



BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

WEDNESDAY 4TH APRIL 2012
AT 6.00 P.M.

COMMITTEE ROOM, THE COUNCIL HOUSE, BURCOT LANE, BROMSGROVE

MEMBERS: Councillors R. Hollingworth (Leader), Mrs. M. A. Sherrey JP (Deputy Leader), Dr. D. W. P. Booth JP, M. A. Bullivant, C. B. Taylor and M. J. A. Webb

AGENDA

1. To receive apologies for absence
2. Declarations of Interest
3. To confirm the accuracy of the minutes of the meeting of the Cabinet held on 7th March 2012 (Pages 1 - 2)
4. Minutes of the meetings of the Overview and Scrutiny Board held on 27th February 2012 (attached) and 26th March 2012 (to follow) (Pages 3 - 10)
 - (a) To receive and note the minutes
 - (b) To consider any recommendations contained within the minutes
5. Minutes of the meetings of the Shared Services Board held on 26th January 2012 and 8th March 2012 (Pages 11 - 18)
 - (a) To receive and note the minutes
 - (b) To consider any recommendations contained within the minutes
6. Minutes of the meeting of the Worcestershire Shared Services Joint Committee held on 23rd February 2012 (Pages 19 - 26)
 - (a) To receive and note the minutes
 - (b) To consider any recommendations contained within the minutes

7. Overview and Scrutiny Task Group Planning Policy Report (Pages 27 - 28)
8. To receive verbal updates from the Leader and/or other Cabinet Members on any recent meetings attended in an ex-officio capacity (Pages 29 - 30)
9. Bromsgrove Town Centre Townscape Heritage Initiative - Second Round Submission (Pages 31 - 34)
10. Longbridge - Statement of Principles Regarding Affordable Housing Provision (Pages 35 - 40)
11. Worcestershire Extra Care Housing Strategy 2011 (Pages 41 - 44)
12. Performance Monitoring Quarter 3 2011/12 (Pages 45 - 48)
 - Appendix For Item 7 - Overview And Scrutiny Task Group Planning Policy Report (Pages 49 - 82)
 - Appendix For Item 10 - Longbridge - Statement Of Principles Regarding Affordable Housing Provision (Pages 83 - 84)
 - Appendices For Item 9 - Bromsgrove Town Centre Heritage Initiative - Second Round Submission (Pages 85 - 260)
 - Appendix For Item 11 - Worcestershire Extra Care Housing Strategy 2011 (Pages 261 - 342)
 - Appendix For Item 12 - Performance Monitoring Quarter 3 2011/12 (Pages 343 - 346)
13. To consider any other business, details of which have been notified to the Head of Legal, Equalities and Democratic Services prior to the commencement of the meeting and which the Chairman, by reason of special circumstances, considers to be of so urgent a nature that it cannot wait until the next meeting
14. To consider, and if considered appropriate, to pass the following resolution to exclude the public from the meeting during the consideration of item(s) of business containing exempt information:-

"RESOLVED: that under Section 100 I of the Local Government Act 1972, as amended, the public be excluded from the meeting during the consideration of the following item of business on the grounds that it involves the likely disclosure of exempt information as defined in Part I of Schedule 12A to the Act, as amended, the relevant paragraph of that part, in each case, being as set out below, and that it is in the public interest to do so:-

Item No. Paragraph
15 3 "

15. Marketing Exercise - Inclusion of Council Owned Assets (Hanover Street Car Park, George House and Stourbridge Road Car Park) (Pages 347 - 354)

K. DICKS
Chief Executive

The Council House
Burcot Lane
BROMSGROVE
Worcestershire
B60 1AA

26th March 2012



INFORMATION FOR THE PUBLIC

Access to Information

The Local Government (Access to Information) Act 1985 widened the rights of press and public to attend Local Authority meetings and to see certain documents. Recently the Freedom of Information Act 2000 has further broadened these rights, and limited exemptions under the 1985 Act.

- You can attend all Council, Cabinet and Committee/Board meetings, except for any part of the meeting when the business would disclose confidential or “exempt” information.
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- You can inspect minutes of the Council, Cabinet and its Committees/Boards for up to six years following a meeting.
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- An electronic register stating the names and addresses and electoral areas of all Councillors with details of the membership of all Committees etc. is available on our website.
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- You have access to a list specifying those powers which the Council has delegated to its Officers indicating also the titles of the Officers concerned, as detailed in the Council’s Constitution, Scheme of Delegation.

You can access the following documents:

- Meeting Agendas
- Meeting Minutes
- The Council’s Constitution

at www.bromsgrove.gov.uk

Declaration of Interests - Explained

Definition of Interests

A Member has a **PERSONAL INTEREST** if the issue being discussed at a meeting affects the well-being or finances of the Member, the Member's family or a close associate more than most other people who live in the ward affected by the issue.

Personal interests are also things relating to an interest the Member must register, such as any outside bodies to which the Member has been appointed by the Council or membership of certain public bodies.

A personal interest is also a **PREJUDICIAL INTEREST** if it affects:

- The finances, or
- A regulatory function (such as licensing or planning)

Of the Member, the Member's family or a close associate **AND** which a reasonable member of the public with knowledge of the facts would believe likely to harm or impair the Member's ability to judge the public interest.

Declaring Interests

If a Member has an interest they must normally declare it at the start of the meeting or as soon as they realise they have the interest.

EXCEPTION:

If a Member has a **PERSONAL INTEREST** which arises because of membership of another public body the Member only needs to declare it if and when they speak on the matter.

If a Member has both a **PERSONAL AND PREJUDICIAL INTEREST** they must not debate or vote on the matter and must leave the room.

EXCEPTION:

If a Member has a prejudicial interest in a matter being discussed at a meeting at which members of the public are allowed to make representations, give evidence or answer questions about the matter, the Member has the same rights as the public and can also attend the meeting to make representations, give evidence or answer questions **BUT THE MEMBER MUST LEAVE THE ROOM ONCE THEY HAVE FINISHED AND CANNOT DEBATE OR VOTE.**

However, the Member must not use these rights to seek to improperly influence a decision in which they have a prejudicial interest.

For further information please contact Committee Services, Legal, Equalities and Democratic Services, Bromsgrove District Council, The Council House, Burcot Lane, Bromsgrove, B60 1AA

Tel: 01527 873232 Fax: 01527 881414

Web: www.bromsgrove.gov.uk email: committee@bromsgrove.gov.uk

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

WEDNESDAY, 7TH MARCH 2012 AT 6.00 P.M.

