



Shropshire Council  
Legal and Democratic Services  
Shirehall  
Abbey Foregate  
Shrewsbury  
SY2 6ND

Date: Tuesday, 10 January 2017

**Committee:  
Cabinet**

**Date: Wednesday, 18 January 2017**

**Time: 12.30 pm**

**Venue: Shrewsbury Room, Shirehall, Abbey Foregate, Shrewsbury, Shropshire, SY2 6ND**

You are requested to attend the above meeting.  
The Agenda is attached

Claire Porter  
Head of Legal and Democratic Services (Monitoring Officer)

**Members of Cabinet**

Malcolm Pate (Leader)  
Steve Charmley (Deputy Leader)  
Karen Calder  
Lee Chapman  
Simon Jones  
David Minnery  
Cecilia Motley  
Malcolm Price  
Stuart West  
Michael Wood

**Deputy Members of Cabinet**

Peter Adams  
Nicholas Bardsley  
Gwilym Butler  
Dean Carroll  
Nic Laurens  
Robert Macey  
Robert Tindall

Your Committee Officer is:

**Jane Palmer** Senior Democratic Services Officer

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May 2015

# AGENDA

## 1 Apologies for Absence

## 2 Disclosable Pecuniary Interests

Members are reminded that they must not participate in the discussion or voting on any matter in which they have a Disclosable Pecuniary Interest and should leave the room prior to the commencement of the debate.

## 3 Minutes

To consider and approve as a correct record the Minutes of the Cabinet meeting held on 21 December 2016. **TO FOLLOW**

## 4 Public Question Time

To receive any questions or petitions from members of the public, notice of which has been given in accordance with Procedure Rule 14. Deadline for notification for this meeting is 5.00pm on Friday 13 January 2017.

## 5 Scrutiny Items

To consider any matters from Council or any of the Scrutiny Committees.

## 6 Shropshire Council Adult Social Care - Local Account 2015/2016 (Pages 1 - 4)

Lead Member – Councillor Lee Chapman – Portfolio Holder for Adults

Report of the Director of Adult Services. Appendix to the report **TO FOLLOW**

Contact: Andy Begley      Tel: 01743 258911

## 7 Consultation on Issues and Strategic Options for the Shropshire Local Plan Review (Pages 5 - 10)

Lead Member – Councillor Malcolm Price – Portfolio Holder for Planning, Housing, Regulatory Services and Environment.

Report of the Director of Place and Enterprise

Contact: George Candler      Tel: 01743 255003

**8 Marches Business Broadband Grant Scheme (Pages 11 - 14)**

Lead Member – Councillor Steve Charmley – Deputy Leader and Portfolio Holder for Business and Economy

Report of the Director of Place and Enterprise

Contact: George Candler Tel: 01743 255003

**9 Shropshire Schools Funding Formula 2017/18 (Pages 15 - 30)**

Lead Member – Councillor David Minnery – Portfolio Holder for Children and Young People

Report of the Director of Children's Services

Contact: Karen Bradshaw Tel: 01743 254201



<u>Committee and Date</u>
Cabinet
18 January 2017

## Shropshire Council Adult Social Care – Local Account 2015-16.

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**Responsible Officer:** Andy Begley

**E-mail:** [andy.begley@shropshire.gov.uk](mailto:andy.begley@shropshire.gov.uk)

### 1. Summary

1.1. This report presents the Local Account for Shropshire for 2015–16. This is the sixth year of producing a local account in this format and it is both a retrospective review of the achievements during 2015-16 and importantly, sets out our aspirations, challenges and direction of travel for 2016-17.

### 2. Recommendations

2.1. Cabinet Members are requested to note and approve the Adult Social Care Local Account for 2015-16.

### 3. Risk Assessment and Opportunities Appraisal

3.1. Equalities Appraisal -The Local Account provides information on all areas of service delivery in adult social care.

3.2. Human Rights Appraisal-The content of the Local Account is compatible with the Human Rights Act.

3.3. Risk Management Appraisal. The Local Account is an opportunity to publicise the achievements of the previous year within adult social care and to outline the aspirations and challenges looking forward to 2016-17.

3.4. Environmental Consequences. To reduce unnecessary printing the local account will be published on both the Shropshire Council website, Shropshire Choices and is available in hard copy upon request.

3.5. Consultation. Our Making it Real Advisory groups, comprising local people, who are expert by virtue of their experience in adult social care, have been involved in the production of this year's Local Account. In addition, our "Making it Real" Board and Partnership Boards have also been consulted.

## **4. Financial Implications**

- 4.1. The local account includes a section on expenditure during 2015-16.

## **5. Background**

- 5.1. Making it Real is a national framework established to support all those working towards personalisation. It gives us the opportunity to check our progress so that we can decide which areas need to be improved. Making it Real highlights the issues most important to the quality of people's lives. It helps the social care sector to take responsibility for change and publicly share the progress being made.
- 5.2. Making it Real is built around 'I' Statements which sit within 6 different themes (developed by people who use services and family carers). The 'I' Statements outline what people would say if services were personalised.
- 5.3. Shropshire Council has signed up to Making it Real (MiR) to help make sure we are improving services in this way.
- 5.4. Being part of MiR shows our commitment to involving our local communities in shaping care services for the future, and being clear about what type of care is actually making things better for people.
- 5.5. A key theme throughout this report is the inclusion of real life Shropshire stories, at every opportunity, which not only demonstrates our closer involvement with our community, but also helps to bring this document to life.
- 5.6. Completion of the Local Account is in response to the "Promoting Excellence in Councils Adult Social Care Programme Board". This Board recommended "that all Councils with Adult Social Services Responsibility (CASSRs) consider producing a short, accessible local account on an annual basis, which highlights performance, and to publish this locally".
- 5.7. The Local Account will also be used therefore, as a way of demonstrating and describing performance in adult social care to local people. The concept is one that is user-focussed, and highlights the quality aspects of services provided, rather than the numbers.
- 5.8. Throughout the document, we have tried to link what we said we would do last year, to what we have actually done this year, so that these documents, year on year, will have currency and relevance to the local people who helped to produce them. It is envisaged that this document will be used by our local communities "to hold us to account" for the quality of services we provide or commission, and will, by its very nature, help to drive forward improvements.

- 5.9. A key theme throughout the Local Account is one of ensuring transparency about the issues and impact of the changes and challenges that are occurring within adult social care. We have tried to ensure that these issues are appropriately balanced in this year's account and that learning from positive and negative experience is identified.
- 5.10. We have continued with the theme and 'magazine' style approach from last year to create a report that is visual, more inviting and easier to read.
- 5.11. This year's Local Account continues to focus on our distinct operating model and describes how we have further developed the way in which we interact with individuals.
- 5.12. The Local Account also sets out how people can continue to be involved in shaping services for the future, including through their local Councillor and the Making it Real Advisory groups which meet across the county. The Local Account carries a strong call for participation in the Making it Real Advisory group.

## **6. Conclusions**

- 6.1. We have focused on producing an easy to read report tailored to what local communities want to know about adult social care in Shropshire, and at the same time, the account can also be used to judge our performance, as part of the sector led improvement programme. We have adopted an approach which makes the best use of our existing scarce resources and utilises existing user and carer forums such as Making it Real and partnership boards for engaging with citizens.
- 6.2. In order to meet the challenges we face, Shropshire Council is rethinking all aspects of the work we do and redesigning services – this document reflects this new way of working and is based on a new understanding of what works for people. It demonstrates what we have achieved through the use of case studies that try to show the reality of everyday working including achievements and challenges.
- 6.3. We view this document as an evolving document that we hope to improve year on year. Importantly, we want this document to have resonance with people in Shropshire and to be referred to throughout discussions about our performance, to genuinely "hold the council to account" to deliver what we set out to do.

## **Appendix A: Shropshire's Local Account for Adult Social Care for 2015-16.**

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## Committee and Date

Cabinet

18 January 2017

## **CONSULTATION ON ISSUES AND STRATEGIC OPTIONS FOR THE SHROPSHIRE LOCAL PLAN REVIEW**

**Responsible Officer** George Candler, Director of Place and Enterprise  
e-mail: [George.candler@shropshire.gov.uk](mailto:George.candler@shropshire.gov.uk) Tel: 01743 258671

### **1. Summary**

- 1.1 The purpose of this report is to seek approval for consultation on the first stage, known as Issues and Strategic Options, of the partial review of the Shropshire Local Plan. The Shropshire Local Plan currently comprises the Core Strategy (adopted 2011) and the Site Allocations and Management of Development (SAMDev) Plan (adopted 2015) and they will both remain in force until any new Local Plan is adopted (anticipated around 2019). As part of the Examination of the SAMDev Plan, Shropshire Council committed to an early partial review of its Local Plan, extending the plan period to 2036. This partial review will ensure that the Local Plan continues to be the primary consideration for decisions about development in Shropshire by maintaining robust and defensible policies that conform with national policy and address the changing circumstances within the County and beyond. The Local Plan Partial Review will deliver these objectives over the extended plan period, ensuring our strategy is based on up to date and objective assessments of our development needs. Cabinet approval will permit the consultation documents to be published on 23 January 2017 for a period of 8 weeks.

### **2. Recommendations**

- A. That Cabinet approves the draft document attached for consultation subject to minor amendments and editing.
- B. That authority is delegated to the Director of Place and Enterprise in consultation with the Portfolio Holder for Planning, Housing, Regulatory Services and Environment to approve the final version of the documents and to publish these for public consultation.

## **REPORT**

### **3. Risk Assessment and Opportunities Appraisal**

- 3.1 The Shropshire Local Plan currently comprises the Core Strategy (adopted 2011) and the Site Allocations and Management of Development (SAMDev) Plan (adopted 2015). These documents set out proposals for the use of land

and policies to guide future development to help to deliver sustainable growth in Shropshire for the period up to 2026. However, Local Planning Authorities are required to keep under review any matters that may affect the development of its area or the planning of its development. There is a requirement to objectively assess the development needs of the County and this also permits a longer term view to be taken for the period to 2036. In addition, there continue to be significant national policy and procedural changes along with opportunities and challenges at the national and regional level which will impact, to varying degrees, on Shropshire. These matters should be addressed through a partial review of the Local Plan to help to ensure the continuing conformity of the Local Plan with national policy.

- 3.2 This partial review of the Local Plan will provide an up to date and deliverable Plan for Shropshire. It will help to maintain local control over planning decisions by ensuring that the adopted policies and proposals will be the primary consideration for decisions about development in Shropshire. Maintaining an up to date Local Plan will further support local growth by generating certainty for investment in local development and infrastructure through a policy framework that supports sustainable development in communities across the County, during the period to 2036.
- 3.3 The Issues and Strategic Options consultation will focus on key areas of change, and set out options for the level and distribution of new housing and strategies for employment growth to 2036. The overall strategic approach of focusing growth in Shropshire's county town, market towns and key centres, whilst enabling some controlled development in rural areas, to maintain local sustainability, will remain at the heart of the development strategy. The partial review will present opportunities to strengthen the existing strategy and policy framework, to re-assess the purpose of specific policies or to bring together policies with common objectives to enhance their effects.
- 3.4 The Local Plan Review consultation documents have been the subject of both a Sustainability Appraisal and a Habitats Regulation Assessment and copies of these assessments are attached.
- 3.5 The consultation on the Issues and Strategic Options will also be accompanied by a 'Call for Sites', inviting landowners and the development industry to submit potential development sites for further assessment.

#### **4. Financial Implications**

- 4.1 The product of the review will be a new Local Plan document. The partial review will merge the Core Strategy and SAMDev Plans and will contain both strategic and more detailed (development management) policies, together with existing (unimplemented) site proposals and new site allocations to deliver sustainable growth in Shropshire up to 2036. However, some of the existing policies in the Core Strategy & SAMDev do not need to be amended and may be carried forward as part of the Local Plan Review.
- 4.2 Development strategies and specific sites will continue to be identified for the 18 existing 'Place Plan' areas comprising Shrewsbury, the market towns and key centres, and for other major redevelopment sites. In smaller rural settlements (including existing Community Hubs and Clusters), development will be managed in future through criteria-based policies using a consistent

set of guidelines to help deliver sustainable development in these settlements. Resource and time constraints mean it will not be possible to maintain the geographically specific approach for smaller rural settlements in the adopted SAMDev Plan.

## **5. Background**

- 5.1 This is the first significant stage for public and stakeholder involvement in the partial review of the Local Plan. The objective at this stage is obtain feedback concerning the key issues and strategic options to guide the scope of the review, to test whether there are any other viable alternatives and to ensure prompt identification of potential sites to help deliver sustainable development during the period to 2036.
- 5.2 The consultation documents invite feedback on choices for each of the following strategic options:
- i. Housing Requirement
  - ii. Strategic distribution of future growth
  - iii. Strategies for employment growth
  - iv. Delivering development in rural settlements
- 5.3 In addition to the these strategic options, at a later stage the partial review process will also consider a range of issues including: the role of Shrewsbury and its University; new retail and leisure needs; town centre designations; the need for affordable housing; provision for gypsies and travellers; the redevelopment of strategic sites; and provision to maintain sand and gravel production.
- 5.4 Continuing member involvement will be important in accordance with the Local Member Protocol to support the work of the Local Plan Member Group which has discussed and endorsed the format and content of the consultation documents.
- 5.5 The consultation will be undertaken in line with the standards set out in the Council's published Statement of Community Involvement (SCI) and national guidance. Consultation documents will be made available on the Shropshire Council web-site, and paper copies will be provided at libraries and council offices in the main towns. A significant number of organisations and individuals will continue to be notified directly of the publication of the consultation documents in accordance with the SCI. A Consultation Plan describing these arrangements will be published alongside the Local Plan Review document for information. Electronic responses are encouraged to reduce printing and distribution costs and to reduce the time spent collating and analysing paper responses.
- 5.6 The consultation document has been subject to Sustainability Appraisal, assessment under the Habitats Regulations and an Equality and Social Inclusion Impact Assessment (ESIIA) consistent with national guidance and copies of these assessments will be published alongside the Local Plan Review document for information.

5.7 The consultation responses will be used to inform the next stages of the Local Plan review with further consultation anticipated for a full draft of the reviewed Local Plan currently anticipated in the early part of 2018.

**List of Background Papers (This MUST be completed for all reports, but does not include items containing exempt or confidential information)**

- Consultation Plan
- Sustainability Appraisal (SA)
- Habitats Regulations Assessment (HRA)
- Equality and Social Inclusion Impact Assessment (ESIIA)

**Cabinet Member (Portfolio Holder)**

Mal Price, Portfolio Holder Planning, Housing, Regulatory Services and Environment

**Local Members**

All

**Appendices**

- Consultation on Issues and Strategic Options for the partial review of the Shropshire Local Plan

**Shropshire Local Plan Review**  
**Consultation on Issues and Strategic Options**

**Cabinet 18 January 2017**

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

**Scope of the consultation**

- Topic of this consultation: This consultation seeks views on the key issues and strategic options for the partial review of the Shropshire Local Plan. It covers the following strategic options:
1. Housing Requirement
  2. Strategic distribution of future growth
  3. Strategies for employment growth
  4. Delivering development in rural settlements
- Scope of this consultation: We are seeking views of all parties with an interest in the proposals, so that relevant views and evidence can be taken into account in deciding the best way forward.
- Geographical scope: These proposals relate to the administrative area of Shropshire Council.
- Impact assessment: The Issues and Strategic Options document has been subject to Sustainability Appraisal; has been screened under The Conservation of Habitats and Species Regulations 2010; and been subject to an Equality and Social Inclusion Impact Assessment (ESIIA). The reports of these assessments are available on the Council's website.
- Duration: This consultation will run from Monday 23 January 2017 and will conclude on Monday 20 March 2017.
- After the consultation: We plan to issue a summary of responses on the Council's website within three months of the closing date of the consultation.

**How to respond to this consultation**

The consultation will be undertaken in line with the standards set out in the Council's published Statement of Community Involvement (SCI) and national guidance. Consultation documents will be made available on the Shropshire Council web-site, and paper copies will be provided at libraries and council offices in the main towns. A significant number of organisations and individuals will be notified directly of the publication of the consultation documents by email in accordance with the SCI. To respond to this consultation use our e-survey form which is available at the following link: [link to be inserted]

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

If you do not wish to use the e-survey form above, then please print and complete the form available here: [link to be inserted] and send it by post to:

Shropshire Council  
Planning Policy & Strategy Team  
Shirehall  
Shrewsbury  
SY2 6ND

**Confidentiality and data protection**

Information provided in response to this consultation, including personal information, may be subject to publication or disclosure in accordance with the access to information legislation (primarily the Freedom of Information Act 2000, the Data Protection Act 1998 and the Environmental Information Regulations 2004).

