

The Welborne Plan

Issue 11: Delivering the New Community including Viability, Monitoring and Review (WEL41 – WEL43)

Actions arising from hearing session

November 2014

CD-44

Introduction

Chapter 10 of the Welborne Plan deals with delivering the new community. Chapter 11 concerns monitoring and review. At the Welborne Plan Examination hearing session on Issue 11: Delivering the New Community including Viability, Monitoring and Review (WEL41 – WEL43), the Inspector asked for two further pieces of work to be undertaken to address points raised during the hearing session. These are set out in this note.

1. A new Phasing Plan to be prepared by the Council in consultation with the site promoters setting out how Welborne is likely to be delivered; and
2. A review of Chapter 11, giving more certainty on how the Welborne Project will be monitored, including mechanisms for review of the project and monitoring indicators.

1 Phasing Plan

Chapter 10 of the publication version of the Welborne Plan included a Phasing Plan setting out a description of how the Welborne new community would be developed. The Council subsequently considered that the description, based on the Council's Concept Masterplan, would quickly become superseded by the developer's Phasing Plan which is required to be submitted alongside their initial planning application, and so should remove it from the Plan and include it in a supporting document (EV38).

However, at the Issue 11 hearing session, the Inspector indicated that he considered that a Phasing Plan along the lines of what was formerly shown in paragraph 10.5 to 10.23 of the Welborne Plan (SD-03) should be included in the Plan and requested that the Council work with the site promoters to provide such details.

The site promoters subsequently provided the Council with a schedule setting out the timing of various elements of their proposals and the likely layout of phases of development. Those details were included in document CD-36 which was circulated at the beginning of the Issue 11 hearing session.

Following consideration of the information provided by the site promoters and others, Council Officers have prepared a new Phasing Plan description to be included in the Welborne Plan and provided at Appendix A to this document.

2 Monitoring and Review

Chapter 11 of the Welborne Plan concerns monitoring and review. At the Issue 11 hearing session of the Welborne Plan, the Council acknowledged that this section of the Plan should be rewritten to be clearer on the following issues –

- Monitoring of the output of the Plan;
- The mechanism for managing the delivery of the new community, including necessary infrastructure; and
- Any triggers for review of the Plan.

The governance arrangements for the Welborne Project are currently under review. However, the project has the active involvement of a number of key parties which will aid in its delivery. Therefore the Council has drafted a new Chapter 11 which sets out the key elements of the monitoring and review mechanism for the project. The proposals are set out in Appendix B to this document.

APPENDIX A – Phasing Plan

The following new text is proposed by the Council to be added to the supporting text of the Welborne Plan in place of the paragraphs 10.6 to 10.23 which are currently ~~struck through~~ in the submission Welborne Plan:

- 10.6 The delivery of housing and employment floorspace is dependent upon a range of factors including market conditions. The Council recognises that the site promoters have aspirations for the early delivery of employment floorspace which is in excess of the indicative employment development trajectory set out in Table 10.2 of this Plan. The Council is supportive of early delivery of employment floorspace should sufficient market demand exist and suitable infrastructure is in place. However, the Phasing Plan set out below, and the monitoring framework in Chapter 11 is based on the indicative trajectory for employment floorspace which has arose from the evidence available in the Welborne Employment Strategy and set out in Table 10.2. The description of employment land phasing is not an absolute cap on what may be achievable in each phase.

10.7 Main Phase 1 (2015 – 2019)

Commencement on site, initial major infrastructure and local road mitigation.

