 ('wheelchair user dwellings').
- For affordable housing within a scheme 80% of homes will be required to meet Building Regulations M4 (2) category 2 standard (to be 'accessible and adaptable dwellings') and a further 20% will be required to meet Building Regulations M4 (3) category 3 ('wheelchair user dwellings')."



Relevant Objective

O8 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

Local Policy Context

- CS2 Delivering sustainable design and construction.
- DM42 Accessible and adaptable Housing

POLICY PWH7 - ADAPTABLE NEW HOMES

Residential schemes of 10 units or more will be supported where they are in conformity with Building Regulations Part M and demonstrate how they have responded positively to the Portishead Local Housing Needs Assessment.

ALTERATIONS TO MAKE EXISTING HOMES ACCESSIBLE

Context

4.64 Policy PWH7 will seek to ensure that at least 50% of new homes to be provided in Portishead through the emerging Local Plan to 2038 will be designed to accessible standards, however this will be unlikely to meet the changing needs of our existing community.

4.65 Because of our town's distinct constraints on growth and resulting limitations on capacity for new homes, it is particularly important that our existing homes are able to meet changing housing accessibility needs to make it possible for residents to continue to live actively at home or accommodate a relative in Portishead should their mobility needs require.

4.66 Consistent with the Government's Health and Social Care reforms, the Town Council will provide in-principle support for proposed alterations to existing housing that will contribute to enabling older and disabled people to remain active and included members of the community whilst remaining at their home.

4.67 Adaptations and additional accessible accommodation often enables existing property to become more accessible.

Many adaptations will not require planning consent. But some external alterations and extensions will. Alterations to make listed buildings accessible will also be likely to require heritage consent.

4.68 North Somerset Development Management Policies DM32 (High quality design and place-making) DM37 (Residential development in existing residential areas), and North Somerset Council's Residential Design Guide provide a strategic policy framework within which proposals to improve access can be assessed. In addition, the Portishead Community Character Statement (2021) provides detailed specific analysis of neighbourhood character. North Somerset policies DM3 (Conservation Areas) and DM4 (Listed Buildings) set assessment and design quality standards that aim to ensure proposed alterations and development within Portishead Conservation Area and to listed buildings protect the historic character and fabric of the host listed building.

Relevant Objective

O8 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

Local Policy Context

| | |
|------|---|
| DM3 | Conservation Areas |
| DM4 | Listed Buildings |
| DM32 | High Quality Design and Place-making |
| DM37 | Residential Development in Existing Residential Areas |

POLICY - PWH8 ALTERATIONS TO MAKE EXISTING HOMES ACCESSIBLE

Where planning, conservation area consent or listed building consent is required, proposals to adapt an existing dwelling to improve accessibility will be supported where proposals:

- Are of a high standard of design in conformity with Portishead Neighbourhood Plan Policies PEB1 (High Quality Design) and PEB3 (Local Heritage) and North Somerset Council Policies
- Do not cause unacceptable or irreversible harm to the fabric and setting of the host listed building and local heritage assets
- Conserve the character of Portishead Conservation Area; and
- Do not harm neighbouring residential amenity;
- Do not result in a loss of car parking.

COMMUNITY LED DEVELOPMENT PROJECTS

Context

4.69 Community led housing can qualify as a recognised affordable housing sector. It can provide 100% affordable housing schemes to rent, now including the Government's new First Homes discounted market housing product. With the particular constraints on housing delivery and affordability issues identified in the Portishead Housing Needs Assessment 2021, this form of affordable housing can supplement affordable housing delivered through developer contributions, where land becomes available.

4.70 'Community development' must be delivered by an appropriately established community development organisation such as a community land trust. Community led housing and development can provide additional affordable housing choices and meet specific community needs.

4.71 North Somerset Core Strategy Policy CS16 (Affordable Housing) sets the in principle expectations for its delivery, but does not set a ceiling on the percentage to be delivered within each housing development. The emerging North Somerset policy DP46 (Homes

for all) provides in principle support for community led affordable housing schemes. Portishead Town Council supports this approach and will give in principle support to proposals for community led housing on previously developed land within Portishead.

4.72 The Town Council will continue to work with North Somerset Council, landowners and community development organisations to support opportunities to deliver community led housing on previously used land, underused buildings and upper floors during the Neighbourhood Plan period.

Relevant Objective

O8 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

Local Policy Context

CS16 Affordable housing
DM34 Housing type and mix
Affordable Housing SPD

POLICY - PWH9 COMMUNITY LED DEVELOPMENT PROJECTS

Proposals for community led affordable housing and facilities including proposals that include discounted market affordable housing will be supported when they:

- Conform with North Somerset Council Core Strategy policy CS16 (Affordable Housing) and The North Somerset Affordable Housing SPD 2013 (or any subsequent adopted revision);
- Conserve the character of Portishead's landscape setting;
- Protect or enhance the local character
- Do not harm the amenity of the neighbouring residents.

SELF-BUILD AND CUSTOM-BUILD HOUSING

Context

4.73 Portishead Housing Needs Assessment (2021) identifies the current need for all types of affordable housing and a severe issue of affordability. Custom-build housing should form part of how this is provided. Due to the identified distinct and acute affordability issues, and constraints that limit the scale of potential housing growth within the Portishead Neighbourhood Area, it is essential that all possible and viable approaches to making home ownership affordable are harnessed to the fullest extent.

4.74 The 2015 Self Build and Custom Building Act sets the Government's aim to help more people build or commission their own homes. If you organise the design and construction of your own home, it is classed as self-build housing. If you work with a developer, either as an individual or as part of a group, to help create your own home, it is classed as custom-build housing. Self-build and custom-build housing offers choices for a potentially affordable route into home ownership as well as design creativity. However, securing land to achieve this is often difficult, especially where land is in short supply and values high, as in Portishead. The Neighbourhood

Plan will seek to maximise land made available for such development through larger development sites.

4.75 Core Strategy Policy CS16 (Affordable housing) requires the delivery of affordable housing within housing developments. The emerging North Somerset Local Plan policy DP46 (Homes for All) sets out the criteria for securing opportunities for self and custom-build housing on development sites of more than 100 Homes. Self-build and custom housebuilding covers a wide spectrum, from projects where individuals are involved in building or managing the construction of their home from beginning to end, to projects where individuals commission their home, making key design and layout decisions, but the home is built ready for occupation ('turnkey'). North Somerset Council registers people and organisations who have an aim to build their own homes. The register currently contains 443 records stating a desire to undertake a custom build or self build within North Somerset. Sixty-seven of those specifically express a preference to build in Portishead.

4.76 By reducing the threshold for provision of self-build or custom-build homes to 50

home schemes, the delivery of the policy objective within the context of Portishead's pattern of allocated housing growth can be enabled.

4.77 In response to Portishead's particular land availability and affordability issues, self-build or custom-build home purchase should be maximised though maintaining the emerging Policy DP46 (Homes for all) requirement for 5% of homes, but relating this to sites of 50 homes or more that should be made available as serviced self build plots or custom-build houses for the initial 18 months of house marketing.



Relevant Objective

O8 To protect Portishead’s stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead’s distinct character and maintains resident amenity and highway safety.

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Local Policy Context

CS16 Affordable Housing
DM34 Housing type and mix

POLICY PWH10 - SELF-BUILD AND CUSTOM-BUILD HOUSING

Proposals for self build and custom housing will be supported.

On allocated development sites, proposals for development of 50 homes or more, 5%, or 3 dwellings of the total homes, whichever is the greater, should be made available for sale as self build or custom house building plots. For phased developments, self-build plots must be delivered and serviced at the earliest stage possible.

Plots must be made available and priced and marketed appropriately as self-build or custom build plots for at least 18 months.

SUB-DIVISIONS AND CONVERSIONS OF LARGER RESIDENTIAL PROPERTY

Context

4.78 The Portishead Housing Needs Assessment (2021) identifies a higher than average proportion of under-occupied larger houses within the town, contrasting with the shortage of smaller single, two and three bedroom properties.

4.79 North Somerset development management policies DM32 (High quality design) and DM38 (Residential extensions) provide overarching criteria to inform appropriate conversions to protect character and amenity. The Portishead Community Character Assessment (2021) identifies that larger and detached homes make a positive contribution to local distinction including within the conservation areas.

4.80 The subdivision of large properties to create smaller self-contained homes can help meet our local housing needs. It may also breathe new life and investment into houses that are now too large to be single family dwellings.

4.81 Inappropriate flat conversions and concentrations of flats can harm the amenity and residential character of existing areas. For example, large numbers of flats can lead to problems such as a shortage of on-street parking and bin storage areas and

harmful changes to local heritage. Whilst applying to Weston Super Mare, North Somerset policy DM39 (Sub-division of properties) also provides principles relating to cumulative impacts that should be taken into account at Portishead.

4.82 Enabling such conversions must therefore be managed within planning policy criteria to ensure harmful impacts are avoided.

Relevant Objective

O8 To protect Portishead's stock of one and two bedroom and accessible homes, and ensure that any future housing that comes forward to meet government targets contains a diverse range of tenures, forms and sizes to meet the identified housing needs of the community, protects and enhances Portishead's distinct character and maintains resident amenity and highway safety.

Existing Local Policy Context

| | |
|------|---|
| CS15 | Mixed and Balanced |
| DM32 | Communities |
| DM38 | High Quality Design and Place-making |
| DM39 | Extensions to Dwellings Sub-division of Properties |

POLICY PWH11 - SUB-DIVISIONS AND CONVERSIONS OF LARGER RESIDENTIAL PROPERTY

Proposals for the sub-division of existing large residential properties will be supported where:

- Sub-division would result in the provision of smaller housing units that contribute positively towards meeting Portishead's particular housing needs for one, two and three bedroom homes; and
- Proposed accommodation meets current national space standards; and
- The amenity of existing residents is maintained and proposed accommodation provides acceptable standards of amenity for new residents; and
- Proposals do not harm the fabric and setting of Portishead's designated and locally valued heritage assets and conserves the character of Portishead Conservation Areas; and
- Proposals protect the residential character and appearance of the host building and the surrounding neighbourhood; and
- Proposed locations are well connected to pedestrian and cycle routes to community facilities and public transport; and
- Resident and visitor car and cycle parking achieves North Somerset Council multi-modal parking standards (2021).

PROSPERITY POLICIES

The following section of the neighbourhood plan contains policies related to prosperity:

Economy

- Policy PPE1: Protecting Portishead's Valued Employment Space
- Policy PPE2: Supporting Business Investment, Start-ups and Low Carbon Business Enterprise
- Policy PPE3: Supporting Low Carbon Local Businesses
- Policy PPE4: Digital Connectivity and Telecommunications
- Policy PPE5: Homeworking and Live Work Units

Transport

- Policy PPT1: Inclusive Active Travel
- Policy PPT2: Encouraging Active Travel for Leisure and Recreation
- Policy PPT3: Supporting the Shift to Ultra Low Emission Vehicles
- Policy PPT4: Parking
- Policy PPT5: Highways Impacts and Securing Highway Safety
- Policy PPT6: Development Proposals and Travel Planning

UN SDGs

The policies in this section contribute to the following United Nations Sustainable Development Goals:



PROSPERITY: INTRODUCTION

PORTISHEAD ECONOMY

5.0 Portishead is a relatively affluent town, although with some pockets of deprivation. Nothing is left of its industrial village heritage. The economy today is based on the services sector and very limited small-scale manufacturing. Portishead is not famous for any particular area of commerce, although there is a wide variety of mostly small businesses covering sectors such as hospitality, health care, retail, manufacturing, marine, communications, creative industries, office and professional services. Avon and Somerset Police is a large employer. Home working, already popular, has increased greatly during the COVID-19 pandemic following national and international trends.

5.1 Commerce is focussed on a small number of sites including Old Mill Road, The High Street, West Hill Triangle, Harbour Road including Kestrel Court, Paper Mill Gardens, Newfoundland Way, and Middle Bridge Business Park.

5.2 The High Street rarely has vacant units for long, in contrast to many other towns locally and across the country. There is a strong core of independent shops as well as regional and national retailers, albeit a disproportionately large number of charity shops and estate agents.

5.3 In recent years, numerous sites have been turned from commercial into residential despite there being continued demand for commercial premises as proven by high occupancy and relatively high rents compared with neighbouring towns.

5.4 An attempt through a Planning Application to turn one of the last remaining commercial areas (Old Mill Road) into residential and retail led to a huge public outcry and three public demonstrations. Eventually the application was withdrawn.

5.5 There is a lack of available commercial land within the settlement boundary, so Portishead business owners often locate to Bristol, Portbury, Avonmouth or further afield.

5.6 Our surveys of businesses and residents revealed a strong desire to retain commercial land as well as allocating more commercial land if possible. With the plethora of small businesses, there is unsatisfied demand for flexible and scalable business premises to support growing businesses.

5.7 Local businesses report that the main biggest challenges are the lack of infrastructure such as transport, conference facilities and hotels. There is also a lack of premises to be able to expand in the right price.

5.8 The main employment hubs offering better paid employment for Portishead residents are predominantly outside of Portishead, notably in North and Central Bristol, Avonmouth and Portbury docks and wider afield.

5.9 This exacerbates the position of Portishead as a commuter town and puts particular pressure on local road infrastructure.



TRANSPORT

5.10 Transport infrastructure includes roads and motorways, public transport facilities including rail facilities and bus routes, footpaths, cycleways and bridleways and vehicle parking.

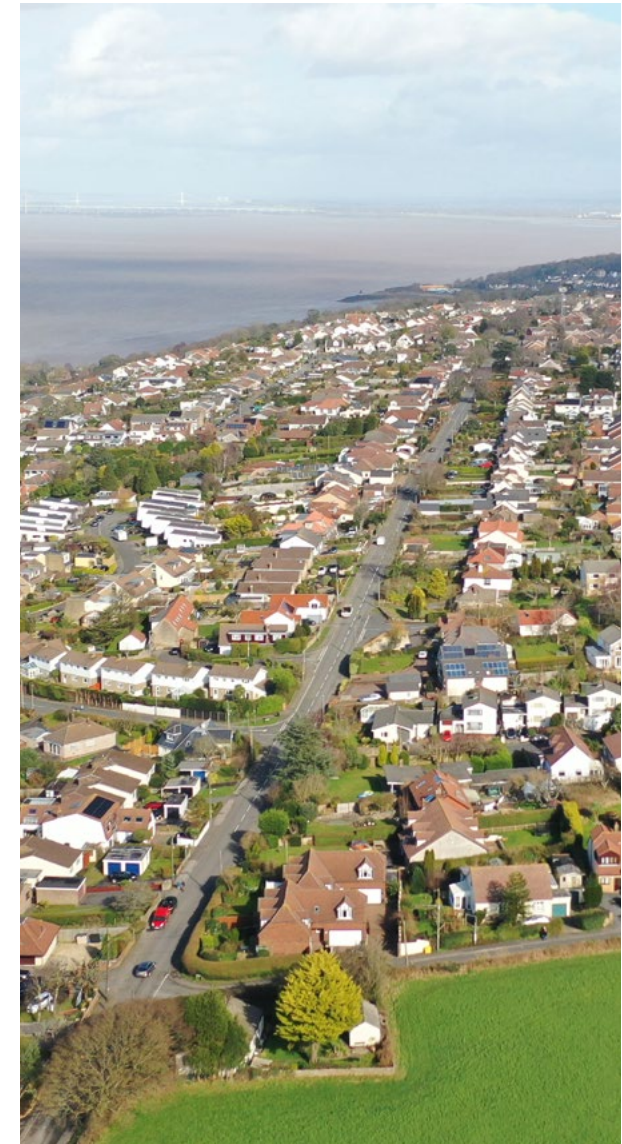
5.11 Transport infrastructure is also important in terms of supporting economic development such as haulage and freight to and from the port and airport.

