



**REPORT TO:** Planning Portfolio Holder  
**LEAD OFFICER:** Joint Director for Planning and Economic Development

26 July 2017

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## South Cambridgeshire Local Plan – Modifications to Monitoring Indicators

### Purpose

1. To agree proposed modifications to the submitted South Cambridgeshire Local Plan that relate to *Policy S/12: Phasing, Delivery and Monitoring* and its *supporting text*, including *Figure 4: Monitoring Indicators* necessary to make the Local Plan sound. This responds to a request from the Inspectors examining the Local Plan, who asked the Council to review the monitoring framework and requirements set out in its Local Plan to ensure that the Local Plan could be found sound in relation to this issue.
2. This is a not a key decision; however it was first published in the June 2017 Forward Plan.

### Recommendations

3. It is recommended that the Planning Portfolio Holder:
  - (a) agrees the proposed modifications to the submitted South Cambridgeshire Local Plan (as set out in **Appendix A** of this report) that relate to *Policy S/12: Phasing, Delivery and Monitoring* and its *supporting text*, including *Figure 4: Monitoring Indicators*, be submitted to the Inspectors examining the Local Plan in response to their request, along with the 'audit trail' for the changes to monitoring indicators in **Appendix B**; and
  - (b) agrees that delegated authority be given to the Joint Director for Planning and Economic Development to make any subsequent minor amendments and editing changes, in consultation with the Planning Portfolio Holder.

### Reasons for Recommendations

4. The South Cambridgeshire and Cambridge Local Plans are currently being examined by independent Planning Inspectors. The Inspectors asked the Councils to review the monitoring framework and requirements set out in their respective Local Plans to ensure that the monitoring indicators were SMART (specific, measurable, achievable, relevant, and time-bound) so that their respective Local Plans could be found sound in relation to this issue.
5. The Councils have worked together to review their monitoring requirements and indicators, and where appropriate have made them consistent. Modifications are proposed in order to make the South Cambridgeshire Local Plan sound (as set out in **Appendix A** of this report) and these modifications will be submitted to the Planning Inspectors for consideration in response to their request, if agreed by the Planning Portfolio Holder.

## Background

6. South Cambridgeshire District Council and Cambridge City Council submitted their respective Local Plans for examination on 28 March 2014. Examination hearing sessions were held from November 2014 to July 2017.
7. At the joint examination hearing session for *Matter 5: Infrastructure / Monitoring / Viability* in November 2014, the Inspectors asked the Councils to review the monitoring framework and requirements set out in their respective Local Plans to ensure that the monitoring indicators were SMART (specific, measurable, achievable, relevant, and time-bound) so that the Local Plans could be found sound in relation to this issue.
8. In letters to the Inspectors in September 2016, the Councils outlined that work on their respective monitoring frameworks was ongoing, and that they anticipated that any proposed modifications arising from it would be submitted to the Inspectors by the end of February 2017. The subsequent examination programme meant that this timetable did not prove to be possible and it was agreed with the Inspectors via the Programme Officer that a later date for completion of this work would not affect the overall examination programme and would also give the opportunity to incorporate any changes to the monitoring indicators arising from the final hearings.
9. The Councils have worked together to review their monitoring frameworks and requirements, including the monitoring indicators, and where appropriate have made the monitoring indicators consistent in order to align monitoring processes and reduce resource implications, as the Councils move towards implementation of a shared Greater Cambridge planning service and joint Local Plan. This review has identified proposed modifications (as set out in **Appendix A** of this report) that are necessary in response to the Inspectors' request so that the South Cambridgeshire Local Plan can be found sound in relation to this issue. The review has also highlighted that proposed modifications are also necessary to make the Cambridge Local Plan sound.

## Considerations

10. The monitoring requirements and indicators for the South Cambridgeshire Local Plan are set out in *Policy S/12: Phasing, Delivery and Monitoring* and its *supporting text*, including *Figure 4: Monitoring Indicators*. *Policy S/12 (subsection 3)* sets out that monitoring of the planning policies and allocations included in the Local Plan will be a continuous process throughout the plan period, and that if through monitoring it appears that the planning policies and / or allocations are not being achieved, a series of actions will be triggered. The *supporting text* outlines that monitoring will take place annually, that the results will be published in the Annual Monitoring Report, and that *Figure 4* includes a set of indicators specifically developed for monitoring the Local Plan.
11. In considering the Inspectors' request to review the monitoring framework and requirements set out in the Local Plan to ensure that the Local Plan could be found sound in relation to this issue, officers have identified that proposed modifications are necessary to address the Inspectors' concerns.