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**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

## **Contents**

<b>1. Introduction</b>	<b>7</b>
<b>2. Housing Requirement and Strategic Distribution Options</b>	<b>14</b>
<b>3. Economic Growth and Employment</b>	<b>21</b>
<b>4. Rural Policy</b>	<b>28</b>
<b>Appendix 1: Allocated but as yet undeveloped employment sites in the adopted Local Plan</b>	<b>36</b>
<b>Appendix 2: Hierarchy of Settlements Methodology</b>	<b>38</b>
<b>Appendix 3: Community Clusters within the SAMDev Plan</b>	<b>51</b>

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**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

## **1. Introduction**

### **Why are we reviewing the Local Plan?**

- 1.1 The Shropshire Local Plan currently comprises the Core Strategy (adopted 2011) and the Site Allocations and Management of Development (SAMDev) Plan (adopted 2015). These documents set out proposals for the use of land and policies to guide future development in order to help to deliver the sustainable growth in Shropshire for the period up to 2026.
- 1.2 Local Planning Authorities are required to keep under review any matters that may affect the development of its area or the planning of its development. There is a requirement to objectively assess the development needs of the County and this also permits a longer term view to be taken for the period to 2036. In addition, there continue to be significant national policy and procedural changes along with opportunities and challenges at the national and regional level which will impact, to varying degrees, on Shropshire.
- 1.3 These matters should be addressed through a partial review of the Local Plan to help to ensure the continuing conformity of the Local Plan with national policy. Core tasks for this review of the Local Plan are set out in the SAMDev Inspector's Examination Report (2015) as follows: *"The review will include housing requirements (including objectively assessed need), employment land requirements, the distribution of development and a review of Green Belt boundaries, as part of the consideration of strategic options to deliver new development in the review plan period which is likely to be 2016-2036."* (SAMDev IR, Para 23).
- 1.4 To meet the requirements of national policy, the Local Plan needs to identify enough land to provide for future housing and employment to reflect Shropshire's future needs. These needs are calculated from national data sources and local evidence which track changes in the size of Shropshire's population and labour supply which derive from both local growth and migration to and away from the county. The partial review needs to establish future growth requirements for Shropshire in a way which is consistent with national policy.
- 1.5 The Council is keen to maintain a robust and defensible Local Plan for Shropshire and the partial review will help to ensure that there is an up to date and deliverable Plan which will help to ensure that local, rather than national policies act as the principal benchmark for planning decisions. Maintaining an up to date Local Plan will support local growth by generating certainty for investment in local development and infrastructure through a policy framework that establishes an up to date and objective assessment of our development needs and supports sustainable development in Shropshire during the period to 2036.

**Shropshire Local Plan Review**  
**Consultation on Issues and Strategic Options**  
**Cabinet 18 January 2017**

**What is a partial review?**

- 1.6 The overall strategic approach of focusing growth in Shropshire's county town, market towns and key centres whilst enabling some controlled development in rural areas to maintain local sustainability will remain as the preferred development strategy. Many of the existing policies in the Core Strategy & SAMDev do not need to be amended and will be carried forward as part of the new Plan. The review will therefore focus on key areas of change, including options for the level and distribution of new housing and strategies for employment growth during the period to 2036, together with any amended policies and new site allocations which are needed to demonstrate that these requirements can be delivered. The existing Core Strategy & SAMDev Plan will remain in force until any new Plan is adopted which is anticipated around 2019.
- 1.7 Given time and resource limitations, the new plan will be less geographically specific in its approach than the SAMDev Plan, with specific sites identified only in Shrewsbury, the market towns and key centres, and at major redevelopment locations which could include Tern Hill near Market Drayton and the former Ironbridge Power Station. In smaller rural settlements (including existing Community Hubs and Clusters), development is proposed to be managed in future through criteria-based policies using a consistent set of guidelines to help deliver sustainable development in these settlements.
- 1.8 This consultation therefore invites feedback on choices for each of the following strategic options:
- i. Housing requirement
  - ii. Strategic distribution of future growth
  - iii. Strategies for employment growth
  - iv. Delivering development in rural settlements
- 1.9 In addition to these strategic options and the matters identified in the SAMDev Examination Report (see paragraph 1.3 above), at a later stage the partial review process will also consider a range of issues including: the role of Shrewsbury and its University; new retail and leisure needs; town centre designations; the need for affordable housing; provision for gypsies and travellers; the redevelopment of strategic sites; and provision to maintain sand and gravel production.
- 1.10 The product of the review will be a new Local Plan document which merges the Core Strategy and SAMDev Plans and contains both strategic policies and more applied policies which primarily inform planning decisions, together with existing (unimplemented) sites and new site allocations.

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

**Strategic Objectives of the Local Plan Review**

- 1.11 The strategic objectives, policies and proposals in the current Local Plan have only been in place for a relatively short period of time since the adoption of the Core Strategy in 2011 and the adoption of the SAMDev Plan in 2015. It is considered that the many of these objectives remain relevant to the sustainable development of Shropshire during the period to 2036.
- 1.12 The following strategic objectives are proposed for the Local Plan review:
- i. Provide an appropriate development strategy for Shropshire for the period 2016-2036 through an up to date Development Plan for Shropshire which is fully compliant with the National Planning Policy Framework (NPPF);
  - ii. Ensure a deliverable Development Plan for Shropshire which secures a five year land supply for both housing and employment development and maintains local planning control over decision making, in accordance with the policies in the Local Plan;
  - iii. Support the development of sustainable communities which are thriving, inclusive and safe, ensuring that people in all areas of Shropshire have access to decent affordable homes, jobs, education and training (Core Strategy Objective 1);
  - iv. Develop the roles of Shrewsbury as a sub-regional centre, and Shropshire's Market Towns and Key Centres as more sustainable and self-sufficient settlements, providing the main focus for new housing, employment and infrastructure development (Core Strategy Objective 2);
  - v. Support rural communities through the delivery of local housing and employment opportunities appropriate to the role, size and function of each settlement (Core Strategy Objective 3);
  - vi. Promote sustainable economic development and growth by providing a flexible and responsive supply of employment land and premises, and the development of further/higher education and training opportunities, to support business development, satisfy the changing needs and demands of the Shropshire economy, promote inward investment, and help generate skilled, well paid employment opportunities (Core Strategy Objective 6);
  - vii. Support the development of sustainable tourism, rural enterprise, broadband connectivity, diversification of the rural economy, and the continued importance of farming and agriculture (Core Strategy Objective 7).

**Strategic Context**

- 1.13 Shropshire is a large, diverse but predominantly rural, inland county. There are a range of interactions taking place affecting Shropshire which cross its boundary with adjacent areas in Herefordshire, Worcestershire, the Borough of Telford and Wrekin, Staffordshire, the West Midlands conurbation, Cheshire

**Shropshire Local Plan Review**  
**Consultation on Issues and Strategic Options**  
**Cabinet 18 January 2017**

and across the English-Welsh border. These include: cross border service provision such as shopping, health, education and leisure; transport links and commuting patterns, any potential inter-dependencies between housing markets and economic areas and protection of the Green Belt. These interactions are the subject of on-going discussion with neighbouring planning authorities under the 'Duty to Co-operate'. The spatial context for the Local Plan Review is described in detail in the Authority Monitoring Report (AMR) which is available on the Council's web pages. More detailed facts, figures and trends concerning the Shropshire context are also available on the Council's webpages here: <http://shropshire.gov.uk/facts-and-figures>

*Shropshire: Strategic Challenges and Opportunities*

- 1.14 The existing Local Plan and particularly the Core Strategy was prepared against the backdrop of the global economic recession which significantly affected the economies of both the UK and Shropshire. The current Local Plan has continued to plan for an economic upturn to assist the recovery which has now started to take effect across Shropshire under the positive influence of its objectives, policies and development strategies.
- 1.15 The influence of the Local Plan and the resurgence of demand and investment in Shropshire have coincided with proposed national infrastructure and investment programmes within the UK economy. The national agenda for political and administrative devolution has brought forward the Combined Authority for the West Midlands conurbation and the drive towards establishing the Midlands Engine to channel investment into the region. This agenda has also created further opportunities through the earlier devolution of authority to Greater Manchester as part of the drive to create the Northern Powerhouse providing a second route to channel investment into the west and north of England.
- 1.16 These emerging channels for investment are expected to be helpfully drawn together by the national infrastructure investment in the High Speed 2 (HS2) link providing a rapid transit route between the south-east region and the regions of the north to encourage investors to look beyond the London conurbation and the Home Counties. HS2 will deliver a close link to Shropshire through the proposed interchange at Crewe which will provide a further channel for investment through a proposed investment zone located around the Northern Gateway centred on Crewe.
- 1.17 The emergence of these exciting investment opportunities in the sub-regions around Shropshire is timely in relation to meeting the challenge established in the SAMDev Plan the Inspector's Examination Report (2015) to undertake an early Partial Review of the now adopted Local Plan. In setting out the core tasks for the Partial Review it is necessary to review our future housing and employment land requirements and to refresh our land supply and policies to

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

help meet our future needs and to capture the opportunities in and around the County.

1.18 The past few years have seen a change in Shropshire's fortunes with the scale of investment evident in the widespread resurgence of residential development and key investments by existing business across the County. This resurgence in the County was set against the backdrop of the healthy projections for the UK economy for over 2% growth through 2017. The national economy and the fortunes of the County may be further challenged by the decision to leave the European Community as a result of the Brexit referendum in the summer of 2016 and the negotiations on the UK exit strategy which have now commenced.

1.19 In light of this context, the following strategic opportunities and challenges have been identified:

*Opportunities*

- i. The Combined Authority for the West Midlands brings together the metropolitan authorities with adjoining areas to drive forward the Midlands Engine. Shropshire has the potential to benefit from this enterprise via the M54 corridor and key investment locations at Wolverhampton, Telford, Shifnal, Albrighton, Bridgnorth and opportunities created around RAF Cosford in Shropshire;
- ii. The Northern Powerhouse and Northern Gateway together aim to re-invigorate the North West region. The Northern Gateway will drive the creation of an investment zone around the HS2 interchange at Crewe with the effects extending through physical proximity and journey time/distance into the Shropshire economy. This is expected to create direct opportunities for the northern Market Towns of Oswestry, Whitchurch and Market Drayton and also Ellesmere and Wem.
- iii. The positive effects of the Northern investment potential will also be experienced through the rail network with the potential to influence other areas of the County.
- iv. The opportunities created through these external influences are expected to enhance the investments being delivered within Shropshire and in the adjoining areas of the Local Enterprise Partnership in Telford & Wrekin and Hereford. The joint working within this partnership will be led and influenced through the Strategic Economic Plan being refreshed along with the Partial Review of the Shropshire Local Plan.

*Challenges*

- i. The focus of the HS2 investment will be located to the north of Shropshire and will attract significant interest from other sub-regions similarly affected by this nationally significant infrastructure investment. Shropshire needs

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

to be able to understand the nature of demands to be created by HS2 and ensure that some of these investment needs are met within the County.

- ii. Shropshire recognises the opportunities to be derived from other national and sub-regional investments and from the investment and potential of its own vibrant local economy. The County places a premium on the promotion of economic growth but will need to understand and address the barriers to investment and growth to translate this demand into employment and prosperity.
- iii. Shrewsbury and Oswestry as the main centres for economic investment expect to see their current principal employment sites come to completion during the plan period to 2036. Whilst new land is available in these locations and within the market towns and other key centres there is a need to further replenish the supply and bring forward a readily available supply of accessed and serviced land for investment.

**Evidence Base**

- 1.20 The partial review of the Local Plan will be informed by an extensive evidence base which will be made available through the Council's web pages here: <http://shropshire.gov.uk/planning-policy/local-plan/local-plan-partial-review-2016-2036/> This 'Issues & Strategic Options' document is based on evidence from the published Full Objectively Assessed Housing Need Report (FOAHN) and Rural Settlement Assessment.

**Sustainability Appraisal**

- 1.21 The Issues and Strategic Options document has been subject to Sustainability Appraisal in line with the Environmental Assessment of Plans and Programmes Regulations 2004. A report of the appraisal is available on the Council's website. The Issues and Options document has also been screened under The Conservation of Habitats and Species Regulations 2010 (as amended) and an HRA Initial Screening Report is available on the Council's website. Targeted consultation with Natural England, Natural Resources Wales and the Environment Agency will be undertaken alongside the current consultation.

**Call for Sites**

- 1.22 This consultation is accompanied by a 'Call for Sites', which is a request to private; public; and voluntary sector bodies and individuals to submit potential development sites for consideration within the Strategic Land Availability Assessment (SLAA). The SLAA is a technical assessment of the capacity; suitability; availability; and achievability (including viability) of land for development. The SLAA incorporates the process formerly known as the Strategic Housing Land Availability Assessment (SHLAA) but now seeks to include land for uses other in addition to housing. Sites can be submitted using the Shropshire Council Site Proforma, which must be accompanied by a plan



**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

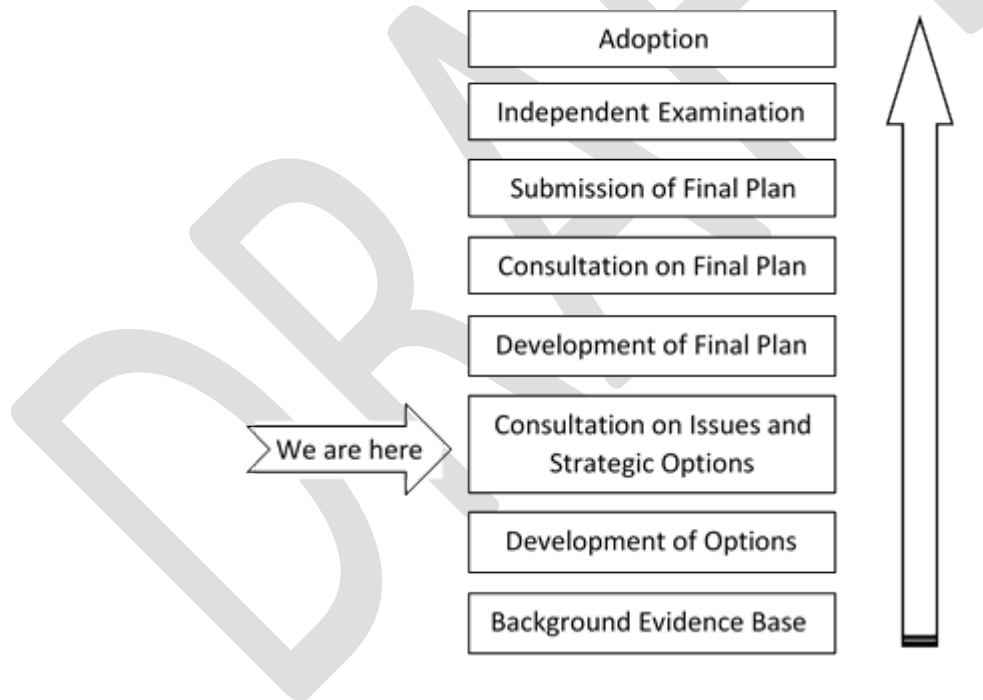
indicating the location and boundary of the site. The Shropshire Council Site Proforma is available on the Shropshire Council website at:

<http://shropshire.gov.uk/planning-policy/strategic-land-availability-assessment/>

- 1.23 The SLAA represents a key component of the evidence base which will support the partial review of the Local Plan. However, whilst the SLAA is an important technical document, it does not allocate land for development or include all locations where future housing growth might occur. The SLAA simply provides information which will be investigated further through the plan-making process.

**What Happens Next?**

- 1.24 We will publish a summary of the responses to the Issues and Strategic Options consultation on our web pages. The comments we receive will be used to inform the further development of the partial review of the Local Plan.
- 1.25 The process for completing the partial review of the Local Plan is as follows:



**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

## **2. Housing Requirement and Strategic Distribution Options**

- 2.1 The Council will need to establish a new housing requirement figure for the new plan period (2016-2036), and establish how this growth will be distributed.
- 2.2 In setting the new housing requirement the Council will seek to address the defined housing need for the county, whilst considering other policy issues, such as the aspiration to deliver higher levels of affordable housing or increasing levels of economic growth.
- 2.3 There is also a requirement to make separate provision for the accommodation needs of the Gypsy and Traveller community. However, this is influenced by different evidence and considerations to bricks and mortar housing provision, and is more appropriately considered in a detailed rather than strategic way.
- 2.4 Importantly, the housing requirement will need to take account of the environmental and infrastructure capacity of settlements to ensure that the planned strategy is deliverable in a sustainable manner.
- 2.5 The Council do not start from a blank sheet. As at 31<sup>st</sup> March 2016 Shropshire has over 17,000 committed dwellings 'in the system' from existing planning approvals or sites currently allocated for development in the adopted SAMDev Plan. This is a considerable amount of planned supply already available to the housing market to deliver. These commitments will be taken into account when defining how much additional land will be needed in order to achieve the new housing requirement up to 2036.