5.12 'Active Travel' refers to the movement of people or goods by using the physical activity of a person for movement. That is, mainly walking and cycling. Active travel also helps to address the growing health emergency as a range of diseases can be significantly reduced by increased physical activity. The Town Council and the policies within this section of the Neighbourhood Plan support the development of an inclusive sustainable transport network that is accessible to all; not just those that are most able to walk or cycle.

5.13 The approach to transport in the Neighbourhood Plan has a significant role to play in delivering sustainable patterns of development consistent with the Town Council's climate emergency ambition. The

priority is to maximise the opportunities for active travel and access to effective public transport and so reduce the overall number of car trips. This reflects the approach in emerging policy from North Somerset Council, which sets out that trips should be accommodated by investing in non-car infrastructure first and foremost, then only increasing capacity for cars to deal with residual trips that cannot be accommodated on public transport or active travel options.

5.14 Car ownership and use is higher than average in Portishead. Local topography and perceived risks of cycling mean there will still be a need for highway improvements to address local issues.



PLANNING POLICIES: ECONOMY

PROTECTING PORTISHEAD'S EXISTING EMPLOYMENT SPACE

Context

5.15 Portishead has the potential to support a highly sustainable balance of housing, places to work and community services.

5.16 Core Strategy policy CS20 (Supporting a successful economy) aspires to ensure that all new development is sustainable and contributes to reducing the existing problems of out-commuting, lack of local employment opportunities and associated problems such as congestion and deprivation. The Core Strategy seeks to better align job growth with residential development. In Portishead, new employment development will be supported primarily on allocated land with a key objective of improving self containment and reducing out-commuting. Such opportunities are likely to take the form of either small scale development or regeneration on existing employment sites or allocated land.

5.17 The Neighbourhood Plan places a high priority on protecting existing opportunities for employment which simultaneously provide community facilities and local services. This reflects North Somerset Local Plan policy SA4, which contains criteria to protect existing employment uses and discourage change of use from employment to other uses. PPE1 aims to reinforce and add to North Somerset

Council policies through adding protection for identified valued places of local employment.

5.18 Figure 14 identifies valued employment locations and uses that would be applicable to this policy.

5.19 In 2020, changes to the Town and Country Planning Act Use Class Order amalgamated business use class B1 with other retail, office and community sports and health employment uses, within a new Class E. This enables flexible changes of use without planning consent within the new class. But it does also remove much of the ability to protect B1 office uses as well as town centre shop frontage uses.

5.20 Use class MA now also enables vacant class E uses to be converted to residential use through a simplified "prior consent" process. Such a route does enable the delivery of affordable housing as part of the change of use. This more recent employment use context must be taken into account when seeking to protect office, retail and some sport, health and childcare uses within Portishead. Such prior consent and permitted development rights do not affect the need for planning permission for other "operational development" which may materially alter the appearance or the operational characteristics of the land or buildings.

Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Local Policy Context

CS20 Supporting a successful economy
DM47 Proposals for economic development within towns and defined settlements.

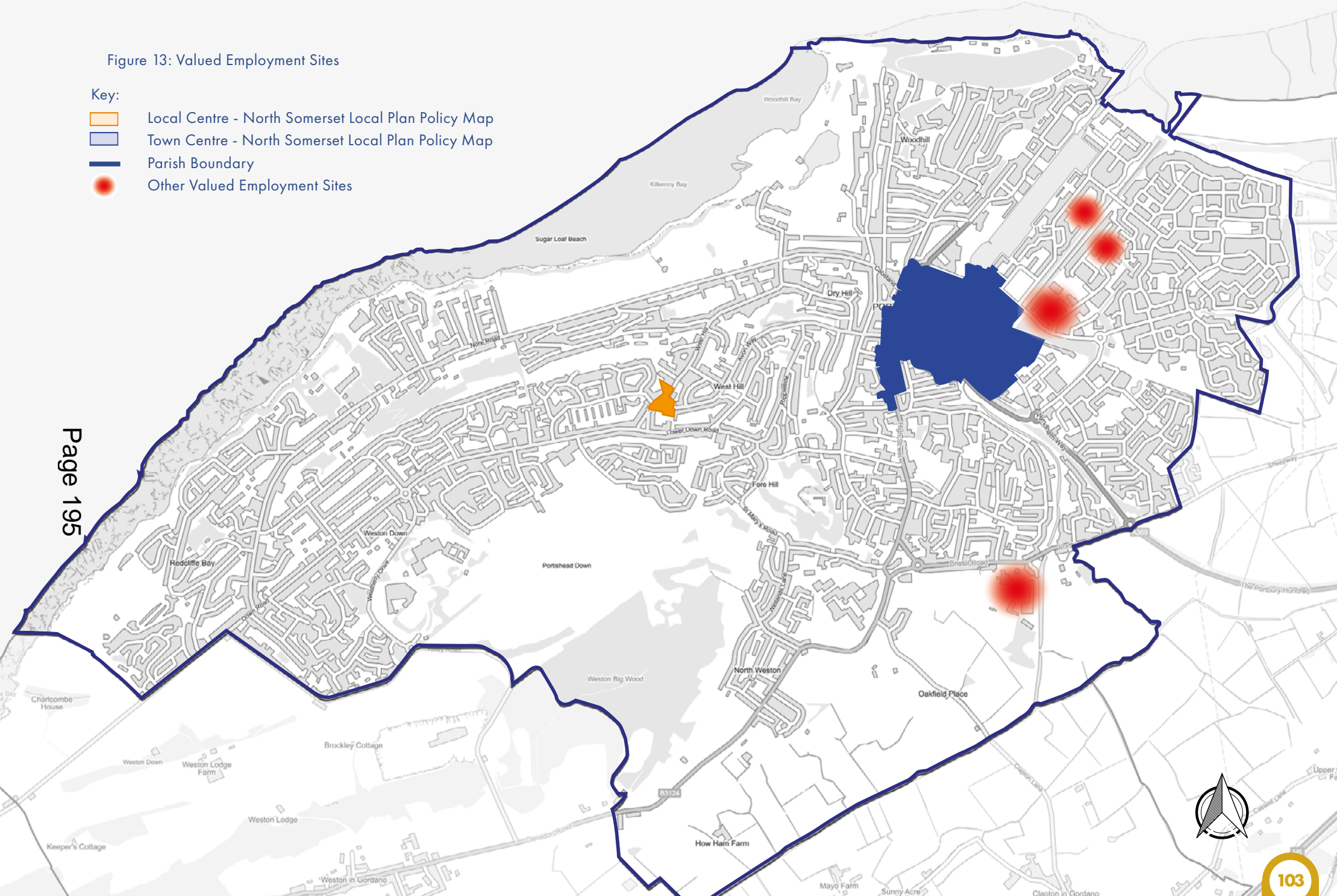
POLICY PPE1 – PROTECTING PORTISHEAD'S VALUED EMPLOYMENT SPACE

At 'Valued Employment Sites' within Portishead, listed in Figure 13, development proposals that retain, restore or increase employment levels within use classes E(g), B2 or B8, will be supported in principle subject to compliance with other relevant policies within the development plan in relation to development that changes the character or appearance of the proposal land or buildings.

Figure 13: Valued Employment Sites

Key:

- Local Centre - North Somerset Local Plan Policy Map
- Town Centre - North Somerset Local Plan Policy Map
- Parish Boundary
- Other Valued Employment Sites



SUPPORTING BUSINESS INVESTMENT, START-UPS AND LOW CARBON BUSINESS ENTERPRISE

Context

5.21 Portishead provides a very high quality of life, a pleasant environment and has a buoyant economy. New opportunities are in the service and public sector industries (Avon and Somerset Police headquarters is a major local employer), the creative sector and a huge increase in micro-businesses with many people working from home. These employment opportunities in no way match the local population growth, with many people commuting out of Portishead.

5.22 In preparing this plan, the Steering Group conducted both community surveys and held in-depth discussions with a cross-section of local employers. The results of this research are summarised in the Employment and Business Survey Analysis 2021. Local business owners identified the need for high quality mixed use business space as a priority for their future needs.

5.23 North Somerset's Core Strategy policy CS20 identifies Portishead as a focus for either small scale employment development or regeneration. Portishead has attractive and varied neighbourhoods that are well-connected to a high quality

built and coastal environment. The Lake Grounds, Lido, marina, leisure centre and the town centre offer a rich and varied resident and visitor experience, which contribute significantly to the vitality and viability of our economy.

5.24 The potential for future development within the Wyndham Way study area creates an opportunity to deliver significant additional employment space, including smaller start-up units in a highly sustainable location. The Community Action for Wyndham Way Study Area sets out the Neighbourhood Plan's approach to this area.

5.25 The Neighbourhood Plan aims to protect existing employment and harness the town's qualities to attract new investment. The Town Council is committed to supporting and working with the business community to build and sustain a strong and diverse local business and visitor economy that meets the employment needs of the community and supports development needs of employers.



Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Local Policy Context

- CS20 Supporting a successful economy.
- DM47 Proposals for economic development within towns and defined settlements

POLICY PPE2 - SUPPORTING BUSINESS INVESTMENT AND START-UPS

New employment development, including but not limited to, the provision of starter units, shared service accommodation and the development of offices will be supported where it will maintain resident amenity, the character of Portishead (as set out in the Portishead Community Character Statement) and maintain highway safety.

Tourism and leisure development that enhances the offer and which does not detract from the vitality and viability of the town centre will be supported.

SUPPORTING LOW CARBON LOCAL BUSINESSES

Context

Climate change and sustainable development principles are woven through the Neighbourhood Plan. Core Strategy Policy CS1 states that all development should demonstrate a commitment to reducing carbon emissions, including through reducing energy demand through good design, and utilising renewable energy. Policy is now underpinned by the North Somerset Council Climate Strategy and Action Plan towards achieving a carbon neutral area by 2030. Portishead Town Council has committed to embedding sustainable development into the Neighbourhood Plan and its own activities.

The Town Council will support development proposals for both new low carbon business investment and existing business investment in technology and equipment that contribute towards achieving carbon neutrality within the area by 2030.

Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Local Policy Context

- CS20 Supporting a successful economy.
- DM47 Proposals for economic development within towns and defined settlements

POLICY PPE3 - SUPPORTING LOW CARBON LOCAL BUSINESSES

Proposals for development that will enable local businesses to contribute to delivery of The North Somerset Climate Emergency Strategic Action Plan, which aims to achieve carbon neutrality within North Somerset by 2030, will be supported, where proposals do not harm Portishead's character (as set out in the Portishead Community Character Statement) and residential amenity.

Proposals for the development of new green technology and low carbon employment will be particularly supported in principle.

RELATED COMMUNITY ACTIONS:

Supporting local businesses to be carbon positive

DIGITAL CONNECTIVITY AND TELECOMMUNICATIONS

Context

5.26 The quality of digital connectivity is critical to the success of Portishead's business growth, at employment buildings and sites and for homeworking. For Portishead, digital communication quality was identified as a key factor in discussions with employers undertaken during preparation of the Neighbourhood Plan (Employment and Business Survey Analysis 2021). It also has the potential to make a significant contribution to reducing commuting and its carbon emissions by supporting working from home and digital conferencing. COVID-19 remains a threat to business continuity, and businesses that are able to connect with customers and do business online are significantly more resilient to its impacts on society.

5.27 Core Strategy employment policy CS20 links to Development Management Policy DM48; Broadband, requires housing developments above 10 dwellings and employment proposals above 200 sqm to be flexibly connected to high speed broadband provision.

5.28 The Neighbourhood Plan recognises the heightened importance of enabling

and maintaining digital connectivity to the highest standard for Portishead. Over the lifetime of the plan, it is likely that technologies will change. Installation of future proofed infrastructure will be vital. Whilst future broadband infrastructure may be largely delivered beneath ground, it will also be necessary to be ready for the installation of new infrastructure that could affect the appearance of buildings or streetscape.

5.29 The strategic policy framework and Neighbourhood Plan combine policies to ensure such proposals can be managed to protect character and amenity and health. However, the Neighbourhood Plan provides in principle support for proposals that ensure Portishead's businesses and residents can have access to the latest and highest quality of digital connectivity.



Relevant Objective

O11 To support Portishead’s economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

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Local Policy Context

CS20 Supporting a successful economy
DM48 Broadband

POLICY PPE4 – DIGITAL CONNECTIVITY AND TELECOMMUNICATIONS

Development proposals that contribute to providing Portishead’s residents, businesses and community facilities with access to state-of-the-art digital connectivity will be supported where development protects the amenity of neighbouring residents and the character of Portishead (as set out in the Portishead Community Character Statement).

HOMWORKING AND LIVE WORK UNITS

Context

5.30 Home working provides a seedbed platform for entrepreneurs and micro businesses and enables traditional office based businesses to offer hybrid working patterns. In doing so, car commuting can be reduced and local businesses and services have the opportunity to build a larger local customer base.

5.31 Since the COVID-19 pandemic, working from home has become and is likely to remain an integral part of many peoples' working patterns. Census data from 2001 showed homeworking rates for Portishead at 9%⁵¹, while Portishead Neighbourhood Plan surveys undertaken in 2021 put this figure now at 25%.

5.32 Working from home does not need planning permission, as long as the residential character and amenity of the area is maintained. In some cases, planning permission will be needed for extensions and annexes to enable home working at existing houses. Specific live-work units can define distinct employment

and residential components. The Neighbourhood Plan will give support to both residential annexes, subject to conformity with adopted strategic and Neighbourhood Plan design and transport policies that safeguard area character, traffic and parking considerations and residents' amenity.

5.33 The Neighbourhood Plan encourages new homes built in Portishead to provide viable space as well as digital connectivity to enable home working. Support will also be given to proposals for appropriately designed and located live/work units which can support micro and start up use class E businesses linked to residential and commercial accommodation.



Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Local Policy Context

- CS1 Addressing climate change and carbon reduction
- CS12 Achieving High Quality Design and Place-making
- DM43 Residential annexes

POLICY PPE5 - HOMEWORKING AND LIVE WORK UNITS

New housing development should be designed to enable home working and viable live/work accommodation.

Support will be given to planning or listed building applications to create additional residential space to enable ancillary home working, subject to the proposed development maintaining existing residential amenity, being of an appropriate scale and design and preserving the fabric and setting of affected historic fabric and locally valued green infrastructure.

PLANNING POLICIES: TRANSPORT

INCLUSIVE ACTIVE TRAVEL

Context

5.34 Maximising active and carbon zero travel within Portishead will make a significant contribution to delivery of the North Somerset Climate Emergency Strategic Action Plan (2019). Whilst cars remain a popular way of getting around in Portishead, we would like to see more opportunities to get around the town without the use of a private vehicle. Accessible, inclusive and safe infrastructure that promotes and enables walking, wheeling (using a wheelchair or mobility aid), cycling and public transport for local journeys to key facilities such as schools, medical centres and open green spaces are important.

5.35 Throughout all of this, the needs of disabled people, children, those with pushchairs and the elderly should be considered and provided for. The active travel network should reflect the core principles of:

- Coherence
- Safety
- Directness
- Comfort
- Attractiveness
- Integration

5.36 The Joint Local Transport Plan 4⁵² sets the scene for Policy PPT1, setting out how the West of England Combined Authority (North Somerset, Bath and North East Somerset, Bristol and South Gloucestershire) will have carbon neutral transport by 2036. Related to this document is the [West of England Local Cycling and Walking Infrastructure Plan](#)⁵³, which sets out priorities for improvements to the active travel network in Portishead.

