

## **Local Plan Part 3: The Welborne Plan**

### **Schedule of Minor Modifications to The Welborne Plan Submission Version (June 2014)**

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January 2015

## Introduction

This document comprises the schedule of all Minor Modifications that are proposed to the Welborne Plan Submission Version (June 2014) (SD01).

The Borough Council has identified a number of proposed changes which address typographical errors or provide additional clarity to the Welborne Plan. These are additional modifications to the Plan which do not directly relate to “soundness” but nonetheless improve the Plan. They include changes arising as a consequence of the proposed Main Modifications, updates, minor amendments to the supporting text and other changes which the Inspector has determined would not constitute Main Modifications. For clarity, these have been published and are available for public comment during the six-week period for Public representations commencing 26 January 2015.

The additional modifications include a large number of changes to Chapter 6 (AM42), Chapter 10 (AM57) and Chapter 11 (AM58). To aid clarity, those modifications are set out in Appendices A, B and C.

All changes are shown with additional text underlined and deleted text ~~struck through~~.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM01	Page 1 - Section sub- heading	<b>The Publication Draft Welborne Plan</b>	To remove references to Publication Draft version of Plan and reflect the current position
AM02	Page 1 - Paragraph 1.2	<del>This document is the second, or The 'Publication' draft of the Welborne Plan <u>was published in February 2014 for a period of representations, following the completion of which This is the version of the Welborne Plan that the Council intends to the Plan was submitted to the Secretary of State in June 2014</u> for independent examination, by a Planning Inspector, later in 2014.</del>	To remove references to Publication Draft version of Plan and reflect the current position
AM03	Page 1 - Paragraph 1.3	<del>This draft of the plan has been published now to provide an opportunity for you to comment before the Welborne Plan is submitted for examination. Any comments you make on the Publication Plan are important and will be submitted to the Planning Inspector for consideration alongside the Welborne Plan and its supporting documents. Please note that the ability to speak at the independent examination will be limited to those who have made comments seeking a change to the plan at this consultation stage, and have indicated a wish to appear before the Inspector.</del>	To remove references to Publication Draft version of Plan and reflect the current position
AM04	Page 1 - Paragraph 1.4	<del>The purpose of the independent examination <del>will be</del> <u>is</u> to consider whether the Welborne Plan is <b>legally compliant</b> (i.e. if it has been prepared in accordance with the law set out in planning legislation) and whether it is a 'sound' plan. To be considered 'sound' a plan must meet the criteria set out in paragraph 182 of the National Planning Policy Framework (see extract below). Therefore, any comments received regarding this Publication Plan must address issues of legal compliance and soundness.</del>	To remove references to Publication Draft version of Plan and reflect the current position
AM05	Page 2 - Section sub- heading	<b><del>How to Respond to the Consultation on this Plan</del></b>	To remove references to Publication Draft version of Plan and reflect the current position

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AM06	Page 2 - Paragraph 1.5	<del>The Publication Welborne Plan as well as the Sustainability Appraisal and the evidence base that has informed the objectives and policies within this plan can all be viewed online at: <a href="http://www.fareham.gov.uk/have_your_say/">http://www.fareham.gov.uk/have_your_say/</a>. All of the above documents are available to view at the Civic Offices in Fareham and the Publication Plan and Sustainability Appraisal are available at Fareham Library.</del>	To remove references to Publication Draft version of Plan and reflect the current position
AM07	Page 2 - Paragraph 1.6	<del>In making comments, it is helpful if you identify the part of the plan you are commenting on and explain the reasons for your comments. If you wish to send any comments to the Council, then please complete the response form available online. Alternatively, a paper copy of the response form is available at the Civic Offices and at Fareham Library and this should be returned to the Welborne Planning Team at:</del>  <del>Department of Planning and Environment Fareham Borough Council Civic Offices Civic Way Fareham Hampshire PO16 7AZ</del>	To remove references to Publication Draft version of Plan and reflect the current position
AM08	Page 2 - Paragraph 1.7	<del>The six week period of consultation commences on <b>Friday 28<sup>th</sup> February 2014</b> and will conclude on <b>Friday 11<sup>th</sup> April 2014</b>. All comments must be received by the Council no later than <b>5pm on Friday 11<sup>th</sup> April</b>. As this is a statutory stage of consultation, no late comments can be accepted.</del>	To remove references to Publication Draft version of Plan and reflect the current position
AM09	Page 3 - Paragraph 1.8,	<i>Addition of bullet points to end of list:</i>  <ul style="list-style-type: none"> <li>• <u>A 6-week period of consultation on the Proposed Submission Draft Welborne Plan starting in February 2014; and</u></li> <li>• <u>A 6-week period of consultation on the Suggested Change to the Draft Welborne Plan - identifying an additional alternative location for the Secondary School, starting in June 2014.</u></li> </ul>	To remove references to Publication Draft version of Plan and reflect the current position

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM10	Page 3 - Paragraph 1.9; 1 <sup>st</sup> sentence	These and other opportunities provided interested parties, developers, residents and landowners with the chance to express their views on the issues and options that emerged during the early strategic masterplanning work as well as on <del>the initial</del> <u>all</u> stages of preparation of the Welborne Plan.	To remove references to Publication Draft version of Plan and reflect the current position
AM11	Page 3 - Paragraph 1.10	Following the <u>completion of all</u> consultation <del>period</del> referred to in paragraph 4.7 <u>1.8 above</u> , <del>this the</del> <u>Publication Draft Welborne Plan (Submission version)</u> , together with the supporting evidence <u>base</u> , <del>the final</del> Sustainability Appraisal, Habitats Regulation Assessment and all of the <del>comments</del> <u>representations submitted on the Publication Draft Welborne Plan received</u> , <del>will</del> <u>were</u> be submitted to the <del>Secretary of State</del> <u>Planning Inspectorate</u> for independent examination. At the conclusion of the examination, <u>and following publication of the Government Planning Inspector's report, the intention of the Council is to adopt the Welborne Plan</u> <del>will be adopted</del> as Part 3 of Fareham's Local Plan. <u>The timeframe for All of the past and future stages in the preparation stages of the Welborne Plan can be seen are presented in Figure 1.1 below.</u>	To remove references to Publication Draft version of Plan and reflect the current position
AM12	Page 4 - Figure 1.1	<b>Independent Examination (July 2014 - <del>October December</del> April 2014<u>2015</u>)</b> <b>Adoption of the Welborne Plan (Early <del>Spring</del> 2015)</b>	To revise the Plan examination timescales.
AM13	Page 4 - Paragraph 1.11; 1 <sup>st</sup> sentence	The dates for all the <del>future stages in this and all other</del> <u>of Fareham's Local Plan Development</u> <del>Documents</del> can be found in the Local Development Scheme.	To reflect current status of Plan
AM14	Page 4 - Paragraph 1.13; 2 <sup>nd</sup> bullet	<ul style="list-style-type: none"> <li><b>Local Plan Part 2 (Development Sites and Policies)</b> - This part of the Local Plan sets out the Council's approach to managing and delivering development in the rest of Borough, outside of Welborne, for the period to 2026. This document <u>is subject to examination by the Planning Inspectorate from autumn 2014 through to spring 2015.</u> <del>is also currently being consulted on at the Publication stage, prior to submission to the Secretary of State alongside the Welborne Plan later in 2014. The consultation period for Local Plan Part 2 also ends on Friday 11th April 2014.</del></li> </ul>	To remove references to Publication Draft version of Plan and reflect the current position