### **Housing Need**

- 2.6 Shropshire Council published the County's Full Objectively Assessed Housing Need (FOAHN) in July 2016. This is a technical exercise that determines the housing need for an area.
- 2.7 It is the role of the Local Plan to translate the evidence on housing need into an appropriate housing requirement for the area. This could result in a housing requirement which exceeds the defined need in order to respond to specific policy considerations.
- 2.8 The published FOAHN is available on the Council's website at: <http://shropshire.gov.uk/media/2101729/Shropshire-Council-FOAHN-2016-.pdf>.
- 2.9 The FOAHN concludes the housing need for Shropshire over the plan period (2016-2036) is **25,178 dwellings**. The Council considers this assessment is robust and in line with national guidance.

<p><b>Q1. Do you consider the housing need identified in Shropshire between 2016 and 2036 within the Full Objectively Assessed Housing Need</b></p>
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**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

**(FOAHN) is appropriate and in line with national guidance?**

**Housing Requirement Options**

- 2.10 The Council needs to present a range of sustainable and deliverable options to inform the eventual housing requirement. These options take the evidence on housing need as a starting point, but also look at how other policy objectives may need to be taken into account. In particular, these policy considerations include the delivery of affordable housing and enabling the growth of the local economy.

***Housing Requirement Option 1: 'Moderate Growth'***

This option represents a total housing requirement of around **26,250 dwellings** over the plan period, which equates to 1,325 dwellings as an annual average.

- This option represents a requirement 5% above the defined housing need.
- Achieving this moderate level of growth will allow further progress to be made on delivering additional affordable housing.
- This housing requirement will require the release of some additional greenfield sites adjacent to existing settlements, but it is likely this will be less than either Options 2 and 3.
- This housing requirement represents a growth rate slightly higher than Shropshire's average delivery rate over the previous three years, but is considered to be at a level which is deliverable in the longer term.
- This housing requirement would represent a slightly lower level of delivery than the levels currently being applied through the adopted Local Plan.

***Housing Requirement Option 2: 'Significant Growth'***

This option represents a total housing requirement of around **27,500 dwellings** over the plan period, which equates to 1,375 dwellings as an annual average.

- This option represents a requirement 10% above the defined housing need.
- Achieving this significant level of growth will enable the delivery of higher rates of affordable housing delivery through new open market housing schemes and on affordable only 'exception' schemes.
- It is considered this level of growth will have a positive influence on the number of economically active people in the county. In turn, this helps to maintain and increase levels of economic growth within the county.

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

- This housing requirement is likely to require the release of a higher level of additional greenfield sites compared to Option 1.
- This annual housing requirement of 1,375 dwellings represents a higher growth rate compared to Shropshire's average delivery rate over the previous three years, but is considered to be at a level which is deliverable in the longer term.
- This housing requirement is equivalent to the current housing requirement set out in the adopted Local Plan.

***Housing Requirement Option 3: 'High Growth'***

This option represents a total housing requirement of around **28,750 dwellings** over the plan period, which equates to 1,437 dwellings as an annual average.

- This option represents a requirement 15% above the defined housing need.
- Achieving this high level of growth will allow the opportunity to deliver affordable housing at a rate above Options 1 or 2, particularly as a percentage of new open market housing schemes.
- It is considered this level of growth will have the most positive influence on the number of economically active people in the county, in turn, helping to maintain and increase levels of economic growth within the county.
- However, without a restructuring of Shropshire's local economy this option is also likely to increase the number of non-economically active people residing in the county, for instance retired people moving into Shropshire.
- It is likely that this option will require the release of higher levels of greenfield land compared to either Option 1 or 2, especially on strategic sites on the edge of settlements.
- The annual housing requirement of 1,437 represents a higher growth rate compared to Shropshire's average delivery rate over the previous three years, and is also higher than any individual year's delivery rate over the previous 10 years
- Recent evidence of an increase in Shropshire's annual housing completion rates, as well as the large number of sites with planning approval already in the system, indicates that this high level of growth is a realistic prospect. However, a consistent upward 'step-change' in the way the market delivers housing is clearly required in order to achieve this option, and the overall sustainability will need to be balanced against the infrastructure and environmental constraints of towns and villages.

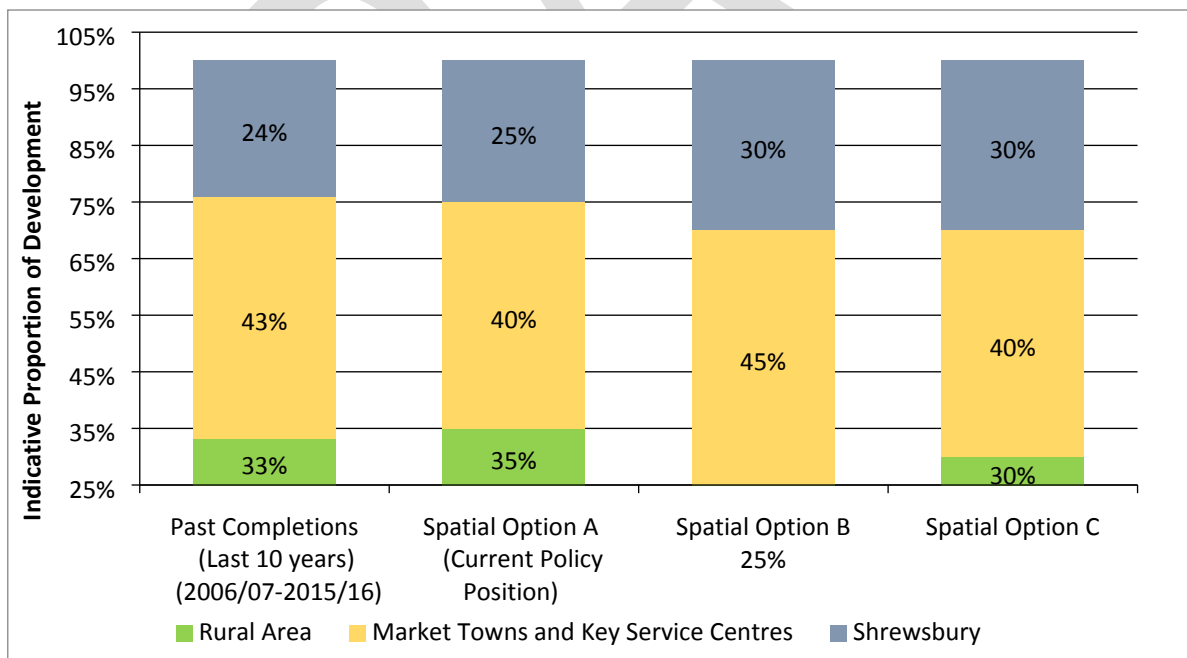
**Q2. Which housing requirement option would you prefer to see used for the Local Plan Review and why? Please indicate if there are any other options you think the Council should consider.**

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

**Strategic Distribution of Housing**

- 2.11 The adopted Local Plan applies a strategic distribution of growth by three broad categories: Shrewsbury; 17 Market Towns and Key Centres<sup>1</sup>; and the rural area.
- 2.12 It is considered these broad categories continue to be an appropriate basis within which to distribute growth in the Local Plan review.
- 2.13 However, given that the new Plan extends the plan period by a further 10 years and is to be based upon a new housing requirement, it is now appropriate to consider whether it is beneficial to change how growth is distributed between these categories.
- 2.14 **The Council are considering three options for the strategic distribution of housing growth.** These are illustrated in Figure 2.1 below. This also shows the actual levels of development being achieved in these categories over the last 10 years by way of comparison.
- 2.15 It is considered all these options are deliverable and can accommodate any of the housing requirement options outlined above.

*Figure 2.1: Strategic Options for Spatial Distribution of Growth*



<sup>1</sup> Albrighton; Bishop's Castle; Bridgnorth; Broseley; Church Stretton; Cleobury Mortimer; Craven Arms; Ellesmere; Highley; Ludlow; Market Drayton; Minsterley/Pontesbury; Much Wenlock; Oswestry; Shifnal; Wem and Whitchurch

**Shropshire Local Plan Review  
 Consultation on Issues and Strategic Options  
 Cabinet 18 January 2017**

**Strategic Distribution Option A: 'Current Policy - Rural Rebalance'**

*This option provides a continuation of the current Core Strategy Policy CS1. This option is most closely aligned with actual levels of housing delivery seen over the previous 10 years and represents the aspiration for 'rural rebalance' as advocated in the Core Strategy and SAMDev. Monitoring shows that the current policy framework is working effectively.*

- Shrewsbury would provide for growth of around 25% of the housing requirement. The option would allow for a continuation of Shrewsbury's current role as a growth point and focus for significant development, including balanced employment growth. As well as the completion of the currently committed Sustainable Urban Extensions to the South and West of the town and other commitments, it is likely there will be a need for some further greenfield land releases on the edge of the town.
- The 17 Market Towns and Key Centres would provide around 40% of the housing requirement. There will be opportunities to explore a different distribution of growth between these settlements than currently adopted in the SAMDev. It is likely there will need to be some further greenfield development on the edge of settlements.
- The rural area will continue to accommodate around 35% of the overall housing requirement. The focus for this development will continue to be in identified Community Hubs and Community Clusters and represents the highest of the options presented for the rural area. At this level of growth, it is likely there will be a need for additional development in rural settlements to be identified.

*Figure 2.2: Strategic Distribution Option A against each Housing Requirement Option*



**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

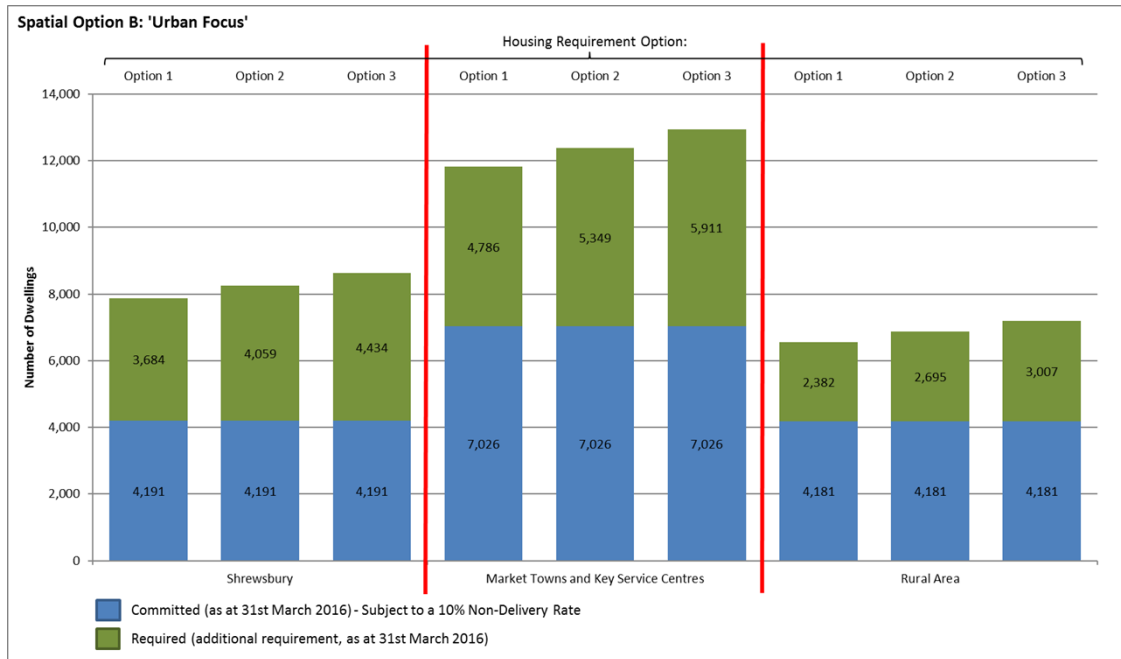
**Strategic Distribution Option B: 'Urban Focus'**

*This option provides a greater focus for growth around Shrewsbury and the market towns and key centres, with around 75% of growth to these areas. Whilst the rural area would continue to accommodate some growth, this would be at a level below current policy and past trends.*

- Shrewsbury would provide for growth of around 30% of the housing requirement. This represents an increase on current policy requirements. It is considered this rate of growth offers further potential to utilise significant growth opportunities on the edge of the settlement, building upon the recent opening of the University Centre Shrewsbury. It is likely there will need to be significant further greenfield extensions to the town as well as increased levels of employment and infrastructure provision to support balanced growth. There may be a requirement to extend retail provision.
- The market towns and key centres would provide around 45% of the housing requirement. This represents an increase on current policy requirements. It is considered this rate of growth would allow a greater opportunity to utilise Shropshire's market towns as centres of growth and investment. Growth could be distributed to the more sustainable settlements having regard to infrastructure and environmental capacity. Whilst several towns offer good development opportunities including for larger scale mixed use schemes, care will be taken to distribute development between settlements appropriately. It is acknowledged that the future growth potential of some towns will necessitate development into the adjoining parish areas.
- The rural area would provide growth of around 25% of the housing requirement. The greater focus of the urban area will necessitate a significant reduction in the amount of growth identified in the rural area compared to current policy requirements. Affordable housing and dwellings for essential workers would continue, but there will be less need to deliver new open market housing to ensure the delivery of the overall housing requirement. This could mean a reduction in the number of villages identified for growth and / or a reduction in the scale of individual development schemes considered appropriate.

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

*Figure 2.3: Strategic Distribution Option B against each Housing Requirement Option*



**Strategic Distribution Option C: 'Balanced Growth'**

*This option effectively provides a middle ground between Options A and B, balancing needs and opportunities across the urban and rural areas. Compared to current policy, this option would accommodate more growth in Shrewsbury and less in the rural areas, but would maintain a similar rate of growth in the market towns and key centres.*

- Shrewsbury would provide for growth of around 30% of the housing requirement. This represents an increase on current policy requirements. It is considered this rate of growth offers further opportunity to utilise significant growth opportunities on the edge of the settlement, building upon the recent opening of the University Centre Shrewsbury. It is likely there will need to be significant further greenfield extensions to the town as well as increased levels of employment and infrastructure provision to support balanced growth. There may be a requirement to extend retail provision.
- The 17 Market Towns and Key Centres would provide around 40% of the housing requirement. There will be opportunities to explore a different distribution of growth between these settlements than currently adopted in the SAMDev. It is likely there will need to be some further greenfield development on the edge of settlements.
- The rural area would provide growth of around 30% of the housing requirement. This represents a small decrease compared to current policy requirements.



**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

However, it is considered this option continues to offer the opportunity for both larger and smaller villages to grow sustainably to meet their needs for affordable housing and wider market housing needs. This could mean a reduction in the number of villages identified for growth and / or a reduction in the scale of individual development schemes considered appropriate.

*Figure 2.4: Strategic Distribution Option C against each Housing Requirement Option*



**Q3. Which spatial distribution option would you prefer to see used for the Local Plan Review and why? Please indicate if there are any other options you think the Council should consider**

### 3. Economic Growth and Employment

- 3.1 The partial review of the Local Plan will need to establish the employment land requirement for the plan period from 2016 to 2036. This requirement must provide sufficient employment land to offer a range and choice of sites to meet demand in the County and the distribution of this land will reflect the spatial options identified above.
- 3.2 In order to set this requirement, the partial review must ensure the Local Plan economic strategy will support investors and businesses to deliver our future economic growth and meet employment needs to 2036. To achieve these aims, it is necessary to ensure that the economic objectives, policies and proposals are sufficiently robust to encourage enterprise, accommodate growth and to help support and maintain our communities.

**Shropshire Local Plan Review**  
**Consultation on Issues and Strategic Options**  
**Cabinet 18 January 2017**

**Shropshire Context**

- 3.3 The strategic approach in the adopted Local Plan set an aspirational requirement for 290 hectares of employment development from 2006 to 2026, of which 90 hectares is to be provided in Shrewsbury. This requirement aspired to boost the rate of economic growth in Shropshire over this 20-year period and at April 2016, has delivered 67 hectares of development under challenging economic circumstances.
- 3.4 The adopted Local Plan has also brought forward a further 158 hectares of land committed with permission comprising 100 hectares on allocated sites and 58 hectares on windfall sites offering a broad range and choice of sites in the County. These commitments represent a healthy supply of readily available sites, well above the minimum threshold of 72 hectares (or the 5 years supply) of sites required in the Local Plan as identified in the Authority Monitoring Report at [http://shropshire.gov.uk/planning-policy/annual-monitoring-report-\(amr\)/](http://shropshire.gov.uk/planning-policy/annual-monitoring-report-(amr)/).
- 3.5 An initial demand forecast of market activity in Shropshire set out in the published Full Objectively Assessed Housing Need (FOAHN) at <https://shropshire.gov.uk/media/2101729/Shropshire-Council-FOAHN-2016-.pdf>, indicates that this committed land would provide at least 9,300 new jobs from 2016 to 2036. This growth will help meet some of the needs of Shropshire's residents and provides the basis for the Strategic Options set out below.
- 3.6 Whilst, the adopted Local Plan policies and proposals have helped stimulate an economic recovery which will provide a reasonable level of growth, the economic objectives for Shropshire in the Local Plan should still be re-assessed. The partial review must also consider the potential of the local economy to address the challenges and opportunities facing the County in the period to 2036. This should also include consideration of the potential of an additional 147 hectares of land on 19 sites still allocated but as yet undeveloped in the adopted Local Plan, shown in Appendix 1. These matters will inform the Strategic Options to help set an employment land requirement for the County.