PRESENT: Councillors Mrs. M. A. Sherrey JP (Deputy Leader in the Chair),
Dr. D. W. P. Booth JP, M. A. Bullivant, C. B. Taylor and M. J. A. Webb

Observers: Councillor P. M. McDonald

Officers: Ms. S. Hanley, Ms. J. Pickering, Ms. J. Willis, Mrs. S. Sellers,
Ms. R. McAndrews and Ms. R. Cole.

119/11 **APOLOGIES FOR ABSENCE**

An apology for absence was received from Councillor R. Hollingworth.

120/11 **DECLARATIONS OF INTEREST**

No declarations of interest were received.

121/11 **REFERRAL FROM THE COUNCIL - CCTV MOTION**

Councillor P. M. McDonald spoke in support of the motion referred from Council which called upon the Council to cease the monitoring of CCTV coverage outside Bromsgrove and Redditch and to give due notice to those it may concern. Councillor McDonald referred to the possibility that a greater number of cameras lessened the ability of the operators to maintain full coverage.

An officer report in connection to the motion was considered. The report set out the basis on which CCTV cameras were operated on behalf of Wyre Forest District Council under a Service Level Agreement (SLA) (which was due to expire in April 2012) and the implications if the SLA was not renewed.

Following discussion it was

RESOLVED:

- (a) that this Council continues to provide CCTV services outside Bromsgrove and Redditch, subject to suitable agreements being in place; and
- (b) that the existing SLA with Wyre Forest District Council which will expire in April 2012 be renegotiated.

122/11 **MINUTES**

The minutes of the meetings of the Cabinet held on 1st February 2012 and 22nd February 2012 were submitted.

RESOLVED that the minutes be confirmed as a correct record in each case.

123/11 **AUDIT BOARD**

The minutes of the meeting of the Audit Board held on 2nd February 2012 were submitted.

RESOLVED that the minutes be noted.

124/11 **VERBAL UPDATES FROM THE LEADER AND/OR OTHER CABINET MEMBERS ON ANY RECENT MEETINGS ATTENDED IN AN EX-OFFICIO CAPACITY**

Councillor C. B. Taylor reported that he had recently attended an Awards Evening at The Artrix.

The meeting closed at 6.12 p.m.

Chairman

BROMSGROVE DISTRICT COUNCIL

MEETING OF THE OVERVIEW AND SCRUTINY BOARD

MONDAY, 27TH FEBRUARY 2012 AT 6.00 P.M.

PRESENT: Councillors S. R. Colella (Chairman), C. J. Bloore, J. S. Brogan, Mrs. R. L. Dent, K. A. Grant-Pearce, R. J. Laight, P. Lammas (Vice-Chairman), P. M. McDonald, S. P. Shannon, Mrs. C. J. Spencer and L. J. Turner

Observers: Councillor M. A. Bullivant, Councillor C. B. Taylor and Ms. J. Bayley

Officers: Ms. J. Pickering, Mrs. C. Felton, Mrs. A. Heighway, Ms. B. Houghton, Mr. C. Santoriello-Smith, Ms. A. Glennie and Ms. A. Scarce

89/11 **ELECTION OF CHAIRMAN**

RESOLVED that Councillor S. R. Colella be elected as Chairman of the Board for the remainder of the municipal year.

90/11 **APOLOGIES**

Apologies for absence were received from Councillors Dr. B. T. Cooper and Mrs. J. M. L. A. Griffiths.

91/11 **DECLARATIONS OF INTEREST AND WHIPPING ARRANGEMENTS**

There were no declarations of interest or whipping arrangements.

92/11 **MINUTES**

The minutes of the Overview and Scrutiny Board meeting held on 23rd January 2012 were submitted.

RESOLVED that the minutes be approved as a correct record.

93/11 **HOMELESSNESS GRANT 2012/13**

The Chairman welcomed the Portfolio Holder for Planning, Core Strategy, Regulatory Services and Strategic Housing and the Strategic Housing Officer who reminded Members that the Board had asked to receive this report following its inclusion on the Forward Plan and subsequent submission to Cabinet on 1st February 2012.

The Strategic Housing Officer provided Members with details of the funding received by the Council for 2011/12 and 2012/13, together with progress on schemes in place for 2011/12 and the methodology used in allocating the funds for 2012/13 and which had been recommended by the Homelessness Strategy Steering Group.

Members discussed the following in detail:

- The Economic Recovery Fund and how residents were made aware of the availability of the funds. This was only available in exceptional circumstances following advice and referral from Citizens Advice Bureau (CAB) specialist mortgage rescue adviser.
- The role of the Homelessness Strategy Steering Group – it had been in existence for 7/8 years, its members included CAB, Bromsgrove District Housing Trust (BDHT), Bromsgrove Youth Forum Newstarts Furniture Project, Fry Housing, Our Ways, St Basils and Registered Providers and met on a quarterly basis.
- The development of services year on year – Members raised concerns that scheme would become dependant on the funds provided by the Council.
- The Newstart Furniture Project and the services that were provided by this project.
- The New Homes Bonus (calculated on the number of new homes created over a period of time) – which had already been included in the main budget. It was confirmed that this Bonus had not been ring fenced.
- The National Home Swap Scheme – accessed by BDHT through Homeswapper.
- The Discretionary Housing Benefit scheme and work carried out in conjunction with the Housing Benefit Department.
- Lashbrook House – Members were provided with background information on this facility.
- The Night Assessment Centre – who this was available to and how this was accessed.
- The use of sheltered accommodation for those under the usual required age criteria and the flexibility of that age criteria.

Members raised concerns that a proportion of the Grant had been surrendered to the Council's balances. Officers informed the Board that this had been agreed by Members and the Grant for 2011/12 to which this referred was not ring fenced. For 2012/13 the full Grant would be made available, although not ring fenced.

The Board discussed the new Government Welfare Reforms and in particular raised concerns in respect of the "bedroom" tax. Officers informed Members that an impact assessment had been carried out to ascertain the affect of the changes, this included a "modelling" exercise on the supply of accommodation, the number of people affected by the private sector changes and other issues and it was likely that it would take 4/5 years for the changes to take full effect. It was confirmed that there were approximately 290 people

who would be affected by the changes at BDHT. It was confirmed that the legislation would come into force with effect from April 2013. Officers informed Members that BDHT were taking a pro-active approach to the changes and had already contacted those residents which would be affected. Members further discussed the "bedroom" tax and the age range of those residents it was most likely to affect and the changes to retirement age.