5.37 Portishead has a higher than average percentage of car ownership which exacerbates our shared challenge of reducing car use by 40% by 2030 in line with local carbon targets. In seeking to meet the needs of a balanced and diverse community, our local transport network must address the needs of people who cannot drive, children, some older and disabled people, or those who choose not to drive.

5.38 North Somerset Council and the West of England Combined Authority recently secured 'Bus Service Improvement Plan' funding which should contribute positively towards this.

5.39 Congestion is a key issue for local residents. Whilst switching to electric vehicles may assist in reducing harmful vehicle emissions, it will not reduce congestion. Only using our cars less will achieve that. Improvements to public transport network have the potential to alleviate this if they can be delivered.

5.40 During the preparation of the Neighbourhood Plan, local people identified particular priorities for improvement within the existing active travel network:

- Creation of direct walking or cycling access from the Lake Ground to High Street
- Dedicated cycle routes for schools
- Dedicated cycle route between the 'top' of the town and the town centre.

5.41 Whilst local topography presents a challenge to make walking and cycling attractive to everyone, Portishead is a compact town with a well-connected network of local walking and cycling routes. This enables many trips to local facilities and the town centre to be convenient on foot or bike within 20 minutes. Together with its high quality

of environment, it provides a distinct opportunity to facilitate change in how people choose to make local trips. Increased use of e-bikes will also help to address the topographical challenges to active travel.

5.42 Emerging North Somerset Policy DP14 sets district wide active travel objectives and expectations of development. The Neighbourhood Plan supports this approach and will support development proposals that conform with and make proportionate contribution to delivering its aims in Portishead, through the connections to and enhancement of its active travel network illustrated on the [North Somerset Public Rights of Way Map](#)⁵⁴ and in Figure 15.

Relevant Objectives

O10 To ensure all residents have easy access to local green, blue and open spaces, and to promote environments and transport networks that offer all individuals and communities the greatest potential to lead active and healthy lifestyles.

O13 To deliver an integrated, sustainable, accessible and inclusive transport network that encourages active travel and reduces congestion within Portishead.

Local Policy Context

| | |
|------|---|
| CS1 | Addressing climate change and carbon reduction |
| CS10 | Transportation and Movement |
| DM25 | Public rights of way, pedestrian and cycle access |

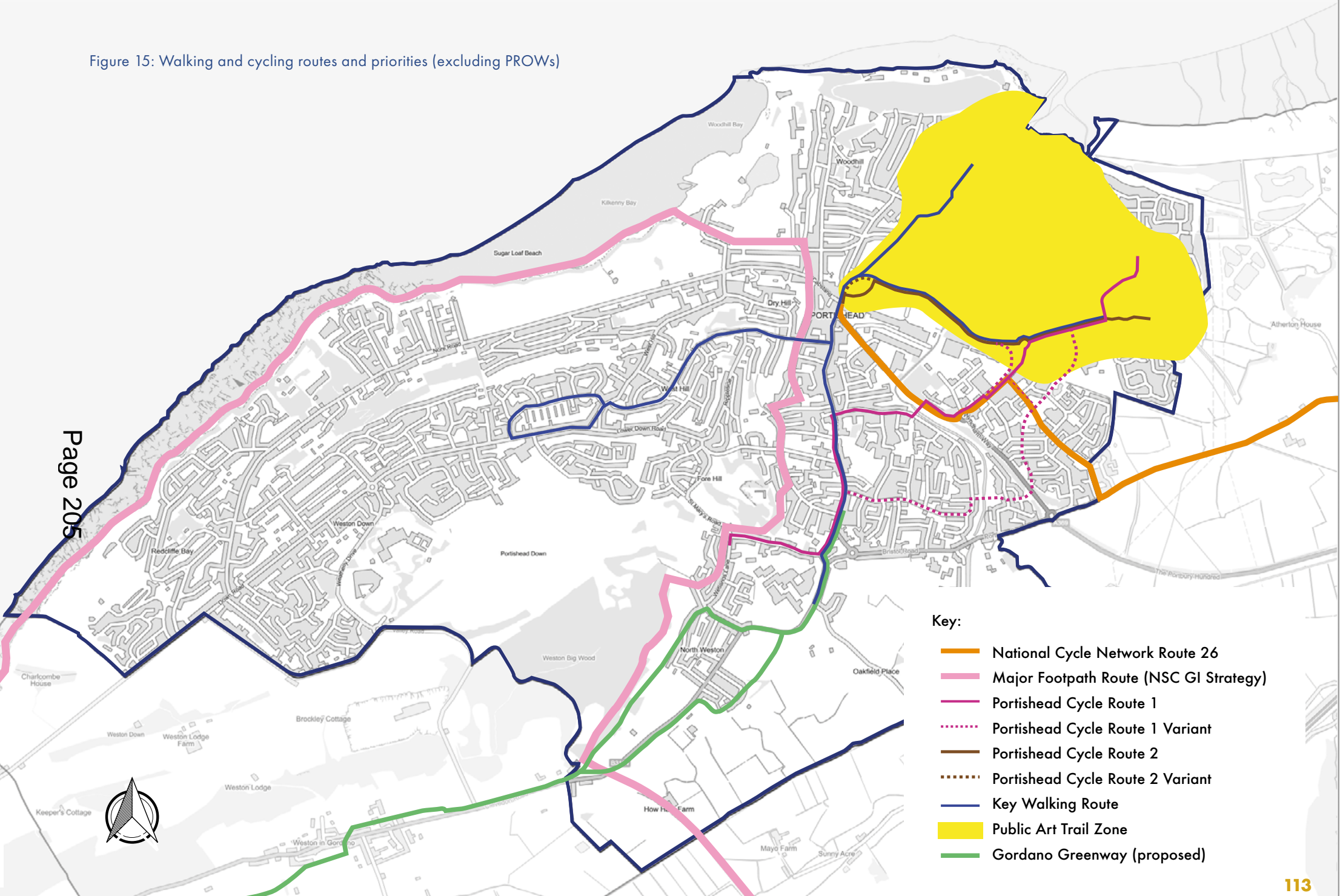
POLICY PPT1 – INCLUSIVE ACTIVE TRAVEL

Development proposals will only be supported where they contribute proportionately and positively towards the protection of, connection to and enhancement of Portishead's active and sustainable transport network as illustrated on Figure 15 and the Definitive Public Rights of Way Map.

Proposals will be supported where they:

- optimise inclusive measures to encourage walking, cycling and connections to public transport in conformity with North Somerset Policy CS10 (Transportation and Movement)
- integrate with public transport services and achieve accessible and safe pedestrian connections of no more than 400m or 5 minutes safe and convenient walking distance to an active bus stop.

Figure 15: Walking and cycling routes and priorities (excluding PROWs)



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Key:

- National Cycle Network Route 26
- Major Footpath Route (NSC GI Strategy)
- Portishead Cycle Route 1
- ⋯ Portishead Cycle Route 1 Variant
- Portishead Cycle Route 2
- ⋯ Portishead Cycle Route 2 Variant
- Key Walking Route
- Public Art Trail Zone
- Gordano Greenway (proposed)



ENCOURAGING ACTIVE TRAVEL FOR LEISURE AND RECREATION

Context

5.43 The benefits of walking and cycling for recreation and leisure for our health and wellbeing are widely reported. Portishead's outstanding environment presents a particularly distinct opportunity to harness its benefits. The COVID-19 pandemic highlighted just how important it is to be able to get out and about in our local environment and to exercise locally. The pandemic also created a shift where lots of people interacted with their familiar surroundings in new ways; appreciating what's on their doorstep and spending more time outdoors.

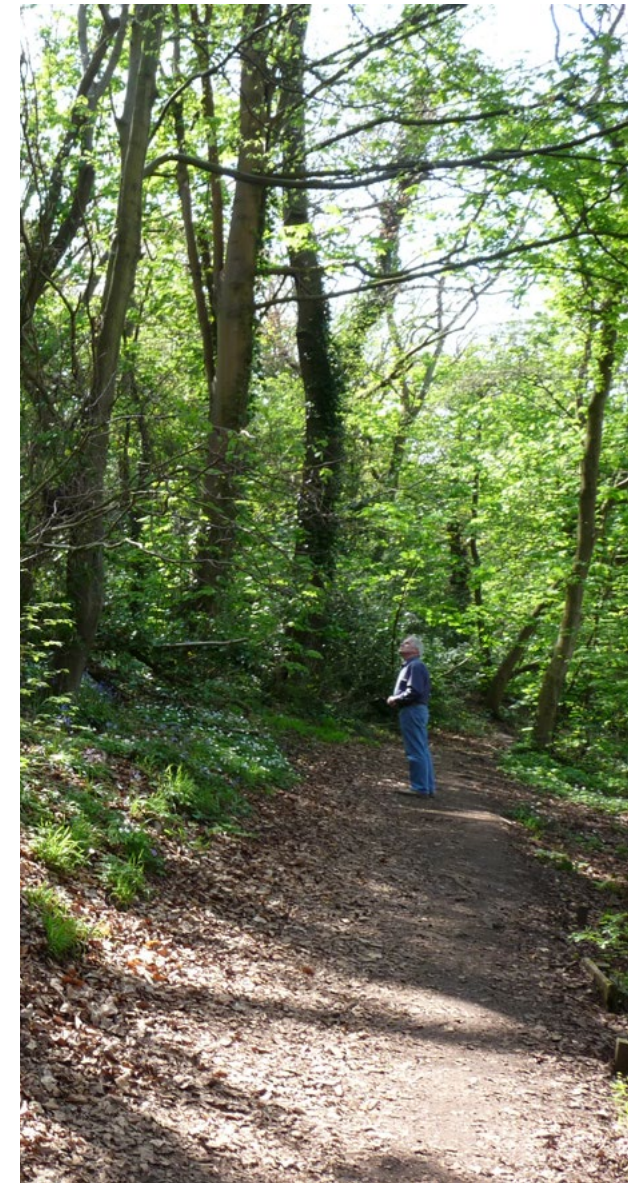
5.44 From our coastline, to ancient woodland, to the Marina and High Street; Portishead has a distinct wealth of attractive areas and features for residents and visitors alike to enjoy. Many people already take advantage of the extensive public right of way network that links a number of these assets.

5.45 Portishead has key strategic green transport routes used for recreation including the English coastal path and National Cycle Route 26, which links Portishead to Easton-in-Gordano and

further west towards Bristol along the Pill Path.

5.46 During the preparation of the Neighbourhood Plan, the working groups identified an opportunity to better link our assets and strategic routes through wayfinding signage, interpretation and better maintenance. But securing their protection and delivering connections to these routes must be a baseline action.

5.47 The overall aim is to deliver improved connections that will enable all of our community to access and enjoy Portishead's open spaces, landscape, heritage and leisure facilities as well as make connections into the strategic footpath network. More information on this can be found in the Green and Blue Infrastructure Evidence Base Report 2022.



Relevant Objective

O10 To ensure all residents have easy access to local green, blue and open spaces, and to promote environments and transport networks that offer all individuals and communities the greatest potential to lead active and healthy lifestyles.

O13 To deliver an integrated, sustainable, accessible and inclusive transport network that encourages active travel and reduces congestion within Portishead.

Local Policy Context

- CS9 Green Infrastructure
- CS10 Transportation and Movement
- CS26 Supporting healthy living and the provision of health care facilities
- DM25 Public rights of way, pedestrian and cycle access

POLICY PPT2 - ENCOURAGING ACTIVE TRAVEL FOR LEISURE AND RECREATION

Walking and cycling routes that connect Portishead's coastline, woodland landscapes, town centre and marina to its local neighbourhoods will be protected and enhanced to enable and encourage walking and cycling for leisure, health and wellbeing.

Development proposals and engineering works that maintain or enhance existing strategic public rights of way and permissive footpaths and connections to them will be supported.

Portishead Town Council will support the enhancement and extension of the sections of strategic walking and cycling routes within Portishead, including:

- The South West Coastal Path
- National Cycle Network Route 26
- Gordano Greenway
- Cycle route along full length of Portbury Ditch on both sides
- Cycle lane from Portishead to Clapton in Gordano
- Cycle lane from Sheepway to Portbury using Gypsy Lane with a safe crossing across the A369

RELATED COMMUNITY ACTIONS

Portishead Town Council will work with the community, landowners, neighbouring parishes, local partners and North Somerset Council to protect, enhance and extend Portishead's pedestrian and cycling network.

A priority will be the delivery of a connected and accessible "leisure walking loop" within the town. This will harness existing public rights of way and provide new and improved connections that will enable all of our community to access and enjoy Portishead's open spaces, landscape, heritage and leisure facilities as well as make connections into the strategic footpath network.

Other actions:

- Key Routes to School Project
- Improvements to infrastructure (e.g. dropped kerbs and disabled parking) for older people and people with a disability should be made where appropriate.
- The Town Council will explore the means of prevention of pavement parking where it is considered to be a hazard.

SUPPORTING THE SHIFT TO ULTRA LOW EMISSION VEHICLES

Context

5.48 Ultra-low emission vehicles (ULEVs) use electric and other new power sources and produce no exhaust fumes or engine noise. Whilst still only accounting for about 8% of the cars on the road in 2020, electric car (EV) sales increased by 186%. The growth of the EV market is expected to accelerate as the UK prepares for the 2030 ban on new petrol and diesel vehicle sales.

5.49 Portishead has a higher than national average car ownership level where only 13% of households do not own a car⁵⁵. Cars are convenient and often essential to people in our community and whilst we need to significantly reduce overall usage, they are likely to remain a significant part of Portishead's transport system for the foreseeable future. But within the lifetime of the Neighbourhood Plan nearly all cars are likely to be replaced. This presents an opportunity to fast-track Portishead's conversion to ultra-low emission vehicles.

5.50 Using a combination of local policy and community actions, we aim to make choosing to use an ultra-low emission vehicle feasible, attractive and the norm

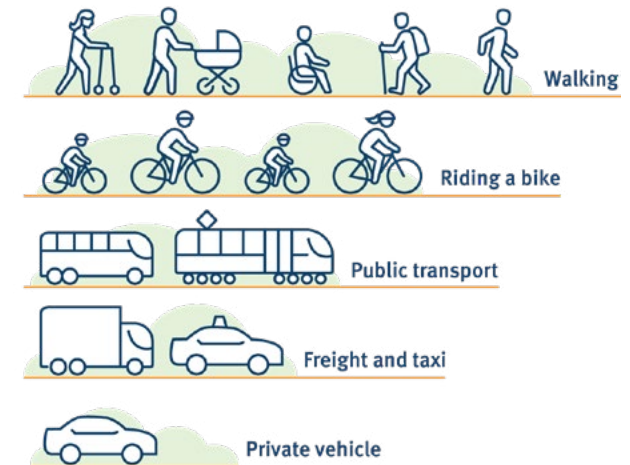
in Portishead, and preferred over internal combustion alternatives. This will be achieved through a combination of local community actions, working alongside North Somerset planning and transport policies, building regulations, and NDP policy PPT3. The Neighbourhood Plan requires new development to provide for charging of ultra-low emission vehicles and be future proofed to accommodate changing technology. The Town Council will also work with North Somerset Council and local businesses to install public facilities to enable charging.

5.51 ULEVs alone cannot address all transport-related issues in Portishead. Issues such as affordability, congestion and wider environmental impacts remain. North Somerset Council's emerging policy prioritises all other modes of transport above the private vehicle, whether powered by internal combustion or other low emission methods. This reflects the approach in the Transport Hierarchy.