**New Opportunities and Challenges**

- 3.7 The Shropshire economy is recovering well from the recent economic downturn. New businesses are forming and many existing businesses are looking to invest and expand in the County. Shropshire is experiencing some of the benefits of the economic recovery and the demand forecast in the FOAHN at <http://shropshire.gov.uk/media/2101729/Shropshire-Council-FOAHN-2016-.pdf> gives some confidence that the effects of the recovery will continue despite a degree of caution being expressed in some national economic forecasts. Notwithstanding this, the national agenda is to devolve power to the regions and to bring greater confidence in the growth potential of the UK economy. The Combined Authority for the West Midlands will bring a

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

drive to establish the 'Midlands Engine' to channel investment into the region. The devolution of power to Greater Manchester will drive the creation of a Northern Powerhouse. These two investment channels are also expected to be drawn together in the infrastructure investment for High Speed 2 (HS2). This connection to the South East region is expected to create significant investment potential in the heart of England. The partial review of the Local Plan will need to both capture the opportunities for growth and to respond positively to unidentified, windfall proposals arising from:

- demand expressed at key investment locations in the east of the County;
- the creation of an investment zone around the HS2 interchange at Crewe creating opportunities in the north of the County;
- investments delivered through The Marches Local Enterprise Partnership with particular effect along the rail network in the north, centre and south of the County.

**Q4. How might Shropshire best exploit these new investment opportunities to improve the economic performance of the County and what challenges might be encountered when seeking to achieve this?**

**Q5. What other opportunities / challenges for economic growth might be encountered in the County over the period to 2036?**

### **Strategic Options for Economic Growth**

#### ***Economic Option 1: Significant Growth***

*This option continues the current strategic approach in the adopted Local Plan for the 20-year period from 2016 to 2036, maintaining the current level of aspiration and rolling forward the existing employment land requirement to 2036 to provide a comparable level of employment land to that in the current Plan and delivering a similar level of new jobs to 2036.*

This option:

- recognises that the strategy of the recently adopted Local Plan needs time to take effect following the upturn in the economic circumstances in the County. The extended plan period will provide the opportunity for this to happen;
- seeks to develop and diversify the employment offer wherever possible to meet the needs of the economically active population but recognises the implications for growth stemming from an older population structure;
- recognises the 20-year employment land requirement of 290ha as an aspirational target for economic growth which has provided a good range and choice of investment opportunities across the County, as set out in the

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

Employment Land Review (2011) at

<http://shropshire.gov.uk/media/1059468/EV7-Employment-land-review.pdf>;

- is supported by the demand forecast for Shropshire to provide at least 9,300 jobs over the period served from the sufficient supply of committed employment land but also seeks to increase the overall provision of new jobs;
- largely relies on current Plan proposals and the existing spatial distribution of these investment opportunities. Where demands do not match this pattern of opportunity there would be a reliance on flexible policies to accommodate this investment;
- sets out a robust approach to economic growth in Shropshire focusing on the principal towns with a flexible approach to rural development which seeks to identify a deliverable economic strategy for the County.

***Economic Option 2: High Growth***

*This option seeks to establish a revised strategic approach for the 20-year period from 2016 to 2036, to create a higher level of aspiration supported by an appropriate employment land requirement, providing a higher level of employment land supply and delivering a higher level of new jobs.*

This option:

- recognises that the Local Plan must seek to sustain growth in the local economy by seeking to offer further opportunities to accommodate new investment and development over the additional plan period from 2026 to 2036;
- seeks to develop and diversify the employment offer as a principal means of boosting the economically active population from in-migration and by drawing people into or retaining them in employment within the County;
- seeks to establish a revised 20-year employment land requirement to reflect a higher aspiration for economic growth and to further improve the range and choice of investment opportunities across the County;
- is supported by the demand forecast for Shropshire to provide at least 9,300 jobs over the period served from the supply of committed employment sites but will consider the need for new land provision in the County in order to increase the overall provision of new jobs;
- relies on opportunities being identified at the national and regional level being delivered within the extended Plan period and expressing increased demands for existing and new development opportunities in Shropshire;
- sets out an optimistic approach to economic growth in Shropshire boosting the role of principal towns with flexible rural development and capturing some of the potential of changing national and regional economic circumstances.

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

***Economic Option 3: Productivity Growth***

*This option seeks to establish a new strategic approach for the 20-year period from 2016 to 2036, to capture the potential for new investment in Shropshire and to seek to influence the structure of the economy, the productivity of its sectors and the range, type and quality of new employment. This option would create a higher aspiration to provide more 'higher value' jobs whilst potentially setting a lower employment land requirement and a lower overall provision of new jobs.*

This option:

- recognises both the challenges of promoting growth in Shropshire and the opportunities provided by the changing national and regional economic circumstances which the Local Plan might seek to embrace;
- seeks to tap the potential of emerging new investment opportunities to change the employment offer in Shropshire towards 'higher value' employment as a means of further boosting the economically active population in the County;
- seeks to establish a new and possibly lower 20-year employment land requirement to reflect an aspiration for economic growth which focuses the range and choice of investment opportunities to locations where higher quality demand might be expressed;
- is supported by the demand forecast for Shropshire to provide at least 9,300 jobs served from the supply of committed employment sites but anticipates that the lower scale of new development might provide opportunities for 'higher value' employment.
- seeks to promote significant changes to the structure of the population, changing the traditional Shropshire growth sectors and the profile of those seeking new employment in the County which is unlikely to be achieved even in the extended Plan period;
- sets out a very ambitious approach to economic growth in Shropshire using those principal towns where investment demand is most likely to be expressed and seeking to capture, to the fullest degree, the potential of changes in national and regional economic circumstances and the new investment opportunities likely to be delivered.

**Q6. Which of the following Strategic Options would provide the most appropriate level of aspiration for the growth of the Shropshire economy?**

**Please set out the reasons for your choice and outline the opportunities and challenges for the Shropshire economy.**

**Or, set out an alternative Strategic Option outlining the key characteristics of this option for the growth of the Shropshire economy.**

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

**Economic Objectives for Shropshire**

- 3.8 The adopted Local Plan currently identifies the following economic objectives:
1. Promoting Shropshire as an investment location for a range of business types including home based enterprise,
  2. recognising the environment and the quality of life for its residents as key elements of its investment offer;
  3. Developing the role of Shrewsbury as the County town and the growth point and sub-regional centre to function as the main focus for business, services and visitors;
  4. Developing the role of Shropshire's Market Towns as key employment and service centres to revitalise their function within the rural areas of the County;
  5. Supporting the development and growth of key business sectors and clusters;
  6. Supporting development and related initiatives to provide higher and further education facilities, improving education, training and skills and meeting the needs of employers including the promotion of University Centre, Shrewsbury;
  7. Supporting the development of communication and transport infrastructure to improve accessibility to employment, training and education;
  8. Recognising the continuing importance of farming for food production, supporting rural enterprise and diversification of the rural economy;
  9. Planning flexible supply of employment land and premises to offer a range and choice of sites in appropriate locations to meet the investment needs of the local economy;
  10. Managing a responsive supply of employment land and premises by maintaining a readily available supply in excess of a 5 years supply of land and premises.
- 3.9 These strategic objectives are set out in Core Strategy, Policies CS13 and CS14 and are intended to help develop and diversify investment, enterprise and employment in the County. These strategic objectives influence the employment land requirement by indicating the scale, range and choice of land required and the need for flexibility to accommodate new investment proposed during the Plan period on sites not specifically allocated or protected for employment use. These objectives may also influence the distribution of the requirement alongside the broad spatial options for development.

**Q7. Do you agree that these strategic objectives should continue to influence the economic strategy in the Local Plan for the period to 2036?**

**Please consider whether:**

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

**Any of these strategic objectives might be amended to better address the needs of the Shropshire economy;**

**Other strategic objectives might be identified in the Local Plan.**

**Range and Choice of Remaining Allocations**

- 3.10 National policy requires that any undeveloped allocations in a Local Plan be assessed to determine their continuing viability for employment uses. Appendix 1 lists the undeveloped employment sites in the SAMDev Plan comprising 19 greenfield sites with a combined area of 147 hectares. The location and characteristics of these sites have been identified and this shows that 11 of these sites are in Shrewsbury and the Market Towns. There are also 11 sites which are considered to be high or good quality sites for employment use. There are also six sites that form part of a mixed use development with residential use. In some instances, this residential development is already being delivered. It is important therefore, to consider how this suite of sites might contribute to the economic growth of the County or whether they might be used to meet the broad range of development needs in Shropshire as part of the new Local Plan strategy to 2036.

**Q8. Do each of these 19 sites make a positive contribution to the employment land supply in the County or, might some, or all of these sites be used in other ways to make a more positive contribution to the Local Plan strategy over the period to 2036?**

**Protecting Existing Employment Areas**

- 3.11 In Core Strategy, Policy CS14, the supply of new employment land is supported by protecting developed employment land and premises on existing employment areas which were assessed in the Strategic Sites and Employment Areas Studies (2014) at <http://shropshire.gov.uk/planning-policy/samdev-examination/evidence-base/>. These assessments helped to justify the presumption in favour of protecting existing employment areas in SAMDev Policy MD9, to safeguard key employers, provide readily available development opportunities and to contribute to the range and choice of employment sites in Shropshire. This protection is proportionate to the significance of the employment area in accordance with a hierarchy of the quality and importance of different types of existing employment sites. This presumption for protection applies to both identified employment areas shown in the Authority Monitoring Report at [http://shropshire.gov.uk/planning-policy/annual-monitoring-report-\(amr\)/](http://shropshire.gov.uk/planning-policy/annual-monitoring-report-(amr)/) and to other existing areas that become subject to proposals for partial or complete redevelopment for other uses.

**Q9. Does the protection provided to existing employment areas as a**

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

**source of serviced and readily available land make a positive contribution to the supply of employment land and premises in Shropshire?**

**Please consider whether:**

**The level of protection provided to existing employment areas shown in the Authority Monitoring Report is appropriate.**

**The approach to protecting existing employment areas might be changed or improved in the partial review of the Local Plan.**

## **4. Rural Policy**

4.1 This section focuses on three key areas, these are:

1. Identifying a suitable methodology for the identification of Community Hubs and Community Clusters, up to 2036;
2. Identifying criteria to achieve appropriate sustainable development in Community Hubs and Community Clusters; and
3. For rural areas outside Community Hubs and Community Clusters, that is considered countryside, identifying a suitable approach to managing development.

### **Shropshire Context**

4.2 Shropshire is a large rural County containing hundreds of small rural villages and hamlets; and numerous dispersed dwellings within a large rural hinterland.

4.3 In total the plan area covers approximately 320,000 hectares, 98% of which is classed as rural (containing approximately 40% of the population) and 2% as urban (containing approximately 60% of the population).

4.4 To maintain and enhance the vitality of rural communities, an appropriate proportion of the total housing requirement for Shropshire will need to be delivered in sustainable rural settlements.

4.5 Sustainable rural settlements are considered to be:

#### ***Community Hubs:***

*Settlements which have a 'sufficient population' to maintain a range of services; facilities; and employment. Appropriate sustainable development should contribute to the retention and enhancement of existing services; facilities; and employment. It should also support the provision of new services; facilities; employment opportunities; and housing to meet local needs.*



**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

**Community Clusters:** *Groups of two or more small settlements which 'opt in' and together offer or aspire to offer a range of services; facilities; and employment, contributing to a sustainable community. Appropriate sustainable development should contribute to the retention and enhancement of existing services; facilities; and employment. It should also support the provision of new services; facilities; employment opportunities; and housing to meet local needs.*

*In order to 'opt in', a Community Cluster should be proposed to Shropshire Council by the Parish Council(s), as elected representatives of the community.*

- 4.6 As with the current policy framework, it is expected that Community Hubs and Community Clusters will continue to be the focus for new open market housing in the rural area.

**Identification of Community Hubs**

- 4.7 In order to identify those settlements which function as a Community Hub, Shropshire Council is intending to undertake an assessment of service and facility provision; employment opportunities; and public transport links, in rural settlements. The purpose of this assessment is:
1. To identify how rural settlements function;
  2. To utilise information on the availability of services and facilities; employment opportunities; and public transport links, to identify a threshold for Community Hubs; and
  3. To identify those settlements which meet this threshold.
- 4.8 Appendix 2 of this Issues and Strategic Options consultation includes further details on the proposed methodology for this assessment which will occur following the conclusion of this consultation

**Q10. Do you agree with the approach and/or the methodology proposed to identify Community Hubs?**

**Identification of Community Clusters**

- 4.9 Shropshire Council is offering communities within small rural settlements that are not classified as Community Hubs, the opportunity to 'opt in' as a Community Cluster. This will help them to maintain or enhance their area's social and economic sustainability by accommodating appropriate sustainable development.
- 4.10 Community Clusters will consist of two or more recognisable named rural settlements, which do not meet the criteria for a Community Hub, but are either:
1. Identified as a Community Cluster within the SAMDev DPD<sup>2</sup>, unless Parish Council(s) indicate that they no longer wish to hold this status during the partial review of the Development Plan; or

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

2. Promoted as a Community Cluster by the Parish Council(s), through the partial review of the Development Plan.
- 4.11 Existing Community Clusters can be found in Appendix 3 of this report. This list will be updated to reflect the new definitions of Community Hubs and Community Clusters; and as further communities 'opt in/out' during the partial review of the Development Plan.
- 4.12 Communities that do not come forward as Community Clusters through the 'opt in' process during the partial review of the Development Plan, will be considered as countryside and development in these areas will be managed accordingly. However, if subsequently there are local aspirations for a wider range of development, such as open market housing, the Parish Council, supported by other representatives of the community, are able to prepare a Neighbourhood Plan in order to further these ambitions.

**Q11. Do you think any of the existing Community Clusters identified in Appendix 3 should no longer have Community Cluster status?**

*If so please specify any community support you are aware of for this proposal.*

**Q12. Do you think any additional Community Clusters should be formed?**

*If so please specify any community support you are aware of for this proposal.*

**What types and levels of development are appropriate in Community Hubs and Community Clusters?**

- 4.13 Community Hubs and Community Clusters represent sustainable settlements within the rural area and are therefore suitable, in principle, for appropriate types and levels of development.
- 4.14 In order to provide greater certainty on the types and levels of development that are considered appropriate, whilst also maintaining choice and competition, it is proposed that a criteria based policy will be developed for Community Hubs and another for Community Clusters. Consequently it is proposed that no specific sites will be allocated within these settlements. It is also proposed that existing settlement boundaries will be withdrawn and no new development boundaries identified.
- 4.15 Potential criteria for inclusion within the Community Hub and Community Cluster policies are summarised in the following tables:

**Community Hubs**

**Q13. The table below provides a summary of some of the criteria which may be included within the Community Hub policy.**

---

<sup>2</sup>Excluding those that meet the criteria for a Community Hub

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

***Please provide your opinion on the importance of each criteria, using the following descriptions:***

***(1) Unimportant; (2) Neutral; (3) Important; or (4) Very Important.***

*Figure 3.1: Community Hub Draft Criteria*

<b>Community Hub Draft Criteria</b>	
1.	Development proposals must have regard to relevant policies on Sustainable Design and Development Principles.
2.	Development should be of a scale and design that is sympathetic to the character of the settlement and its environs.
3.	Development should be well and clearly related to the existing built form of a settlement and not result in an isolated form of development.
4.	Development should reflect design criteria and policies identified within relevant Neighbourhood Plans and Community Led Plans.
5.	Development proposals to extend a Community Hub beyond its natural built form will normally consist of a small group of dwellings and include a range of housing sizes, types and tenures, and should protect the integrity of any strategically important gaps between settlements.
6.	There should be sufficient infrastructure capacity, or scope to address or alleviate any infrastructure constraints to appropriately meet development needs.
7.	<p>Sites of five or more dwellings should include an appropriate mix of types and sizes of housing; and meet local needs for affordable and family housing, based on any local evidence.</p> <p>When determining an appropriate mix of types; sizes; and tenures, regard should be given to the need to provide appropriate family accommodation; available local evidence; and the outcomes of community consultation.</p>
8.	Non-residential sites should be designed to complement their setting and meet the needs of their intended occupiers.
9.	<p>The cumulative impact of residential development proposals is a significant policy consideration.</p> <p>Cumulatively, residential development proposals, in combination with any existing commitments; allocations or completions since the 31<sup>st</sup> March 2016 must complement the nature, character and size of a settlement.</p> <p>Decisions on cumulative impact will have regard to:</p> <ul style="list-style-type: none"> <li>i. The cumulative increase to the size of the settlement; and</li> <li>ii. The number of other development proposals in close proximity or adjacent to the proposal site, in seeking to avoid the over-development of settlements;</li> </ul>

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

<b>Community Hub Draft Criteria</b>	
	and iii. The benefits arising from the development.
10.	The cumulative impact of non-residential development is also a significant policy consideration. Cumulatively, non-residential development, in combination with any existing commitments; allocations or completions since the 31 <sup>st</sup> March 2016 must complement the nature, character and size of a settlement.
11.	Allocations made within Community Hub settlements in the SAMDev Plan are considered appropriate sites for development.
12.	Development within the Green Belt is generally considered inappropriate, apart from the specific exceptions referenced within national policy.
13.	Development should respect the qualities of the local landscape and be sympathetic to its character and visual quality.
14.	Development should have a positive effect on any relevant heritage designations.
15.	Development should have a positive effect on any relevant environmental designations.