Members understood the need for houses with multiple occupations (HMOs) within the district but concerns were raised about the controls that were needed to ensure that the area surrounding such houses did not suffer as a consequence. This was noted by officers and the Board was informed that inspections were carried out to ensure that this was not the case.

RESOLVED:

- (a) that the report on Homelessness Grants 2012/13 be noted;
- (b) that the Strategic Housing Manager and Portfolio Holder provide the Board with an update report on the affect of the Government Reforms and the Impact Assessment carried out, at the meeting to be held on 23rd April 2012; and
- (c) that the Strategic Housing Manager and Portfolio Holder provide the Board with an update report on the progress of expenditure for 2012/13 at the meeting to be held on 10th September 2012.

94/11 **UPDATE REPORT ON DEALING WITH FLY-POSTING**

The Chairman welcomed the Head of Community Services, the Community Safety Manager and the Senior Community Safety Project Officer to the meeting.

The Senior Community Safety Project Officer provided Members with background information on fly-posting and advised that the current policy had been in place since December 2004 and did not reflect the complexity of tackling fly-posting. Members were informed of the legislation which could be used to tackle fly-posting and advised that the Community Safety Team together with Environmental Services and Planning were currently working with colleagues from Worcestershire County Council to identify the most effective options that could be used at a local level to successfully implement that legislation, in order to produce an updated policy and procedure for fly-posting. Members were informed that it was anticipated that the updated policy and procedure would be brought before the Board for comment at its meeting to be held on 18th June 2012.

It was confirmed to Members that three wardens and the Senior Community Safety Project Officer had completed the relevant training in order to issue fixed penalty notices. Members discussed the follow in more detail:

- The type of advertisement that could be classed as fly-posting.
- The consent required for different types of advertisements.
- The resources available to deal with fly-posting.

RESOLVED

- (a) that the Update report on dealing with Fly-posting be noted; and
- (b) that the Board receive the new Fly-posting policy and procedures for comment at the meeting to be held on 18th June 2012.

95/11 **APRIL TO DECEMBER 2011 - QUARTER 3 FINANCE MONITORING REPORT**

The Quarter 3 Finance monitoring report 2011/12 which set out the Council's financial position for the period April to December 2011 was considered by the Board. The Executive Director for Finance and Resources informed Members that Officers were aware of the financial pressures that the Council was under and were ensuring quality services were maintained, whilst minimising spend to essential items only.

Members discussed the following areas in more detail:

- Unfilled vacancies and the use of agency staff and external consultancy and professional advice.
- The necessity for the increase in the budget for Building Control (Executive Director for Finance and Resources to provide Board with further detail.)
- The budget estimates and the savings made.
- Environmental Services underspend - it was confirmed that no increase in complaints had been received following the restructure of Street Cleansing team.
- Installation of Solar panels – these should be in place by the end of the financial year and the feed in tariff rates.
- Regulatory Services – underspend from Environmental Health and savings made following the move of Regulatory Services to White House.
- Revenue and Benefits – shortfall due to benefit calculation, error rate and active recovery of overpayments.
- Elections and Electoral Services – the expected cost of the election of a Police Commissioner. (Executive Director for Finance and Resource to provide Board with details.)
- Sundry Debtors – Garden Waste, invoicing process and payment options.
- Write offs – approved by the Portfolio Holder for Finance and the Section 151 Officer and reported quarterly through the Audit Board and the Cabinet.
- Treasury Management – credit ratings of the companies used and investment rates.

The Executive Director Finance and Resources provided Members, as requested at a previous meeting, with details of the use of agency staff at the Depot (Environmental Services). The Board was also provided with an update in respect of Section 106 monies, which it was confirmed were agreed with the Legal and Finance Teams and in liaison with Planning and the

Leisure Team to ensure these were being used appropriately and within the required timescale.

After further discussion it was

RESOLVED that the Quarter 3 Finance Monitoring Report 2011/12 be noted and in future, where appropriate, the relevant Head of Service be invited to attend future meetings.

96/11 **SICKNESS ABSENCE PERFORMANCE AND HEALTH FOR PERIOD ENDED 31ST DECEMBER 2011**

The Chairman welcomed the Portfolio Holder for Policy, Performance, Communications, Customer Service, Legal, Equalities, Democratic Services and Human Resources and the Executive Director for Finance and Resources provided background information on the Sickness Absence Performance and Health Report.

The Board discussed the following in detail:

- The level of sickness and the comparative figures provided.
- The recording of sickness through the Shared Service regime – a review of the methodology had been requested by Human Resources to look at addressing this.
- Work being undertaken, particularly at the Depot, to manage sickness and support staff.
- The development of a revised report and supporting documentation
- The effectiveness of the Sickness Policy

RESOLVED that the Sickness Absence Performance and Health Report be noted.

97/11 **DISCOUNTED PARKING CHARGES - OVERVIEW AND SCRUTINY TOPIC PROPOSAL REPORT**

The Board considered the Overview and Scrutiny Topic Proposal put forward by a resident, Mr. Charles Bateman, in relation to discounted parking charges. As the Board had recently completed a Task Group in respect of the Recreation Road South Car Park and in light of the agreement at the Cabinet meeting held on 22nd February 2012 for a cross party review to be carried out in respect of car parking, Members agreed it was not appropriate to investigate the issues raised in this Topic Proposal until such time as that review had been completed.

RESOLVED that the Board receive, upon completion, the report on the Review of Car Parking before giving further consideration to the Topic Proposal in respect of Discounted Parking Charges.

98/11 **PLANNING POLICY TASK GROUP - INTERIM REPORT**

Members were informed by Councillor S. R. Colella, Chairman of the Planning Policy Task Group that the final report was nearing completion and would be formally presented to the Board at its meeting to be held on 26th March 2012.

Members discussed issues at the Marlbrook Tip site and officers confirmed that these were outside of the terms of reference of the Task Group. However, officers agreed to ask the Head of Planning and Regeneration for clarification as to whether an expert report on the condition of the site had been commissioned and if so, when the contents of that would be made available. The Board also discussed arrangements in respect of meeting the cost of such a report and Worcestershire County Council's involvement.

RESOLVED that the report be noted.

99/11 **FORWARD PLAN OF KEY DECISIONS**

The Forward Plan of Key Decisions was considered by the Board. Members discussed the item in respect of Longbridge Statement of Principles regarding Affordable Housing Provision in detail and raised concerns in respect of any implications this could have on the Council's current policy for the provision of affordable housing. The Board also discussed the inclusion of the Performance Monitoring Report within its Work Programme and officers confirmed that this should be a standing item and was included within the Board's terms of reference.