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM15	Page 9 - Paragraph 1.34; 2 <sup>nd</sup> & 3 <sup>rd</sup> sentences	The Final Sustainability Report <sup>1</sup> that accompanies this <del>Publication Draft</del> <u>Submission</u> Welborne Plan presents the results of a detailed sustainability appraisal of the final strategic masterplan and of each of the policies within this plan. <del>The Final SA report is being made available for public comment alongside this plan.</del>	To remove references to Publication Draft version of Plan and reflect the current position
AM16	Page 9 - Paragraph 1.34a	<i>Insert new paragraph, 1.34a, below existing paragraph 1.34:</i>  <u>To accompany the amendment to Policy WEL16 of the Publication Draft Welborne Plan regarding the location of the Secondary School, an Addendum to the combined Sustainability Appraisal (SA) / Strategic Environmental Assessment (SEA), and Habitats Regulations Assessment (HRA) was produced following submission of the Plan in June 2014<sup>19a</sup>. This addendum report provided detailed assessment findings for an alternative secondary school location and was made available for public comment during July – August 2014.</u>	To provide update on the Sustainability Appraisal process
AM17	Page 9 - Paragraph 1.34a	<i>Insert new footnote 19a:</i>  <u><sup>19a</sup> SA/SEA and HRA for the Welborne Plan – Addendum (Urban Edge, June 2014)</u>	To provide additional clarity on the Sustainability Appraisal process
AM18	Page 9 - Paragraph 1.34b	<i>Insert new paragraph, 1.34b, below new paragraph 1.34a:</i>  <u>A second SA/SEA Addendum report was published in January 2015<sup>19b</sup> to provide the information necessary under SA/SEA and HRA to accompany the Main Modifications to the Welborne Plan, which the Council consulted on in January 2015.</u>	To provide update on the Sustainability Appraisal process
AM19	Page 9 - Paragraph 1.34b	<i>Insert new footnote 19b:</i>  <u><sup>19b</sup> SA/SEA and HRA for the Welborne Plan Modifications (Urban Edge, January 2015)</u>	To provide additional clarity on the Sustainability Appraisal process
AM20	Page 9 - Paragraph 1.36; last sentence	The Appropriate Assessment Report <del>is forms</del> <u>forms</u> part of the HRA <sup>21</sup> , and <del>is being</del> <u>was</u> made available for public comment alongside this Publication Plan <u>in February 2014</u> .	For additional clarity.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM21	Page 9 - Paragraph 1.36a	<i>Insert new paragraph 1.36a, below paragraph 1.36:</i>  <u>In addition, the impact of the change to WEL16 on the Habitats Regulations Assessment was considered through the Addendum report in June 2014, whilst an HRA screening assessment of the Main Modifications was provided through the second SA/SEA and HRA Addendum Report in January 2015.</u>	To provide update on the Habitats Regulation Assessment process
AM22	Page 11 - Footnote 24	<sup>24</sup> Chapter 10 below sets out the main policy for the 'deferral of contributions approach' and the Welborne Planning Obligations <u>and Affordable Housing</u> SPD will provide a full explanation of how the approach will operate. This SPD will be adopted at the same time as the Welborne Plan in early 2015	For consistency
AM23	Page 12 - Paragraph 1.48; last sentence	It was also tested with the local community at public exhibitions and through an online public survey in July 2012 and subsequently through the consultation on the Draft Welborne Plan <del>in</del> <u>from April 2013 May and to June 2013 and the period of representations on the Publication Draft Plan from February 2014 to April 2014.</u>	To reflect current status of Plan
AM24	Page 15 - Paragraph 1.61; 2 <sup>nd</sup> sentence	Finally, planning applications should be consistent with any relevant guidance provided by adopted Supplementary Planning Documents (SPDs) that support the Fareham Local Plan, including the Welborne Design Guidance SPD and the <u>Welborne</u> Planning Obligations <u>and Affordable Housing</u> SPD.	For consistency
AM25	Page 32 - Paragraph 3.45	They will also provide a greater level <del>of</del> <u>of</u> detail <del>of</del> <u>on</u> the broad layout and disposition of the main land uses, to set the parameters for each successive phase of the development.	To amend typographical errors
AM26	Page 33 - Paragraph 3.46	<i>Addition to end of paragraph 3.46:</i>  <u>In the event that the strategic design codes are not submitted with initial outline planning applications, the high-level development principles that will guide the development of Welborne as a whole, will need to be clearly set out and accompany the Structuring Plan. Any high level design principles which accompany the Structuring Plan would need to be in accordance with the Welborne Design Guidance Supplementary Planning Document.</u>	For additional clarity.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM27	Page 33 - Paragraph 3.47	<p><i>Addition to end of paragraph 3.47:</i></p> <p><u>In order to give sufficient guidance on what is required from the Structuring Plan, Comprehensive Masterplanning process and the Strategic Design Guides, the Council has prepared the draft Welborne Design Guidance SPD, which sets out those principles which should be further explored and incorporated into the relevant documents.</u></p>	For additional clarity.
AM28	Pages 38-39 - Policy WEL5	<p><i>Amendment to 2<sup>nd</sup> paragraph of WEL5:</i></p> <p><b>For each of <u>The settlement buffers allocated, as set out below, these are shown on Appendix B.3 and on the Fareham Policies Map. Development on land included within the settlement buffer allocations will generally be resisted and will only be permitted where:</u></b></p>	Grammatical correction
AM29	Page 44 - Paragraph 4.17	<p><i>Addition of new paragraph below existing paragraph 4.17:</i></p> <p><u>A key principle in the layout and design of Welborne will be the treatment of the A32 to ensure that land uses on the eastern side of A32 are properly integrated into the main community to the west side. In particular, through the use of prioritised crossing points that ensure safe pedestrian and cyclist movements to and from everyday facilities, as well as encourage wider community integration.</u></p>	For additional clarity to the supporting text as a consequence of Main Modification (MM5) to Policy WEL6.
AM30	Page 44 - Paragraph 4.18	<p><i>Addition to end of paragraph 4.18:</i></p> <p><u>The layout and design of Welborne will also need to ensure that it takes into account and effectively mitigates a number of potential environmental impacts, including noise, light pollution, and air quality within the site. Impacts on air quality outside of the site boundaries will need to be addressed through the Transport Assessment, and Environmental Assessment.</u></p>	For additional clarity to the supporting text as a consequence of Main Modification (MM4) to Policy WEL6.
AM31	Pages 44-45 - Policy WEL6	<p><i>Deletion of final paragraph of Policy WEL6:</i></p> <p><b><del>“In order to assist the process of comprehensive masterplanning and preparing the strategic design codes the Council will prepare the Welborne Design Guidance SPD, setting out those principles which should be further explored and incorporated into the above documents”.</del></b></p>	To be consistent with the revised approach of removing all references to SPDs in policy.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM32	Page 46 - Paragraph 4.23	<p data-bbox="432 188 1182 220"><i>Insert new paragraph below existing paragraph 4.23:</i></p> <p data-bbox="432 260 1809 587"><u>It is recognised that at the time of submission of an outline planning application for Welborne, the design process may not be sufficiently advanced to enable the Strategic Design Codes to be provided. Policy WEL7 therefore, allows for the Strategic Design Codes to be submitted with subsequent detailed or reserved matter planning applications. Where Strategic Design Codes are not submitted with an outline planning application, high-level development principles will instead be provided to describe the design assumptions behind the key elements of the Structuring Plan. The development principles will guide all subsequent masterplans, detailed applications and the Strategic Design Codes by demonstrating how the following elements could function in technical and design terms:</u></p> <ul data-bbox="432 635 943 826" style="list-style-type: none"> <li>• <u>Green and blue infrastructure;</u></li> <li>• <u>Access and movement;</u></li> <li>• <u>Land use;</u></li> <li>• <u>Building heights and density; and</u></li> <li>• <u>Character areas.</u></li> </ul>	For additional clarity on the role and timing of Strategic Design Code to the supporting text as a consequence of Main Modification (MM6) to Policy WEL7.
AM33	Page 55 - Paragraph 5.24	<p data-bbox="432 858 920 890"><i>Addition to end of paragraph 5.24:</i></p> <p data-bbox="432 930 1809 1002"><u>All car and cycle parking in employment areas should be provided in accordance with the Non-Residential Car and Cycle Parking SPD.</u></p>	For additional clarity.
AM34	Pages 56-57 - Policy WEL9; item iii	<p data-bbox="432 1074 1809 1145"><b>iii. Provide sufficient parking to cater for the needs of the employment development in accordance with the Non-Residential Car and Cycle Parking SPD;</b></p>	To be consistent with the revised approach of removing all references to SPDs in policy

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM35	Page 61 - Policy WEL10; 5 <sup>th</sup> paragraph	<b>The District Centre shall be well connected to the employment areas, to the central park and to Welborne's residential areas through attractive and direct walking and cycle routes which make use of the green corridor network where possible. Bus stops shall be provided at the District Centre for local services and for the BRT. These bus stops shall be located in a highly visible and accessible position within the District Centre. Adequate parking for each use will need to be provided, <del>in accordance with the Borough's Residential Car and Cycling Parking Standards SPD and the Non-residential Car and Cycle Parking Standards SPD.</del></b>	To be consistent with the revised approach of removing all references to SPDs in policy
AM36	Page 62 - Paragraph 5.51; 3 <sup>rd</sup> & 4 <sup>th</sup> sentences	<del>Where being proposed, these sorts of services</del> <u>All planning applications for retail and leisure services within the Local Centre</u> will be required to demonstrate, through robust impact assessments that they will not give rise to significant adverse impacts on Fareham Town Centre or Wickham's centre. Impact assessments will also need to demonstrate <u>that retail and leisure proposals the Local Centre will be consistent with the role of the Local Centre and its place within Fareham's hierarchy of centres overall will serve to complement the function of the District Centre and will not adversely compete with it the District Centre or with Wickham's centre.</u>	To provide additional clarity to the supporting text as a consequence of Main Modification (MM8) to Policy WEL11.
AM37	Page 73 - Paragraph 5.91	The Strategic Framework Diagram (Appendix B.2) identifies the indicative location of the secondary school, <del>at the western edge of the new community, immediately north of the District Centre, with the majority of its playing fields within the Knowle Triangle which is within Winchester City Council's area.</del> The approximate location of the school is also indicated with a symbol on the Fareham Policies Map, <u>an extract of which is presented at and on Appendix B.3 of this plan.</u> This location emerged from <del>the concept masterplanning work and from</del> extensive engagement with the relevant landowners, Hampshire County Council, Winchester City Council and others <u>local communities.</u>	Revision to supporting text as a consequence of Main Modification (MM9) to Policy WEL16.
AM38	Page 73 - Paragraph 5.92	The location is designed to be highly accessible by sustainable travel modes from the main residential areas at Welborne, west of the A32, <u>and would provide additional footfall around the district centre. Furthermore, this location will also provide opportunities for a primary school to be delivered in close proximity to the secondary school.</u> <del>It is also focussed on supporting the Community Hub as the smallest of Welborne's three centres and the adjacent primary school. In addition, the location will provide clear opportunities for pupils from Knowle to access a much closer school which will support significant reductions in vehicular travel to school for 11-16 year-olds from Knowle.</del>	Revision to supporting text as a consequence of Main Modification (MM9) to Policy WEL16.