**Q22. Please identify any additional criteria you consider would be beneficial for Community Hubs.**

**Community Clusters**

**Q14. The table below provides a summary of some of the criteria which may be included within these policies.**  
**Please provide your opinion on the importance of each criteria, using the following descriptions:**  
**(1) Unimportant; (2) Neutral; (3) Important; or (4) Very Important.**

Figure 3.2: Community Cluster Draft Criteria

<b>Community Cluster Draft Criteria</b>	
1.	Development proposals must have regard to relevant policies on Sustainable Design and Development Principles.
2.	Development should be of a scale and design that is sympathetic to the character of the settlement and its environs.

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

<b>Community Cluster Draft Criteria</b>	
3.	Development should be well and clearly related to the existing built form of a settlement and not result in an isolated form of development.
4.	Development should reflect design criteria and policies identified within relevant Neighbourhood Plans and Community Led Plans.
5.	There should be sufficient infrastructure capacity, or scope to address or alleviate any infrastructure constraints to appropriately meet development needs.
6.	Within Community Clusters, development should either be located on small scale infill sites or represent conversions of existing buildings within or adjoining the settlement. Infill sites will consist of land usually with built development on adjacent land on three sides. The rural area between Community Clusters is considered countryside. The integrity of any strategically important gaps between settlements will be protected.
7.	When considering the size, type and tenure of housing, all residential development should have regard to the need to provide appropriate family accommodation; available local evidence; and the outcomes of community consultation.
8.	Non-residential sites should be designed to complement their setting and meet the needs of their intended occupiers.
9.	<p>The cumulative impact of residential development proposals is a significant policy consideration.</p> <p>Cumulatively, residential development proposals, in combination with any existing commitments; allocations or completions since the 31<sup>st</sup> March 2016 must complement the nature, character and size of a settlement.</p> <p>Decisions on cumulative impact will have regard to:</p> <ul style="list-style-type: none"> <li>i. The cumulative increase to the size of the settlement; and</li> <li>ii. The number of other development proposals in close proximity or adjacent to the proposal site; and</li> <li>iii. The benefits arising from the development.</li> </ul>
10.	The cumulative impact of non-residential development is also a significant policy consideration. Cumulatively, non-residential development, in combination with any existing commitments; allocations or completions since the 31 <sup>st</sup> March 2016 must complement the nature, character and size of a settlement.
11.	Allocations made within a Community Cluster settlement in the SAMDev Plan are considered appropriate sites for development.
12.	Development within the Green Belt is generally considered inappropriate,

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

<b>Community Cluster Draft Criteria</b>	
	apart from the specific exceptions referenced within national policy.
13.	Development should respect the qualities of the local landscape and be sympathetic to its character and visual quality.
14.	Development should have a positive effect on any relevant heritage designations.
15.	Development should have a positive effect on any relevant environmental designations.

***Q15. Please identify any additional criteria you consider would be beneficial for Community Clusters.***

4.16 Neighbourhood and other Community Led Plans will allow communities to provide further local context to the criteria based policies within Community Hubs and Community Clusters.

***Q16. Do you think that criteria based policies for Community Hubs and Community Clusters will strike an appropriate balance between providing certainty on the types and levels of development whilst also maintaining choice and competition?***

***Q17. Do you agree that a consistent approach of identifying no development boundaries within Community Hub and Community Cluster settlements is appropriate?***

**Residential Development in the wider Countryside**

4.17 In order to avoid new isolated homes in the countryside, outside Community Hubs and Community Clusters, it is proposed that the current policy approach will continue. Development will therefore be limited to specific, very special circumstances. National Policy<sup>3</sup> specifies that such exceptions are:

- The essential need for a rural worker to live permanently at or near their place of work in the countryside;
- Where such development would represent the optimal viable use of a heritage asset or would be appropriate enabling development to secure the future of heritage assets; or
- Where the development would re-use redundant or disused buildings and lead to an enhancement to the immediate setting; or

<sup>3</sup>Paragraph 55 of the National Planning Policy Framework (NPPF)

**Shropshire Local Plan Review  
Consultation on Issues and Strategic Options  
Cabinet 18 January 2017**

- The exceptional quality or innovative nature of the design of the dwelling. Such a design should:
  - Be truly outstanding or innovative, helping to raise standards of design more generally in rural areas;
  - Reflect the highest standards in architecture;
  - Significantly enhance its immediate setting; and
  - Be sensitive to the defining characteristics of the local area.

**Q18. What local criteria, if any, do you consider should be applied in addition to those produced at the national level?**

**Non-Residential Development in the wider Countryside**

4.18 In order to promote a prosperous rural economy National Policy<sup>4</sup> specifies that planning policies should:

- Support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well-designed new buildings;
- Promote the development and diversification of agricultural and other land-based rural businesses;
- Support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres; and
- Promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship.

**Q19. What local criteria, if any, do you consider should be applied in addition to those produced at the national level?**

**Green Belt**

4.19 Within the designated Green Belt in south-eastern Shropshire, there will be additional control of new development complying with the requirements of the NPPF and local policy criteria. In accordance with the SAMDev Inspector's Examination Report (2015), a review of the Green Belt in Shropshire is currently being undertaken.

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<sup>4</sup>Paragraph 28 of the National Planning Policy Framework (NPPF)

## Appendix 1: Allocated but as yet undeveloped in the adopted Local Plan

Settlements	Allocated Sites not Commended (April 2016)	Site Characteristics	Allocated Site Area (hectares)
<b>Shrewsbury</b>	<b>Sustainable Urban Extension (SUE) - South</b>	High quality, greenfield site served from the adjoining retail developments within the mixed use SUE, situated close to the football stadium and accessible to A5 by-pass, in south Shrewsbury	<b>26</b>
	<b>SUE - West</b>	Group of good quality, greenfield sites within the mixed use SUE located on the route of the proposed Oxon Link Road or adjoining the A5 by-pass in west Shrewsbury. Land offers two opportunities to extend Oxon Business Park and roadside prominence as the A5 / Welshpool Road junction at Churncote Island, in west Shrewsbury	<b>9</b>
	<b>Battlefield Road East</b>	Greenfield site at the A49 / A53 / Battlefield Road junction, adjoining the new residential development at Shillingston Drive, in north Shrewsbury	<b>2</b>
<b>Oswestry</b>	<b>Innovation Park</b>	High quality greenfield site at A5 / A483 'Mile End' junction, opposite the adopted SUE and the Maes y Clawdd employment area, to the south east of Oswestry	<b>23</b>
	<b>Whittington Road</b>	Good quality, greenfield site with prominence to the A5 / Whittington Road junction close to the Oswestry showground to the north east of Oswestry	<b>16</b>
<b>Bridgnorth</b>	<b>Land south of A458, Tasley</b>	Good quality, greenfield site with prominence to A458 by-pass at the principal gateway to the town	<b>6.7</b>
<b>Whitchurch</b>	<b>Heath Road</b>	Group of greenfield sites wholly contained within A41 / A525 / B5395 with adjoining mixed roadside uses, south of Whitchurch	<b>11</b>
	<b>Oaklands Farm</b>	Part of good quality, mixed use greenfield site with the employment area on eastern frontage of the B5398, east of Whitchurch	<b>8.5</b>
<b>Market Drayton</b>	<b>Sych Farm</b>	Good quality, greenfield site forming a natural extension to Sych Farm Industrial Estate with prominence to the A53, north of Market Drayton	<b>18</b>
<b>Ludlow</b>	<b>East of Eco-Park</b>	Part of good quality, mixed use greenfield site with the employment area forming a natural extension to the north east of Ludlow Eco-Park	<b>2.5</b>
	<b>South of Sheet Road</b>	High quality greenfield site adjoining the A49 junction south of Sheet Road, situated adjacent to the Eco-Park and opposite the roadside / retail services at Foldgate Lane	<b>3.5</b>



## Appendix 1: Allocated but as yet undeveloped in the adopted Local Plan

Settlements	Allocated Sites not Commended (April 2016)	Site Characteristics	Allocated Site Area (hectares)
<b>Broseley</b>	<b>Land south of Avenue Road</b>	Part of mixed use greenfield site with enabling residential development located to the south of Broseley	<b>1.3</b>
<b>Church Stretton</b>	<b>Springbank Farm</b>	Greenfield site exhibiting some constraints, situated between the secondary school and the Welsh Marches Railway Line, east of Church Stretton	<b>1.3</b>
<b>Craven Arms</b>	<b>Land north of Long Lane</b>	Greenfield site offering the potential to extend Craven Arms Business Park, situated between Long Lane and the Welsh Marches Railway Line, to the north of Craven Arms	<b>3.5</b>
	<b>Land west of A49</b>	Greenfield site with prominence to the A49, opposite the proposed Newington Food Park and trunk road junction, to the north of Craven Arms	<b>2.5</b>
<b>Ellesmere</b>	<b>Ellesmere Business Park</b>	Good quality greenfield site, exhibiting some constraints, intended to extend the existing Ellesmere Business Park, west of Ellesmere	<b>6.6</b>
<b>Highley</b>	<b>Adjoining Netherton Workshops</b>	Greenfield site accessed from B4555 through Netherton Workshops forming a natural extension to this adjoining protected employment area, in Highley	<b>0.6</b>
<b>Minsterley</b>	<b>Hall Farm</b>	Part of mixed use greenfield site with enabling residential development located to the west of Minsterley	<b>1.0</b>
<b>Wem</b>	<b>Shawbury Road</b>	Good quality greenfield site, exhibiting some constraints, with prominence to the B5063 Shawbury Road with the potential to improve the employment offer in Wem	<b>4.0</b>
<b>TOTAL</b>			<b>147</b>

# **Shropshire Council**

## **Hierarchy of Settlements Methodology**

## Appendix 2: Hierarchy of Settlements Methodology

# CONTENTS

1.	Introduction .....	37
	Background .....	37
	Purpose of this Document.....	37
	Proposed Methodological Approach .....	37
	How the Hierarchy Will Be Utilised .....	37
2.	The Policy Context .....	38
	National Policy .....	38
	Local Policy .....	38
3.	Methodology .....	39
	Introduction .....	39
	Stage 1: Identification of Settlements .....	39
	Stage 2: Screening of Settlements .....	39
	Stage 3: Assessment of Screened-In Settlements .....	40
	Services and Facilities .....	40
	Employment Opportunities .....	41
	Public Transport Links .....	42
	Hinterland Serviced by the Settlement .....	42
	Conclusion .....	42
	Stage 4: Categorisation of Settlements .....	43

## Annex

Annex 1.	‘Identifiable Named Settlements’ .....	44
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# 1. Introduction

### Background

- 1.1. Shropshire<sup>5</sup> is a large rural County, covering approximately 320,000 hectares, 98% of which is classed as rural (containing approximately 40% of the population) and 2% as urban (containing approximately 60% of the population). As a result of its size and predominantly rural nature, Shropshire contains a range of settlement types and sizes.
- 1.2. Due to the size and diversity of Shropshire and its settlements, it is considered beneficial to produce a settlement hierarchy. A settlement hierarchy is a way of arranging settlements into an order and subsequently into settlement categories, based upon an assessment of specific and consistent criteria. This information will in part, inform decisions on locations of development.

### Purpose of this Document

- 1.3. This document summarises the proposed methodology for undertaking a settlement hierarchy in Shropshire.

### Proposed Methodological Approach

- 1.4. Shropshire Council considers that it is appropriate to base its settlement hierarchy assessment on how a settlement functions, as settlement function is the most accurate indication of the role and sustainability of a settlement.
- 1.5. Settlement function involves consideration of:
  - The population of the settlement;
  - The extent to which the settlement provides services and facilities; employment opportunities; and public transport links; and
  - The hinterland served by the services and facilities; employment opportunities; and public transport links to and from the settlement.
- 1.6. The proposed methodology will allow for a comprehensive assessment and accurate indication of a settlement's function. This in turn will inform a settlement's position in the hierarchy and its categorisation.

### How the Hierarchy Will Be Utilised

- 1.7. Upon its conclusion the settlement hierarchy will inform decisions on a settlement's potential to accommodate new development. In this way, the settlement hierarchy will support the partial review of the Shropshire Council Development Plan.
- 1.8. ***Please Note: Whilst the settlement hierarchy is an important technical document, it does not make decisions on whether a settlement is or is not appropriate for development; the levels of development which are appropriate within a settlement; or whether specific sites for development within settlements are appropriate.***
- 1.9. *The settlement hierarchy ultimately provides information which will be investigated further through the plan-making process.*

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<sup>5</sup>All references to Shropshire within this document exclude the Telford and Wrekin Council area.

# 2. The Policy Context

### National Policy

- 2.1. The National Planning Policy Framework (NPPF), sets out the Government's planning policies for England and how these are expected to be applied. In this way, it provides a framework for Local Planning Authorities producing Development Plans.
- 2.2. The purpose of this settlement hierarchy is to review how settlements in Shropshire function, which will inform decisions on future locations of development. In this way it will provide important information linked to the following principles of the NPPF:
  - Patterns of growth should be actively managed to make fullest possible use of public transport, walking and cycling and focus significant development in locations which are or can be made sustainable (paragraph 17);
  - In drawing up Local Plans, local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their vitality. They should also define a network and hierarchy of centres that is resilient to anticipated future economic changes (paragraph 23);
  - In rural areas, the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship, should be promoted through local and neighbourhood plans (paragraph 28);
  - In preparing Local Plans, local planning authorities should support a pattern of development which, where reasonable to do so, facilitates the use of sustainable modes of transport, in order to reduce greenhouse gas emissions and reduce congestion (paragraphs 30 and 34);
  - Local planning authorities should boost significantly the supply of housing through the plan making process (paragraph 47). In rural areas, local planning authorities should be responsive to local circumstances and plan housing development to reflect local needs (paragraph 54);
  - Sustainable development should be promoted in rural areas by locating new housing where it will enhance or maintain the vitality of rural communities. For example, where there are groups of smaller settlements, development in one village may support services in a village nearby (paragraph 55);
  - New housing should be discouraged in the open countryside unless there are special circumstances: for example, where it would meet the essential need for a rural worker to live near their place of work; where it would represent the optimal viable use of a heritage asset; where it would re-use redundant buildings; or where it represents exceptional design (paragraph 55).

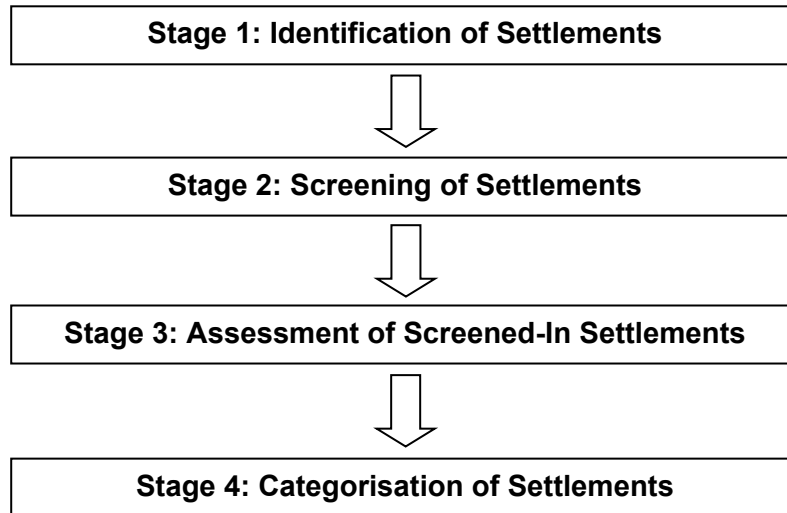
### Local Policy

- 2.3. The Shropshire Council Development Plan consists of the adopted Core Strategy (2011); and adopted Site Allocations and Management of Development (SAMDev) Plan (2015).
- 2.4. The Shropshire Core Strategy (2011) sets out the Council's vision, strategic objectives and broad spatial strategy to guide future development and growth in Shropshire to 2026.
- 2.5. The SAMDev Plan (2015) sets out proposals for the use of land and policies to guide future development in order to help to deliver the vision and objectives of the Core Strategy for the period up to 2026.
- 2.6. Shropshire Council has commenced work on the partial review of the Development Plan. This Settlement Hierarchy forms part of the evidence base for this partial review by informing decisions on a settlements potential to accommodate new development.
- 2.7. In addition, any adopted formal Neighbourhood Plans also form part of the Development Plan.