5.52 ULEVs therefore, are just one piece of the puzzle in addressing the wider challenges of transport and transport

infrastructure and must be implemented alongside improvements to the public transport and active travel networks addressed elsewhere in this Plan and within emerging North Somerset policy. Notwithstanding this, ULEVs can effectively address the transport needs of those who may not be in a position to utilise active or public transport alternatives due to health or timetabling constraints in a way that minimises the local environmental impact.

Sustainable transport hierarchy





Relevant Objective

O13 To deliver an integrated, sustainable, accessible and inclusive transport network that encourages active travel and reduces congestion within Portishead.

Local Policy Context

CS1 Addressing climate change and carbon reduction

POLICY PPT3 – SUPPORTING THE SHIFT TO ULTRA-LOW EMISSION VEHICLES

To future proof new development and to ensure that sufficient electric vehicle parking provision and infrastructure is provided in both public and private parking areas, development proposals will only be supported where they conform with The North Somerset Council, Revised Parking Standards SPD (2021), (Principle 19; Electric Vehicle Parking)

Additional Public e-vehicle Charging Points

To increase the attractiveness and use of ultra-low emission vehicles, additional infrastructure for low emission vehicle charging is encouraged at public parking locations where space allows, particularly at the following destinations and locations:

- Esplanade Road car park
- Parking facilities at the Folk Hall
- Avon Way car park

PARKING

Context

5.53 Community feedback identified parking as a key issue for many people within Portishead. In particular, the tight knit development of “The Village Quarter” has been a hotspot of incidents of inconsiderate parking and obstruction of the highway.

5.54 Town centre parking is valued in supporting local business vitality, and parking adjacent to the coast, Lake Grounds and Lido supports its leisure and visitor economy.

5.55 Many of Portishead’s existing homes were constructed without car parking provision. Some older homes with garages are now too small to accommodate today’s cars. Garages are also re-purposed as storage or living accommodation.

5.56 The rise in car ownership places further pressure on highway space for parking. It also results in the replacement of front garden landscape with hard standing, removing on-street parking and valuable green infrastructure and increasing run-off thus putting further pressure on the overloaded drainage system.

5.57 North Somerset Policy CS11 provides district level direction for provision of and changes to car parking. The adopted and

updated [Parking Standards supplementary planning guidance document \(2020\)](#)⁵⁶ sets new standards for all new development including increased garage size, and car and cycle parking provision for homes and businesses.

5.58 In line with North Somerset’s aspiration to become carbon neutral by 2030, North Somerset Council’s emerging spatial strategy is supportive of development that provides lower levels of car parking in accessible locations that are well served by public and active modes of travel, have good local facilities and are less reliant on private vehicle ownership. Proposals must be accompanied by sufficient evidence to demonstrate that a lower level of parking will not have a detrimental impact on local highway conditions.

5.59 However, whilst the Neighbourhood Plan acknowledges the primary goal of reducing car ownership and usage, parking issues remain a priority for local people in Portishead.

5.60 Where no planning permission is required for changes to property and uses, associated impact on car parking cannot be controlled. Where planning controls can be applied, the Neighbourhood Plan will

expect current district parking standards to be applied to prevent intensification of car parking issues through inappropriate enlargement of houses or changes of use that generate additional parking demands.

5.61 Public car parks at the town centre and at leisure attractions are valued. But all members of the community need to be able to utilise this valued space including those in greatest need of car parking, bicycles and ultra-low emission vehicles.

5.62 The Neighbourhood Plan will support proposals to manage existing and new car parks to maximise their contribution to making travel accessible and sustainable.

5.63 It is recognised that future improvements to public transport may be able to alleviate some of the existing parking issues in Portishead. During the preparation of the Neighbourhood Plan, it was highlighted that many residents are currently unable to utilise the available public transport due to a perceived unreliability as well as timetabling practicalities - these issues need to be resolved in order to encourage more people to use public transport and make a contribution towards improving parking issues in the Neighbourhood Area.

Relevant Objective

O13 To deliver an integrated, sustainable, accessible and inclusive transport network that encourages active travel and reduces congestion within Portishead.

Local Policy Context

CS1 Addressing Climate Change and Carbon Reduction
 CS10 Transportation and Movement
 CS11 Parking
 DM28 Parking Standards
 DM 29 Car Parks
 North Somerset Parking Standards SPD 2021

POLICY PPT4 - PARKING

Parking Standards

Residential and non-residential development proposals will be expected to conform with North Somerset council's Revised Parking Standards SPD (2021).

Car Parking Provision

Proposals that would result in the loss of parking will only be supported where they conform with North Somerset Council's Revised Parking Standards SPD (2021).

Car Parks

Proposals that re-prioritise existing car parking to increase provision for disabled people, ultra-low emission vehicle charging and secured cycle parking will be supported.

HIGHWAYS IMPACTS AND SECURING HIGHWAY SAFETY

Context

5.64 Maintaining and improving highway safety for all users is a primary consideration in assessing all proposals for development that are likely to generate or alter how people access and move around a site or how it may impact on the connecting network. North Somerset Policy DM24 applies district level requirements upon applicants to provide safe transport environments and mitigate problems they cause, including through financial contributions to off-site measures. This will be applied to all development within Portishead.

5.65 Traffic congestion within Portishead is a priority to the local community.

5.66 The cumulative impact of the intensification of residential buildings and plots within Portishead's existing neighbourhoods is already causing significant highway safety issues, particularly when it increases demands for on-street parking that causes obstructions to pedestrians and service and emergency vehicles. Neighbourhood Plan Policy PWH2 seeks to prioritise planning control

of such development through requirements to meet North Somerset Council's Parking Standards (2021).

5.67 The Wyndham Way area is the only location within Portishead that may accommodate significant development within the lifetime of the Neighbourhood Plan. The future for the Wyndham Way area is being developed through a partnership of Portishead Town Council, North Somerset Council and relevant landowners. The Wyndham Way Community Action included in this Plan (see page 128) sets out transportation criteria that the community has expressed as important for this development, including integration with the new railway station, managing car parking and avoiding wider transport impacts.

5.68 Particularly within the town's conservation area and where the Portishead Community Character assessment has identified green infrastructure and highway boundary treatments make a positive contribution to local character, proposals to address

highway safety will only be supported where they conserve or mitigate for environmental or heritage harm caused.

5.69 Development can be expected to ensure it does not exacerbate or create highway safety issues for all users. It can also be expected to contribute towards wider highway safety and sustainability improvement measures. The Neighbourhood Plan supports and reinforces North Somerset Policy.

Relevant Objective

O13 To deliver an integrated, sustainable, accessible and inclusive transport network that encourages active travel and reduces congestion within Portishead.

Local Policy Context

CS10 Transportation and Movement
DM24 Safety, traffic and provision of infrastructure, etc. associated with development

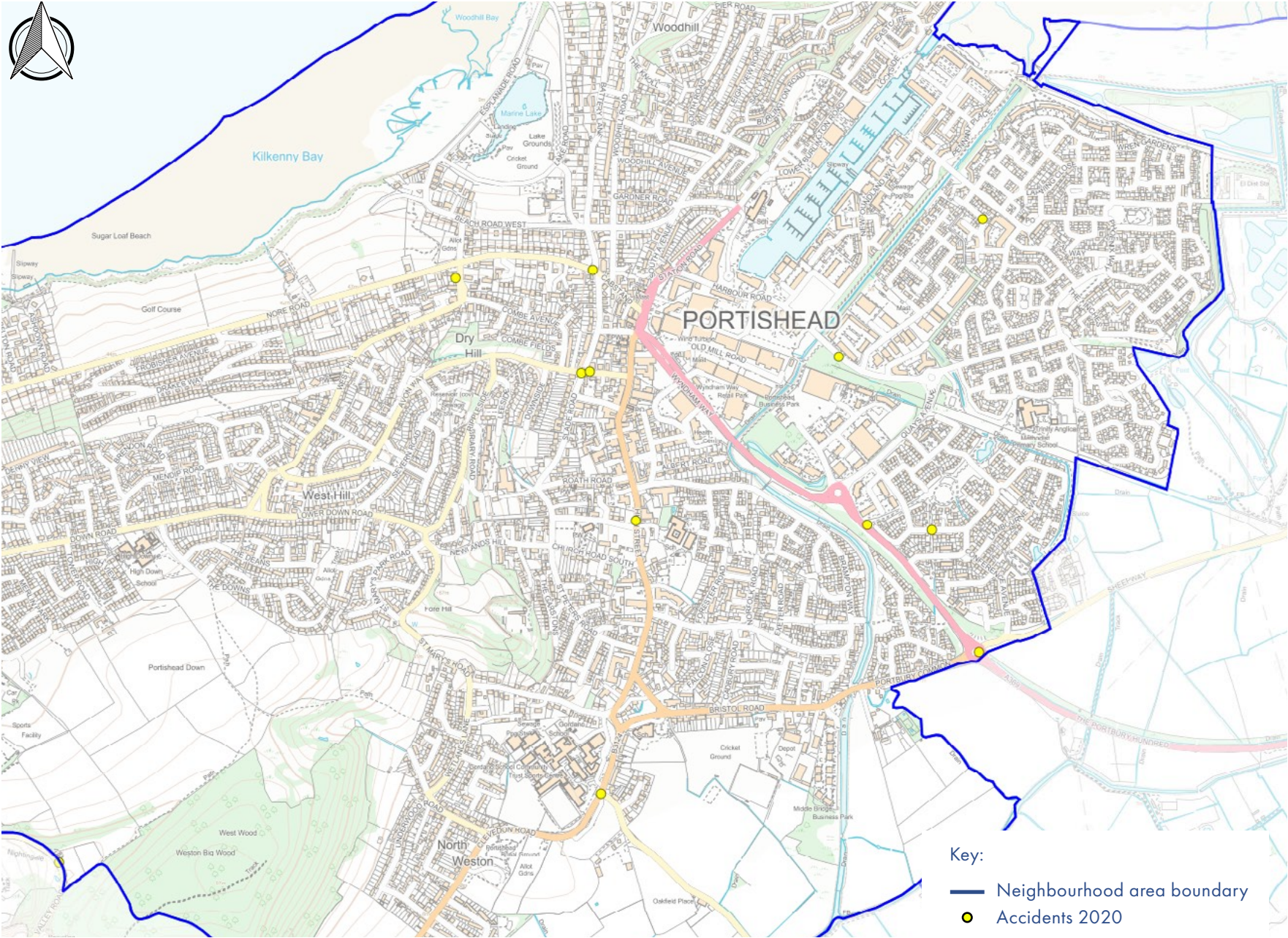
POLICY PPT5 – HIGHWAY IMPACTS AND SECURING HIGHWAY SAFETY

Where development proposals will create demands for additional pedestrian, cycle and vehicle movements and parking, they will be only be supported where they are in conformity with North Somerset Local Plan Policy DM24 (Safety, traffic and provision of infrastructure, etc. associated with development) addressing the assessed safety impacts of the proposed development on the local highway, adopted cycle routes and highway footway network. Proposals will be expected to make proportionate contribution towards the improvement to connecting multi-modal routes to enable safe connections to be achieved for pedestrians, cyclists and all vehicle users to local facilities.

RELATED COMMUNITY ACTIONS

A review of parking restrictions (including double yellow lines), should be regularly conducted, focusing on safety concerns.

Figure 16: Recent Traffic Accidents in Portishead



DEVELOPMENT PROPOSALS AND TRAVEL PLANNING

Context

5.70 Transport and traffic is a major issue and priority for Portishead's community. The existing highway network is often heavily congested. Any major development within the town is likely to exacerbate this issue unless it can minimise the need for car use and maximise public transport use and walking and cycling choices. In addition to directly delivering necessary infrastructure, any development should also adopt measures to embed use of these modes from the outset. Travel Plans can set out how this is achieved to optimum effect.

5.71 North Somerset Council Portishead Town Council and relevant landowners are leading the "Placemaking Plan" master planning to guide the potential development of The Wyndham Way study area. The area may accommodate significant development within the lifetime of the Neighbourhood Plan and potentially beyond, including a linking to the new railway station and local highway network. The scale of change will require a comprehensive master planned approach to design of sustainable and active travel infrastructure to be delivered through major development proposals.

5.72 North Somerset Local Plan will address any proposal for allocation of land for strategic housing growth. This will be likely to be at the edge of Portishead's existing developed area. Proposals for any associated development would be likely to represent major development.

5.73 The Neighbourhood Plan will only support development proposals which would generate significant amounts of movement when they are submitted with a Travel Plan that demonstrates the proposal meets criteria set out in North Somerset policy DM26, and is compliant with the North Somerset Travel Planning Supplementary Planning Document.



Relevant Objective

O13 To deliver an integrated, sustainable, accessible and inclusive transport network that encourages active travel and reduces congestion within Portishead.

Page 217 *Local Policy Context*

- CS1 Addressing climate change and carbon reduction
 - CS10 Transportation and Movement
 - DM26 Travel Plans
 - DM24 Safety, traffic and provision of infrastructure, etc. associated with development
- North Somerset Travel Plans SPD

POLICY PPT6 – DEVELOPMENT PROPOSALS AND TRAVEL PLANNING

Applications for development of 10 homes or more must be submitted with a Travel Plan in accordance with North Somerset Local Plan Policy DM26 (Travel Plans) and the North Somerset Travel Plans SPD (2010) (or any subsequent adopted version).

Proposals for major development proposals will only be supported where the travel plan demonstrates that opportunities to enable active and low carbon transport choices, community safety, inclusive accessibility and avoidance of adverse transport impacts on residential amenity and business vitality within Portishead has been achieved.

Any master plan and major development proposals within the Wyndham Way redevelopment area will only be supported when it is submitted with a policy compliant travel plan. This must take account of pre-existing and future transport demands and infrastructure identified within an approved Wyndham Way “Placemaking Plan” or master plan.

RELATED COMMUNITY ACTIONS

- Town Council commitment to involvement in Railway Station development.

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AREA BASED POLICIES AND COMMUNITY ACTIONS

The following section of the neighbourhood plan contains policies related to wellbeing:

Priorities for Wyndham Way Study Area

Community Action Wyndham Way Study Area

Priorities for Portishead Town Centre

Policy PTC1: Protection of Portishead Town Centre Character and Vitality

Policy PTC2: Business Use of Upper Floors

Policy PTC3: Town Centre Housing

Policy PTC4: Keeping the Town Centre Accessible to Everybody

Policy PTC5: Shopfronts and Signage

UN SDGs

The policies in this section contribute to the following United Nations Sustainable Development Goals:



PLACE FOCUSED POLICIES AND CRITERIA

INTRODUCTION

6.0 Portishead Town Centre and the Wyndham Way study area are at the heart of the town’s economic, community and cultural life. The shaping and future of both areas bring together development themes covered by the Neighbourhood Plan, but also, in the case of the town centre, very specific and distinct issues and opportunities. The Neighbourhood Plan therefore sets out clear and distinct policies for the town centre and provides conditions to inform support for future proposals that may emerge from Placemaking Plan proposals for the Wyndham Way Study Area.

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6.1 Our town centre remains a vibrant local hub but it faces challenges from alternative forms of retailing and has recently suffered the impacts of the COVID-19 pandemic. These changes, together with changes in Government planning legislation, create a need for the Neighbourhood Plan to provide a locally distinct set of place specific policies to direct and guide its ongoing quality and long term vitality at the hub of the community. This may be reinforced by a future town centre strategy.

6.2 At the time of drafting the Neighbourhood Plan, the Wyndham Way Study Area is the focus of a regeneration

and development strategy, being led by North Somerset Council, in partnership with the landowners and Portishead Town Council. The Placemaking Plan work has included a distinct stream of community engagement which has been referenced in drafting town centre Neighborhood Plan policies.