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AM39	Page 73 - Paragraph 5.93	<p>The location of the school, relatively close <u>adjacent</u> to the Knowle Road <u>District Centre</u>, will enable it to be constructed in line with its anticipated first intake of pupils in 2025/2026. <del>The location and minimum size of the site required (9 hectares) will also ensure that the school's playing fields are incorporated alongside it, and the landscaping beyond these, are able to reduce the visual impact of Welborne into the rest of the Knowle Triangle, which will perform a SANGS role for Welborne.</del></p>	<p>Revision to supporting text as a consequence of Main Modification (MM9) to Policy WEL16.</p>
AM40	Page 73 - Paragraph 5.94	<p><del>In terms of the layout of the school the clear expectation is that the parts of the school that are located outside of the Welborne Plan boundary, and therefore outside of Fareham Borough, will comprise grass pitch playing fields with no buildings or permanent structures, beyond fencing and goal posts. This is essential in order to ensure that the Knowle Triangle will be able to perform its role as a settlements gap between Knowle and Welborne, as set out within the Winchester Local Plan Part 1. The layout of the school will need to respond to noise levels in external areas, and ensure that appropriate noise levels are achieved for external teaching and playing areas through the orientation of school buildings. Furthermore the location of the high and intermediate pressure gas pipelines will also need to be taken into account when determining the layout of the school.</del></p>	<p>Revision to supporting text as a consequence of Main Modification (MM9) to Policy WEL16.</p>
AM41	Page 73 - Paragraph 5.95	<p>As referred to above, the opportunity exists to deliver <del>the</del> <u>a primary school</u> and secondary schools within the 'education cluster' adjacent to the <del>Community Hub</del> <u>District Centre</u> in the <del>west</del> <u>east</u> of Welborne, as a single 'all-through school', and this will be explored further <u>with the County Council</u>. Developing an 'all-through school' in stages, as the new community evolved, could potentially facilitate an earlier provision of secondary education on site.</p>	<p>Revision to supporting text as a consequence of Main Modification (MM9) to Policy WEL16 and to provide additional clarity.</p>
AM42	Pages 81–84 - Paragraphs 6.16 – 6.30	<p>Amended Affordable Housing supporting text – see Appendix A to this Schedule</p>	<p>Revision to supporting text to provide clearer guidance on the Council's approach to delivering affordable housing as a consequence of Main Modification (MM10) to Policy WEL18.</p>

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM43	Page 87 - Paragraph 6.50	<i>Addition of new paragraph below existing paragraph 6.50:</i>  <u>All custom build proposals for plots at Welborne should be consistent with the Welborne Design Guidance SPD.</u>	For additional clarity.
AM44	Page 87-88 - Policy WEL21; 4 <sup>th</sup> paragraph	<b>Custom-builders taking up plots at Welborne shall ensure that their proposals comply with relevant policies within the Fareham Development Plan and are consistent with the <del>Welborne Design Guidance SPD and any relevant and approved strategic design codes.</del></b>	To be consistent with the revised approach of removing all references to SPDs in policy.
AM45	Page 89 - Policy WEL22; 1 <sup>st</sup> paragraph	<b>WEL22 - Gypsies, Travellers and Travelling Showpeople</b>  <b>Provision for gypsies, travellers and travelling showpeople is not anticipated to be required at Welborne. However, a <del>Any</del> <u>Any</u> planning applications for one or more permanent pitches for gypsies or travellers at Welborne will only be permitted where it can be demonstrated that the proposal:</b>	For additional clarity.
AM46	Page 91 - Paragraph 7.9	The Transport Strategy and the Strategic Framework have been developed in tandem, to develop revised high level transport principles for Welborne. <u>Transport modelling undertaken to date indicates that the majority of movements to and from Welborne will be to the south, including the M27.</u>	For additional clarity.
AM47	Page 91 - Paragraph 7.12	<i>Addition of new paragraph below existing paragraph 7.12:</i>  <u>Travel planning will be used across the site to assist accessibility to and lead to a reduction in use of the private car. Initiatives will be delivered with each part of the site in accordance with the Framework Travel Plan.</u>	For additional clarity.
AM48	Page 97 - Paragraph 7.30	Any planning application for the site must be supported by a Transport Assessment to assess the phasing of the development against the implementation of various off-site highway improvements, including works to the M27 and A32 and any other primary or secondary links or junctions to mitigate the traffic impacts on the local and strategic road network and mitigate any environmental impacts, <u>including any impacts on air quality in the surrounding area.</u>	For additional clarity.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM49	Page 102 - Paragraph 7.52	<p><i>Addition of new paragraph below paragraph 7.52:</i></p> <p><u>Paragraph 8.38 of this Plan identifies a number of links to the surrounding countryside which should be fully explored to create improved pedestrian and cycling links to surrounding communities and the surrounding countryside.</u></p>	For additional clarity.
AM50	Page 105 - Paragraph 8.9	<p>One of the key aspects of the GI Strategy is to encourage the new community at Welborne to enjoy healthier life-styles. This will in part be achieved through providing a network of connected open spaces which encourages walking, informal exercise, and sports. It will also include giving the residents of Welborne the opportunity to grow their own food and will provide at least <del>2.4</del> <u>2.0</u> hectares of allotments, with the further opportunity to provide community orchards. This amount is based on the standard of 27 allotment plots per 1,000 <del>population</del> <u>households</u>.</p>	To correct error.
AM51	Page 105 - Footnote 130	<p><i>The allotments standard being taken forward within Policy WEL29 derives from the Fareham Allotment Strategy (FBC, 2010) and is based on 27 plots (of 125 square metres each) per 1,000 <del>population</del> <u>households</u>, which equates to <del>0.34</del> <u>0.13</u> hectares per 1,000 <u>population</u>.</i></p>	To correct error.
AM52	Page 111 - Policy WEL31; 1 <sup>st</sup> para	<p><b>The initial planning applications for development at Welborne shall be supported by a full ecological assessment to identify and address potential impacts on designated sites, priority habitats and <del>priority</del> and protected species, within and immediately adjacent to the site boundary.</b></p>	To correct grammatical error.
AM53	Page 111 - Policy WEL31; 2 <sup>nd</sup> para	<p><b>The <del>biodiversity assessment</del> <u>ecological assessment</u> shall clearly set out how biodiversity interests will be protected, and where possible enhanced. Given that the development of Welborne will take place over a long period of time, the <del>biodiversity assessment</del> <u>ecological assessment</u> should provide details of how it is intended that it is regularly updated to ensure that any mitigation measures required are effective.</b></p>	For clarity and consistency.
AM54	Page 113 - Paragraph 8.43	<p><i>Addition to end of paragraph:</i></p> <p><u>Structural landscaping schemes will be required to demonstrate how the proposed landscaping responds to the areas of high landscape quality to the north and east of the site, especially when viewed across the site from the south. The structural landscaping should take into account and soften the potential impact of the eastern edge of Welborne on long distance views of the site from Portsdown Hill.</u></p>	Addition to supporting text to provide further clarity as a consequence of Main Modification (MM16) to Policy WEL33.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM55	Page 120 - Paragraph 9.19; 3 <sup>rd</sup> sentence	If connection of Welborne to the Knowle STW is to be pursued, the site promoters will need to demonstrate that the STW could be expanded and gain planning permission from <del>Winchester City Hampshire County Council</del> as the waste disposal authority <del>STW is in their area</del> .	To correct error.
AM56	Page 132 - Paragraph 10.35	Therefore, the Council expects site promoters to use the phasing principles and guidance within the Concept Masterplan Phasing Plan <del>this chapter of the Welborne Plan</del> as well the IDP to produce a detailed phasing plan and <u>an infrastructure delivery plan strategy for the implementation of the development</u> . This phasing plan and <u>infrastructure delivery plan implementation strategy</u> will need to be submitted to the Council for approval alongside initial planning applications for development at Welborne. In line with the principle of a flexible approach, the site promoters will be expected to keep the phasing plan and <u>infrastructure delivery plan implementation strategy</u> under review and submit any changes to the Council for approval alongside relevant planning applications.	Revision to supporting text to provide clarity as a consequence of Main Modification (MM21) to Policy WEL41.
AM57	Pages 132–133 - Paragraphs 10.36 – 10.41	Deleted Deferral of Contributions section – see Appendix B to this Schedule	Deletion of supporting text as a consequence of Main Modification (MM22) to Policy WEL41.
AM58	Page 138-141 - Chapter 11	See Appendix C to this Schedule for amendments to Chapter 11: Monitoring and Review supporting text - paragraphs 11.5 and 11.6 are including Main Modifications.	Revision to supporting text to provide clarity on the monitoring framework as a consequence of Main Modification (MM23) to Policy WEL41.
AM59	Glossary – new item	<u><b>Transport Framework:</b> A high level statement prepared by the site developers, setting out the key transport implications and strategy for the site as a whole, accompanying the Structuring Plan for the site.</u>	For additional clarity.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM60	Glossary – new item	<u><b>Design Principles:</b> A high level series of principles which shall guide the future design work to be undertaken in preparation of planning applications. They are set out in the Strategic Framework Diagram, the policies of the Welborne Plan and relevant policies in the Core Strategy. The Principles set out the scheme parameters and design objectives that will underpin the Structuring Plan. They will ensure that the Vision for Welborne is an integral part of the proposals and set a consistent high-level approach to design that will guide all future planning applications.</u>	For additional clarity.
AM61	Glossary – new item	<u><b>Environment standards:</b> As set out in legislation or regulation regarding acceptable levels of pollutants or other hazards. For all water issues, the appropriate standards are monitored and regulated by the Environment Agency.</u>	For additional clarity.
AM62	Glossary – new item	<u><b>Travel Planning:</b> Programmes and initiatives designed to influence travel behaviour that will assist accessibility to new developments and lead to a reduction in use of the private car. The standard method of meeting the objectives of travel planning initiatives is through the preparation and delivery of Travel Plans. These are represented by a package of measures designed by a workplace, school or other organisation to encourage safe, healthy and sustainable travel options.</u>	For additional clarity.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM63	Glossary – amended item	<p><del><b>Garden City:</b> A development and design principle for planned new communities developed by Ebenezer Howard in the 19th century which aims to enhance the natural environment, provide high quality affordable housing and locally accessible jobs. Key principles include community ownership of land and long term stewardship of assets, high quality imaginative design including homes with gardens, mixed tenure homes which are affordable for ordinary people, a strong local jobs offer with a variety of employment opportunities within the garden city and easy commuting distance of homes, generous green space linked to the wider countryside, access to strong local cultural, recreational and shopping facilities, integrated and accessible transport systems and local food sourcing, including allotments.</del></p> <p><b>Garden Community:</b>  <u>Welborne seeks to take as a starting point the original guiding principles of the Garden City movement and update them to make them relevant to the 21<sup>st</sup> century. The long established garden city principles which will help guide the development of Welborne include the long term stewardship of community assets, high quality imaginative design including homes with gardens, mixed tenure homes which are affordable for ordinary people, a strong local jobs offer with a variety of employment opportunities, easy access to generous green spaces linked to the wider countryside, local cultural, recreational and shopping facilities, integrated and accessible transport systems and local food sourcing, including allotments.</u></p>	For additional clarity.
AM64	Glossary – new item	<p><b>1 in 100 year rainfall event:</b> <u>This is the likelihood (return period) of a specific rainfall event occurring. The intensity of rainfall runoff is defined by its return period and a high return period event, such as a 1 in 100 year event, will have greater rainfall runoff. However, although a 1 in 100 year event has very intense rainfall, it has only a 1% chance or greater of happening each year.</u></p>	For additional clarity.
AM65	Appendix A: Schedule of Evidence and Background Documents	See Appendix D to this schedule for a revised list of the Schedule of Evidence and Background Documents.	For clarity.
AM66	Appendix B.2, Strategic Framework Diagram	See Appendix E to this schedule for revised Strategic Framework Diagram.	Revision as a consequence of Main Modification (MM9) to Policy WEL16.