After further discussion it was

RESOLVED:

- (a) that a report in respect of Longbridge – Statement of Principles regarding Affordable Housing Provision be received at the Board meeting to be held on 26th March 2012; and
- (b) that the Quarter 3 Performance Monitoring Report be presented to the Board at its meeting to be held on 26th March 2012 and all future Quarterly Performance Reports be included within the Work Programme as a regular item.

100/11 **OVERVIEW AND SCRUTINY BOARD WORK PROGRAMME**

The Board considered the Work Programme and the Chairman asked Members to think about any areas suitable for scrutiny which could be put forward. It was noted that the Board would receive an update on Burglary and Vehicle Crime in Bromsgrove at the meeting to be held on 23rd April 2012. Officers undertook to confirm the date at which the Write Off of Debts Quarterly Report would be made available for consideration by the Board, as soon as possible.

RESOLVED that, subject to the above, the Work Programme be noted.

101/11 **WCC HEALTH OVERVIEW & SCRUTINY COMMITTEE**

Officers informed Members that this item was for information and that the Council's representative on the Worcestershire Health Overview and Scrutiny Committee (HOSC) was Councillor Dr. B. T. Cooper who would, on his return from annual leave, provide Members with regular updates of the work of HOSC and Members would be given the opportunity to ask Councillor Cooper to raise any relevant issues, where appropriate.

Members requested that Councillor Cooper feedback to the Board any matters that were discussed in respect of the Alexandra Hospital in Redditch and other services that were provided within the district.

The meeting closed at 8.38 p.m.

Chairman

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SHARED SERVICES BOARD

26th January 2012 at 5.30pm

COMMITTEE ROOM 2, TOWN HALL, REDDITCH

Present: Councillors Carole Gandy (Chair), Michael Braley, Malcolm Hall and Bill Hartnett (Redditch Borough Council).

Councillors Margaret Sherrey, Mark Bullivant (substitute for Cllr Hollingworth), Steve Colella and Mike Webb (Bromsgrove District Council).

Also in attendance:

Cllr Kit Taylor (Observer, BDC)

Officers: Kevin Dicks, Sue Hanley, Helen Mole and Deb Poole.

Notes: Steve Skinner.

1. APOLOGIES

An apology for absence was received on behalf of Cllr Roger Hollingworth (BDC).

2. MINUTES

the minutes of the previous meeting of the Board held on 10th November 2011 were agreed as a correct record.

3. MATTERS ARISING

In response to a Member's query (Cllr Colella), Mr Dicks agreed to provide a summary of posts created / posts lost as previously provided to Cllr Hartnett.

CONFIDENTIALITY

These notes are an open public record of proceedings of the Board.

[Meetings of the Board are not subject to statutory Access to Information requirements; but information relating to individual post holders and/or employee relations matters would nonetheless not be revealed to the press or public.]

4. **PROGRESS REPORT**

The Board considered the latest report on the progress of Shared Services.

The Chief Executive took Members through the report and provided updates and explanation of specific points of detail as they arose.

Key points noted were as follows:

a) **Shared Services Proposals - Close of Consultation**

Mr Dicks reported on the outcomes of the recent major consultation exercise on the latest round of Shared Services proposals, which had closed in December. A large number of comments had been received, as detailed separately in the Progress Report where significant.

He understood all Trade Union concerns now to have been met.

b) **Transformation Programme**

Ms Poole took Members through the Transformation item, during consideration of which Members considered to what extent Redditch and Bromsgrove Councils were sharing their experience of sharing services and transforming to date. Mr Dicks advised Members how the Councils were currently working together with Stoke City Council and the Vanguard Academy, and further networking with other local authorities.

Members acknowledged that most other Councils were not as advanced as Redditch and Bromsgrove in this respect, but were keen, as well as sharing current good practice, not to lose sight of their own agendas first.

Mr Dicks added that Bromsgrove and Redditch Councils had learnt from their experience so far how current interventions had sometimes tended to generate a 'silo mentality'. It had been learnt that reviews needed to be more cross-cutting between departments, other authorities and other agencies. This learning would strongly influence the next reviews.

He advised that the crucial thing was to take into account full circumstances every time and that key local partners were on board to participate in this. Previous target-driven activity had prompted a very different approach, which now had to be entirely rethought.

Members agreed that although the 'target mentality' had brought problems, some degree of measurement was still required to help Members keep track of progress and the benefits of shared services and transformation.

Mr Dicks responded that new measures being developed ought to be more effective than the previous indicators.

c) 'Live' Shared Services – Policy, Performance and Partnerships

Mr Dicks explained current arrangements and redistribution of responsibilities, following the departure of the Director of Policy, Performance and Partnerships.

This provided the opportunity for further realignments, which would be cost neutral to both Councils.

Further information would be provided to Members by the time of the next Board meeting.

d) 'Live' Shared Services – Internal Audit

Members queried the view that the Shared Internal Audit Service was now fully operational ('Green' in the traffic light system), a point picked up earlier by the Redditch Audit and Governance Committee.

It was **AGREED this service should be recategorised as 'Amber.**

e) 'Live' Shared Services – Property Services

Members similarly queried whether the Shared Property Service presently warranted a 'Green' grading.

It was **AGREED this service should be recategorised as 'Amber.**

f) Financial Reports

Whilst accepting that the information it contained was technically correct, Members considered the Summary Financial Position appendix a little hard to follow. They therefore asked for a review of the presentation of financial information before the next report.

It was **AGREED that**

progress to date be noted, as detailed in the Progress report, subject to Members' comments and any specific further actions, as recorded above.

5. NEXT MEETING

Members noted that the next meeting of the Board would be held on 8th March 2012 at the Bromsgrove DC Conference Room commencing at 5.30 pm, as previously scheduled.

The meeting commenced at 5.30 pm and closed at 6.40 pm.

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**REDDITCH BOROUGH COUNCIL AND
BROMSGROVE DISTRICT COUNCIL**

SHARED SERVICES BOARD

8th March 2012 at 5.30pm

THE CONFERENCE ROOM, THE COUNCIL HOUSE, BROMSGROVE

Present: Councillors Roger Hollingworth (Chairman), Margaret Sherrey, Steve Colella and Mike Webb. (Bromsgrove District Council)

Councillors Carole Gandy, Michael Braley, Malcolm Hall and Bill Hartnett (Redditch Borough Council)

Officers: Sue Hanley, Deb Poole, Teresa Kristunas, Amanda de Warr, Liz Tompkin and Helen Mole

Notes: Rosemary Cole

1. APOLOGIES

There were no apologies.