6.3 Upon adoption, North Somerset’s emerging guidance and policy framework will take the lead in setting the development agenda for the Wyndham Way study area. Neighbourhood Plan policy can inform how the proposals have regard to our community needs and priorities.

6.4 The Neighbourhood Plan can inform how the proposals have regard to our community needs and priorities. However, the Town Council’s input is distinct and separate from its role as the “Qualifying Body” for the Neighbourhood Plan.



WYNDHAM WAY STUDY AREA

CONTEXT

6.5 North Somerset Council are leading a partnership with Portishead Town Council and Aberdeen Standard Investments (ASI), one of the key land owners, to work together to guide future development of land between the High Street, the Marina and the planned new transport hub, known as the Wyndham Way Study Area (WWSA).

6.6 The identified boundary of the WWSA reflects areas where change is considered possible and also where it could help to unlock potential wider benefits such as new routes and connections or improved use of previously developed, 'brownfield', land.

6.7 The WWSA forms part of Portishead town centre. Allocated sites within the WWSA include Old Mill Road (mixed use development), Gordano Gate (employment use) and Harbour Road / Gordano Gate (residential). There are further allocations beyond the WWSA boundary, and the High Street is designated as a Primary Shopping Area.

6.8 The study area contains existing employment and retail uses that make an existing contribution to the value and offer of the town centre and local employment

opportunities. These valued uses are protected by Neighbourhood Plan town centre and employment policies PTC1 and PPE1. Proposals that may come forward for these sites will only be supported where these uses and employment are retained.

6.9 The WWSA is adjacent to land reserved in the Local Plan for the construction of a new integrated transport hub for Portishead including a railway station. It will be essential that all proposals for the study area do not prejudice delivery of this facility and are fully connected to it.

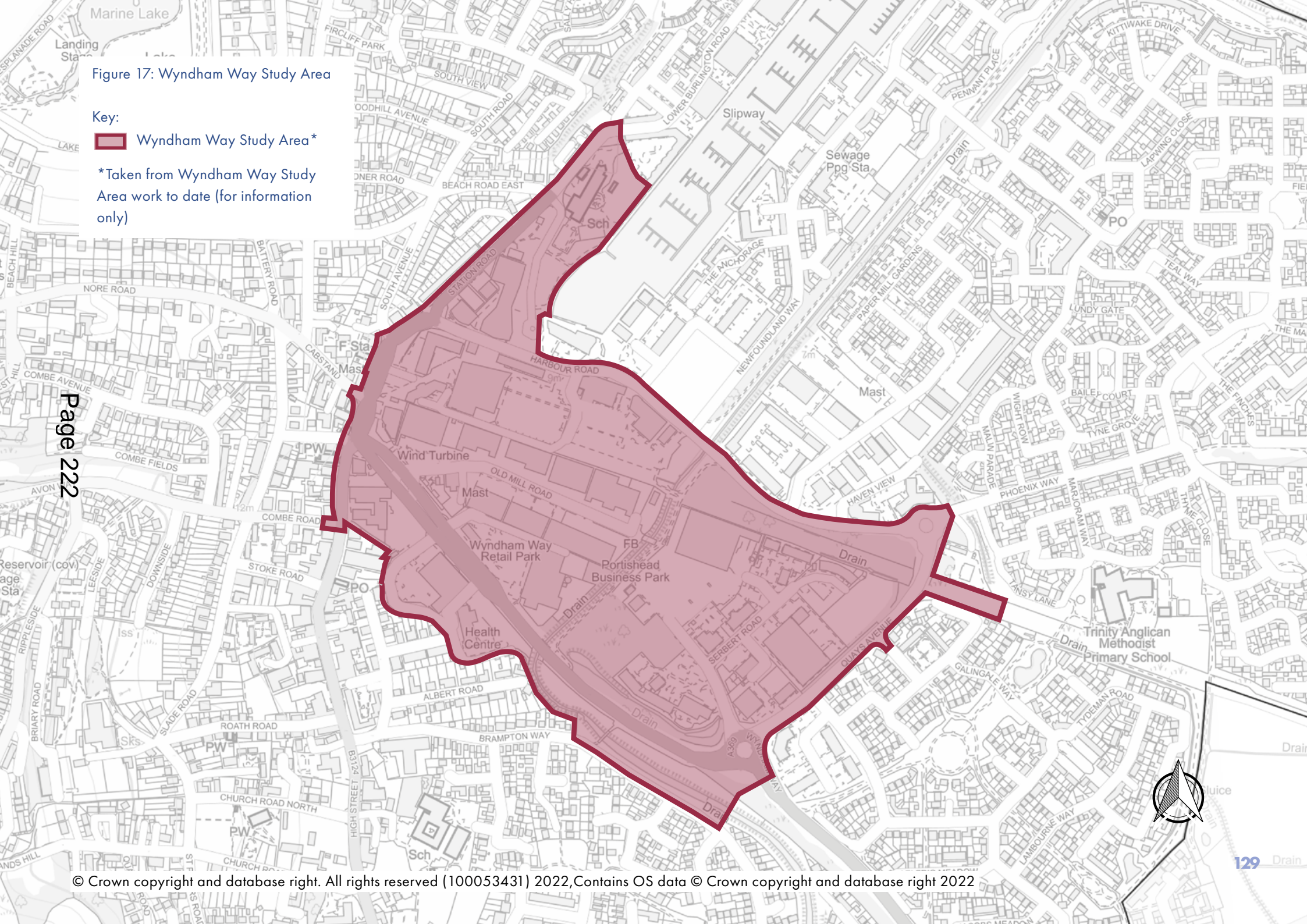
6.10 Work on the Neighbourhood Plan has identified some emerging priorities for the community for the Wyndham Way Study Area. These are summarised in the Wyndham Way Emerging Community Priorities Document (2022).

Figure 17: Wyndham Way Study Area

Key:

 Wyndham Way Study Area*

*Taken from Wyndham Way Study Area work to date (for information only)



Relevant Objective

O12 To deliver a connected, accessible, inclusive, attractive, vibrant and distinctive town centre at the heart of Portishead's community and economic life.

To provide input and policy support to enable and require North Somerset Council to secure the delivery of high quality, sustainable employment-led development and regeneration of land within the Wyndham Way Study Area.

Local Policy Context

| | |
|------|---|
| CS1 | Addressing climate change and carbon reduction |
| CS10 | Transportation and Movement |
| CS20 | Supporting a successful economy |
| DM47 | Proposals for economic development within towns and defined settlements |
| DM22 | Existing and proposed railway lines |

WYNDHAM WAY STUDY AREA

The Town Council will continue to work in partnership with North Somerset Council and landowners to progress future plans for the Wyndham Way Study Area as defined in Figure 17.

In particular, regard will be given to:

- Addressing Portishead's community needs and aspirations for the area, evidenced by Neighbourhood Plan and North Somerset Council public consultation feedback relating to the Wyndham Way Study Area development framework and any subsequent adopted SPD.
- Ensuring the ongoing viability of existing valued employment and town centre retail uses within the study area is protected
- Ensuring proposals are fully integrated with proposals for Portishead Railway Station and contribute to delivery of sustainable transportation and active travel policies and North Somerset Council parking standards.

PORTISHEAD TOWN CENTRE

CONTEXT

6.11 Portishead High Street is the historic focus of the town's retailing and community services. It retains a vibrant mix of uses and a distinct character. It also retains its role as a vibrant focus of local shopping, services and community life. The Neighbourhood Plan aims to protect this vitality and support its ongoing resilience and potential for transformation to achieve long term viability as a community hub.

6.12 North Somerset Development Management Policies DM60 and DM47 (Town Centres) state that within defined boundaries of the town centre of Portishead (as illustrated on Figure 18), the vibrancy, vitality and community focus provided by the town centres will be maintained and enhanced. Proposals for main town centre uses within these areas will, in principle, be supported provided they contribute to the improvement of the town centre.

6.13 Emerging North Somerset Policy DP26 (Primary shopping areas) provides support for retail uses (Class Ea) and for other Class E uses, conditional upon their supporting town centre footfall and vitality and extend business hours within defined primary frontages (defined on the North

Somerset Local Plan Policies Map), but it resists inappropriate or overly large floorspace uses that could harm the character and vitality of the centre.

6.14 Policy DM47 also seeks to ensure that Portishead town centre will be maintained as the focus for town centre uses, requiring a sequential assessment approach to be applied to optimise the use of available town centres sites before out of centre.

6.15 Changes to the Town and Country Planning Act Use Class Order in 2020 and 2021 have consolidated the majority of high street uses within a new single use class E, enabling changes of use within the class through permitted development. This does not apply to proposed changes to the appearance of the frontage or building. New Class MA also enables vacant class E premises to be changed to residential accommodation through the simplified Prior Approvals process. This may make it easier for new ventures to bring new vitality to an ailing high street. However, it also removes layers of previous protection given to primary retail frontages, risking their loss.

6.16 Within the limitations of planning legislation, Portishead Neighbourhood Plan aims to protect the vitality, viability and character of our high street through supporting the protection and investment in active business and service frontages, but also by seeking to prevent harm to both neighbouring uses and character through inappropriate changes to frontages or service areas which do require permission.



Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Local Policy Context

| | |
|-------|--|
| CS1 | Addressing climate change and carbon reduction |
| CS20 | Supporting a successful economy. |
| DM 47 | Proposals for Economic Development |
| DM 60 | Town Centres |
| DM 63 | Primary Frontages |
| DM 66 | Sequential Approach to Retail Development within or Adjacent to Town Centres |

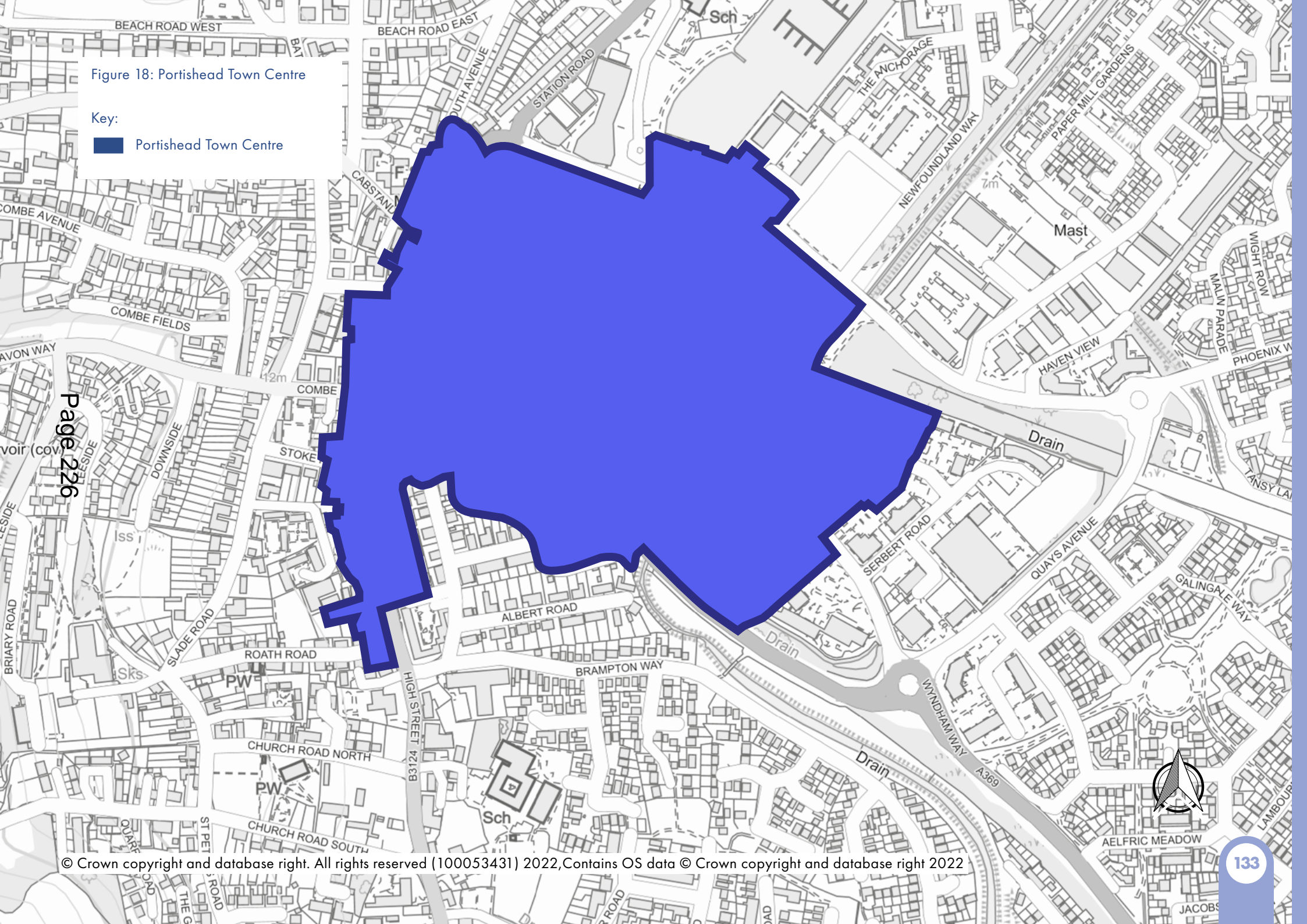
POLICY PTC1 - PROTECTION OF PORTISHEAD TOWN CENTRE CHARACTER AND VITALITY

Within Portishead Town Centre (defined by North Somerset emerging Local Plan (policy DM60) and illustrated in Figure 17, proposals for development including changes of use and operational development will be supported where they:

- Conform with North Somerset Local Plan Policies DM60 (Town Centres)
- Contribute to the continued development of a diverse, high value and low carbon economy
- Protect or increase the viability and quality of retailing, commercial and community service ground floor frontages, and the vitality of the evening economy
- Conserve or enhance the character of the town centre and, where appropriate, the Town Centre Conservation Area.

Figure 18: Portishead Town Centre

Key:
■ Portishead Town Centre



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BUSINESS USE OF UPPER FLOORS

Context

6.17 Portishead town centre is characterised by terraces and groups of largely two storey buildings. Ground floor frontage uses provide the primary activity and vitality. However, upper floors make a meaningful contribution to business, service floorspace and also residential accommodation.

6.18 Visual surveys undertaken as part of evidence for the Portishead Community Character Statement 2021 have estimated Portishead High Street contains about 6000 sq.m of upper floor space. Surveys concluded that just over 50% of the space over shops was used for offices or residential and the remainder appeared currently under-used. This could amount to about 3000 sq.m of underused space that could be harnessed to deliver greater local economic, community facility benefit or to contribute to addressing the local need for smaller and cheaper places to live, in a highly sustainable location.

6.19 The Neighbourhood Plan aims to encourage owners to optimise the value of their upper floor space through supporting new business and service uses.

6.20 North Somerset Council has published a shopfront design guide that includes a section with guidance to inform the change of use of upper floor use.

Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Local Policy Context

CS1 Addressing climate change and carbon reduction
CS12 Achieving High Quality Design and Place Making
CS20 Supporting a successful economy
DM 47 Proposals for Economic Development
DM 60 Town Centres
DM 63 Primary Frontages
North Somerset Shopfront Design Guide SPD 2019

POLICY PTC2 - BUSINESS USE OF UPPER FLOORS

Proposals that make greater use of upper floors of town centre premises, including for offices and small businesses uses (within use class E) will be supported where they:

- Do not conflict with the operations of neighbouring existing uses
- Have independent pedestrian access
- Incorporate appropriate measures to manage refuse and servicing
- Incorporate accessibility measures to optimise inclusivity
- Sustain or enhance the vitality of Portishead town centre
- Maintain or enhance the quality of the host building.