12. The majority of the proposed modifications suggested relate to *Figure 4: Monitoring Indicators*, as to make the indicators SMART as requested by the Inspector it is necessary to include additional information in the form of targets, triggers and actions. *Policy S/12 (subsection 3)* and its *supporting text* remain largely unchanged, except where revisions are necessary to explain and provide consistency with *Figure 4*. The modifications are shown in **Appendix A** of this report.
13. Members should note that proposed modifications to *Policy S/12* and its *supporting text* have already been submitted to the Inspectors in relation to proposals for a joint housing trajectory including for the calculation of five year supply, phasing of the new settlements to remove limitations on the start date of housing completions, and the monitoring of the City Deal commitment to provide an additional 1,000 homes on rural exception sites. These proposed modifications are not repeated in Appendix A.
14. An 'audit trail' explaining the reasoning for each of the modifications proposed to the indicators previously included in Local Plan *Figure 4* is provided in **Appendix B** of this report.
15. Officers at South Cambridgeshire District Council and Cambridge City Council have worked together to review their monitoring indicators, and where appropriate have made their indicators consistent, including targets, triggers and actions, in order to align monitoring processes and reduce resource implications, as the Councils move towards implementation of a shared Greater Cambridge planning service and joint Local Plan.
16. Officers at South Cambridgeshire District Council used the following methodology to review each of the indicators included in *Figure 4* of the submitted Local Plan:
  - a. Each indicator has been considered against the Local Plan policy that it is intended to monitor.
  - b. A target has been added for each indicator based on the requirements of the policy, including specific details such as dates, percentages, and size thresholds where available and/or appropriate.
  - c. The data source and frequency of monitoring has been added, based on previous experience of monitoring our adopted planning policies.
  - d. From the target, data source and requirements of the policy, a trigger(s) has been developed for each indicator that will ensure that actions will be considered and, where appropriate, taken if the trigger is met.
  - e. Actions have been identified for each indicator using the list of mechanisms included in *Policy S/12 (subsection 3)*.
17. Undertaking this process has highlighted that some indicators included in *Figure 4* of the submitted Local Plan are not directly related to the Local Plan policy that they are intended to monitor. These indicators have been considered and the proposed modifications (as set out in **Appendix A** of this report) either amend or delete the indicator. The 'audit trail' (see **Appendix B** of this report) gives the reasons for each of the modifications proposed, including the deletions.

18. The process undertaken has also highlighted that there are some indicators that although not directly related to the requirements of the Local Plan policy they are listed as monitoring, are still important for monitoring purposes and to inform a review of the Local Plan. These contextual indicators have been retained; however it is not possible to set triggers and actions. Additional wording has been proposed to supporting text *paragraph 2.69* to explain that there are different types of indicators.
19. The revised set of monitoring indicators (as included in **Appendix A** of this report) is consistent with the policies included in the Local Plan (as submitted in March 2014) and as proposed to be modified through the Council's examination hearing statements, the schedule of proposed modifications (March 2016), and the further proposed modifications (November 2016).
20. Modifications to the Local Plan have typically been considered by both the Planning Portfolio Holder and full Council where the Council has undertaken further work and is making decisions on proposed changes to the Local Plan that it wishes to put forward to the Inspectors for their consideration. In the case of the monitoring indicators, the Council is providing a technical response to an issue raised by the Inspectors where they have given a very clear steer to the Councils on the changes they consider necessary to make the Local Plans sound, which has been undertaken and is reflected in the proposed modifications included in this report. Under those circumstances the matter is being brought to the Planning Portfolio Holder only, although of course the usual call-in procedures apply.