2. MINUTES

The minutes of the previous meeting of the Board held on 26th January 2012 were agreed as a correct record.

CONFIDENTIALITY

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3. PROGRESS ON INTERVENTIONS

As an alternative on this occasion to a formal Report on the progress of Shared Services, The Board received a number of presentations from Heads of Service currently leading on Interventions. The presentations focussed on progress to date and the experiences of the teams involved.

Members of the Board raised queries for clarification during the presentations and Heads of Service

It was noted that copies of the presentations would be forwarded to all BDC and RBC Members.

a) Strategic Purposes for Both Authorities

Ms Poole reminded the Board of the Workshops and subsequent discussions which had taken place including Cabinet or Executive Members and the Senior Management Team in October and November 2011.

This work together with the use of existing data from other organisations and the Authorities' own data on customer demand had been utilised to develop Operational and then Strategic Purposes for each Authority.

It was noted that the next steps would involve aligning system interventions around the Strategic Purposes, establishing ownership of the purposes together with a set of measures. It was also emphasised that Strategic Purposes would change over time as demand changes.

b) Revenues and Benefits Services

Ms Kristunas gave a detailed presentation on the work undertaken to date on transformation of the Revenues and Benefits Service at both Authorities.

In relation to the Benefits Service it was stressed that there was close working with the Department of Works and Pensions as the requirements of the DWP had been an issue in the past when ways of working had been reviewed.

The work undertaken on work flow had revealed that there was a "loop" with the Customer initially being asked to provide standard information and then often additional information. The number of customer contacts required before a benefit was decided was a cause for concern.

Analysis of failure demands had revealed that Customers often did not understand what was required of them or letters/forms which had been sent to them.

Some redesign of the service had been put in place with a key aspect being the locating of Benefits Officers on a rota basis within the Customer Service Centre so that the "experts" were closer to the Customer and queries could be dealt with on a face to face basis.

The Board were pleased to note the improvement which had already been achieved in the services offered.

With regard to Revenues, similar issues had arisen with information required not being captured at the point of contact which resulted in Customers contacting more than once. The service would be redesigned partly with a view to moving the "experts" closer to the Customer and empowering some of the Customer Service Assistants to deal with more of the process. Further improvements to the service were already being demonstrated.

c) Post Print and Design

Ms De Warr gave a brief presentation on the work which had been undertaken so far within the Post, Print and Design service. Clearly the service was not so “transactional” as Revenues and Benefits and was internal to the Authorities but there were still improvements and savings which could be achieved.

Within the Post Rooms reasons for failure demand were varied but Recharges and coding issues were a significant area. Within the Design service, unclear instructions were an issue.

Whilst the intervention was still on going, some improvements had already been put in place. Staff felt more empowered to raise issues and to do things differently.

d) Housing Transformation (RBC) Rent and Welfare/Locality

Ms Tompkin gave a brief presentation on the Intervention which had commenced in Housing at RBC in relation to Rent and Locality. Clearly this had an impact on the Housing Benefit Service.

The work undertaken to date in profiling a sample of rent accounts had revealed that reasons for tenants falling into arrears were largely related to the tenants working issues.

More work was required in order to better understand the real problems and to enable the service to be redesigned to address these.

4. JOINED UP WORKING

Ms Hanley updated the Board on the work which was being undertaken with partner agencies and organisations to advance Joined up Working. This was at an early stage but workshops had taken place which had involved powerful and distressing real life examples, including young people who had been within “the system” throughout their lives.

It had been recognised by many partners that the way in which services were designed at present was impacting negatively upon those who needed assistance. Whilst this was very early days, organisations were willing to challenge how they were working.

Ms Poole referred to the role of the Authorities in becoming “Leaders of the Community”.

5. NEXT MEETING

Members thanked Heads of Service for the presentations which had been very worthwhile. As a number of Members and officers had other commitments it was agreed that the remaining presentations on Repairs and Maintenance and a Helpdesk be carried forward to the next meeting of the Board.

Members noted that the next meeting would be held on 19th April 2012 at RBC commencing at 5.30 pm, as previously scheduled.

The meeting commenced at 5.30 pm
and closed at 7.25 pm.

Agenda Item 6

BROMSGROVE DISTRICT COUNCIL

WORCESTERSHIRE REGULATORY SERVICES

MEETING OF THE WORCESTERSHIRE SHARED SERVICES JOINT COMMITTEE

THURSDAY, 23RD FEBRUARY 2012 AT 4.00 P.M.

PRESENT: Councillors Mrs. L. Hodgson (Chairman), M. Braley (Vice-Chairman), M. A. Bullivant, C. B. Taylor (during Minute No's 30/11 to 38/11), Mrs. B. Behan, P. Cummings (substituting for P. Grove), P. Mould, A. N. Blagg, Mrs. E. Stokes, K. Jennings (during Minute No's 30/11 to 38/11), P. Harrison (substituting for J. Baker) and M. Hart

Observers: Mr. V. Allison, Deputy Managing Director, Wychavon District Council and Mr. I. Pumfrey Head of Customer and Environmental Services, Malvern Hills District Council

Officers: Ms. J. Pickering, Mr. S. Jorden, Ms. C. Flanagan, Mr. M. Kay, Mr. S. Wilkes, Mr. M. Thomas and Mrs. P. Ross

The Chairman welcomed officers to the meeting.

27/11 APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillors P. Grove, Malvern Hills District Council, F. Lankester, Worcester City Council, D. Thain, Worcestershire County Council and J. Baker, Wyre Forest District Council.

28/11 DECLARATIONS OF INTEREST

No declarations of interest were received.

29/11 MINUTES

The minutes of the meeting of the Worcestershire Shared Services Joint Committee held on 24th November 2011 were submitted.

RESOLVED that the minutes be approved as a correct record.

30/11 WORCESTERSHIRE REGULATORY SERVICES SERVICE PLAN 2012 / 2013

The Committee considered a report that outlined the way in which the Worcestershire Regulatory Service (WRS) activities linked to National Priorities relevant to regulatory services. These National Policies would be mapped across the partners' local priorities.