TOWN CENTRE HOUSING

6.21 The Portishead Local Housing Needs Assessment 2021 identified a severe shortage of smaller and affordable market housing to buy or rent. Portishead is also not capable of expanding to meet housing need on greenfield sites. Policies must therefore optimise the opportunities for housing to meet local needs to be delivered on previously used land and through the appropriate re-purposing of existing sites and buildings.

6.22 As town centres move away from a largely retail led economy, new approaches to their vitality and resilience have recognised that balanced amounts of appropriately located residential accommodation can make a positive contribution to town centre attractiveness and vitality. Under-used floorspace within Portishead High Street may present an opportunity to provide small and affordable housing contributing to meeting local needs.

6.23 However, protection of the viability and operations of existing businesses is paramount. It will be vital that development of particularly residential accommodation does not conflict with existing business uses that affect viability and resident amenity.

6.24 Upper floor residential accommodation must be self-contained. Entrances and stairs should be accessed from the front of the property and must not compromise the existing ground floor uses. Servicing arrangements must not harm high street accessibility or character or existing access. This should be located at the rear of properties and not on the private forecourts that characterise the high street. Within the town centre, under-used back land plots provide potential to accommodate such infrastructure and parking.

6.25 Accommodation must provide an acceptable standard of accommodation, meeting government space standards for small dwellings. They must also meet building regulation standards for quality of light and ventilation.

Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Local Policy Context

CS20 Supporting a successful economy

POLICY PTC3 - TOWN CENTRE HOUSING

Change of use of existing town centre floorspace to residential will be supported where:

- It is restricted to the use of upper floors
- It would not result in the loss of an existing viable town centre use
- It would contribute positively to the vitality and diversity of the town centre
- It would not cause conflicts with existing neighbouring commercial or community facility town centre uses
- Internal space meets current Government space standard guidelines.
- There is a good quality of natural light and ventilation
- It has a separate dedicated access
- It provides adequate accessible space for the storage of refuse and recycling
- Accommodation conforms with North Somerset Council Car Parking Standards.

Proposals will be expected to demonstrate how they have had regard to the North Somerset Shopfront Design Guide Supplementary Planning Document (Adopted 2019).

KEEPING THE TOWN CENTRE ACCESSIBLE TO EVERYBODY

Context

6.26 The 2011 census found that 18.5% of the North Somerset population had a limiting long-term illness (LLTI) and that 33% of households in the district contained one or more persons with a LLTI. There is forecast to be a 54% increase in Portishead's community of people over the age of 65 during the lifetime of the Neighbourhood Plan. Unless our buildings, streets and spaces are designed and adapted to meet changing access needs, many local people will be excluded from our community and its everyday activities.

6.27 Maximising the viability and attractiveness of Portishead town centre is inextricably linked to providing an inclusive and accessible public realm, connecting to inclusive accessible shops and services. This includes maintaining accessible frontage forecourts as much as accessible entrances and internal spaces.

6.28 Outside trading and hospitality has boomed during the pandemic. It has enhanced street life and is likely to become a permanent feature of our high street.

6.29 Outside trading and dining requires planning consent where it changes the use of the external space. Maintaining safe access along the high street for all pedestrians and in particular people with sight and mobility impairment is essential. The Town Council will support proposals that demonstrate this has been achieved. It also encourages high street businesses to utilise outside forecourt space with consideration to all members of the community.

Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Existing Policy Context

- CS12 Achieving High Quality Design and Place-making,
 DM32 High quality design and place-making
 DM33 Inclusive Access into Non-residential Buildings

POLICY PTC4 - KEEPING THE TOWN CENTRE ACCESSIBLE TO EVERYBODY

Development proposals for new shopfronts and community facility premises will be supported where they provide inclusive and step-less connections between the public realm and the premises.

Proposals to change the use of outside frontage spaces to enable external hospitality or trading will only be supported where;

- they maintain at least a 2m clear footway access,
- are operated within hours to avoid harm to neighbouring residents and
- associated outdoor street furniture makes a positive contribution to the character and appearance of the town centre.

Businesses which utilise external private forecourts are encouraged to sensitively locate seating and goods to provide accessible connections to the public pavement and to install cycle and buggy parking as well as opportunities for customers to sit.

SHOPFRONTS & SIGNAGE

Context

6.30 Shopfront design quality and the amount, location and quality of commercial signage is a key factor in protecting, enhancing and celebrating the town centre's distinction and character. [North Somerset Council's Shopfront Design Guidance \(2019\)](#)⁵⁷ provides detailed district wide advice on how good design quality and appropriate signage should be incorporated into high streets.

6.31 The heritage and distinctive character of the town centre, recorded in the Portishead Community Design Statement 2021, make a significant contribution to its attractiveness as a local destination and its lasting vitality. The Design Statement identifies pairs of shops on the High Street built in the Victorian period as making a particular contribution to the town centre's quality. Changes in shopfronts and proposals for new signage on these buildings will be of particular importance.

6.32 The Neighbourhood Plan supports the use of upper floors for town centre businesses that complement ground floor uses. Signage for these uses must be limited to small signs at ground floor

level, associated with the entrances. Wall mounted and projecting signs above ground floor fascia level are harmful to character and will not be supported.

Relevant Objective

O11 To support Portishead's economy and local employment, and support the continued development of a diverse, high value and low carbon economy.

Local Policy Context

CS12 Achieving High Quality Design
DM32 and Placemaking
DM63 High Quality Design and
 Placemaking
North Somerset Shopfront Design Guide
SPD 2019

POLICY PTC5 - SHOPFRONTS & SIGNAGE

Shopfront and town centre business planning and advertisement applications will be supported where they conserve or enhance the existing quality of the shopfront and signage.

Proposals will be expected to demonstrate how they have had regard to the North Somerset Shopfront Design Guide Supplementary Planning Document (Adopted 2019).

Proposed signage for upper floor uses must be limited to small signs at ground floor level, associated with their dedicated entrance. Projecting signs above ground floor level are harmful to character and will not be supported where they are judged to be harmful to the character of the town centre or the host building.

TOWN CENTRE COMMUNITY ACTIONS

Article Four Direction

6.33 Where protection of town centre Class E uses is considered to be critical to protecting the vitality and viability of Portishead Town Centre, the Town Council will work with North Somerset Council to test the feasibility of, and potentially implement, an Article Four Direction within the central core of the town centre. This may remove current Use Class MA Prior Approval/Permitted Development rights to change the use of vacant town centre frontages to residential use.

Town Centre Strategy

6.34 The Town Council will work with local stakeholders to test the feasibility of and potentially lead the development of a vision and strategy to guide and support the long-term vitality and viability of Portishead town centre.

6.35 It would be a freestanding strategy and not part of the Portishead Neighbourhood Plan. Whilst the Neighbourhood Plan provides planning policy support towards delivery of a strategy, the Strategy could consider the future priorities for the town centre

in greater detail and address initiatives and projects beyond the scope of the Neighbourhood Plan.

Key Short Term Town Centre Recovery and Enhancement Projects

6.36 The Portishead Community Design Statement has identified potential areas for improvement in the appearance and public realm quality within the town centre. Some improvements may be possible as short term or “quick win” investments. They have the added potential to contribute to rebuilding lost customer footfall and vitality following the impacts of COVID-19.

6.37 Prior to and without prejudice to the production of a longer-term vision and town centre strategy, the Town Council will work with local stakeholders to identify, prioritise and plan implementation of short term and “quick win” enhancement projects within the town centre.

WHAT IS ARTICLE FOUR?

New use Class MA permits vacant smaller business premises including shops, restaurants, offices and health services, now in Class E, to be changed to residential use without planning permission and with greatly reduced restrictions.

An Article Four Direction is a planning tool that enables Local Authorities to remove permitted development rights when they would cause unacceptable harm. The NPPF allows their very restricted use to remove Class MA rights to avoid wholly unacceptable impacts to essential core primary shopping, that would seriously undermine vitality and viability.

APPENDIX 1: LOCAL EVIDENCE BASE LIST

All of the locally produced evidence base documents are available to view online at: www.portishead.gov.uk

To request a paper copy of an evidence base report, please contact the Town Council office by emailing:

office@portishead.gov.uk

or calling:

01275 847078

ENVIRONMENT

Portishead Community Character Statement (NDP Steering Group and Place Studio, 2022)

Portishead Local Key Views Report (NDP Steering Group and Place Studio, 2022)

Portishead Green and Blue Infrastructure Evidence Base Report (NDP Steering Group and Place Studio, 2022)

Portishead Local Green Space Evidence Base Report (NDP Steering Group and Place Studio, 2022)

Portishead Locally valued Non-Designated Heritage Assets Report (NDP Steering Group and Place Studio, 2022)

Portishead Renewable Energy Study – Task 1 – Proposed Scope of the Renewable Energy Study (Centre for Sustainable Energy, 2021)

WELLBEING

Portishead Community Facilities Evidence Base Report (NDP Steering Group and Place Studio, 2022)

Portishead Housing Needs Assessment (AECOM 2021)

Local Housing Needs Local Data Analysis (NDP Steering Group 2021)

PROSPERITY

Employment and Business Survey Analysis 2021 (NDP Steering Group 2021)

AREA BASED POLICIES AND COMMUNITY ACTIONS

Wyndham Way Study Area: Emerging Community Priorities (Place Studio and NDP Steering Group 2022)

APPENDIX 2: THE PORTISHEAD PRE-APPLICATION COMMUNITY ENGAGEMENT PROTOCOL

The aim of this Protocol is to do all possible so that new development in Portishead Neighbourhood Area helps to shape good quality places to live and work and as a means of working towards improved outcomes for the current and future communities. One particularly effective way of achieving this is through early, planned engagement with the community via the Town Council.

Use of this Protocol is without prejudice to the eventual judgement of Portishead Town Council on the merits of any final application, even if a good engagement process has been agreed and followed.

Context

National Planning Policy and Guidance: The National Planning Policy Framework (2021) makes several mentions of the considerable value of pre-application involvement, for example in paragraph 39:

“Early engagement has significant potential to improve the efficiency and effectiveness of the planning application system for all parties. Good quality pre-application discussion enables better coordination between public and private

resources and improved outcomes for the community.”

The Planning Practice Guidance Note Design: process and tools (2019) also highlights the importance and benefits of early engagement:

“Communities can effectively shape both design policies and development through a collaborative process of meaningful participation. Early engagement and linking engagement activities to key stages of design decision-making and plan-making can empower people to inform the vision, design policies and the design of schemes.”

“It is important that local planning authorities or applicants demonstrate how all views are listened to and considered.”

[North Somerset Council – Statement of Community Involvement \(2019\)⁵⁸](#): The SCI explains the Council’s policy on consultation and involvement in the preparation of planning policy documents and planning applications.

[The 10 Commitments for Effective Pre-application Engagement⁵⁹](#) published by a

group representing planning, industry and community groups states that:

“Early, collaborative discussions between developers, public sector agencies and the communities affected by a new development can help to shape better quality, more accepted schemes and ensure improved outcomes for the community. These discussions also avoid wasted effort and costs.”

Whilst there is an emphasis on early and positive pre-application engagement in ‘major development’ proposals, it is the view of Portishead Town Council that, for their community, the above should also apply to smaller developments in the town because these can have at least as much impact as larger ones. Portishead Town Council fully supports and endorses all of the above and will play its appropriate role in delivering high quality pre-application engagement with themselves and the wider Portishead community as proposals come forward.

Process

Drawing from the 10 Commitments and other guidance on best practice, potential applicants should work with Portishead Town Council to fulfil the following principles:

- 'Day One' contact: By far the best results for all emerge when contact is made with our Town Council, and through us with our local community, at the very start of any process; consulting people late with already prepared schemes is not productive.
- Agreed Process: A key aim of this early contact is to discuss and agree the nature, scope, timetable, information and so forth of the engagement – i.e. the process to be followed.
- Applicant Leadership but Shared Responsibility: Although it is the applicant's role to lead and fund engagement, the Town Council will offer as much support as possible to any agreed process; for example by providing local information, contact details for local groups, advice on meeting places, access to newsletters and so forth.
- Openness and Transparency: Building

trust between all and ensuring an agreed outcome depend heavily on having a process that is as open as possible on all sides, though the Town Council will respect any issues of clear commercial confidentiality.

- Agreed Community: A project may have an impact on a limited number of people or on the whole town. The details of those to be involved will need to be discussed and agreed for any project, as will the potential ways to contact and engage them.
- Agreed Scope: There will also need to be agreement about the scope of the engagement, i.e. what is and is not open to change (e.g. layout, quantum of development, design etc.).
- Proportionality: The nature and scale of engagement will be balanced in appropriate proportion to the scale and likely impact of any proposals.
- Final Reporting: The applicant should submit, with any final application, a thorough report describing and summarising the outcomes of the engagement, demonstrating how the proposals have (or have not) responded to results. If they have not, a short note should be included to explain this. If the process has been

followed fully, Portishead Town Council will endorse this report; if not they may submit their own evaluation of it.

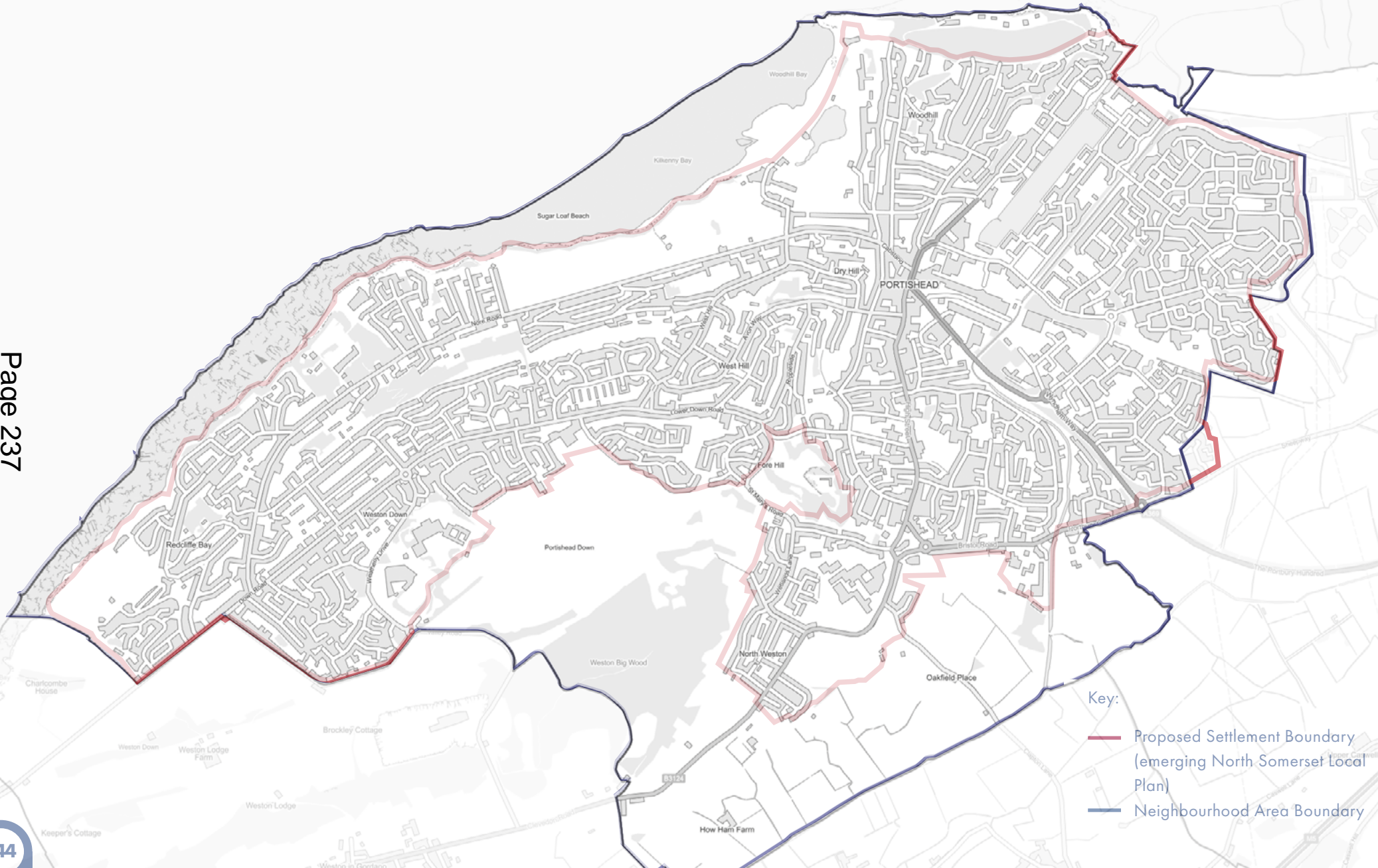
Initial contact should be made at the very outset with the Town Council via:

office@portishead.gov.uk

The Town Council commits to doing all possible to arrange an initial meeting as soon as possible following this contact.