### 3. Methodology

#### Introduction

- 3.1. There are a significant number of settlements in Shropshire of varying sizes and serving different functions. Reflecting this diversity, Shropshire Council is proposing a four stage assessment methodology. These stages are:



#### Stage 1: Identification of Settlements

- 3.2. The first stage in the proposed assessment methodology is to identify those settlements which should be included within it.
- 3.3. Shropshire Council proposes to include ‘recognisable named settlements’ within its assessment. A ‘recognisable named settlement’ comprises a group of houses occupied by households from different families. The group becomes a settlement due to the *number and proximity* of the houses in the group. Although a matter of judgment in each case, particularly for settlements where the number is small or where the houses are dispersed, for example strung along a road, it is the *combination* of these two factors that determines whether the dwellings constitute a settlement.
- 3.4. An ‘identifiable named settlement’ will usually:
- Be named on the Ordnance Survey map;
  - Be referred to in a consistent way by local people; and
  - Have a place name that is shared by a number of dwellings (although this may not be reflected in the postal address).
- 3.5. Using this methodology, Shropshire Council has identified around 550 ‘identifiable named settlements’ in Shropshire. Whilst this list may not be exhaustive, it identifies a significant proportion of ‘identifiable named settlements’ and it is considered an appropriate basis for undertaking this assessment. These settlements are listed within Annexe 1 of this document.

#### Stage 2: Screening of Settlements

- 3.6. The second stage of the proposed assessment methodology is to undertake an initial screening of the ‘identifiable named settlements’ identified for inclusion within the assessment.
- 3.7. The purpose of this screening is to identify those settlements which are unlikely to offer a range of services and facilities; employment opportunities; and public transport links, in order to focus the latter stages of assessment.

## Appendix 2: Hierarchy of Settlements Methodology

- 3.8. The proposed methodology for this screening is to use a combination of **settlement size** and **self-containment**.
- 3.9. Specifically a size threshold of 100 people or 50 dwellings is proposed. Where a settlement is below both of these thresholds, it will be assumed that the settlement, in isolation, will have limited potential to offer a range of services and facilities; employment opportunities; and public transport links and they will be screened-out.
- 3.10. The majority of settlements which exceed either of these thresholds will continue to the latter stages of assessment. However in certain circumstances the population or dwellings that make up a settlement may be dispersed over a large area and its centre unidentifiable. Due to this lack of a focal point for assessment, it is considered that such a settlement is unlikely to offer a range of services and facilities; employment opportunities; and public transport links. Such settlements will therefore be screened-out.

### Stage 3: Assessment of Screened-In Settlements

- 3.11. The third stage in the assessment is to undertake a review of each of the screened-in settlements, in order to understand how they function. This involves a consideration of the range of services and facilities; employment opportunities; and public transport links available within the settlement.
- 3.12. In order to allow comparison; ranking; and categorisation of settlements, it is proposed that a scoring system will be utilised. This scoring system will attribute points to a settlement based on the type and level of services and facilities; employment opportunities; and public transport links available.
- 3.13. The scoring system will also reflect the extent of the hinterland serviced by the amenities available within the settlement.

### Services and Facilities

- 3.14. The provision of a range of services and facilities within a settlement supports those living and working within the settlement itself and its surrounding hinterland. It also increases the potential that these communities will access services and facilities using sustainable modes of transport.
- 3.15. It is proposed that the following services and facilities will be included within this assessment:
 

<ul style="list-style-type: none"> <li>• Nursery/Pre-School</li> <li>• Primary School</li> <li>• Secondary School</li> <li>• Library</li> <li>• NHS Hospital</li> <li>• NHS GP Surgery / Primary Care Centre</li> </ul>	<ul style="list-style-type: none"> <li>• NHS Dentist</li> <li>• Chemist/Pharmacy</li> <li>• Supermarket</li> <li>• Convenience Store</li> <li>• Post Office</li> <li>• Bank/Building Society</li> <li>• Public House</li> </ul>	<ul style="list-style-type: none"> <li>• Petrol Station</li> <li>• Place of Worship</li> <li>• Community Hall</li> <li>• Leisure Centre</li> <li>• Children’s Playground</li> <li>• Outdoor Sports Facility</li> <li>• Amenity Green Space</li> </ul>
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- 3.16. For the purpose of scoring services and facilities, it is proposed that ‘weighting’ is applied to the points awarded, in order to reflect the fact that some services are considered ‘necessary to meet residents day to day needs’ whilst others are ‘nice to have but not essential’.
- 3.17. It is also proposed that in recognition of the increased capacity and resilience offered where there is more than one provider of the same service or facility within a settlement, additional points will be provided in circumstances where there are two or more of the same service or facility.
- 3.18. This proposed ‘weighted’ scoring is as follows:

**Table 1: Proposed Scoring of Services and Facilities**

Category	Description	Services and Facilities	Points		
			Service /	Multiple	Total

## Appendix 2: Hierarchy of Settlements Methodology

			Facility Provided	Provision	
<b>Primary Services</b>	Services and facilities that people need to use on a regular basis that are essential to everyday life.	• Nursery/Pre-School	4	2	6
		• Primary School	4	2	6
		• NHS GP Surgery	4	2	6
		• Convenience Store	4	2	6
		• Post Office	4	2	6
		• Petrol Station	4	2	6
		• Community Hall	4	2	6
<b>Secondary Services</b>	Services and facilities that people would expect to be available in larger settlements and are not needed on a day to day basis.	• Secondary School	3	1	4
		• Library	3	1	4
		• NHS Hospital	3	1	4
		• NHS Dentist	3	1	4
		• Chemist/Pharmacy	3	1	4
		• Supermarket	3	1	4
		• Bank/Building Society	3	1	4
		• Public House	3	1	4
		• Place of Worship	3	1	4
		• Leisure Centre	3	1	4
		• Children's Playground	3	1	4
		• Outdoor Sports Facility	3	1	4
		• Amenity Green Space	3	1	4
<b>Total Score Available:</b>			67	27	94

*\*In a rural settlement, a post office or petrol station offers multiple functions (e.g. banking, convenience and comparison shopping; and often acts as a community hub), so giving it special local importance in the assessment.*

### Employment Opportunities

- 3.19. The provision of significant employment opportunities within a settlement is important, as it provides people with the opportunity to live and work in the same area. It also increases the potential that sustainable modes of transport will be used for journeys to and from work.
- 3.20. A significant employment opportunity is defined as an industrial estate; business park; rural business centre; or individual employer which offers Use Class B (offices; research and development; light industry; general industry; and/or storage and distribution) or appropriate Sui-Generis (commercial and/or industrial activities) employment opportunities.
- 3.21. Where such significant employment opportunities are available, **10 points** will be awarded to the settlement.

### Public Transport Links

- 3.22. Public transport links within a settlement provide a community with the opportunity to utilise these modes of transport when travelling for work; for leisure; and to gain access to services and facilities that are not available within the specific settlement. Particularly where there is a regular service offered during peak travel times.
- 3.23. Reflecting this, where a settlement has a main line railway station or bus station (with an active service), it will be awarded **10 points**.
- 3.24. If the rail or bus services are regular and offered during peak travel times, the settlement will be awarded a further **10 points**. A service is considered regular and offered during peak travel times when it runs an outward service between 06.00 and 09.00, and a return service between 15.00 and 18.00, Monday-Friday.

### Hinterland Serviced by the Settlement

- 3.25. Where a settlement serves a wide rural hinterland, its services and facilities; employment opportunities; and public transport links are of value to not only the community of the settlement itself, but those within the wider rural area.



## Appendix 2: Hierarchy of Settlements Methodology

- 3.26. In situations where Shropshire Council Policy Officers judge that the settlement serves a wide rural hinterland, it is proposed that the added value of these services should be recognised through the award of **6 points**.

### Conclusion

- 3.27. Using this proposed methodology, the maximum score a settlement can achieve is 130 and the minimum score is 0. This is summarised within Table 2:

**Table 2: Settlement Function Scoring**

Category		Description	Function	Total Points
Services and Facilities	Primary Services	Services and facilities that people need to use on a regular basis that are essential to everyday life.	• Nursery/Pre-School	6
			• Primary School	6
			• NHS GP Surgery	6
			• Convenience Store	6
			• Post Office*	6
			• Petrol Station*	6
			• Community Hall	6
	Secondary Services	Services and facilities that people would expect to be available in larger settlements and are not needed on a day to day basis.	• Secondary School	4
			• Library	4
			• NHS Hospital	4
			• NHS Dentist	4
			• Chemist/Pharmacy	4
			• Supermarket	4
			• Bank/Building Society	4
			• Public House	4
			• Place of Worship	4
			• Leisure Centre	4
			• Children's Playground	4
			• Outdoor Sports Facility	4
• Amenity Green Space	4			
Employment Opportunities		An industrial estate; business park; rural business centre; or individual employer which offers Use Class B* or appropriate Sui-Generis*.	• Significant employment opportunity	10
Public Transport Links	Active Link	An active main line train station or active bus stop.	• Train station or bus stop	10
	Regular Link	A regular service offered during peak travel times**.	• Regular peak time public transport service	10
Supported Hinterland		The settlement is adjudged to serve a wide rural hinterland.	• Rural hinterland	6
<b>Maximum Score Available:</b>				<b>130</b>

\*In summary, Use Class B includes offices; research & development; light industry; general industry; and/or storage and distribution. Appropriate Sui-Generis comprises commercial and/or industrial activities.

\*\*A public transport service is considered to be regular and offered during peak travel times when it runs an outward service between 06.00 and 09.00 and a return service between 15.00 and 18.00, Monday to Friday.

### Stage 4: Categorisation of Settlements

- 3.28. Following the completion of the assessment of the range of services and facilities; employment opportunities; and public transport links available within settlements, the scores attributed to each settlement will be used to rank them within the settlement hierarchy.
- 3.29. It is proposed that an assessment of the similarities of settlements within the hierarchy will then be undertaken, in order to divide settlements into specific categories. The specific categories will be determined following the production of the hierarchy, however it is likely to include some or all of the following:
- Principal town;

## **Appendix 2: Hierarchy of Settlements Methodology**

- Large market towns;
- Key service centres;
- Community hub settlements; and
- Small rural settlements.

## Appendix 2: Hierarchy of Settlements Methodology

### Annex 1: 'Identifiable Named Settlements'

A1.1.

A1.2. Table 3 provides a list of the identified identifiable named settlements in Shropshire, sorted alphabetically:

**Table 3: 'Identifiable Named Settlements' in Shropshire**

Settlements		
Abdon	Berrington	Button Bridge
Ackleton	Berwick	Button Oak
Acton Burnell	Besom Woods/Wheathill	Callaughton
Acton Round	Bettws-Y-Crwyn	Calverhall
Acton Scott	Bicton	Cardeston
Adderley	Billingsley	Cardington
Alberbury	Bings Heath	Castle Pulverbatch
Albrighton	Binweston	Catherton Common
Albrighton (Pimhill)	Bishops Castle	Caynham
Aldon	Bitterley	Cefn Blodwel
All Stretton	Black Hole	Cefn Einion
Allfordgreen	Bletchley	Chapel Lawn
Alveley	Bomere Heath	Chavel
Angel Bank/Farden	Boningale	Chelmarsh
Annscroft	Boraston	Cheney Longville
Arscott	Boulton	Chesterton
Ash Magna/Ash Parva	Boulton	Cheswardine
Ashford Bowdler	Bourton	Chetton
Ashford Carbonell	Bourton Westwood	Childs Ercall
Asterley	Brandhill	Chipnall
Asterton	Breadon Heath	Chirbury
Astley	Bridgnorth	Chirk Bank/Gledrid
Astley Abbots	Broad Oak/Six Ashes	Chorley
Aston	Brockton (Lydbury North Parish)	Church Preen
Aston Botterell	Brockton (Shipton Parish)	Church Pulverbatch
Aston Eyre	Brockton (Sutton Maddock Parish)	Church Stretton
Aston Munslow	Brockton (Worthen With Shelve Parish)	Claverley
Aston Pigott	Bromdon	Clee Hill/The Knowle
Aston Rogers	Bromfield	Clee St Margaret
Aston-On-Clun	Bromlow	Cleedownton
Atcham	Brompton	Cleestanton
Babbinswood	Broncroft	Cleeton St Mary
Badger	Bronygarth/Castle Mill	Cleobury Mortimer
Bagginswood	Broome	Cleobury North
Bagley	Broseley	Clive
Barkers Green	Broughall	Clun
Barrow	Brown Heath	Clunbury
Baschurch/Newtown/Prescot	Bryn	Clungunford/Abcot
Bayston Hill	Bryn Melyn	Clunton
Beambridge/Aston Mill	Bucknell	Cockshutford
Beckbury	Buildwas	Cockshutt
Beckjay	Burford	Coed-Y-Go
Bedlam	Burlton	Colebatch
Bedstone	Burwarton	Colemere

## Appendix 2: Hierarchy of Settlements Methodology

Bentlawnt	Bushmoor/Leamoor Common	Colemore Green
<b>Settlements</b>		
Condoover	Eyton	Hilton
Coppice Gate	Eyton On Severn	Hindford
Coreley	Farley	Hinstock/Woodlane
Corfton/Corfton Bache/Bache Mill	Farlow	Hinton
Cosford/Donington	Faulsgreen	Hints
Cound/Upper Cound	Felhampton	Hodnet/Hodnet Heath
Coundmoor/Evenwood Common	Felton Butler	Holdgate
Crackley Bank	Fenn Green	Hollinwood
Craven Arms	Fitz	Homer
Cressage	Ford	Hookagate
Crickheath	Ford Heath	Hope
Croesaubach	Forton Heath/Mytton	Hope Bagot
Cross Houses	Four Crosses	Hope Bowdler
Cross Lane Head	Frodesley	Hopesay
Crows Nest	Garmston	Hopesgate
Cruckmeole	Glazeley	Hopton Bank
Cruckton	Gleedon Hill	Hopton Cangeford
Culmington	Glynmorlas/Rhyn	Hopton Castle
Darliston	Gobowen/Rhewl	Hopton Heath
Deuxhill	Grafton	Hopton Wafers
Dhustone	Gravels (including Gravels Bank)	Hopton/Valeswood
Diddlebury	Great Ness	Horderley
Ditton Priors	Great Wytheford	Hordley
Dobsons Bridge/Roving Bridge	Great/Little Sutton	Horsebridge
Doddington	Greete	Howle
Dolgoch	Grimpo	Hughley
Donnington/Charlton Hill	Grindle	Hungerford/Broadstone
Dorrington	Grindley Brook	Ightfield
Dovaston	Grinshill	Jackfield
Dovaston (Bank)	Habberley	Kemberton
Draycott	Hadnall	Kempton
Dudleston	Halfway House	Kenley
Dudleston Heath/Gadlas	Halston/Plealey Road	Kinlet
Eardington	Hampton Loade	Kinnerley
Eardiston	Hanwood	Kinton
East Wall	Hanwood Bank	Knockin
Easthope	Harley	Knockin Heath
Eaton Constantine	Harmer Hill	Knowbury
Eaton Upon Tern	Hatton	Lea
Edge	Haughton (Upton Magna)	Lea Cross
Edgebolton/Moretonmill	Haughton (West Felton)	Leaton
Edgerley	Haytons Bent/Up Lo Hayton	Lee
Edgton/Basford	Heath	Lee Brockhurst
Edstaston	Heath Common	Leebotwood
Ellesmere Urban	Heath Hill	Leigh
Elson	Heathton	Leighton
Enchmarsh	Hemford	Lilyhurst
English Frankton	High Hatton	Little Brampton
Ensdon	Highley/Netherton	Little Brockton
Exfords Green/Lower Common	Hill Houses	Little Ness