Members were asked to note that under the Worcestershire Shared Services Partnership, Service Level Agreement, WRS had to produce a 3 year Service Plan for agreement and adoption by all of the Member Authorities. The Head of Worcestershire Regulatory Services highlighted that the operating environment was undergoing rapid change and the outputs of the transformation programme had not been fully implemented as yet, therefore a 3 year plan at this stage of the process would be premature.

The Head of Worcestershire Regulatory Services introduced the report and in doing so informed the Committee that the Service Plan had been lined up with national priorities as set by the Local Better Regulation Office (LBRO) 5 Priority Outcomes as detailed at page 3 of the report.

Members were informed that following the initial application of Systems Thinking approach to transform the service so that it was more customer focused, and after consultation with customers, WRS had established 3 purposes that would be used to underpin the way in which the Services would be developed and delivered in the future:

- Help me resolve my problem
- I want to assume everything is ok
- Help me trade well

Member's attention was drawn to page 5 of the report which detailed the Outcomes, Activities and Measures that would replace the performance indicators that Members had been used to.

Members were asked to focus on page 12 of the report which detailed training and development of multi-functional teams. The Head of Worcestershire Regulatory Services informed the Committee that the training and development budget was an extremely critical budget. The training of multi-functional teams would allow the service to have competent staff capable of undertaking a wider range of duties and confident to undertake a more diverse role as the service progressed in order to provide a more cost effective service.

The Committee was asked to note Appendix 2 of the report which detailed the Operating Environment and the Government initiatives and policy changes likely to impact in the short to medium term.

Appendix 3 of the report detailed the outcome measures which had been as a result of consultation with Committee Members and the Management Board. The Head of Worcestershire Regulatory Services informed the Committee that the service would continue to engage with Members and the Management Board throughout the year to clarify the level of detail Members wished to receive in respect of future outcome measures and reporting frequency.

The Head of Worcestershire Regulatory Services responded to Members' questions with regard to performance reporting and baseline data. The Committee was informed that performance against outcome measures would

be reported to the Management Board and the Committee either quarterly or annually depending on the measure. Members were asked to note that due to the lack of a single IT system the collection and analysis of measures data would be difficult therefore meaningful robust data would be unavailable for at least 12 months.

Following further discussion with regard to outcomes measures and performance the Head of Worcestershire Regulatory Services informed the Committee that if requested he could provide preliminary figures and some information in response to individual Member enquiries so that Members had something more tangible to take to their respective authority.

Mr. M. Kay, Business Manager (Acting role), Worcestershire Regulatory Services responded to Councillor M. Braley with regard to an update on the Licensing Act – Deregulation of Regulated Entertainment, which could mean that events of up to 5000 people would not require any form of licence unless they were selling Alcohol. Mr. M. Kay informed Members that the consultation period was now closed and that WRS had responded. Members would be informed of any consultations that were taking place and any future updates via the WRS Licensing Updates newsletter.

RESOLVED that the Worcestershire Regulatory Services, Service Plan 2012 / 2013 be approved.

31/11 **WORCESTERSHIRE REGULATORY SERVICES ICT PROJECT UPDATE**

The Chairman welcomed Mr. Martin Thomas who had been appointed ICT Project Manager, Worcestershire Regulatory Services in December 2011.

Mr. M. Thomas presented the report and in doing so informed the Committee that his first task had been to develop a detailed Project Plan as detailed at Appendix 1 to the report. This was quickly followed by commencement of the procurement process in line with EU Procurement rules as agreed by the Management Board. 40 expressions of interest had been received from suppliers who wished to take part in the procurement process with more expected by the closing date. Mr. M. Thomas informed the Committee of the evaluation process / criteria which would lead to a shortlist of potential suppliers to take forward to the next stage. The next stage, invitation to tender, would start on 10th April 2012. Shortlisted suppliers would be invited to a suppliers' day where the Head of Worcestershire Regulatory Services (WRS) and the WRS Team would describe the vision of WRS, where they were going, how transformation would be key to the solution of going forward and the technicalities of linking to existing solutions within each of the partner authorities. By the 25th May 2012 all of the Invitations To Tender (ITT) would have been received with an evaluation of all of the ITT's to take place against set criteria. The set criteria would include site visits to existing supplier clients and suppliers would be invited to present their final solutions to WRS. The results would then be presented to the Management Board and Joint Committee during July 2011 for approval. Once the contract had been finalised implementation would start on 3rd September 2012.

Mr. M. Thomas and the Head of Worcestershire Regulatory Services responded to Members questions with regard to Bromsgrove District Council's procurement process and EU procurement rules.

Members were asked to note the complexity of the process of trying to link into seven different authorities systems and then into each individual member authorities systems located within that. Transformation had enabled a fundamental redesign of the Service, moving the strategic focus of the organisation to the customer and giving clarity of purpose. The decision was taken early on to do the business transformation first. Transformation had enabled a fundamental redesign of the Service, moving the strategic focus of the organisation to the customer and giving clarity of purpose. WRS had now reached a point in the transformation process where it could be determined what sort of flexible ICT system was required for the redesigned service in preference to an 'off the shelf' system.

RESOLVED that the report be noted.

32/11 **WORCESTERSHIRE REGULATORY SERVICES FINANCIAL MONITORING
APRIL - DECEMBER 2011/2012**

The Committee considered a report which provided details of the financial position of the service for April to December 2011 for both revenue and capital expenditure.

The Executive Director Finance and Corporate Resources, Bromsgrove District Council introduced the report and in doing so informed the Committee of the underspend due to savings arising from two Grade B posts remaining vacant and an overspend of £39,000 in relation to accommodation charges from member authorities prior to Worcestershire Regulatory Services move to Wyatt House. There was a predicted overspend on Transport namely car allowances of approximately £20,000 due to a disturbance allowance being paid to staff moving to Wyatt House for a period of 12 months ending June 2012. Members were asked to note on the capital side an actual spend of £95,000 against an anticipated budget of £1.1 million due to delays in the ICT system.

The Executive Director Finance and Corporate Resources, Bromsgrove District Council responded to Members' questions with regard to training, training and seminars and subscriptions.

RESOLVED that the report be noted.

33/11 **AUDIT COMMISSION ANNUAL AUDIT LETTER 2010 - 2011**

A copy of the Audit Commission Annual Audit Letter for 2010/2011 was considered.

The Executive Director Finance and Corporate Resources, Bromsgrove District Council introduced the report and highlighted that Worcestershire Shared Service had been implemented in June 2010 and therefore the

accounts represented a 10 month period. An unqualified opinion had been issued by the Audit Commission for this period and this opinion had been presented in detail to the Joint Committee in September 2011.