Ref:	Plan Ref.	Proposed Minor Modification	Reason for Change
AM67	Appendix B.3, Extract of the Fareham Policies Map covering Welborne	See Appendix F to this schedule for revised policies map.	Revision as a consequence of Main Modification (MM9) to Policy WEL16.

## APPENDIX A

### Affordable Housing

#### 6.16 Housing Needs

Meeting the needs of those in the Fareham area who cannot access the housing market is one of the key priorities of the Council and is an important objective for Welborne. Delivering new affordable housing is vital in achieving sustainable development and Welborne provides a rare opportunity for the Borough to deliver a significant number of affordable homes and to make a real contribution towards addressing the current backlog of housing need.

6.17 Policy CS13 of the Core Strategy sets out the aim to achieve between 30% and 40% of all homes at Welborne as affordable homes and this was the starting point for the Welborne Plan. Subsequently, up-to-date evidence on housing needs has been undertaken, initially by the Council<sup>98</sup> and subsequently by PUSH through the South Hampshire Strategic Market Assessment (SHMA)<sup>99</sup> and a target of 30% affordable housing has been confirmed. The SHMA identified likely housing need within the Borough to 2036, ~~taking into account the role that lettings in the private rental sector play in meeting needs.~~ This evidence recommended an annual target for the whole Borough of 146 additional affordable homes, which amounts to 3,358 by 2036. Given that Welborne represents a majority of Fareham's planned housing delivery within this period, it is expected that a significant proportion of this target for affordable homes will be met at Welborne.

#### 6.18 Tenure, Housing Mix, Adaptability and Integration

The SHMA ~~also~~ considered the proportions of new affordable homes that should be provided to meet varying levels of need and it recommended a tenure split of 70% affordable and social rented homes and 30% in 'intermediate' forms of tenure, such as shared ownership homes. Whilst this split will be appropriate in the early phases of development, it will need to be kept under review to ensure that tenures being provided meet the needs at the time each phase is built out and that phases of development remain viable.

#### 6.19 Housing Mix, Adaptability and Integration

A wide range of affordable housing types and sizes will be required at Welborne to meet identified housing need. Within each residential phase, the mix will need to provide homes suitable for families and for smaller households as well as homes suitable for vulnerable households, including those with reduced mobility. Over the course of the Welborne development, a range of specialist needs housing should be provided as part of the affordable housing mix. This will include specialised accommodation for older people and wheelchair accessible homes. These requirements are covered in more detail in the following section below and in Policies WEL19 and WEL20.

6.20 The SHMA considered an appropriate mix of affordable homes for Fareham, based on the latest available data on housing needs. However, the long build-out period of Welborne means that this evidence provides only a starting point and the precise affordable housing mix required cannot be known at this stage. Housing needs change over time and are also influenced by Government policies, such as welfare

<sup>98</sup> Fareham Borough Housing Needs Assessment (DTZ, August 2012)

<sup>99</sup> South Hampshire Strategic Housing Market Assessment (GL Hearn for PUSH, January 2014)

reforms. Therefore, the agreed mix of affordable homes provided within each residential phase will need to reflect ~~the~~ identified needs and viability at the ~~that~~ time the phase comes forward ~~and will be agreed with the Council.~~

- 6.21 In line with the requirement set out in the previous section for a proportion of market homes to be adaptable and to provide for those with reduced mobility, the providers of affordable housing at Welborne will also be expected to respond to this need. Therefore, subject to need and viability, approximately 15% of all affordable homes within each residential phase should be designed and built to meet higher accessibility standards equivalent to the Lifetime Homes standards.
- 6.22 To ensure the creation of a mixed, integrated and socially inclusive community, the affordable housing should be developed to the same design and construction standards as the market housing. Affordable dwellings should be integrated with the market housing, taking account of the nature of the stock, the mix of tenures and the prevailing character of the different parts of Welborne, as set out in Chapter 4. The level of integration will always be expected to fit within a range consistent with the upper and lower limits referred to below and set out in Policy WEL18. For management purposes, it may be considered appropriate to cluster the affordable housing in small groups.
- 6.23 *Delivering Affordable Housing*  
National planning policy requires that new development is deliverable and this means that the overall financial burden on new development, including obligations to deliver affordable housing, should not threaten its economic viability.<sup>100</sup> Extensive viability testing has been undertaken on the proposals within this ~~p~~Plan. The outcome of this evidence is that there is potential to deliver a significant proportion of affordable homes, but that an overall target of 30% is likely to be the highest that the development as a whole could reasonably be expected to achieve.
- 6.24 In coming to this conclusion, the viability evidence has taken into account separate studies<sup>101</sup> which have sought to identify and secure additional and external funding for infrastructure and affordable housing at Welborne. ~~One significant outcome of this work is the Council's decision to participate in establishing of the potential delivery mechanisms which may assist viability is a jJoint vVenture hHousing eCompany (JVHC) that will~~ may allow the Council and its partners to play a more central and active role in the delivery of affordable housing across the Borough potentially including Welborne. The nature of the role this JVHC will play at Welborne will be determined in dialogue with the principal landowners ~~prior to the determination of the initial planning applications at Welborne.~~ If the opportunity arises to use the JVHC, or any other external funding, to help deliver a higher level of affordable housing than would be expected to result from the 30% overall target, this will be positively and actively pursued by the Council.
- 6.25 Notwithstanding the potential role of the JVHC, delivering the target level of 30% affordable homes each year will be a significant challenge given the overall infrastructure burden on the development and the length of time it will take to build the new community. Therefore, it is necessary for the Welborne Plan to consider how a flexible approach to the delivery of affordable homes could be required.

<sup>100</sup> National Planning Policy Framework paragraph 173 (DCLG, March 2012)

<sup>101</sup> These comprise the Welborne Infrastructure Funding Study (GVA, March 2013) as well as further commercially confidential work undertaken for the Council on options to support housing investment.