## Appendix 2: Hierarchy of Settlements Methodology

Settlements		
Little Stretton	Morda	Pitchford
Little Worthen	More	Plaish
Llanfair Waterdine	Moreton Corbet	Platt Lane
Llanyblodwel	Moreton Say	Plealey
Llanymynech	Morton/Morton Common	Ploggreen
Llynclys	Morville	Pont Faen
Lockleywood	Much Wenlock	Pontesbury
Long Meadow End	Muckley	Pontesbury Hill
Longden	Muckley Cross	Pontesford
Longden Common	Munslow	Porthywaen
Longford	Myddle	Posenhall
Longnor	Nantmawr	Prees / Prees Wood
Longslow	Nash	Prees Green
Longville In The Dale	Neen Savage	Prees Heath
Longwood	Neen Sollars	Prees Higher Heath
Loppington	Neenton	Prees Lower Heath
Lordstone	Nesscliffe	Preston
Loughton	Netchwood Common	Preston Brockhurst
Lower Frankton	New Marton	Preston Gubbals
Lower Hordley/Bagley Marsh	Newbanks	Preston Montford
Ludlow	Newcastle	Priest Weston
Lydbury North	Newtown	Priors Halton
Lydham	Noneley/Commonwood/Ruewood	Purslow
Lyneal	Norbury	Quatford
Lyth Bank/Lyth Hill	Nordley	Quatt
Maesbrook/Maesbrook Green	Nordley Common	Queens Head
Maesbury	Northwood	Quina Brook
Maesbury Marsh	Norton	RAF Tern Hill
Mainstone	Norton In Hales	Ratlinghope
Marchamley	Nox	Rednal
Market Drayton	Obley	Rhoswel
Marshbrook	Oldbury	Rhyd-y-Croesau
Marton	Ollerton	Richards Castle/Batchcott
Meadowtown	Onibury	Romsley
Melverley	Oreton	Rorrington
Melverley Green	Oswestry	Rosehill
Merrington	Overton	Roughton
Middle/Lower Hengoed	Pant Glas	Round Oak
Middlehope	Pant/Pen-y-Coed	Rowley
Middleton	Park Hall	Rowton
Middleton Priors	Peaton	Ruckley/Langley
Middleton Scriven	Peatonstrand	Rudge
Middleton/Aston Square	Pennerley/The Bog/Tankerville	Rudge Heath
Mill Green	Pentervin	Rushbury/Roman Bank
Milson	Pentre	Rushton
Minsterley	Pentreheyling	Ruyton XI Towns
Minton	Peplow	Ryton
Monkhopton	Petton	Ryton (Condoover)
Montford	Picklescott	Sansaw Heath
Montford Bridge	Pipegate	Seifton

## Appendix 2: Hierarchy of Settlements Methodology

Settlements		
Selattyn	Tern Hill	Weston (Stowe)
Shawbury	Ternhill	Weston And Wixhill
Sheinton	Tetchill	Weston Heath
Shelderton	The Down	Weston Heath (Sherrifhales)
Shelve	The Hobbins	Weston Lullingfields
Shepherds Lane/Calcott	The Hope	Weston Rhyn/Preesgweene
Sheriffhales	The Sheet	Weston Wharf/Weston Common
Shifnal	The Smithies	Whitchurch Urban
Shipley	The Wern	Whitcot
Shipton	Ticklerton	Whitcot Keysett
Shorthill	Tilley	Whitemere
Shrawardine	Tilstock	Whittingslow
Shrewsbury	Tong	Whittington
Sibdon Carwood	Tong Norton	Whitton
Sidbury	Treflach	Whittytree/Duxmoor
Siefton	Trefonen	Whixall
Siefton Bache	Tuckhill	Wilcott
Silvington	Tugford	Wistanstow
Snailbeach	Twitchen (Three Ashes)	Wistanswick/Crickmery
Snitton	Tyrley	Withington
Soudley	Uffington	Wollaston
Soudley (Great)	Upper Affcot	Wollerton
Spurtree/Hammerhill	Upper Astley	Woodseaves
St Martins Moor	Upper Hengoed	Woofferton
St Martins/Ifton Heath	Uppington	Woolstaston
Stableford	Upton Cressett	Woolston (Oswestry Parish)
Stanley Green	Upton Magna	Woolston (Wistanstow Parish)
Stanmore Camp	Vennington	Woore/Irelands Cross
Stanton Lacy	Vernolds Common	Wooton
Stanton Long	Vron Gate	Worfield
Stanton Upon Hine Heath	Walcot	Worthen
Stanwardine in the Fields	Walford Heath/Oldwood	Wotherton
Stapleton	Walkmill	Wrentnall
Stapleton Common	Wall Under Heywood	Wroxeter
Stiperstones/Perkins Beach	Wallbank	Wyken
Stockton	Walton (Onibury)	Wykey
Stoke Heath	Waterloo	Yeaton
Stoke St Milborough	Wattlesborough Heath	Yockleton
Stoke Upon Tern	Weirbrook	Yorton
Stokesay	Welsh Frankton/Perthy	
Stoney Stretton	Welshampton	
Stottesdon	Welshend	
Stowe	Wem Urban	
Street Dinas	Wentnor	
Strefford	Wern Ddu	
Stretford Bridge	West Felton	
Stretton Westwood	Westbury	
Sutton	Westhope	
Sutton Maddock	Westley	
Sweeney Mountain/Nant-Y-Caws	Weston	

### Appendix 3: Community Clusters within the SAMDev Plan

Community Cluster Settlements	Place Plan Area
Abcot, Beckjay, Clungunford, Hopton Heath, Shelderton and Twitchen (Three Ashes)	Bishops Castle
Brompton, Marton, Middleton, Pentreheyling, Priest Weston, Stockton and Rorrington	Bishops Castle
Bucknell	Bishops Castle
Chirbury	Bishops Castle
Clun	Bishops Castle
Hope, Bentlawnt, Hopesgate, Hemford, Shelve, Gravels (including Gravels Bank), Pentervin, Bromlow, Meadowtown and Lordstone	Bishops Castle
Lydbury North	Bishops Castle
Snailbeach, Stiperstones, Pennerley, Tankerville, Black Hole, Crows Nest and The Bog.	Bishops Castle
Wentnor and Norbury	Bishops Castle
Worthen, Brockton, Little Worthen, Little Brockton, Binweston, Leigh, Rowley, Aston Rogers and Aston Pigott.	Bishops Castle
Acton Round, Aston Eyre, Monkhopton, Morville and Upton Cressett	Bridgnorth
Ditton Priors	Bridgnorth
Hopton Wafers and Doddington	Bridgnorth
Kinlet, Button Bridge, Button Oak	Bridgnorth
Neenton	Bridgnorth
Oreton, Farlow and Hill Houses	Bridgnorth
Silvington, Bromdon, Loughton and Wheathill	Bridgnorth
Stottesdon, Chorley and Bagginswood	Bridgnorth
Aston on Clun, Hopesay, Broome, Horderley, Beambridge Long Meadow End, Rowton, Round Oak	Craven Arms
Bache Mill, Boulton, Broncroft, Corfton, Middlehope, Peaton, Seifton, (Great/Little) Sutton, Westhope	Craven Arms
Stoke St Milborough, Hopton Cangeford, Cleestanton, Cleedownton	Craven Arms
Cockshutt	Ellesmere
Dudleston and Street Dinas	Ellesmere
Dudleston Heath and Elson	Ellesmere
Tetchill, Lee and Whitemere	Ellesmere
Welsh Frankton, Perthy, New Marton and Lower Frankton	Ellesmere
Welshampton and Lyneal	Ellesmere
Burford	Ludlow
Clee Hill	Ludlow
Onibury	Ludlow
Adderley	Market Drayton
Bletchley, Longford, Longslow & Moreton Say	Market Drayton
Cheswardine	Market Drayton
Childs Ercall	Market Drayton
Hinstock	Market Drayton
Hodnet	Market Drayton
Marchamley, Peplow and Wollerton	Market Drayton
Stoke Heath	Market Drayton

### Appendix 3: Community Clusters within the SAMDev Plan

Community Cluster Settlements	Place Plan Area
Woore, Irelands Cross and Pipe Gate	Market Drayton
Buildwas	Much Wenlock
Gobowen	Oswestry
Kinnerley, Maesbrook, Dovaston and Knockin Heath	Oswestry
Knockin	Oswestry
Llanyblodwel, Porthywaen, Dolgoch, Llyncllys and Bryn Melyn	Oswestry
Llanymynech and Pant	Oswestry
Park Hall, Hindford, Babbinswood and Lower Frankton	Oswestry
Ruyton XI Towns	Oswestry
Selattyn, Upper, Middle & Lower Hengoed and Pant Glas	Oswestry
St Martins	Oswestry
Weston Rhyn, Rhoswel, Wern and Chirk Bank	Oswestry
Whittington	Oswestry
Albrighton	Shrewsbury
Baschurch	Shrewsbury
Bayston Hill	Shrewsbury
Bicton and Four Crosses	Shrewsbury
Bomere Heath	Shrewsbury
Condover, Dorrington, Stapleton	Shrewsbury
Fitz, Grafton and Newbanks	Shrewsbury
Great Ness, Little Ness, Wilcott, Hopton/Valeswood, Kinton and Felton Butler	Shrewsbury
Hanwood and Hanwood Bank	Shrewsbury
Longden, Hook-a-gate, Annscroft, Longden Common and Lower Common/Exfords Green	Shrewsbury
Montford Bridge West	Shrewsbury
Mytton	Shrewsbury
Nesscliffe	Shrewsbury
Uffington	Shrewsbury
Walford Heath	Shrewsbury
Weston Lullingfields, Weston Wharf and Weston Common	Shrewsbury
Myddle and Harmer Hill	Wem
Shawbury	Wem
Prees and Prees Higher Heath	Whitchurch
Tilstock, Ash Magna/Ash Parva, Prees Heath, Ightfield and Calverhall	Whitchurch





## Committee and Date

Cabinet

18<sup>th</sup> January 2017

## **MARCHES BUSINESS BROADBAND GRANT SCHEME (MBBGS)**

**Responsible Officer** Chris Taylor, Connecting Shropshire Programme Manager

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Tel: 01743 252205

### **1. Summary**

The report sets out a recommendation to reallocate unspent Phase 1 Broadband Delivery UK (BDUK) grant funding to support a complimentary Marches ERDF (European Regional Development Funding) project. This will enable SME's who are not benefiting from current Connecting Shropshire contract delivery projects, to get a grant towards Next Generation Access (NGA) broadband (capable of 30 megabits per second) or Business Grade broadband (BGB).

### **2. Recommendations**

Cabinet agrees:

- 2.1 That £842,853 from decommissioned contract obligations, in its BDUK Phase 1 project, is swapped for capital ring fenced funding in its Phase 2b procurement. The released capital of £842,853 will be used to enable Shropshire Council to draw down an additional £1,331,825 ERDF funding to support businesses with individual grants that will enable NGA or BGB.

## **REPORT**

### **3. Financial Implications**

- 3.1 Following decommissioning of some contract obligations in the Connecting Shropshire BDUK Contract 1, £842,853 match funding has been identified. BDUK have endorsed and approved the reuse of the grant funding for this purpose.
- 3.2 A sum of £842,853 will be reallocated. The funding will be swapped with capital funding currently allocated in Connecting Shropshire's Phase 2b procurement that is in progress.
- 3.3 Shropshire Council will need to contribute £23k revenue funding which can be found from within existing budgets.

## **4. Background**

- 4.1 Connecting Shropshire, together with Superfast Telford and Herefordshire Council, who are acting as the lead applicant, applied for project ERDF funding. The funding will enable the roll out of NGA and BGB that will support the adoption of emerging technologies within the digital economy.
- 4.2 The MBBGS project is valued at £3,956,572 in total (from partners' contributions and ERDF grant funding) and was approved by the Department for Communities & Local Government in November 2016, with subsequent ratification by the Marches ESIF committee on 28<sup>th</sup> November 2016. Herefordshire, and Telford and Wrekin Councils have pro rata funding secured and committed for the MBBGS project.
- 4.3 The MBBGS project is designed to complement current BDUK contracts that are in deployment by all three local bodies. ERDF funding will enable the LEP to focus its intervention specifically at qualifying SME's that currently are projected to fall outside of the current commitments. The MBBGS project will provide both individual and groups of business, with access to financial support to get access to NGA and BGB. The project will support an essential component that all businesses now rely upon in the evolving digital economy.
- 4.4 The project will only be open to those SMEs within Herefordshire, Shropshire and Telford & Wrekin, which at the point of award have neither been enabled with superfast broadband by the mainstream Fastershire, Connecting Shropshire and Superfast Telford projects or any commercial broadband investment across the participating Local Authorities areas. In this regard the MBBGS project will add significant value to those extensive efforts to achieve wide scale superfast broadband coverage (which is agnostic to connectivity need or demand) by enabling more intensive intervention to be applied to qualifying SMEs in the local bodies unserved areas.
- 4.5 It is anticipated that 253 businesses will be supported across the Marches through the programme based on an average grant sum of £15,000. It remains highly possible that the average costs will be reduced over the term of the contract to enable significantly higher outputs to be achieved.
- 4.6 The anticipated number of businesses directly benefitting from the intervention in Shropshire will be a minimum of 150.

## **5. Risk and Opportunities**

- 4.1 Connecting Shropshire are currently undertaking a new procurement (Phase 2b) to address the remaining projected gaps in the Shropshire Council area. This new procurement includes a strategy that will specifically incentivise bidders to address registered business premises as a priority. The approach could potentially reduce the number of business premises that could qualify for a grant from the MBBGS project.

- 4.2 The Local bodies' project have adopted a cautious approach in estimating the numbers of business, which could qualify for, grant funding and the average cost in doing so. Should the average scale of grants materialise at a lower average cost, or if aggregation schemes enable solutions to be provided across multiple occupancy sites, a higher call targets may ultimately be deliverable.
- 4.3 Take up of grants may be lower than expected. The risk can be managed with close coordination with key stakeholders and a proactive marketing strategy.

**5 Conclusion**

- 6.1 The reallocation of Phase 1 current funding will support an additional project, which will specifically support the critical area of improved broadband for qualifying businesses.

<b>List of Background Papers (This MUST be completed for all reports, but does not include items containing exempt or confidential information)</b> 13-07-2016 Cabinet – Connecting Shropshire Broadband Strategy 27-07-2016 Cabinet - Connecting Shropshire Phase 2 Procurement Strategy 28-11-2016 The Marches ESI Funds Sub-Committee	
<b>Cabinet Member (Portfolio Holder)</b> Councillor Steve Charmley – Deputy Leader	
<b>Local Member</b> All members	
<b><u>Glossary</u></b>	
<b>BDUK</b>	Broadband Delivery UK
<b>BGB</b>	Business Grade Broadband can be described as <ul style="list-style-type: none"> <li>• Dedicated/uncontended</li> <li>• Can be symmetric</li> <li>• Supported with service level guarantees</li> <li>• &gt;20Mbps Download &amp; capable of being configured/upgraded to support &gt;30Mbps; and</li> <li>• &gt;2x faster than any current business grade connection to the location</li> </ul>
<b>ERDF</b>	European Regional Development Funding
<b>LEP</b>	Local Enterprise Partnership
<b>MBBGS</b>	Marches Business Broadband Grant Scheme
<b>MBPS</b>	Megabits Per second
<b>NGA</b>	Next Generation Access (defined as capable of 30 Mbps)

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## Committee and Date

Cabinet

18 January 2017

## **SHROPSHIRE SCHOOLS FUNDING FORMULA 2017-18**

**Responsible Officer** Karen Bradshaw

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### **1. Summary**

On 21 July 2016 the Department for Education (DfE) announced that the funding arrangements for schools in 2017-18 will remain broadly similar to those for the current year. The announcement included reference to the Government's latest plans for implementing a national fair funding formula for schools - the timeline has slipped and implementation is now planned for 2018-19 rather than 2017-18.

Shropshire Schools Forum, at their meeting on 15 September 2016, noted the revised timescale for implementation of a new national funding formula for schools and agreed the school funding arrangements for 2017-18.

The Education Funding Agency (EFA) require the proposed formula to be politically approved by Members by mid-January 2017. This paper therefore sets out the proposals agreed by the Shropshire Schools Forum for Cabinet approval.

A further announcement was made on 1 December 2016 on the schools funding arrangements for 2017 to 2018, which has significant implications for the funding of a number of statutory local authority support services for maintained schools, through planned changes to the allocation of Education Services Grant (ESG). This paper briefs Cabinet on these planned changes and their implications.

### **2. Recommendations**

That Cabinet:

- accept the recommendation of Shropshire Schools Forum on the funding formula for Shropshire schools for the financial year 2017-18 for maintained schools, and the academic year 2017-18 for academies
- note the changes to the allocation of ESG to local authorities in 2017-18 and the potential implications.

## **REPORT**

### **3. Risk Assessment and Opportunities Appraisal**

The 21 July 2016 DfE announcement that there are no planned changes to the schools funding formula for 2017-18, means that there was no requirement to formally consult with maintained schools and academies on this aspect of schools funding.

The Government's announcement on 1 December 2016 on planned changes to the ESG received by local authorities, however, has far-reaching implications for both local authority support services for schools, the way in which schools are funded in 2017-18 and access to education support services.

There is no time to formally consult with schools ahead of the local authority requirement to submit an Authority Proforma Tool (APT) to the EFA by 20 January 2017, confirming the schools funding formula for 2017-18. This is a risk, as the formula and therefore school budgets are likely to be impacted upon by the planned removal of ESG.