The Annual Audit Letter as detailed at Appendix 1 of the report summarised findings from the 2010/2011 Audit. The following 2 elements were considered:

- Audit of financial statements
- Assessment of Value for Money arrangements

Members were advised that the Audit Commission had made a number of recommendations in the Audit Letter. These had been considered by officers and discussed with the Audit Commission and it had been agreed that processes were now in place to address the issues raised. These were:

- Accounts should be allocated to more than one officer
- A clear plan should be agreed by the Commission
- Reporting of certain items need to be more defined between participating Councils
- Working papers to be improved

The Executive Director Finance and Corporate Resources, Bromsgrove District Council provided Members with detailed information on the figures shown on page 3 of the Audit Commission, Annual Audit Letter Audit 2010 / 2011, Key Messages, Audit opinion and financial statements.

The Committee was informed that the accounts for 2011 / 2012 would be audited to reflect the regulatory services body being classed as a Smaller Relevant Body. This would result in a simple Annual Return being prepared and therefore an anticipated reduction in fee.

RESOLVED that the recommendations included in the Audit Commission, Annual Audit Letter 2010 / 2011 be noted.

34/11 **HUMAN RESOURCES & FINANCIAL POLICES AND PROCEDURES**

The Committee was asked to consider a report which detailed the arrangements for ensuring that Human Resources (HR) and financial issues in relation to Worcestershire Regulatory Services were managed in line with robust policies and procedures.

The Executive Director Finance and Corporate Resources, Bromsgrove District Council introduced the report and in doing so informed the Committee that following the establishment of the Worcestershire Shared Services Partnership for Regulatory Services it had been agreed that Bromsgrove District Council would act as the Host Authority for employment matters. It was essential that the wording of adopted policies correctly reflected the relationship between the Joint Committee and Bromsgrove District Council.

RESOLVED:

- a) that the adoption of the Human Resources policies and procedures of Bromsgrove District Council be approved, subject to revisions that are required to reflect the partnership arrangements;
- b) that authority be delegated to the Worcestershire Regulatory Services (WRS) Management Board to agree the wording revisions to individual HR policies; and
- c) that the adoption of the Contract Procedure Rules and Financial Regulations of Bromsgrove District Council be approved, subject to revisions in relation to the references to the shared service management hierarchy and committee approval arrangements.

35/11 **NUFFIELD SCHOLARSHIP AWARD - ANIMAL HEALTH OFFICER**

The Committee was asked to note a report which detailed the work of what was formerly Worcestershire County Council's Animal Health Team. The team played a key role in preventing notifiable animal diseases such as foot and mouth from having the devastating impact they could have on Worcestershire's rural economy.

Mr. S. Wilkes, Business Manager, Worcestershire Regulatory Services introduced the report and in doing so highlighted the Nuffield Scholarship award which recognised the level of excellence achieved by this team and its individual staff members, particularly Joanne Nash.

The award was one of only 20 awarded in the United Kingdom (UK) and required Joanne to apply her skills and professional knowledge outside of the UK to a range of animal health issues.

The Chairman requested that officers pass on the Committee's congratulations to Joanne on her success and that Members looked forward to hearing the results of her study meetings and visits held in the UK and abroad.

RESOLVED that the report be noted.

36/11 **DEPARTMENT FOR BUSINESS, INNOVATION & SKILLS ON TRANSFORMING REGULATORY OUTCOMES**

The Committee considered a report which highlighted the Government's views on the 'Better Regulation' agenda which had potential for direct impact particularly on the operation of some of the Trading Standards elements of service delivery.

The Chairman drew Members' attention to the revised recommendation.

Mr. S. Wilkes, Business Manager, Worcestershire Regulatory Services introduced the report and in doing so informed the Committee that the Government had published its responses to the Transforming Regulatory Outcomes consultation that took place earlier in the year. The Government's response stated that there was evidence of good practice of regulators and

business working together on compliance but there were too many areas where the enforcement of regulation was heavy-handed, inefficient, overly prescriptive and culturally risk-averse.

Members' attention was drawn to the Key Elements of the Government Response and Worcestershire Regulatory Services examples of good practice as detailed in the report.

The Government wished to reinforce the use of the Regulators Compliance Code and in its review of regulators it intended to check on how far they had applied the Code. Regulators would be asked to give more prominence to the Code in publications and websites.

RESOLVED that the principles identified in the report be adopted and included in future Service Plans.

37/11 **INSPECTION BY THE INTERCEPTION OF COMMUNICATIONS COMMISSIONER'S OFFICE (IOCCO)**

The Committee considered a report which detailed the positive outcome of a recent inspection by the Interception of Communications Commissioners Office (IOCCO).

Mr S. Wilkes, Business Manager, Worcestershire Regulatory Services introduced the report and in doing so informed Members that where a local authority used surveillance or obtained what is referred to as communications data, processes under the Regulation of Investigatory Powers Act 2000 and its associated Regulation must be observed. Authorities were audited by two bodies, the Office of the Surveillance Commissioner for directed surveillance and the IOCCO. IOCCO's inspection which took place during December was effectively an inspection of the host authority, Bromsgrove District Council.

Applications and notices were reviewed by the inspector. He was very impressed with the process that Worcestershire Regulatory had adopted although there were a number of areas for officers to improve their practice as detailed in the report. In light of the good standard of compliance the inspector observed he would not be returning for his next review for approximately 18 months.

RESOLVED that the report be noted

38/11 **ANNUAL MEETING OF THE COMMITTEE**

(The Chairman agreed that this matter be raised as an urgent item at the meeting as a decision on this matter could not wait until the next meeting of the Committee).

The Chairman reported that Members had been made aware during the previous item (Minute No. 31/11 refers), on Worcestershire Regulatory Services ICT Project update, of the specific deadline dates to be met under Bromsgrove District Council's and the EU procurement process for the

preferred ICT supplier. Following on from this process a report to the Joint Committee would not be made available until July 2012. Members were therefore asked to consider if the Joint Committee, Annual Meeting of Thursday 28th June 2012 could be rescheduled to Wednesday 11th July 2012 in order for the Committee to receive the ICT preferred supplier report.

RESOLVED that the Annual Meeting of the Joint Committee be held on Wednesday 11th July 2012 at 4:00pm at Bromsgrove District Council.

The meeting closed at 5.15 p.m.