- 6.26 Flexibility may be required, for example, where the proportion of affordable homes considered to be deliverable within the early phases of the development fell below the 30% policy target, or proposed a different tenure split to the 70:30 envisaged in Policy WEL18. In line with the overall approach to development viability (see Chapter 10), the Council would expect such proposals to be fully justified by a robust and independently verified viability assessment. Where the Council accepted a reduced percentage levels of affordable housing numbers delivery, there would also be a clear expectation that the affordable housing deficit would be ‘clawed-back’ rectified, preferably later within that same phase of development or, failing that, within a subsequent residential phase.
- 6.27 ~~Before accepting reduced levels of affordable housing delivery, the Council will initially consider whether some or all of the short-fall in affordable housing could be delivered by the JVHC. Where this option proved not to be viable, feasible or desirable, the Council will apply its deferral of contributions policy as set out in WEL41 and expanded upon in the Welborne Planning Obligations SPD.<sup>102</sup> In essence, this policy expects that, if market sales values increase significantly following an agreed reduction in affordable housing delivery, the increased development revenues would subsidise additional affordable housing provision within that phase of development.~~
- 6.28 If it proves not to be viable or practical for the principal landowners to increase the level percentage of affordable housing provision within the same phase, then the Council will seek to ensure that the affordable housing deficit is rectified the ‘claw-back’ within the subsequent phase of residential development. ~~Again, the~~ The Council will initially consider the potential for the JVHC to deliver some or all of the short-fall, but failing that, will expect increased development revenues within that the next phase to subsidise the additional affordable housing. ~~In the latter case, expectations of additional provision for affordable housing would be subject to the overall priorities at that time for the use of deferred contributions where other infrastructure requirements had also been deferred on viability grounds.~~
- 6.29 In cases where the affordable housing deficit claw-back is deferred to a subsequent phase and, at the start of that phase of development, the principal landowner considers that the provision of the additional affordable housing would not be financially viable, then the Council will expect this to be tested through a formal development valuation commissioned by the Council, at the developer’s cost. This valuation would take account of costs and revenues to date as well as the anticipated infrastructure requirements ~~(including any other requirements deferred from previous phases)~~ and the anticipated revenues for the following main phase. Where it is agreed that both the normal target levels of provision and the additional ~~claw-back~~ provision to rectify a shortfall on the previous phase cannot be met, the Council will again consider whether it would be viable, feasible and desirable for the JVHC to deliver some of or the entire shortfall. ~~Failing this, the Council will re-employ its deferral of contributions policy.~~
- 6.30 When applying any flexibility in the phasing and delivery of affordable housing it will be important not to undermine the principle of creating a mixed, integrated and socially inclusive community as set out above. In practice, this means that lower and upper percentages of affordable housing will be set for any given phase of development at Welborne to avoid under provision or over-concentration in any one part of the

<sup>102</sup> The Welborne Planning Obligations SPD will be prepared during 2014 and will be adopted at the same time as the Welborne Plan in early 2015.

development. The minimum and maximum levels that will be acceptable within any given phase will be agreed with the Council. However, overall, it is considered that a ~~an absolute~~ lower limit of 10% affordable housing numbers and an upper limit of 40% affordable housing numbers provide a reasonable balance between the need for flexibility and achieving the vision and objectives of the Welborne Plan.

## APPENDIX B

### Deferral of Contributions

- 10.36 ~~The approach to ensuring development viability is set out in Chapter 1. This emphasises that the Welborne Plan aims to ensure that necessary infrastructure (including affordable housing<sup>153</sup>) could be fully delivered at the time it was needed, as a fundamental requirement for achieving the vision for Welborne. However, it also indicates that all parts of the Welborne Plan were underpinned by the principle of ensuring that a flexible approach would operate, where necessary, to allow for changes in development viability and to ensure that the development as a whole remained deliverable throughout the plan period.~~
- 10.37 ~~As part of this flexible approach, the Council is introducing a 'deferral of contributions' policy that will apply only where necessary and justified by independently tested viability assessment. In such circumstances, application of the policy will allow the deferral of some infrastructure requirements to be considered by the Council.~~
- 10.38 ~~In cases where the Council agrees to defer infrastructure, application of the deferral of contributions policy will seek the subsequent provision of any deferred contributions (or the delivery of the deferred infrastructure items) within the same main phase of the development. If this cannot be achieved, as demonstrated by an independently tested viability assessment, then the deferred infrastructure contributions or provision will be sought in the following main phase, in addition to the 'normal' requirements of that new phase.~~
- 10.39 ~~Where viability problems remain, a further independently tested viability assessment will be required to take account of previous and future costs and revenues, the 'normal' infrastructure requirements of the new phase and any outstanding deferred infrastructure requirements. This viability evidence will need to be submitted to the Council for agreement alongside initial planning applications for the new main phase. Where the Council accepts the on-going viability constraints, the deferral of contributions policy will be re-employed as set out in the previous paragraph. Where, despite deferral, an item of infrastructure remains unviable, the Council and site promoter will agree an alternative approach which does not require the specified infrastructure, to funding to ensure that infrastructure necessary to support the development can be delivered when it is required but which nevertheless achieves mitigation of the impacts of the development. This decision would be informed by an independently tested viability assessment.~~
- 10.40 ~~In all cases where more than one infrastructure item is being deferred as set out above, the Council will agree with any relevant infrastructure or service providers which of the deferred infrastructure items should be provided first as priority during that main phase of the development, should any claw-back of contributions be triggered by improving market and economic conditions.~~

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<sup>153</sup> ~~Although this section refers primarily to 'infrastructure' this should be read as including affordable housing requirements. A detailed approach to how the deferral of contributions policy would apply to affordable housing is set out in Chapter 6.~~

10.41 ~~The detailed guidance setting out how the deferral of contributions policy will be operated by the Council is set out within the Welborne Planning Obligations SPD.~~<sup>154</sup>

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<sup>154</sup> ~~The Welborne Planning Obligations SPD will be produced during the course of 2014 and will be adopted by the Council at the same time as the Welborne Plan in early 2015.~~

## APPENDIX C

### The Monitoring Framework

- 11.1 This chapter sets out how the Welborne Plan will be monitored following its adoption. The mechanisms may be altered over the lifetime of the project, but nonetheless this chapter sets out the main principles by which monitoring will take place.
- 11.2 ~~The adopted Core Strategy contains a series of high level targets in relation to Policy CS13 which represent the essential components for the delivery of Welborne. However these targets have required review and refinement in light of the technical evidence work and as such, the suite of detailed policies in the Welborne Plan to guide development will require new monitoring targets and indicators. These will supplement the reviewed targets within the Core Strategy and together will form the monitoring framework for Welborne.~~  
Delivering the Welborne project depends upon the actions of a number of interested parties. Therefore monitoring the Welborne project will require a coordinated and complimentary approach to be followed by the key agencies involved.
- 11.3 ~~The purpose of developing a monitoring framework is to provide a mechanism for assessing developmental progress of Welborne against the overall vision and objectives for the new community as set in the Welborne Plan. This is of particular relevance where development targets are set within the policies of this plan, such as for the delivery of housing or employment space, or for the provision of specific community, education and recreation facilities. However, it should be recognised that much of the finer detail will only come forward through the planning applications and the development management process over the lifetime of the project.~~  
A key asset for the Welborne project to date has been the Strategic Delivery Group, with active involvement of the following:
- Site promoters
  - Fareham Borough Council
  - Hampshire County Council
  - Highways Agency
  - Homes and Communities Agency, and
  - Solent Local Enterprise Partnership.
- 11.4 ~~Implementing the policies in the Welborne Plan depends upon the actions of a number of interested parties and cannot be directly controlled. Further detail on how the various parties are expected to contribute towards the overall delivery of Welborne can be found in the Infrastructure Delivery Plan.~~  
These organisations all have an interest in the delivery of a successful new community at Welborne. The Group has provided an opportunity for the organisations to discuss the emerging proposals for Welborne, with a focus on delivery. The governance arrangements will be reviewed over the lifetime of the project; nonetheless there will always be a role for a group to coordinate public and private sector action and investment. This will build upon both the body of technical work contained within the evidence base for the Welborne Plan, (e.g. the transport evidence), as well as the principle of coordinated investment set out in the Infrastructure Funding Strategy. Specific tasks for this Group include identifying and agreeing key infrastructure spend and monitoring and reviewing infrastructure funding and cost.
- 11.5 ~~Monitoring the outcomes of the policies in the Welborne Plan will be undertaken on a~~

~~regular basis to enable early action to be taken to overcome any barriers to delivery of the plan's objectives and policies.~~

The Phasing Plan contained within Chapter 10 of this document sets out the *key outcomes* and *critical infrastructure* identified for each of the main phases of development. This has been produced to inform the understanding of the Plan, using the best information available. It should be recognised that the mechanism which will deliver Welborne, including critical infrastructure, will be the phasing plan, infrastructure delivery plan and s106 planning agreement approved alongside planning application(s) for the site. Nonetheless, the phasing plan in Chapter 10 provides a useful guide to the Council's expected outcomes, including infrastructure.

- 11.6 ~~Where appropriate, Borough-wide targets which are monitored through the Council's Authority Monitoring Report (AMR) will be broken down and applied to the Welborne Plan area, so that the contribution of Welborne to Borough-wide targets can be seen on a local scale.~~

Strategic Group meetings will be undertaken on a regular basis throughout the year to enable early action to be taken to overcome any barriers to delivery of the Plan's objectives and policies. Particular reference will be made to the *key outcomes* and *critical infrastructure* listed in the Phasing Plan in Chapter 10 of this Plan. Any risk to the timely delivery of either will be reported as an entry in the Delivery Risk Register which will be created and reviewed at the Group meetings. Given the wider public interest in the delivery of the Welborne project, it will be appropriate for changes in the Delivery Risk Register for Welborne to be reported to the Welborne Standing Conference as and when they arise and included in the Council's Authority Monitoring Report.