### **4. Financial Implications**

The announcement on 1 December of the removal of the ESG general funding rate for local authorities will result in a full year loss of £1.946 million of local authority funding to support statutory work in support of schools. While local authorities will be able to offset some of this loss of funding via a new separate grant to cover their statutory intervention functions and services (such as monitoring and commissioning school improvement support), this will only cover part of the grant loss.

The DfE is proposing that local authorities will be able to fund services previously underwritten by the ESG general funding rate (for maintained schools only) from maintained school budget shares with the agreement of maintained school members of the Schools Forum.

A Schools Forum Task & Finish Group has been established to appraise the options available, but have limited delegated authority to make key decisions affecting school budgets without the opportunity to consult with their peers from across the whole school community. The lateness of the DfE announcement, together with the requirement to submit the APT by 20 January 2017, means there is limited opportunity to do this.

### **5. Background**

Shropshire Schools Forum has a statutory consultative and advisory role in respect of school funding, while the responsibility for determining and approving the funding formula rests with the local authority. The EFA require formal political approval of the schools funding formula, hence why this paper has been brought to Cabinet.

The Government allocates Dedicated Schools Grant (DSG) funding to local authorities on an annual basis. While an element of this funding is centrally retained – in line with DSG financial regulations - the vast majority is distributed to schools via a local funding formula. This formularised element of DSG is called the Individual Schools Budget (ISB).

## 6. School Funding Arrangements for 2017-18

In the announcement on 21 July 2016, the Government has confirmed that for 2017-18 no local authority will see a reduction from their 2016-17 per pupil funding on the schools block of the DSG or the cash amount of the high needs block.

At their meeting on 15 September 2016, Schools Forum considered and noted a report on these proposals, which highlighted there was little or no change – at this point - to the funding arrangements for schools (report attached at Appendix A).

The Government’s announcement on 1 December 2016, with further details on the proposals for removing the ESG general funding rate, came after Forum received their report and so they have not had the opportunity to be consulted on or properly consider the impact on school budgets resulting from these plans. Forum established a Task & Finish Group at their meeting on 24 November 2016 to consider the issues, once Government guidance was released.

## 7. Removal of ESG in 2017-18

In the 2015 Spending Review the Government announced a saving of £600 million by removing the ESG general funding rate from 2017-18. As part of the first stage of the consultation on the introduction of a national fair funding formula, they indicated their intention to provide transitional funding from April to August 2017, before removing it completely in September 2017.

The ESG allocation for Shropshire in 2016-17 is detailed below:

	<b>Per Pupil Rate</b>	<b>Total ESG</b>
<b>Retained duties rate</b>	£15	£0.558 million
<b>General duties rate</b>	£77	£1.946 million
<b>Total ESG Allocation</b>		£2.504 million

It is the general duties rate of £77 that is being removed from local authorities. Academies will continue to receive the general duties rate ESG and will be protected to limit the reduction to their funding as a result to changes to ESG. The first stage of the consultation on the introduction

of a national fair funding formula stated that there are plans to ‘unwind this protection by 2020’ for academies.

Taking into account the transitional funding available from April to August 2017, the loss of general duties ESG in 2017-18 is estimated to be £1.4 million.

The guidance received on 1 December 2016 provides details on the ESG duties, both retained and general – Appendix B to this paper includes an extracted table from the guidance listing these duties.

School improvement is not included in the appended table. The Government has reported that local authorities will receive a separate grant ‘covering their statutory intervention functions and services such as monitoring and commissioning school improvement support’. The grant will be £50 million nationally in a full year. At the time of writing, the allocations for local authorities have yet to be announced.

The options available to local authorities in recouping the lost ESG funding across the various support services are:

- to retain schools block funding for certain support services prior to the school budget shares being determined, effectively ‘top-slicing’ DSG – as this will only affect maintained schools, this will result in different formulas for maintained schools and academies
- to de-delegate funding for maintained schools after the budget shares have been determined – this option is only available for school improvement services
- to establish Service Level Agreements to allow maintained schools to ‘buy-back’, from September 2017, statutory education support services previously funded by ESG.

There is the option to cease providing some of these services, requiring schools to secure this support from other sources.

Each of the options outlined above will have a significant impact on all maintained schools, while having little impact on academies, who will continue to receive their allocation of ESG for general duties. They will add cost pressures for maintained schools, over and above those already being faced.

The Schools Forum Task & Finish Group meet on 12 January 2017 to consider proposals on how to address the loss of ESG general duties funding and will be asked to make a number of important decisions on behalf of all maintained schools. While the full Schools Forum will meet on 19 January 2017, there will be no opportunity to amend the decisions of the Task & Finish Group, as the APT confirming the schools funding formula for 2017-18 has to be submitted to the EFA by 20 January 2017.



A verbal update on the options considered and the decisions taken will be provided at the Cabinet meeting on 19 January 2017.

**List of Background Papers (This MUST be completed for all reports, but does not include items containing exempt or confidential information)**

Cabinet Report 10 December 2014: Shropshire Schools Funding Formula 2015-16  
Schools Forum website - <http://shropshire.gov.uk/schools/shropshire-schools-forum/>

**Cabinet Member (Portfolio Holder)**

David Minnery

**Local Member**

All Council members

**Appendices**

Appendix A - Schools Forum 'School Funding 201' report, 15 September 2016

Appendix B – Extract from Schools revenue funding 2017 to 2018 – Operational guide – Updated November 2016

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**Schools Forum**

Date: 15 September 2016

Time: 8:30 a.m.

Venue: Shrewsbury  
Training and Development  
Centre

Paper

Public

**School Funding 2017-18****Responsible Officer** Gwyneth Evans

e-mail: gwyneth.evans@shropshire.gov.uk Tel: 01743 254865 Fax: 01743 340034

**Summary**

The Department for Education (DfE) announced on 21 July 2016 their latest plans for the implementation of a national fair funding formula for schools.

The Government published a first stage consultation in March 2016 on the principles of a new national funding formula and had planned to publish a second stage consultation during the summer with implementation from April 2017.

Whilst the Government remains committed to introducing fairer funding for schools, high needs and early years, this latest announcement confirms that changes proposed in the first stage consultation will not be implemented for 2017-18. The new system will now apply from 2018-19.

The funding arrangements for schools for 2017-18 will remain broadly similar to the current year. This report details the funding arrangements for 2017-18.

**Recommendation**

- To note the revised timescale for implementation of a new national funding formula for schools and the school funding arrangements for 2017-18.
- To provide feedback on the proposed new layout for 2017-18 individual budget share information for Shropshire maintained schools.

**Report****New National Funding Formula**

1. The DfE published the first stage consultation on a new national funding formula for schools in March 2016. The second stage consultation was expected during the summer 2016 with implementation from April 2017.

2. However the Government announced on 21 July 2016 that the new national funding formula will now apply from 2018-19. Their intention is to publish a full response to the first stage consultation and set out proposals for the second stage consultation in the autumn 2016 with final decisions being made early in the new year.
3. In light of the delayed introduction of a national fair funding formula, f40 has written to the Secretary of State requesting a funding uplift for schools in the poorest funded local authorities for 2017-18. A copy of the letter is attached to this report at Appendix 1. To date there has been no response.
4. As expected, on the 11 August 2016 the Government published a consultation on an early years national funding formula and changes to the way three and four year old entitlements to childcare are to be funded. A summary of the consultation document is provided in a separate report to Schools Forum.

### **School Funding Arrangements for 2017-18**

5. The government has confirmed that for 2017-18 no local authority will see a reduction from their 2016-17 per pupil funding on the schools block of the Dedicated Schools Grant (DSG) or the cash amount of the high needs block. As usual, an uplift for high needs will be applied later in the year.
6. The current minimum funding guarantee (MFG) for schools will be retained so that no school can face a funding reduction of more than 1.5% per pupil in funding received through the local authority funding formula.
7. Proposals made in the first stage of the national funding formula consultation to create a new Central Schools Block, allow local flexibility on the MFG and to ring-fence the Schools Block within the DSG will not be implemented for 2017-18.
8. The arrangements for 2017-18 are broadly similar to the current 2016-17 year. The main changes are:
  - The DSG blocks have been re-baselined to reflect current spending patterns
  - Funding for Education Services Grant (ESG) retained duties (£15 per pupil) will be transferred into the Schools Block for 2017-18
  - The removal of the post 16 funding factor within the schools' funding formula, but with protection through the MFG
  - That local authorities will be able to retain funding from the DSG from maintained schools, including special schools and pupil referral units (PRUs), for statutory duties previously covered by the ESG
  - Using a national weighting for secondary low attainment figures
  - Using new bandings for the index of deprivation affecting children (IDACI)
  - That local authorities are submitting one Authority Proforma Tool (APT) in January 2017.

9. Local authorities must engage in open and transparent consultation with all maintained schools and academies in the area, as well as its Schools Forum about any proposed changes to the local funding formula including the method, principles and rules adopted. Given there are no major changes to the funding formula for 2017-18, funding information and any necessary consultation with schools will be in writing only. There are no plans to hold a Lord Hill briefing event this autumn. However, a communication will go out to all schools following the meeting of Schools Forum to brief them on the revised Government proposals.

### **2017-18 Budget Share Information to Shropshire Maintained Schools**

10. The DfE will publish DSG Schools Block and High Needs Block allocations for 2017-18 along with provisional Early Years Block allocations in mid-December 2016. The deadline for the submission of the final 2017-18 APT to the Education Funding Agency (EFA) is 20 January 2017. The deadline for confirmation of schools budget shares to maintained schools is 28 February 2017.
11. The local authority intends to use the APT layout for publishing individual school budget share information to Shropshire maintained schools for 2017-18. This will ensure maintained schools receive their individual budget shares as soon as possible after submission to the EFA in January 2017.
12. The proposed format for the 2017-18 individual budget share information to schools is attached at Appendix 2 to this report for comment.

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## Extract from Schools revenue funding 2017 to 2018 – Operational guide Updated November 2016

90. For 2017 to 2018, the general duties rate is ending and funding previously allocated through the ESG retained duties rate (£15) will be transferred into the schools block. Local authorities will be able to fund central services previously funded within the retained duties rate (for all schools), with the agreement of schools forum. They will be able to fund services previously funded within the general duties rate (for maintained schools only) from maintained school budgets shares with the agreement of maintained school members of the schools forum. The split of services between the two groups is shown at Table 6. References are to the schedules in the current schools and early years finance (England) regulations.

<b>ESG DUTIES</b>	
Responsibilities local authorities hold for all schools (funding may be retained centrally from all schools with agreement of schools forum)	Responsibilities local authorities hold for maintained schools (funding may be retained centrally from <u>maintained schools only</u> with agreement of schools forum)
<p><b><u>Statutory and Regulatory duties</u></b></p> <p>Director of children's services and personal staff for director (Sch 1, 20a)</p> <p>Planning for the education service as a whole (Sch 1, 20b)</p> <p>Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 1, 20d)</p> <p>Administration of grants (Sch 1, 20e)</p> <p>Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 1, 20fi)</p> <p>Formulation and review of local authority schools funding formula (Sch 1, 20g)</p> <p>Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA</p>	<p><b><u>Statutory and Regulatory duties</u></b></p> <p>Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 1, 20c)</p> <p>Budgeting and accounting functions relating to maintained schools (Sch 1, 20d)</p> <p>Functions relating to the financing of maintained schools (Sch 1, 20e)</p> <p>Authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Sch 1, 20fii)</p> <p>Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 1, 20h)</p> <p>Internal audit and other tasks related to the authority's chief finance officer's responsibilities</p>

<b>ESG DUTIES</b>	
Responsibilities local authorities hold for all schools (funding may be retained centrally from all schools with agreement of schools forum)	Responsibilities local authorities hold for maintained schools (funding may be retained centrally from <u>maintained schools only</u> with agreement of schools forum).
<p>1972 except duties specifically related to maintained schools (Sch 1, 20i)</p> <p>Consultation costs relating to non-staffing issues (Sch 1, 20r)</p> <p>Plans involving collaboration with other LA services or public/voluntary bodies (Sch 1, 20v)</p> <p>Standing Advisory Committees for Religious Education (SACREs) (Sch 1, 24)</p> <p>Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 1, 20w)</p>	<p>under Section 151 of LGA 1972 for maintained schools (Sch 1, 20i)</p> <p>Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 1, 20j)</p> <p>Investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Sch 1, 20L)</p> <p>Functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Sch 1, 20m)</p> <p>Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 1, 20n)</p> <p>HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition/organisation of staff (Sch 1, 20o); determination of conditions of service for non-teaching staff (Sch 1, 20p); appointment or dismissal of employee functions (Sch 1, 20q)</p> <p>Consultation costs relating to staffing (Sch 1, 20r)</p> <p>Compliance with duties under Health and Safety at Work Act (Sch 1, 20s)</p> <p>Investigation and resolution of complaints relating to maintained schools (Sch 1, 20t)</p> <p>Provision of information to or at the request of the Crown relating to schools (Sch 1, 20w)</p> <p>School companies (Sch 1, 20x)</p>



<b>ESG DUTIES</b>	
Responsibilities local authorities hold for all schools (funding may be retained centrally from all schools with agreement of schools forum)	Responsibilities local authorities hold for maintained schools (funding may be retained centrally from <u>maintained schools only</u> with agreement of schools forum)
	<p>Functions under the Equality Act 2010 (Sch 1, 20y)</p> <p>Establish and maintaining computer systems, including data storage (Sch 1, 22)</p> <p>Appointment of governors and payment of governor expenses (Sch 1, 26)</p>
<p><b><u>Education Welfare</u></b></p> <p>Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 1, 10c)</p> <p>School attendance (Sch 1, 11)</p> <p>Responsibilities regarding the employment of children (Sch 1, 29)</p>	<p><b><u>Education Welfare</u></b></p> <p>Inspection of attendance registers (Sch1, 11)</p>
<p><b><u>Asset management</u></b></p> <p>Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 1, 10a)</p> <p>General landlord duties for all buildings owned by the local authority, including those leased to academies</p>	<p><b><u>Asset management</u></b></p> <p>General landlord duties for all maintained schools (Sch 1, 10a (section 542(2) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have:</p> <ul style="list-style-type: none"> <li>• appropriate facilities for pupils and staff (including medical and accommodation)</li> <li>• the ability to sustain appropriate loads</li> <li>• reasonable weather resistance</li> <li>• safe escape routes</li> <li>• appropriate acoustic levels</li> <li>• lighting, heating and ventilation which meets the required standards</li> <li>• adequate water supplies and drainage</li> <li>• playing fields of the appropriate standards</li> </ul>

<b>ESG DUTIES</b>	
Responsibilities local authorities hold for all schools (funding may be retained centrally from all schools with agreement of schools forum)	Responsibilities local authorities hold for maintained schools (funding may be retained centrally from <u>maintained schools only</u> with agreement of schools forum)
	<p>General health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc Act 1974).</p> <p>Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012).</p>
<p><b><u>Central support services</u></b></p> <p>No functions</p>	<p><b><u>Central support services</u></b></p> <p>Clothing grants (Sch 1, 10e)</p> <p>Provision of tuition in music, or on other music-related activities (Sch 1, 15)</p> <p>Visual, creative and performing arts (Sch 1, 16)</p> <p>Outdoor education centres (but not centres mainly for the provision of organised games, swimming or athletics) (Sch 1, 17)</p>
<p><b><u>Premature retirement and redundancy</u></b></p> <p>No functions</p>	<p><b><u>Premature retirement and redundancy</u></b></p> <p>Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 1, 25)</p>
<p><b><u>Monitoring national curriculum assessment</u></b></p> <p>No functions</p>	<p><b><u>Monitoring national curriculum assessment</u></b></p> <p>Monitoring of National Curriculum assessments (Sch 1, 23)</p>
<p><b><u>Therapies</u></b></p> <p>No functions</p>	<p><b><u>Therapies</u></b></p> <p>This will be covered in the high needs section of the regulations</p>
<b><u>Additional note</u></b>	

ESG DUTIES	
Responsibilities local authorities hold for all schools (funding may be retained centrally from all schools with agreement of schools forum)	Responsibilities local authorities hold for maintained schools (funding may be retained centrally from <u>maintained schools only</u> with agreement of schools forum)
<p>Services set out in the table above will also include overheads relating to these services (regulation 8(11) already refers to this for schedule 2 services) for:</p> <ul style="list-style-type: none"> <li>• Ensuring payments are made in respect of taxation, national insurance and superannuation contributions (sch 1, 20e).</li> <li>• Recruitment, training, continuing professional development, performance management and personnel management of staff (Sch 1, 20k)</li> <li>• Investigations of employees or potential employees, with or without remuneration (Sch 1, 20l)</li> <li>• Investigation and resolution of complaints (Sch 1, 20t)</li> <li>• Legal services related to education functions (Sch 1, 20u)</li> </ul>	

**Table 6 Former ESG duties may be funded from centrally retained schools block funding with agreement of schools forum**