Key outcomes –

- Approximately 500 homes located adjacent to the District Centre and to the north of Knowle Road.
- 1,000 sq. m employment floorspace
- District Centre commencement including the foodstore, and initial community facility
- Local Centre commencement

Necessary Infrastructure –

- Initial works to Junction 10 of M27, including access from the A32 and associated roads
- Local Highway Network Improvements
- Enhanced public transport
- Pedestrian and cycle links
- Initial utilities strengthening
- Diversion of large diameter water mains
- Initial primary school provision
- Green Infrastructure, including SANGS
- Initial structural planting
- Sustainable Drainage systems

- 10.8 This main phase represents initial site preparation and the delivery of infrastructure required to unlock the early stages of development. Increased capacity in utilities infrastructure and the road network will be required before the next phase can be commenced. For roads, this will include site accesses from the A32 and Knowle Road, as well as initial improvements to the existing eastbound on-slip to Junction 10 of the M27. In relation to utilities, the primary electricity sub-station required to serve Welborne will need to be completed as well as the provision of sufficient foul water disposal capacity to serve at least the initial and following main phase. In addition, Portsmouth Water will have to divert

an existing large diameter water main to allow this site to be developed, though the works along the A32 provide the opportunity for a service corridor to be delivered at the same time as the proposed road improvements. Similarly, a high pressure water main to the south of the site is likely to require diversion in this or the next phase of development with the new north-south link providing the opportunity for a service corridor to be created in this part of the site.

10.9 Development within this initial phase will focus on and around the Local and District Centres, and will entail the delivery of residential, employment and retail floorspace. North of Knowle Road, the Local Centre will start to be developed, some initial retail units and residential areas. In the southern part of the site, the District Centre will be commenced with the foodstore, some shops and initial community facility. Initial primary school provision will be made. Some 1,000 sq. m of employment floorspace is anticipated in this phase in the southern part of the site, west of the A32. An early start of employment space for small businesses, including the incubation centre is envisaged, which will help support self-containment. In total, approximately 500 home completions are anticipated during this main phase, close to the Local and District Centres. If more homes and employment space can be delivered over this period this will be encouraged.

10.10 During this phase, Welborne's green corridor network will begin to be delivered, concentrating initially on enhancements to existing links which relate to the areas being developed at this stage and securing key green infrastructure assets, including pedestrian and cycle links to important destinations including secondary schools off site. Sufficient SANGS will need to be delivered, in this and subsequent phases prior to residential development, to support the avoidance or mitigation of potential damage to sensitive sites. Similarly, complimentary green infrastructure, including open space and playing fields will need to be delivered in each phase to serve the growing community.

10.11 Main Phase 2 (2019-2022)

Completion of Junction 10 of the M27, development around the district and local centres.

Key outcomes –

- 1,000 homes
- 5,850 sq. m employment floorspace
- District Centre completed
- Local Centre completed

Critical Infrastructure –

- Upgrade to Junction 10 of M27 complete
- Physical works required to deliver BRT to the site
- Enhanced public transport
- District Community Centre
- Pedestrian and cycle links
- Initial playing pitches and sports provision
- Green Infrastructure, including SANGS
- Sustainable Drainage systems

10.12 The second main phase will see the pace of development and investment in

infrastructure increase. Key will be the completion of the upgrade to Junction 10 of the M27 to provide an all-moves junction. This will be required to be fully operational before the next main phase can commence. The main internal road network will begin to take shape during this phase.

- 10.13 During the second main phase, development will continue north of Knowle road, including at the Local Centre and near the District Centre, both of which will be at least partially completed by the end of the phase. By the end of this phase some 1,500 dwellings will have been completed at Welborne.
- 10.14 Employment development during this phase will be focused south of the District Centre, to the west of the A32, with the Business Incubation Centre promoting indigenous economic growth within the new community, supported by a training and skills programme. Development of this part of the site provides the opportunity to lay out the new north-south link and other elements of the new internal road network, providing the opportunity to move water mains and other services to suitable alignments.
- 10.15 It is anticipated that the development of the District Centre during this main phase will include the main community building, linked to shared facilities in the primary school which will provide a range of community facilities that are needed to support the early residents, including the opportunity for health care and other services to be provided at Welborne prior to bespoke facilities being constructed. Providing these facilities and services during these early phases will be crucial for establishing a sense of place for Welborne at the outset and providing a focus for new residents and visitors.
- 10.16 This phase also provides the first opportunity to deliver a Household Waste Recycling Centre.
- 10.17 The green corridor network and the first significant green open spaces will be delivered during this second main phase. Towards the end of this period, local work is anticipated to begin on formalising the main central park to ensure that the growing number of residents have sufficient formal green infrastructure.
- 10.18 Main Phase 3 (2022-2026)
Central part of the site and main internal road network