- 11.7 ~~Table 11.1 below lists all of the local indicators that will be monitored specifically for the Welborne Plan area. It should be noted that the quantities of development or provision are based on the assumption that 6,000 homes will be delivered at Welborne. These quantities would need to rise or fall if a different number of homes are delivered.~~

If an issue is identified where delivery of a key outcome or item of critical infrastructure for a phase may not be met, it will be for the Strategic Group to identify any contributory factor and identify necessary action to remedy the issue. If a planning policy in the Welborne Plan is the issue (or a main contributing factor) then necessary amendments will be identified and if they require a change to a Plan policy, may trigger a review of the Welborne Plan. Should any review of the Plan appear likely, then the Welborne Standing Conference will have a role in informing the priorities for any revision.

- 11.8 Complimentary to the role of the Strategic Group, will be the ongoing monitoring of the outputs of the Plan by the Borough Council. The monitoring will cover a range of measures, both in terms of built form (homes delivered, floorspace built, etc.) as well as some quantifiable measures of what sort of place the new community is becoming (e.g. number of homeworkers, number of children of secondary school age, etc.).

- ~~44.2~~  
11.9 The adopted Core Strategy contains a series of high level targets in relation to Policy CS13 which represent the essential components for the delivery of Welborne. However these targets have required review and refinement in light of the technical evidence work and as such, the suite of detailed policies in the Welborne Plan to guide development will require new monitoring targets and indicators. These will supplement the reviewed targets within the Core Strategy and together will form the monitoring framework for the Welborne Plan.

- ~~44.3~~ The purpose of developing a monitoring framework is to provide a mechanism for

- 11.10 assessing developmental progress of Welborne against the overall vision and objectives for the new community as set in the Welborne Plan. This is of particular relevance where development targets are set within the policies of this plan, such as for the delivery of housing or employment space, or for the provision of specific community, education and recreation facilities. However, it should be recognised that much of the finer detail will only come forward through the planning applications and the development management process over the lifetime of the project.
- 11.11 Where appropriate, Borough-wide targets which are monitored through the Council's Authority Monitoring Report (AMR) will be broken down and applied to the Welborne Plan area so that the contribution of Welborne to Borough-wide targets can be seen on a local scale. Given the wider public interest in the delivery of Welborne the progress against targets will be reported to the Standing Conference.
- 11.12 Table 11.1 below lists indicators that will be monitored specifically for the Welborne Plan area. It should be noted that these indicators and targets themselves will be subject to change over the lifetime of the project, to ensure that the overall framework provides a suitable mechanism for assessing the delivery of the Plan. For instance, the mechanism and timetable of delivery of the schools will be fixed in section 106 planning agreements. Nonetheless, the following sets out the Council's commitment to indicate the built form outputs of the Plan and what type of place is being delivered.
- 11.13 It will take a mixture of sources to monitor all of the outputs listed. These will include buildings regulations information and residents surveys. The monitoring of the framework set out below will be undertaken by the Council in liaison with the Community Development Officer to ensure that built form outputs and qualitative measures are captured.
- 11.8 Monitoring of these indicators will establish the extent to which the vision for Welborne is being achieved. This will help to identify areas where further action is required from the Council or other agencies identified within the monitoring framework. Taken together the targets and indicators provide a robust framework for assessing delivery of the plan. However, given the scale and the evolving nature of the project it is unlikely that failure to meet one target would indicate that the plan needs reviewing. Should monitoring indicate that a phase of development was not delivering the overall vision and objectives of the Plan, the Council will consider the need to formally review the Welborne Plan. The need for this review will be identified through the Authority's Monitoring Report.
- 11.14

**Table 11.1: Welborne Monitoring Indicators**

<b>Indicator</b>	<b>Target(s)</b>	<b>Year</b>
Net increase in provision of B use class employment floorspace at Welborne	60,000 sq. m.	2036
<u>Floorspace built</u>		
<u>Phase 1</u>	<u>1,000 sq. m</u>	<u>2015-2019</u>
<u>Phase 2</u>	<u>4,860 sq. m.</u>	<u>2019-2022</u>
<u>Phase 3</u>	<u>18,520 sq. m.</u>	<u>2022-2026</u>
<u>Phase 4</u>	<u>10,650 sq. m.</u>	<u>2026-2030</u>
<u>Phase 5</u>	<u>24,850 sq. m.</u>	<u>2030-2036</u>
<u>No of jobs delivered at Welborne</u>	<u>5,735</u>	<u>2036</u>
<u>Number of Borough residents developing</u>		<u>Ongoing</u>

Indicator	Target(s)	Year
<u>relevant skills and finding employment in the development of Welborne</u>		
Amount of retail space provided at the District Centre:		
<ul style="list-style-type: none"> <li>• Supermarket (convenience)</li> <li>• General A1 – A5 (comparison)</li> </ul>	1900-2500 sqm. (net) 3600 sqm. (net)	2026
Provision of a multi-purpose main community <del>hub</del> <u>centre</u> at the District Centre (based on 6,000 homes) <i>Comprised of:</i>	1800 sqm.	2022
<ul style="list-style-type: none"> <li>• Community/art/culture space</li> <li>• Library space</li> <li>• Indoor sports space</li> <li>• Safer Neighbourhood Police space</li> </ul>	1000 sqm. 227 sqm 400 sqm. 168 sqm.	
Provision of a Primary care centre at Welborne	Space for 8 GP surgeries	2026
Education provision at Welborne:		
<ul style="list-style-type: none"> <li>• Nursery 1</li> <li>• Nursery 2 &amp; 3</li> <li>• Nursery 4 &amp; 5</li> <li>• Nursery 6</li> <li>• Nursery 7</li> <li>• Primary school 1</li> <li>• Primary school 2</li> <li>• Primary school 3</li> <li>• Secondary school</li> </ul>	180 sqm. 360 sqm. 360 sqm. 180 sqm. 180 sqm. 3FE 2FE 2FE 7FE	2019 2022 2026 2030 2036 2019 2026 2030 2026
<u>Number of primary and secondary age children on site</u>		<u>Ongoing</u>
Number of net dwellings completed at Welborne	6000 dwellings (See table 11.2 below)	2036
Total number of new affordable dwellings delivered at Welborne (part of the total 6000 dwellings)	1800 dwellings	2036
Amount of Extra Care (or similar) housing for the elderly	16 units	2036
Average residential (internal) water consumption per person	105 litres per person per day	Ongoing
Proportion of homes in each phase meeting the Lifetime Homes (or equivalent) standards	<u>15% of completions in each phase</u>	Ongoing
<u>Percentage of Custom build homes</u>	<u>1% of completions in each phase</u>	<u>Ongoing</u>
Percentage of completed dwellings built to “Passivhaus” standards	<u>10% of completions in each phase</u>	Ongoing
Amount of community play/ sports provision delivered at Welborne (based on 6,000 homes):	<i>See Table 4.7 of the Welborne IDP (Stage 2) Report</i>	
<ul style="list-style-type: none"> <li>• Artificial Grass Pitch</li> <li>• 1 x Bowling Green</li> <li>• 4 x Tennis Courts</li> <li>• Local play space (0-11 ages)</li> </ul>	685 sqm. 170 sqm. 670 sqm. per court 3900 sqm.	2022 2026 2022-2036 From 2016

Indicator	Target(s)	Year
• Neighbourhood play space (all ages)	(maximum 13 spaces) 3900 sqm.	From 2016
• Youth play space (12+ ages)	(maximum 8 spaces) 2600 sqm.	From 2016
• Play space equipment	(maximum 13 spaces) 42 pieces	From 2016
Additional amount of public open space delivered at Welborne ( <del>based on 6,000 homes</del> ):	<i>See Table 4.6 of the Welborne IDP (Stage 2) Report</i>	
• Parks & amenity space	<u>1.5ha per, 1,000 population</u>	Ongoing
• Allotments	<u>0.13ha per 1,000 population</u>	Ongoing
• Sports & Playing pitches (including shared school provision)	<u>1.2 ha per, 1,000 population</u>	Ongoing
• On-site semi-natural green space	<u>3ha per 1,000 population</u>	Ongoing
• SANGS (both on and off-site)	<u>Sufficient SANGS provided in agreement with Natural England to support each phase of development in place before development</u>	Ongoing
Transport infrastructure delivered at Welborne: BRT	At least three BRT buses an hour to serve the site.	2019
BRT	Full on-site routing for BRT	2026
M27 Junction 10 upgrades	Junction 10 upgraded to all-moves	2022
<u>Modal split for transport to/from Welborne – mode for travel to work</u>		<u>Ongoing</u>
Pedestrian and cycle links: Fareham - Wickham Welborne – Whiteley	100%	2022
Proportion of commercial and community development covered by Travel Plans		Ongoing

**Table 11.2: Target Housing Completions**

Year	Target completions	Target cumulative completions
2016/17	120	120
2017/18	180	300
2018/19	200	500
2019/20	320	820
2020/21	340	1160
2021/22	340	1500
2022/23	340	1840
2023/24	340	2180
2024/25	340	2520
2025/26	340	2860
2026/27	340	3200
2027/28	340	3540

2028/29	340	3880
2029/30	340	4220
2030/31	340	4560
2031/32	340	4900
2032/33	280	5180
2033/34	280	5460
2034/35	280	5740
2035/36	260	6000