There is considerable benefit for applicants in also sharing any process with North Somerset Council, as planning authority, and securing their agreement to it. As per the opening proviso, endorsement of an engagement process and results does not necessarily mean support for the resulting proposals.

APPENDIX 3: PROPOSED PORTISHEAD SETTLEMENT BOUNDARY (EMERGING NORTH SOMERSET LOCAL PLAN)



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4. **North Somerset Climate Emergency Strategic Action Plan** <https://www.n-somerset.gov.uk/sites/default/files/202002/North%20Somerset%20climate%20emergency%20action%20plan.pdf>
5. **National Planning Practice Guidance** <https://www.gov.uk/guidance/neighbourhood-planning--2#:~:text=A%20policy%20in%20a%20neighbourhood,and%20supported%20by%20appropriate%20evidence.>
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10. **The North Somerset Strategic Flood Risk Assessment** <https://www.n-somerset.gov.uk/sites/default/files/2020-12/North%20Somerset%20Council%20Level%201%20SFRA%20-%20acc.pdf>
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14. **Avon Wildlife Trust are delighted at North Somerset Council's recent Declaration of an Ecological Emergency (2020) Avon Wildlife Trust** <https://www.avonwildlifetrust.org.uk/news/avon-wildlife-trust-are-delighted-north-somerset-councils-recent-declaration-ecological>
15. **Nature Recovery Network, West of England Nature Partnership** <https://www.wenp.org.uk/nature-recovery-network/>
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North Somerset Council

Report to the Executive

Date of Meeting: 7 September 2022

Subject of Report: Q1 performance update

Town or Parish: ALL

Officer/Member Presenting: Emma Diakou, Head of Business Insight, Policy and Partnerships

Key Decision: NO

Reason:

This is an information item.

Recommendations

The contents of this report are noted.

1. Summary of Report

Our Business Planning and Performance Management Framework is designed to monitor progress against our Corporate Plan priorities and against our vision for an ***open, fairer, greener North Somerset***. We do this on an annual basis by developing, implementing and monitoring Annual Directorate Statements. These are the business plans for the directorate and give the key strategic commitments for the year ahead. These commitments are both business-as-usual and transformational. Progress against these commitments is monitored by key projects and their milestones. We also monitor a number of Key Corporate Performance Indicators (KCPIs) which give an overview of activity, pace and outcomes.

This paper gives an update on progress against the transformation commitments and against the KCPIs that are reported to our Scrutiny Panels. The Executive is asked to note this Q1 performance progress using the following framework:

Annual Directorate Statement commitments:

- GREEN: Successful delivery of this commitment is highly likely. There are no major outstanding issues that at this stage appear to threaten delivery.
- GREEN/AMBER: Successful delivery of this commitment is likely but there are some minor outstanding issues that need to be resolved to ensure delivery.
- AMBER: Successful delivery of this commitment appears feasible, but issues already exist requiring management attention. These appear resolvable at this stage and if addressed promptly should not present further problems.
- AMBER/RED: Successful delivery of this commitment may be unachievable. Issues already exist requiring immediate management attention to ensure delivery.
- RED: Successful delivery of this commitment appears to be unachievable. There are major issues which at this stage do not appear to be manageable or resolvable.

Key Corporate Performance Indicators:

- GREEN: On track.
- AMBER: Not on track but likely to be brought back on track by end year.
- RED: Not on track and unlikely to be so by end year.

As of the end of Q1:

For the Annual Directorate Statement commitments (transformational):

- 27 are GREEN (27.8%)
- 38 are GREEN/AMBER (39.1%)
- 23 are AMBER (23.7%)
- 9 are AMBER/RED (9.2%)
- 0 are RED

For the aligned KCPIs:

- 23 are GREEN (60.5%)
- 12 are AMBER (31.5%)
- 3 are RED (7.8%)

A number of additional KCPIs are reportable in future quarters and will be included in upcoming reports.

2. Policy

The Corporate Plan is the council's overarching strategic document. It is the only plan which covers the full range of the council's responsibilities and is an important tool to help focus our effort and resources on the right things. By prioritising a clear set of commitments, the Corporate Plan also helps residents to hold the council to account for its performance and challenge it to improve.

Annual Directorate Statements show how each directorate will contribute to the aims and priorities in the Corporate Plan for the year ahead. Following on from the publication of the Annual Directorate Statements each year, an Integrated Performance Management Framework (IPMF) is developed, including risk registers. This framework is updated and reported quarterly.

3. Details

For the detail on the Annual Directorate Statement commitments please see appendix one. In summary, commitments that are AMBER/RED and so requiring immediate management attention are:

- We will implement the Digital Strategy and deliver on any in year actions in the action plan.
- We will implement the Information Strategy and deliver on any in year actions in the action plan.
- We will review how we recruit staff across the organisation and implement the action plan for improvement.
- We will contribute to a mental health and wellbeing needs assessment for children.
- We will develop a robust and responsive quality assurance framework to support a learning organisation to include purposeful case audit activity.
- We will seek regular feedback from children and families and use this to inform practice improvements.

- We will commission a variety of placements to meet the needs of children and young people.
- We will ensure focused recruitment of mainstream, specialist fostering and supported lodging carers, and promotion of staying put scheme.
- We will deliver a Children's Family Support and Safeguarding Recruitment and Retention Action Plan.

For the detail on the KCPIs please see appendix two. In summary, KCPIs that are RED and so requiring immediate management attention are:

- The percentage of adults in contact with secondary mental health services living independently or without support.
- The number of households living in temporary accommodation.
- The percentage of care leavers (19-21 year olds) in education, employment and/or training.

4. Consultation

As part of the Business Planning and Performance Management Framework all tier three managers and above contribute to their Annual Directorate Statement. These are then agreed by Directorate Leadership teams and Corporate Leadership Team.

The views of residents, staff and other stakeholders all helped to shape the development of the Corporate Plan on which the Annual Directorate Statements are based.

5. Financial Implications

The Annual Directorate Statements are developed alongside the Medium-Term Financial Plan (MTFP) to ensure that the commitments made are within the resource envelope for the year ahead.

Monitoring the effectiveness of our financial management is then embedded within the Annual Directorate Statements. All statements include a commitment as follows: *Ensure effective financial management across the directorates including a balanced budget at year end and delivery of MTFP savings.*

There are no specific financial implications to this report.

Costs

N/A

Funding

N/A

6. Legal Powers and Implications

N/A

7. Climate Change and Environmental Implications

All statements include a commitment as follows: *Deliver the Climate Emergency Strategy and contribute via directorate action plans.*

8. Risk Management

Risk management is embedded within the business planning framework. Once the commitments have been identified for the year ahead, directorate-wide risk registers are developed. These seek to ensure we are aware of any challenges to achievement of the commitments. They are updated and reported quarterly alongside the IPMF. A quarterly review is also undertaken of any AMBER/RED and RED risks to ensure they are captured within the risk registers and if not, included for the following quarter. This ensures there is a clear link between the Corporate Plan and our risk management framework.

These directorate risks then feed into the Strategic Risk Register which is also updated and reported quarterly.

9. Equality Implications

The PMF identifies which commitments are 'equality commitments' and these are updated and reported quarterly. All statements also include a commitment as follows: *Ensure we are an inclusive organisation, meeting our equalities duties, and exemplifying our values to act with integrity, respect each other, innovate, care and collaborate.*

10. Corporate Implications

Business planning is important to ensure we are achieving the aims and priorities within the Corporate Plan.

11. Options Considered

Business planning and performance reporting are part of the governance of the council.

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Appendices:

- Appendix one: Annual Directorate Statement commitments
- Appendix two: Key Corporate Performance Indicators

Background Papers:

- North Somerset Corporate Plan: [North Somerset Corporate Plan 2020-2024 \(n-somerset.gov.uk\)](https://www.n-somerset.gov.uk/corporate-plan)
- Corporate Plan action plan and strategic risk register: [Microsoft Power BI](#)
- Adults Annual Directorate Statement 2022/23
- Corporate Services Annual Directorate Statement 2022/23
- Children's Annual Directorate Statement 2022/23
- Place Annual Directorate Statement 2022/23
- Public Health and Regulatory Services Annual Directorate Statement 2022/23

Appendix one: Annual Directorate Statement commitments Q1 update

| ADS commitment | Commitment type | Q1 progress |
|--|---------------------------------------|-------------|
| We will implement the Empowering Communities and Reducing Inequalities strategy and deliver any in-year actions in the action plan | Organisational wide commitment wide | GREEN |
| We will implement the Customer Services strategy and deliver any in-year actions in the action plan | Organisational wide commitment wide | GREEN |
| We will respond to national policy opportunities in the coming year to tackle inequalities including the Levelling Up Whitepaper | Organisational wide commitment wide | GREEN |
| We will refresh the Adults Climate Emergency Strategy and deliver any in year actions in the action plan | Adults | GREEN |
| We will establish a therapy led reablement service, with a Technology Enabled Care first approach for the whole community | Adults | GREEN |
| We will contribute to the Integrated Care Partnership development and ensure North Somerset has a voice | Adults | GREEN |
| We will deliver the ConnectED partnership programme, in collaboration with Bristol Council, South Gloucestershire Council and Bristol University (positive behaviour change) | Adults | GREEN |
| We will refresh the Children's Climate Emergency Strategy and deliver any in year actions in the action plan | Children's Services | GREEN |
| As part of the Dedicated Schools Grant Management Plan, we will lead the Council's participation in the Department for Educations' Safety Valve Project, to ensure that benefits are maximised | Children's Services | GREEN |
| We will complete an Exploitation Needs Assessment to inform an Exploitation Strategy | Children's Services | GREEN |
| We will improve the rigour of monitoring of safeguarding arrangements in schools and settings | Children's Services | GREEN |
| We will ensure we provide a comprehensive music education service to children, young people, their families and schools across North Somerset | Children's Services | GREEN |
| We will refresh the Corporate Services Climate Emergency Strategy and deliver any in year actions in the action plan | Corporate Services | GREEN |
| We will align our Programme Management Office front door with our business and performance management framework, and our assurance activity to ensure a 360 degree view | Corporate Services | GREEN |
| We will develop and implement a Data Strategy and action plan linked in to the Information Management Strategy | Corporate Services | GREEN |
| We will review the use of Modern Gov functionality and implement identified improvements | Corporate Services | GREEN |
| We will enable objectives within place-based partnerships to include a focus on improving population health and wellbeing and preventing ill health | Public Health and Regulatory Services | GREEN |

| ADS commitment | Commitment type | Q1 progress |
|---|---------------------------------------|-------------|
| We will create greater resilience in our population to communicable disease (health protection in a post covid world) | Public Health and Regulatory Services | GREEN |
| We will ensure Regulatory Services and Emergency Planning / Business Continuity service delivery continues to meet statutory requirements | Public Health and Regulatory Services | GREEN |
| We will implement a new case management and reporting system across teams | Public Health and Regulatory Services | GREEN |
| We will launch the Capital Programme Management Office as part of the council-wide PMO front door ensuring capital projects are successfully delivered | Place | GREEN |
| We will deliver the Community Renewal Fund and ensure overall successful programme reporting | Place | GREEN |
| We will deliver the action plan for promoting North Somerset for inward investment and securing investment opportunities through an enabling approach | Place | GREEN |
| We will re-masterplan the commercial footprint of J21 Enterprise Area to support Parklands phase 2 development and commercial space including Construction Skills Centre | Place | GREEN |
| We will develop a more joined up approach to environmental enforcement and community safety | Place | GREEN |
| We will finalise the Highways Asset Management Strategy and new Highways Delivery Model | Place | GREEN |
| We will deliver the libraries strategy and any in year actions for 2022/23 | Place | GREEN |
| We will implement the Joint Health and Wellbeing Strategy and ensure we deliver any in year actions in the action plan for 2022/23 | Organisational wide commitment wide | GREEN/AMBER |
| We will ensure we are an inclusive organisation, meeting our equalities duties, and exemplifying our values to act with integrity, respect each other, innovate, care and collaborate | Organisational wide commitment wide | GREEN/AMBER |
| We will implement the People Strategy and ensure we deliver any in year actions in the action plan for 2022/23 | Organisational wide commitment wide | GREEN/AMBER |
| We will deliver the actions in the Accommodation Strategy for 2022/23 and embed new ways of working across the organisation | Organisational wide commitment wide | GREEN/AMBER |
| We will contribute to the development of effective housing with support solutions for all adults with care and support needs | Adults | GREEN/AMBER |
| We will develop a market sustainability plan setting out our local strategy for 2022-2025 | Adults | GREEN/AMBER |
| We will undertake a cost of care exercise for Domiciliary Care and Residential Care in line with the Government Policy Paper 'Market Sustainability and fair Cost of Care fund' | Adults | GREEN/AMBER |
| We will establish PAMMS (Provider Assessment and Market Management Solution) | Adults | GREEN/AMBER |
| We will ensure an effective and robust response to adult's safeguarding concerns by establishing a centralised Safeguarding Team | Adults | GREEN/AMBER |
| We will embed Phase 2 of the Front Door developments – to include the MASH, missing and exploitation meetings | Children's Services | GREEN/AMBER |