Key outcomes –

- 1,360 homes
- 18,500 sq. m employment floorspace
- District Centre development
- Local Centre development

Critical Infrastructure –

- Enhanced public transport
- Primary care centre
- Secondary School
- Second primary school
- Pedestrian and cycle links
- Green Infrastructure, including SANGS

- Central Park
- Sustainable Drainage systems

10.19 The third main phase will see the development start to take shape as significant residential and employment areas and community facilities are delivered. Key pieces of infrastructure required by the end of this main phase include the second primary school, the primary care health centre(s), the central park and the on-site routing for the Bus Rapid Transit (BRT) service. These will all be required before the next main phase can commence.

10.20 Residential development during the third main phase will mainly be located in the centre of the site, taking shape around the central park. The main internal spine road network route providing access and BRT services to key areas will be delivered, including the new north-south route parallel to the A32. During this phase, at least one supported housing scheme, such as extra care accommodation, is expected to be completed. Residential development at the Crockerhill Industrial Park, to the east of the A32, is also anticipated in this phase. Overall, by the end of this main phase, some 2,860 homes will have been delivered at Welborne.

10.21 The main employment areas to the south of the central park will continue to be developed during the third main phase. This is likely to focus on the area to the west of the A32, potentially including the employment areas closest to the District Centre. The District Centre itself (as well as the Local Centre) should have been completed by the end of this phase.

10.22 The green corridor network will be continued during this main phase and the central park will be expected to be substantially complete by the end of this phase to ensure both that the growing number of residents benefit from this key strategic open space and also to ensure that the new secondary school is well connected by sustainable travel routes to the completed housing areas east of the park.

10.23 Main Phase 4 (2026-2030)

Completion of residential development to the west of the A32 and commencement to the east

Key outcomes –

- 1,360 homes
- 24,500 sq. m employment floorspace
- District Centre development
- Local Centre development

Critical Infrastructure –

- Third primary school
- Community hub
- Pedestrian and cycle links
- Green Infrastructure, including SANGS
- Sustainable Drainage systems

10.23a Main Phase 4 is anticipated to involve considerable residential development to the west and north of the site. By the end of Main Phase 4 about 4,220 homes will

have been completed at Welborne. Development of the western part of the site (north of Funtley) will need to accommodate the future provision of a new rail halt on the Fareham to Eastleigh rail line, unless it is demonstrated that it is not technically feasible or viable to deliver this before the end of the Plan period.

10.23b With respect to other infrastructure, the key items to be delivered during this phase include the third primary school and the completion of the Community Hub. This phase will also need to include the completion of a range of green infrastructure assets.

10.23c A significant quantity of employment floorspace is likely to be completed during Main Phase 4, potentially amounting to about 24,500 square metres. At some point in the development, the total employment net floorspace delivered will be reduced due to the expected loss of about 14,000 square metres to residential development at Dean Farm.

10.23d In addition, development will also commence to the east of the A32, with main road infrastructure and residential development commencing to the north of Roche Court.

10.23e Main Phase 5 (2030-2036)
Development of eastern part of the site

Key outcomes –

- 1,780 homes
- 25,000 sq. m employment floorspace
- District Centre development
- Local Centre development

Critical Infrastructure –

- Enhanced public transport
- Pedestrian and cycle links
- Green Infrastructure, including SANGS
- Sustainable Drainage systems

10.23f The final strategic phase will see residential development to the east of the A32 completed both north and south of Roche Court. By the end of Main Phase 5, approximately 6,000 homes will have been completed.