### **Next Steps**

21. The Councils will jointly submit the modifications to their monitoring frameworks (and their associated audit trails explaining the reasons for each of the modifications) to the Planning Inspectors on 31 July 2017 for their consideration, if agreed by the South Cambridgeshire Planning Portfolio Holder and the Cambridge Executive Councillor for Planning Policy and Transport.

### **Options**

22. The Planning Portfolio Holder has the following options:
  - (a) Agree all or some of the proposed modifications relating to the monitoring framework for the South Cambridgeshire Local Plan (as set out in **Appendix A** of this report) be submitted to the Local Plan Inspectors;
  - (b) Agree all or some of the proposed modifications relating to the monitoring framework for the South Cambridgeshire Local Plan (as set out in **Appendix A** of this report), but with some amendments be submitted to the Local Plan Inspectors;
  - (c) Agree the proposed modifications as at options (a) or (b) but consider that they should be referred to full Council for consideration, even though they respond to a specific request from the Inspectors and relate to a clear steer on the changes necessary; or
  - (d) Not agree the proposed modifications relating to the monitoring framework, however the Inspectors asked the Councils to review the monitoring framework and therefore a response must be provided to the Inspectors.

## **Implications**

23. In the writing of this report, taking into account financial, legal, staffing, risk management, equality and diversity, climate change, community safety and any other key issues, the following implications have been considered:

### ***Financial***

24. There are no direct financial implications arising from this report. The cost of preparing the Local Plan has already been budgeted for, and the monitoring of the Local Plan set out in the proposed modifications will be undertaken within existing resources.

### ***Legal***

25. There are no direct legal implications arising from this report. However, the Inspectors asked the Council to review the Local Plan monitoring framework and this report identifies proposed modifications considered necessary for the Inspectors to find the Local Plan sound.

### ***Staffing***

26. There are no direct staffing implications arising from this report. The staffing needed to prepare the Local Plan has already been allocated and the monitoring of the Local Plan set out in the proposed modifications will be undertaken within existing staffing.

### ***Risk Management***

27. The Local Plan is a corporate priority. The Inspectors asked the Council to review the Local Plan monitoring framework and this report identifies proposed modifications considered necessary for the Inspectors to find the Local Plan sound.

## **Consultation responses**

28. Officers within the Planning Policy Teams at South Cambridgeshire District Council and Cambridge City Council have worked together to review their monitoring indicators, and have consulted officers in other departments where necessary.

## **Effect on Strategic Objectives**

### **Objective 1 – Living Well: support our communities to remain in good health whilst continuing to protect the natural and built environment**

29. The Local Plan aims to satisfy the development needs of the area while preserving and enhancing its rich built and natural heritage and distinctive character and providing quality places where people are happy to live, work and play. The Annual Monitoring Report will use the monitoring indicators included in the Local Plan to provide detailed analysis on how our planning policies are performing.

### **Objective 2 – Homes for Our Future: secure the delivery of a wide range of housing to meet the needs of existing and future communities**

30. The Annual Monitoring Report will use the monitoring indicators included in the Local Plan to provide detailed analysis on how our planning policies are performing, and a number of the monitoring indicators relate to the planning policies for housing, including in relation to overall housing delivery and five-year housing land supply.

## **Background Papers**

South Cambridgeshire Proposed Submission Local Plan (submitted in March 2014):  
[www.scambs.gov.uk/localplan](http://www.scambs.gov.uk/localplan)

Examination Hearing Statements: [www.scambs.gov.uk/local-plan-examination-written-statements](http://www.scambs.gov.uk/local-plan-examination-written-statements)

Proposed Modifications (submitted in March 2016): [www.scambs.gov.uk/localplanmods-dec2015](http://www.scambs.gov.uk/localplanmods-dec2015)

Further Proposed Modifications (submitted in November 2016):  
[www.scambs.gov.uk/localplanmods-nov2016](http://www.scambs.gov.uk/localplanmods-nov2016)

## **Appendices**

Appendix A: Proposed Modifications to the submitted South Cambridgeshire Local Plan that relate to Policy S/12 and its supporting text including figure 4

Appendix B: 'Audit Trail' explaining the reasoning for each of the modifications proposed to the monitoring indicators

**Report Author:** Jenny Nuttycombe – Senior Planning Policy Officer  
Telephone: (01954) 713184