| ADS commitment | Commitment type | Q1 progress |
|--|---------------------------------------|--------------------|
| We will review of the Family Wellbeing Service offer including consultation with partners inc the voluntary sector and the public and publicising across the partnership | Children's Services | GREEN/AMBER |
| We will develop and deliver an Education Strategy in partnership with key stakeholders | Children's Services | GREEN/AMBER |
| We will improve governance processes internally (including democratic, finance and procurement) to empower staff and reduce administrative burdens, linked in with the overall corporate support services offer for the directorates | Corporate Services | GREEN/AMBER |
| We will develop a framework for monitoring the Capital Strategy and programme within new governance processes | Corporate Services | GREEN/AMBER |
| We will deliver the Communications Strategy Action Plan | Corporate Services | GREEN/AMBER |
| We will deliver the new healthy workplaces accreditation scheme | Corporate Services | GREEN/AMBER |
| We will implement a coaching and mentoring scheme | Corporate Services | GREEN/AMBER |
| We will identify the preferred option for Support Services Partnership post Sep 2025 | Corporate Services | GREEN/AMBER |
| We will deliver the capital programme and software replacement projects | Corporate Services | GREEN/AMBER |
| We will refresh the Public Health and Regulatory Services climate emergency action plan and deliver to timescales | Public Health and Regulatory Services | GREEN/AMBER |
| We will implement the action plan for more effective and efficient working across PHRS teams | Public Health and Regulatory Services | GREEN/AMBER |
| We will develop new models of service delivery in primary care | Public Health and Regulatory Services | GREEN/AMBER |
| We will develop a research, evidence and evaluation strategy which supports teams across the council | Public Health and Regulatory Services | GREEN/AMBER |
| We will refresh the Climate Emergency Strategy and deliver any in year (2022/23) actions in the action plan | Place | GREEN/AMBER |
| We will enable SEE Monster successfully, including establishing a strong legacy and developing a new delivery model for the Tropicana | Place | GREEN/AMBER |
| We will progress the Local Plan through consultation, member decisions and submission to Examination | Place | GREEN/AMBER |
| We will complete delivery of the Planning Peer Review action plan including introduction of an enhanced pre-application system to enable development proposals | Place | GREEN/AMBER |
| We will continue to deliver priority projects within Weston Placemaking programme including completion of phase 1 works to The Sovereign | Place | GREEN/AMBER |
| We will progress delivery of the Birnbeck Pier project in partnership with RNLI | Place | GREEN/AMBER |
| We will complete placemaking strategies for Nailsea, Clevedon and Portishead and agree action plans with town councils and services | Place | GREEN/AMBER |

| ADS commitment | Commitment type | Q1 progress |
|--|-------------------------------------|-------------|
| We will build a pipeline of high-quality homes and commercial space through the council's Development Programme | Place | GREEN/AMBER |
| We will ensure continued development of North Somerset Environment Company (NSEC) and consideration of options for transfer of services | Place | GREEN/AMBER |
| We will deliver the in-year (2022/23) actions of the Waste Strategy | Place | GREEN/AMBER |
| We will review opportunities for wider use of CCTV | Place | GREEN/AMBER |
| We will develop and deliver a programme of work to support transport decarbonisation (EV, active travel, parking etc) | Place | GREEN/AMBER |
| We will deliver the Bus Service Improvement Plan and set up of the Enhanced Partnership | Place | GREEN/AMBER |
| We will deliver the in-year (2022/23) actions of the Green Infrastructure Strategy including continued roll out of rewilding and developing the opportunities of biodiversity net gain | Place | GREEN/AMBER |
| We will deliver the priorities identified in the Sport and Leisure Facilities Strategy for 2022/23 | Place | GREEN/AMBER |
| We will deliver the Climate Emergency Strategy and contribute via directorate action plans | Organisational wide commitment wide | AMBER |
| We will develop the directorate transformation programmes for 2022/23 linked in to MTFP planning | Organisational wide commitment wide | AMBER |
| We will undertake a demand modelling exercise | Adults | AMBER |
| We will implement systems required to deliver care cap reforms | Adults | AMBER |
| We will create opportunities for people to have fulfilling activities during the day that meets their care needs and improves their wellbeing | Adults | AMBER |
| We will achieve permanence for children by ensuring all children in care have clear plans for permanence which are appropriately tracked to avoid drift and delay | Children's Services | AMBER |
| We will deliver the Education Commissioning Strategy including any in-year actions | Children's Services | AMBER |
| We will ensure sufficiency of high-quality placements for 2-4 year olds including take up, quality, and training of workforce | Children's Services | AMBER |
| We will deliver the SEND improvement plan in partnership with key stakeholders | Children's Services | AMBER |
| The Virtual School ensures the right level of support for those children for whom they have legal responsibility | Children's Services | AMBER |
| We will reduce the number of children missing education (CME) | Children's Services | AMBER |
| We will promote good relationships with parents who are electively home educating their children and young people (EHE) | Children's Services | AMBER |
| We will ensure all children and young people have meaningful transitions to post-16 | Children's Services | AMBER |
| We will prepare for elections considering the requirements of the Elections Bill | Corporate Services | AMBER |
| We will improve how we report on organisation health including HR measures | Corporate Services | AMBER |

| ADS commitment | Commitment type | Q1 progress |
|--|---------------------------------------|-------------|
| We will deliver the actions in the ICT Strategy - 2022/23 delivery plan and review against WoW | Corporate Services | AMBER |
| We will improve revenue collections via enhanced debt recovery | Corporate Services | AMBER |
| We will improve mental health outcomes resulting from prevention and early intervention | Public Health and Regulatory Services | AMBER |
| We will ensure our services (commissioned and provided) are closing the inequalities gap | Public Health and Regulatory Services | AMBER |
| We will develop and implement an action plan from the private rented housing stock condition survey | Public Health and Regulatory Services | AMBER |
| We will deliver the Asset Strategy priorities including investment in Town Hall and completion of key business cases for Castlewood, Depots and Leisure Centres | Place | AMBER |
| We will finalise the Corporate Landlord Operating model including new systems, processes and team structure | Place | AMBER |
| We will review and produce options for home to school transport that support educational needs and a move towards sustainable transport and improvement in life skills | Place | AMBER |
| We will implement the Digital Strategy and deliver on any in year actions in the action plan | Organisational wide commitment wide | AMBER/RED |
| We will contribute to a mental health and wellbeing needs assessment for children | Children's Services | AMBER/RED |
| We will develop a robust and responsive quality assurance framework to support a learning organisation to include purposeful case audit activity | Children's Services | AMBER/RED |
| We will seek regular feedback from children and families and use this to inform practice improvements | Children's Services | AMBER/RED |
| We will commission a variety of placements to meet the needs of children and young people | Children's Services | AMBER/RED |
| We will ensure focused recruitment of mainstream, specialist fostering and supported lodging carers, and promotion of staying put scheme | Children's Services | AMBER/RED |
| We will deliver the Children's Family Support and Safeguarding Recruitment and Retention Action Plan | Children's Services | AMBER/RED |
| We will review how we recruit staff across the organisation and implement the action plan for improvement | Corporate Services | AMBER/RED |
| We will implement the Information Strategy and deliver on any in year actions in the action plan | Corporate Services | AMBER/RED |

Appendix two: Key Corporate Performance Indicators: Q1 update (reportable only)

National benchmarking data is intended to provide a comparison of local data against the latest national data wherever possible. Where the data has not yet been published the latest available data has been given. Contextual measures do not have a target.

| Measure | Year End 2021/22 | 2022/23 | | | | Year-End Target | Predicted Year-End Status | Numerator / Denominator | National benchmarking |
|---|------------------|---------|----|----|----|---|---------------------------|-------------------------|-----------------------|
| | | Q1 | Q2 | Q3 | Q4 | | | | |
| A thriving and sustainable place | | | | | | | | | |
| The number of homes where a significant hazard was removed / repaired through local authority intervention | 107 | 14 | | | | 100 | AMBER | n/a | Local measure |
| The number of privately rented properties within the Private Sector Action Area owned by accredited landlords | 1,651 | 1,651 | | | | Contextual (this measure is not targeted) | | n/a | Local measure |
| The number of Houses in Multiple Occupation improved | 101 | 17 | | | | 40 | GREEN | n/a | Local measure |
| The number of affordable houses through working in partnership | 189 | 146 | | | | 200 | GREEN | n/a | Local measure |
| The number of jobs created at the J21 Enterprise Area | TBC | 53 | | | | 100 | GREEN | n/a | Local measure |
| The number of business start-ups in North Somerset | TBC | 352 | | | | 1,000 | GREEN | n/a | Local measure |
| The percentage of vacant retail premises in Weston super Mare town centre (including the Sovereign Centre) | 20.7% | 19.87% | | | | Contextual (this measure is not targeted) | | 125 / 629 | Local measure |
| The percentage of vacant retail premises in Clevedon town centre | 10.6% | 7.95% | | | | Contextual (this measure is not targeted) | | 12 / 151 | Local measure |
| The percentage of vacant retail premises in Nailsea town centre | 13.3% | 13.33% | | | | Contextual (this measure is not targeted) | | 22 / 165 | Local measure |

| Measure | Year End 2021/22 | 2022/23 | | | | Year-End Target | Predicted Year-End Status | Numerator / Denominator | National benchmarking |
|---|------------------|-------------------------|----|----|----|---|---------------------------|--|-----------------------|
| | | Q1 | Q2 | Q3 | Q4 | | | | |
| The percentage of vacant retail premises in Portishead town centre | 6.7% | 6.67% | | | | Contextual (this measure is not targeted) | 9 / 135 | Local measure | |
| The percentage of municipal waste sent to landfill | 11.48% | 11.09% | | | | Decreasing trend | GREEN | 2,906.4kg / 26,218.9kg England, 6.13% South West, 5.68% (2020/21) | |
| Residual household waste sent to landfill (per household) (kgs) | 404.86kg | 98.92kgs | | | | Decreasing trend | GREEN | 9722.32kg / 98,280 households England, 513.09kgs South West, 449.27kgs (2020/21) | |
| The percentage of household waste sent for reuse, recycling or composting | 59.5% | 61.77% | | | | Increasing trend | GREEN | 15,711.06kg / 25,433.38kg England, 41.71% South West, 49.23% (2020/21) | |
| The number of crimes overall in North Somerset | 13,600 crimes | 3,592 crimes | | | | Decreasing trend | AMBER | n/a Local measure | |
| The number of anti-social behaviour incidents overall in North Somerset | 2,663 crimes | 688 crimes | | | | Decreasing trend | GREEN | n/a Local measure | |
| A Council which empowers and cares about people | | | | | | | | | |
| The proportion of adults with a learning disability who live at home or with family | 66.4% | 63.0% | | | | 68.0% | AMBER | 318 / 501 England, 78.3% South West, 77.7% (2020/21) | |
| The percentage of adults in contact with secondary mental health services living independently or without support | 50.0% | 47.3% | | | | 65.0% | RED | 234 / 295 England, 58.0% South West, 53.0% (2020/21) | |
| The number of new Connecting Lives carers recruited | N/A | Supressed but on target | | | | (10% increase on 2021/22) | GREEN | n/a Local measure | |
| The number of households living in temporary accommodation | 88 households | 83 households | | | | <70 households | RED | n/a Total number of households in Temporary Accommodation per (000s) households NSC, 0.89 England, 2.66 South West, 1.16 (Q3 2021/22) | |

| Measure | Year End 2021/22 | 2022/23 | | | | Year-End Target | Predicted Year-End Status | Numerator / Denominator | National benchmarking |
|--|------------------|------------------|----|----|----|---|---------------------------|-------------------------|---|
| | | Q1 | Q2 | Q3 | Q4 | | | | |
| More homeless, (or threatened with homeless), households who are prevented from being homeless | 51.8% | 54.9% | | | | 60.0% | AMBER | 79 / 144 | Local measure |
| The number of people in permanent care home placements age 65+ | 738 placements | 750 placements | | | | Decreasing trend against long term avg. | GREEN | n/a | Local measure |
| The number of people in permanent care home placements age 18 - 64 | 181 placements | 186 placements | | | | Decreasing trend | AMBER | n/a | Local measure |
| The number of carers' assessments undertaken | N/A | 182 | | | | 800 | AMBER | n/a | Local measure |
| The number of people receiving support via Employment and Skills provision | 565 | 323 | | | | 400 | GREEN | n/a | Local measure |
| Claimant count for those on out of work benefits in North Somerset (aged 16-64 years) | 2.8% | 2.4% | | | | <3% | GREEN | 3,035 / 124,000 | England, 3.8% South West, 2.6% |
| Claimant count for those on out of work benefits in North Somerset (aged 18-24 years) | 4.7% | 3.9% | | | | <5% | GREEN | 525 / 13,330 | England, 4.4% South West, 2.8% |
| The percentage of 16-17 year olds who are NEET (not in education, employment or training) at the end of the period | 2.7% | 2.9% | | | | Decreasing trend | AMBER | TBC | England, 3.8% South West, 2.6% |
| The percentage of assessment of completing within 45 working days (children social care only) | 93.0% | 84.9% | | | | Increasing trend | AMBER | TBC | England, 87.6% South West, 86.8% |
| The percentage of re-referrals to children social care within 12 months of the previous referral | 17.7% | 13.2% | | | | Decreasing trend | GREEN | TBC | England, 22.7% South West, 22.7% |
| Rate of children on a child protection plan (rate per 10k) | 21.2 per 10,000 | 23.05 per 10,000 | | | | Contextual (this measure is not targeted) | | TBC | England, 40.7 per 10,000 South West, 41.4 per 10,000 |

| Measure | Year End 2021/22 | 2022/23 | | | | Year-End Target | Predicted Year-End Status | Numerator / Denominator | National benchmarking |
|---|------------------|-----------------|----|----|----|---|---------------------------|-------------------------|---|
| | | Q1 | Q2 | Q3 | Q4 | | | | |
| The percentage of child protection plans started that were a second or subsequent plan | 35.3% | 30.4% | | | | Decreasing trend | AMBER | TBC | England, 25.2% South West, 22.1% |
| Rate of children in care (per 10k) | 45 per 10,000 | 51.9 per 10,000 | | | | Contextual (this measure is not targeted) | | TBC | England, 59.2 per 10,000 South West, 67 per 10,000 |
| The percentage of children in care with three or more placement moves - rolling 12 month period | 13.0% | 13.6% | | | | Decreasing trend | AMBER | TBC | England, 9.0% South West, 10.7% |
| The percentage of children in care in long-term placement stability | 71.0% | 70.1% | | | | Increasing trend | AMBER | TBC | England, 70.0% South West, 70.0% |
| The percentage of care leavers (19-21 year olds) in suitable accommodation | 94.8% | 88.2% | | | | Increasing trend | AMBER | TBC | England, 88% South West, 89% |
| The percentage of care leavers (19-21 year olds) in education, employment and/or training | 58.2% | 45.1% | | | | Increasing trend | RED | TBC | England, 52% South West, 52% |
| The percentage of schools and settings rated 'Good' or better by Ofsted (all phases) | 83.5% | 87.0% | | | | Increasing trend | GREEN | TBC | Data not yet available |
| An open and enabling organisation | | | | | | | | | |
| The percentage of customer satisfaction via telephone | 99.0% | 99.0% | | | | 90.0% | GREEN | 1,594 / 1,606 | Local measure |
| The percentage of staff satisfied working for the council remains high (staff survey) | 80.0% | 79.0% | | | | Above 5 year average | GREEN | TBC | Local measure |
| The percentage of staff satisfied with the way the council is run remains high (staff survey) | 76.0% | 71.0% | | | | Above 5 year average | GREEN | TBC | Local measure |

| Measure | Year End 2021/22 | 2022/23 | | | | Year-End Target | Predicted Year-End Status | Numerator / Denominator | National benchmarking |
|---|------------------|----------|----|----|----|------------------|---------------------------|-------------------------|-----------------------|
| | | Q1 | Q2 | Q3 | Q4 | | | | |
| The number of employed Apprentices and Apprenticeship funded training | N/A | 49 | | | | Increasing trend | GREEN | n/a | Local measure |
| The net business rates physically received within North Somerset | £52,723m | £22,927m | | | | £54,303m | GREEN | n/a | Local measure |
| The net council tax physically received within North Somerset | £148,394m | £48,634m | | | | £148,076m | GREEN | n/a | Local measure |
| The overall % rate of in-year sundry debt collection | 87.59% | 92.4% | | | | 80.0% | GREEN | 9,0738,844 / 9,825,4699 | Local measure |
| The percentage of employees who are accredited as carbon literate | 14.0% | 16.0% | | | | 25.0% | GREEN | TBC | Local measure |