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**Triggers for a Review**

## APPENDIX D

### Schedule of Evidence and Background Documents

#### 1. Key Submission Documents

ID#	Document Name	Date	Author
SD01	Fareham Borough Local Plan Part 3: The Welborne Plan Submission Version	Jun 2014	FBC
SD02	Schedule of Minor Changes to Fareham Borough Local Plan Part 3: The Welborne Plan Publication Version	Jun 2014	FBC
SD03	Fareham Borough Local Plan Part 3: The Welborne Plan Publication Version	Feb 2014	FBC
SD04	Duty to Co-operate Statement of Compliance	Jun 2014	FBC
SD05	Regulation 22(1)(c) Statement	Jun 2014	FBC
SD06	Regulation 20 full representations on the Welborne Plan (redacted)	Jun 2014	FBC
SD07	Statement on the submission of the Welborne Plan and supporting documents to the Secretary of State - Regulation 22(3)(a)(iv)	Jun 2014	FBC
SD08	Library of Submission Documents	Jun 2014	FBC
SD09	Additions and Deletions to Adopted Proposals Map	Jun 2014	FBC
SD10	Library of Examination Documents	TBC	PINS
SD11	<u>Fareham Local Plan Self-Assessment Checklist for Conformity with the National Planning Policy Framework</u>	<u>Sep 2014</u>	<u>FBC</u>

#### 2. National Documents

ID#	Document Name	Date	Author
ND01	By Design: Urban Design in the Planning System - Towards Better Practice	May 2000	DETR & CABE
ND02	Census 2001: Journey to Work Destination	Oct 2004	ONS
ND03	CIRIA C697 The SuDS manual	2007	CIRIA
ND04	Urban Design Compendium	2007	EP
ND05	Housing our Ageing Population: Panel for Innovation (HAPPI) Report	Jun 2009	HCA
ND06	HCA Employment Densities Guide (2 <sup>nd</sup> Edition)	2010	HCA
ND07	PADHI: HSE's land use planning methodology	May 2011	HSE
ND08	Planning Policy for Traveller Sites	Mar 2012	DCLG
ND09	Review of the barriers to institutional investment in private rented homes (The Montague Review)	Aug 2012	DCLG
ND10	Community Infrastructure Levy Guidance	Dec 2012	DCLG

ID#	Document Name	Date	Author
ND11	Census 2011: Long-term Health Problem or Disability	2013	ONS
ND12	Housing Standards Review Consultation	Aug 2013	DCLG
ND13	<u>Energy and Carbon Implications of Rainwater Harvesting and Greywater Recycling (Report: SC090018)</u>	<u>Aug 2010</u>	<u>EA</u>
ND14	<u>Building Regulations: Housing standards review (March 2014)</u>	<u>Mar 2014</u>	<u>DCLG</u>

### 3. Local Documents

ID#	Document Name	Date	Author
LD01	PUSH Strategic Flood Risk Assessment: Final Report	Dec 2007	Atkins
LD02	Green Infrastructure Strategy for the Partnership for Urban South Hampshire	June 2010	PUSH
LD03	PUSH Economic Development Strategy	Oct 2010	DTZ
LD04	Water Resources Management Plan 2009 (Final)	Sept 2011	Portsmouth Water
LD05	SDMP Phase II Final Report: Predicting the impact of human disturbance on overwintering birds in the Solent	Feb 2012	Stillman, West, Clarke & Liley.
LD06	South Hampshire Strategy: A framework to guide sustainable development and change to 2026	Oct 2012	PUSH
LD07	Transport Delivery Plan 2012-2016	Feb 2013	TfSH
LD08	East Hampshire Abstraction Licensing Strategy	Mar 2013	EA
LD09	Travellers Accommodation Assessment for Hampshire 2013	Mar 2013	Forest Bus
LD10	Winchester City Council Local Plan Part 1 – Joint Core Strategy (Adopted)	Mar 2013	WCC
LD11	Solent Disturbance and Mitigation Project Phase III: Towards an Avoidance and Mitigation Strategy	May 2013	FE & DTA
LD12	Water Resources Management Plan 2014 (Draft)	May 2013	Portsmouth Water
LD13	Solent Disturbance and Mitigation Project (SDMP) Briefing Note	Aug 2013	Solent Forum /SDMP Group
LD14	South Hampshire Strategic Housing Market Assessment	Jan 2014	GL Hearn for PUSH
LD15	Solent LEP Strategic Economic Plan	Mar 2014 (expected)	Oxford Economics
LD16	<u>Strategic Flood Risk Assessment Appendix C: Fareham Guidance Document</u>	<u>Dec 2007</u>	<u>Atkins (for PUSH)</u>
LD17	<u>Portsmouth Water: Final Water Resources Management Plan 2014</u>	<u>Aug 2014</u>	<u>Portsmouth Water</u>
LD18	<u>South Hampshire authorities – Duty to co-operate</u>	<u>May 2013</u>	<u>PUSH</u>

<b>ID#</b>	<b>Document Name</b>	<b>Date</b>	<b>Author</b>
<u>LD19</u>	<u>Report on the Examination into Havant Borough Local Plan (Allocations)</u>	<u>July 2014</u>	<u>PINS</u>
<u>LD20</u>	<u>The Solent Disturbance &amp; Mitigation Project. Phase II - On-site visitor survey results from the Solent region.</u>	<u>Oct 2010</u>	<u>Fearnley, H., Clarke, R. T. &amp; Liley, D.</u>
<u>LD21</u>	<u>Solent Waders and Brent Goose Strategy 2010</u>	<u>Dec 2010</u>	<u>King, D.</u>
<u>LD22</u>	<u>Changing patterns of visitor numbers within the New Forest National Park, with particular reference to the New Forest SPA.</u>	<u>Nov 2008</u>	<u>Sharp, J., Lowen, J. &amp; Liley, D.</u>
<u>LD23</u>	<u>Report to the PUSH Joint Committee - Update on the progress of the PUSH Spatial Strategy 2016 - 2036</u>	<u>September 2014</u>	<u>PUSH</u>
<u>LD24</u>	<u>Protocol for PUSH involvement in the preparation of Local Development Documents</u>	<u>November 2009</u>	<u>PUSH</u>

#### **4. County Documents**

<b>ID#</b>	<b>Document Name</b>	<b>Date</b>	<b>Author</b>
HCC01	A Guide to Development Related Travel Plans	Jan 2009	HCC
HCC02	Housing Provision for Older People in Hampshire: Older Persons Housing Study	Nov 2009	HCC
HCC03	School Places: Framework and Analysis 2012-2016	Nov 2012	HCC
HCC04	Hampshire County Council Infrastructure Statement - Version 1	Dec 2012	HCC
HCC05	Fareham and Gosport Strategic Transport Infrastructure Plan	Oct 2013	HCC
HCC06	Hampshire Minerals and Waste Plan	Oct 2013	HCC
HCC07	Developers' Contributions Towards Children's Services Facilities	Dec 2013	HCC

#### **5. Fareham Borough Documents**

<b>ID#</b>	<b>Document Name</b>	<b>Date</b>	<b>Author</b>
FBC01	Your Fareham Your Future: A Sustainable Community Strategy for Fareham 2010 - 2020	Oct 2009	Network Fareham
FBC02	Fareham Residential Car & Cycle Parking Standards SPD	Nov 2009	FBC
FBC03	Fareham Housing Strategy 2010-2015	Apr 2010	FBC
FBC04	Private Sector House Condition Survey 2009 (Final Report)	Apr 2010	FBC & CPC
FBC05	Allotment Strategy for Fareham	Nov 2010	FBC
FBC06	Fareham Borough Statement of Community Involvement	Jan 2011	FBC
FBC07	Fareham Local Development Scheme	Mar 2012	FBC
FBC08	Fareham Community Infrastructure Levy: Charging Schedule	May 2013	FBC
<u>FBC14</u>	<u>Fareham Local Development Scheme Revised September 2014</u>	<u>Sep 2014</u>	<u>FBC</u>

ID#	Document Name	Date	Author
FBC15	<u>Equality Impact Assessment on Fareham Local Plan Part 3: the Welborne Plan</u>	<u>Aug 2014</u>	<u>FBC</u>
FBC16	<u>New Community North of Fareham Options Consultation</u>	<u>Jul 2012</u>	<u>FBC</u>

## 6. Sustainability Appraisal

ID#	Document Name	Date	Author
SA01	Sustainability Appraisal Scoping Report	Jul 2009	Urban Edge
SA02	Sustainability Appraisal: Scoping Report (update)	May 2012	Urban Edge
SA03	Sustainability Appraisal: Options Assessment	Apr 2013	Urban Edge
SA04	Sustainability Appraisal: Sustainability Report on the Draft Welborne Plan	Oct 2013	Urban Edge
SA05	Sustainability Appraisal: Sustainability Report on the Publication Draft Welborne Plan	Jan 2014	Urban Edge
SA06	SA/SEA and HRA Addendum	Jun 2014	Urban Edge
SA07	SA/SEA and HRA Second Addendum	Jan 2015	Urban Edge

## 7. Habitats Regulations Assessment

ID#	Document Name	Date	Author
HRA01	Habitats Regulations Assessment for the North of Fareham Strategic Development Area – Screening Letter	Jun 2009	Urban Edge
HRA02	Habitat Regulations Assessment: Baseline Data Review Report	May 2012	Urban Edge
HRA03	Habitat Regulations Assessment: Screening Statement	Apr 2013	Urban Edge
HRA04	Habitat Regulations Assessment: Appropriate Assessment Report on the Publication Draft Welborne Plan	Jan 2014	Urban Edge