10.23g Employment land will continue to be developed during Main Phase 5, both east and west of the A32. Depending on take up, it is expected that by the end of this phase a net additional employment floorspace of about 60,000 square metres will have been completed at Welborne. However, even with strong take-up, it is not likely that all of Welborne's employment development will have been completed by 2036. Therefore, it is expected that a further 23,500 square metres of floorspace will be completed in the years following Main Phase 5.

10.23h There are no other strategic infrastructure items phased to be completed during Main Phase 5.

APPENDIX B – monitoring and review

- 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 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 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 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 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 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 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.).
- 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.
- 11.10 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.
- 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.

11.14 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.

Table 11.1: Welborne Monitoring Indicators

Indicator	Target(s)	Year
Net increase in provision of B use class employment floorspace at Welborne	60,000 sq. m.	2036
Floorspace built		
Phase 1	1,000 sq. m	2015-2019
Phase 2	4,860 sq. m.	2019-2022
Phase 3	18,520 sq. m.	2022-2026
Phase 4	10,650 sq. m.	2026-2030
Phase 5	24,850 sq. m.	2030-2036
No of jobs delivered at Welborne	5,735	2036
Number of Borough residents developing relevant skills and finding employment in the development of Welborne		Ongoing
Amount of retail space provided at the District Centre:		
• Supermarket (convenience)	1900-2500 sqm. (net)	2026
• General A1 – A5 (comparison)	3600 sqm. (net)	
Provision of a multi-purpose main community centre at the District Centre (based on 6,000 homes)	1800 sqm.	2022
<i>Comprised of:</i>		
• Community/art/culture space	1000 sqm.	
• Library space	227 sqm	
• Indoor sports space	400 sqm.	
• Safer Neighbourhood Police space	168 sqm.	
Provision of a Primary care centre at Welborne	Space for 8 GP surgeries	2026
Education provision at Welborne:		

Indicator	Target(s)	Year
• Nursery 1	180 sqm.	2019
• Nursery 2 & 3	360 sqm.	2022
• Nursery 4 & 5	360 sqm.	2026
• Nursery 6	180 sqm.	2030
• Nursery 7	180 sqm.	2036
• Primary school 1	3FE	2019
• Primary school 2	2FE	2026
• Primary school 3	2FE	2030
• Secondary school	7FE	2026
Number of primary and secondary age children on site		Ongoing
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	15% of completions in each phase	Ongoing
Percentage of Custom build homes	1% of completions in each phase	Ongoing
Percentage of completed dwellings built to "Passivhaus" standards	10% of completions in each phase	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>	
• Artificial Grass Pitch	685 sqm.	2022
• 1 x Bowling Green	170 sqm.	2026
• 4 x Tennis Courts	670 sqm. per court	2022-2036
• Local play space (0-11 ages)	3900 sqm. (maximum 13 spaces)	From 2016
• Neighbourhood play space (all ages)	3900 sqm. (maximum 8 spaces)	From 2016
• Youth play space (12+ ages)	2600 sqm. (maximum 13 spaces)	From 2016
• Play space equipment	42 pieces	From 2016
Additional amount of public open space delivered at Welborne	<i>See Table 4.6 of the Welborne IDP (Stage 2) Report</i>	
• Parks & amenity space	1.5ha per, 1,000 population	Ongoing
• Allotments	0.13ha per 1,000 population	Ongoing
• Sports & Playing pitches (including shared school provision)	1.2 ha per, 1,000 population	Ongoing

Indicator	Target(s)	Year
<ul style="list-style-type: none"> On-site semi-natural green space SANGS (both on and off-site) 	3ha per 1,000 population Sufficient SANGS provided in agreement with Natural England to support each phase of development in place before development	Ongoing 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
Modal split for transport to/from Welborne – mode for travel to work		Ongoing
Pedestrian and cycle links:		
Fareham - Wickham	100%	2022
Welborne – Whiteley		
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