## 8. Evidence Base by Topic

### *Masterplanning*

ID#	Document Name	Date	Author
EV01	Refining the Fareham SDA Capacity Analysis Study	Jul 2009	DLA
EV02	Overview of Demographic Change: Chelmer Demographic Model	2011 & 2012	Cambridge Econometrics
EV03	Dynamic Demographic Analysis	Jun 2012	Cambridge Econometrics
EV04	Concept Masterplan Options Study	Aug 2012	LDA
EV05	Preferred Concept Masterplan Option Report	Apr 2013	LDA

ID#	Document Name	Date	Author
EV06	Concept Masterplan Final Report	Jan 2014	LDA
EV07	Environmental Noise Assessment	Jan 2014	Hoare Lea
EV38	Welborne Concept Masterplan Phasing Plan	Jun 2014	FBC
EV63	<u>Helping to create a 'Vision' for the North of Fareham Strategic Development Area: Report on the Fareham SDA stakeholder visioning workshop held on 27th March 2009</u>	<u>Mar 2009</u>	<u>Urban Design + Mediation</u>
EV64	<u>Helping to create a 'Vision' for the North of Fareham Strategic Development Area - Formulating Development Principles and Design Specifications: Report on the second Fareham SDA stakeholder visioning workshop held on 19th June 2009</u>	<u>Jul 2009</u>	<u>Urban Design + Mediation</u>

### **Employment**

ID#	Document Name	Date	Author
EV08	Fareham Retail Study 2012 – NCNF Supplementary Retail Paper	Dec 2012	GVA
EV09	Final Paper on Employment and Workspace	Apr 2013	HJA
EV46	Welborne Employment Strategy	Nov 2013	Wessex Economics

### **Housing**

ID#	Document Name	Date	Author
EV10	Fareham Borough Housing Need Assessment Final Report	Aug 2012	DTZ
EV11	Housing Market Assessment: Summary Report	Mar 2013	DTZ & WE
EV12	Build Out Rates Study	Nov 2013	GVA
EV60	<u>Private Sector Housing Condition Survey 2009</u>	<u>Apr 2010</u>	<u>FBC with CPC</u>

### **Transport**

ID#	Document Name	Date	Author
EV13	Smarter Choices and Parking Study: Parking Standards Study	Jan 2012	Campbell Reith
EV14	Smarter Choices Study	Jan 2012	Campbell Reith
EV15	Transport Strategy	Mar 2013	PB
EV16	Transport Modelling Summary: Final Report	Apr 2013	PB
EV17	Transport Strategy (Final)	Jan 2014	PB
EV39	Welborne SRTM Modelling Analysis (Runs 1-4)	Nov 2012	MVA/TfSH
EV40	Welborne SRTM Modelling Analysis (Run 6)	Oct 2013	MVA/TfSH
EV41	Welborne SRTM Modelling Analysis (Run 7)	Oct 2013	MVA/TfSH
EV42	Welborne SRTM Modelling Analysis (Run 7a)	Dec 2013	MVA/TfSH
EV43	Welborne SRTM Modelling Analysis (Run 8a)	Dec 2013	MVA/TfSH

<b>ID#</b>	<b>Document Name</b>	<b>Date</b>	<b>Author</b>
EV44	Welborne SRTM Modelling Analysis (Run 8b)	Dec 2013	MVA/TfSH
EV45	Welborne SRTM Modelling Analysis (Run 9)	Nov 2013	MVA/TfSH
EV47	<u>Welborne M27 Junction 10 – Preferred Option Note</u>	<u>Apr 2014</u>	<u>HCC/FBC/HA</u>
EV48	<u>Welborne Plan Parking Strategy</u>	<u>Jan 2014</u>	<u>FBC</u>
EV50	<u>Welborne SRTM Modelling Analysis (Run 5)</u>	<u>May 2013</u>	<u>MVA/TfSH</u>
EV61	<u>South East Hampshire BRT Future Phases Study for Hampshire County Council</u>	<u>May 2012</u>	<u>Atkins</u>

### ***Green Infrastructure and Landscape***

<b>ID#</b>	<b>Document Name</b>	<b>Date</b>	<b>Author</b>
EV18	Landscape Study	Jul 2012	LDA
EV19	Implementation Plan Final Report (Indoor and Outdoor Sports Facilities Assessment)	Oct 2012	KKP
EV20	Archaeological Review (Update)	May 2013	HCC
EV21	Green Infrastructure Strategy	Feb 2014	LDA
EV51	<u>Green Infrastructure Strategy for the Borough of Fareham</u>	<u>Sep 2014</u>	<u>FBC</u>

### ***Energy, Water and Waste***

<b>ID#</b>	<b>Document Name</b>	<b>Date</b>	<b>Author</b>
EV22	Eco-Opportunities Study (Final Report)	Aug 2012	LDA & PB
EV23	District Energy Network: Outline Feasibility Study	Oct 2013	HCC
EV24	Potential New HWRC: Briefing Note	Jan 2014	HCC
EV56	<u>Welborne Plan - Wastewater Treatment</u>	<u>Sep 2014</u>	<u>Environment Agency</u>
EV57	<u>Welborne Wastewater Infrastructure: Preliminary Infrastructure Assessment</u>	<u>Aug 2014</u>	<u>Albion Water</u>
EV58	<u>Provision of Wastewater Services - Statement from Southern Water</u>	<u>Sep 2014</u>	<u>Southern Water</u>
EV59	<u>Welborne Wastewater Infrastructure: Initial Infrastructure Assessment</u>	<u>Sep 2014</u>	<u>Albion Water</u>

### ***Infrastructure and Viability***

<b>ID#</b>	<b>Document Name</b>	<b>Date</b>	<b>Author</b>
EV25	Infrastructure Funding Position Statement	Apr 2011	Almondree Consulting
EV26	Major Infrastructure Funding Scoping Study: Fact File Update	Feb 2012	Almondree Consulting
EV27	Infrastructure Delivery Plan Review 2013 Stage 1 Report	Feb 2013	AECOM
EV28	Outline Infrastructure Funding Strategy	Mar 2013	GVA
EV29	Infrastructure Delivery Plan 2014: Stage 2 Update Report	Jan 2014	AECOM
EV30	Stage 2 Viability Testing – GVA Approach, Assumptions & Results (Executive Summary)	Jan 2014	GVA
EV52	<u>Welborne Infrastructure Funding Strategy</u>	<u>July 2014</u>	<u>GVA</u>

ID#	Document Name	Date	Author
EV53	<u>Welborne Infrastructure Funding Strategy: Position Statement Update</u>	<u>July 2014</u>	<u>FBC</u>
EV54	<u>Welborne Infrastructure Funding Strategy (IFS) and Position Statement Update</u>	<u>Sep 2014</u>	<u>FBC</u>
EV55	<u>Site Promoter Representations on Welborne Infrastructure Funding Strategy</u>	<u>Sep 2014</u>	<u>FBC</u>

### 9. Local Plan Documents

ID#	Document Name	Date	Author
EV31	Fareham Borough Local Plan Part 1: Core Strategy (Adopted)	Aug 2011	FBC
EV32	Fareham Borough Core Strategy Inspector's Report	Jul 2011	Plns
EV33	Fareham Borough Local Plan Part 3: Welborne Plan (Draft)	Apr 2013	FBC
EV34	Fareham Local Plan Part 2: Development Sites and Policies DPD (Publication)	Feb 2014	FBC
EV35	Fareham Local Plan Part 2: Development Sites and Policies DPD (Submission)	Jun 2014	FBC
EV36	Welborne Planning Obligations and Affordable Housing Supplementary Planning Document	May 2014	FBC
EV37	Community Infrastructure Levy: 'First Review', Consultation on the Preliminary Draft Charging Schedule	May 2014	FBC
EV49	<u>Welborne Design Guidance SPD</u>	<u>Jun 2014</u>	<u>FBC / LDA</u>
EV62	<u>Residential Car and Cycle Parking SPD</u>	<u>Nov 2009</u>	<u>FBC</u>

### 10. Political Meetings and Decisions

ID#	Document Name	Date	Author
FBC09	Council Meeting Summons	4 Aug 2011	FBC
FBC10	Minutes of Executive	15 Apr 2013	FBC
FBC11	Minutes of Executive	10 Feb 2014	FBC
FBC12	Minutes of Council	13 Feb 2014	FBC
FBC13	Schedule of Changes to Publication Draft Welborne Plan and Sustainability Appraisal Report Agreed under Delegated Authority	25 Feb 2014	FBC

### 11. Monitoring of the Core Strategy

ID#	Document Name	Date	Author
AM1	Fareham Borough Annual Monitoring Report 2009-10	Dec 2010	FBC
AM2	Fareham Borough Annual Monitoring Report 2010-11	Dec 2011	FBC
AM3	Fareham Borough Monitoring Report 2011-12	Dec 2012	FBC
AM4	Fareham Borough Monitoring Report 2012-13	Feb 2014	FBC

## APPENDIX E

### Strategic Framework Diagram

## APPENDIX F

### Revised Extract of the Fareham Policies Map covering Welborne