Chairman

CABINET

4th April 2012

OVERVIEW & SCRUTINY BOARD – PLANNING POLICY TASK GROUP

Relevant Portfolio Holder	Councillor Kit Taylor
Portfolio Holder Consulted	Yes
Relevant Head of Service for Overview and Scrutiny	Claire Felton – Head of Legal, Equalities and Democratic Services
Wards Affected	All
Ward Councillor Consulted	All Ward Councillors were invited to join the Task Group
Non-Key Decision	

1. SUMMARY OF PROPOSALS

- 1.1 The purpose of this report is to allow Cabinet to consider the findings and recommendations of the attached Overview and Scrutiny Board Task Group report.

2. RECOMMENDATIONS

- 2.1 The Cabinet is requested to:
- (a) consider the attached Overview and Scrutiny Board Task Group report (Appendix 1) and the recommendations contained within it;
 - (b) to either agree, amend or reject each of the recommendations contained in the report;
 - (c) provide an Executive Response to the Overview and Scrutiny Board report and recommendations, which may include an Action Plan to summarise how and when each of the agreed recommendations will be implemented.
 - (d) request the relevant Portfolio Holder in consultation with appropriate officers to indicate the expected implementation dates, as appropriate.

3. KEY ISSUES

- 3.1 Following a request from full Council, at the Overview and Scrutiny Board meeting held on 27th September 2011 it was agreed that a Task Group would be established to investigate the Council's Planning and Enforcement Policies. Full details of the Task Group's terms of reference and investigations are detailed in the attached report.
- 3.2 The report and recommendations were agreed by the Overview and Scrutiny Board at its meeting on 26th March 2012 and referred to Cabinet for consideration.

Financial Implications

- 3.3 The estimated Financial and Resource implications of the recommendations are detailed in the Summary of Recommendations of the appended report.

Legal Implications

- 3.4 These are detailed within the attached report.

Service/Operation Implications

- 3.5 Overview and scrutiny is a key part of the Council's democratic decision making process and enables non-executive Members of the Council to put forward recommendations for policy development, policy review and service improvement.

Customer / Equalities and Diversity Implications

- 3.6 N/A

4. RISK MANAGEMENT

- 4.1 N/A

5. APPENDICES

Appendix 1 – Planning Policy Task Group Report

6. BACKGROUND PAPERS

See attached report for details.

7. KEY

None

AUTHOR OF REPORT

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Agenda Item 8

THERE ARE NO ENCLOSURES FOR THIS AGENDA ITEM

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**Bromsgrove Town Centre Townscape Heritage Initiative
Second Round Submission**

Relevant Portfolio Holder	Cllr D Booth / Cllr CB Taylor
Portfolio Holder Consulted	Yes
Relevant Director	John Staniland
Wards Affected	St Johns
Ward Councillor Consulted	No
Non-Key Decision	

1. SUMMARY OF PROPOSALS

- 1.1 In April 2010 the Council was provisionally awarded £1.2 million from the Heritage Lottery Fund (HLF), to operate a Townscape Heritage Initiative (THI) in Bromsgrove Town Centre Conservation Area. In order to release the full funding the Council is required to prepare a second round submission which provides much clearer detail on the Conservation area, the issues facing it and how they will be managed, and most importantly how the money will be spent which adds lasting improvements and historic value to the area.
- 1.2 The key elements of the second round bid are the bid document itself and the Conservation Area Appraisal and Management Plan. These documents have recently been the subject of a period of public consultation, the results where possible have directly influenced the final content of the bid.

2. RECOMMENDATIONS

- 2.1 **That subject to any final recommendation from the Heritage Lottery Fund monitor to be approved by the Executive Director Planning & Regeneration, Regulatory and Housing Services the Bromsgrove Town Centre THI second round bid is submitted to the Heritage Lottery Fund for consideration.**
- 2.2 **That the Bromsgrove Town Centre Conservation Area Appraisal and Management plan is adopted as a material consideration for planning purposes.**

**3. KEY ISSUES
Financial Implications**

- 3.1 There are no financial implications associated with this report. The financial arrangements associated with the grant will not impact on the Councils accounts or financial position.

Legal Implications

- 3.2 There are no legal implications arising from this report save that when the Council is ready to release the grant funding to property owners who want to carry out works to their premises under the scheme the owners/ leaseholders will be required to enter into a legal agreement with the Council.

Service / Operational Implications

- 3.3 As stated in 1.1 the Council have been provisionally awarded £1.2 million from the Heritage Lottery Fund to undertake a THI in Bromsgrove Town Centre Conservation Area. £400,000 match funding has also been secured from Worcestershire County Council, bringing the total amount of funding available to £1.6 million. The purpose of this £1.6 million is to improve the look, feel and vitality of a key section of the Conservation Area. The money will be available for a selection of eligible properties in the form of grants to reinstate historic elements such as shop fronts, the grant rates offered will depend on the type of work being undertaken. A significant element of the THI will be focussed on the public realm. Alongside the wider scheme being developed for the Town Centre, new more traditional and high quality public realm will be a key element of the ongoing regeneration of the Town Centre. Full details of how the funding will be allocated can be seen in section 5 of the bid document at appendix 1 of this report.
- 3.4 The initial HLF award of £50,000 in April 2011 was to enable the Council to work up a full bid confirming to the HLF that Council can and will be able to spend the money on projects which THI's are designed for. Since April we have recruited a THI project officer who has then been responsible for the development of the bid into its current form. The development of the bid has focussed on those elements specified by the HLF in the first bidding round. Two key studies have been completed, an accessibility audit and a building condition survey. The building condition survey has provided more precise costs for renovating the key historic buildings in the high street. The accessibility audit has informed the development of the public realm scheme part of which will be funded by the THI. These studies were key pieces of evidence used to develop the funding structure as seen in section 5 of appendix 1.
- 3.5 Alongside the work done on developing the bid itself further work has been done on both the Conservation Area Appraisal and Management Plan. The Management Plan is a significant document which will ensure that measures can be taken to ensure that current problems within the conservation area are properly dealt with such as the enforcement of unauthorised development. The Management Plan is

also important because it will help to ensure that the improvements which are a result of the THI are permanent and not overshadowed by the return of unauthorised or poor quality development. It is now proposed that the Council adopt these documents as a material consideration for planning purposes ensuring the continued protection of the conservation area.

Customer / Equalities and Diversity Implications

- 3.8 The Equalities Officer is a key member of the project team, and has and will continue to ensure that equalities and diversity issues are successfully incorporated in the THI bid and subject to HLF approval the THI implementation. The Worcestershire Association of Service Users who carried out the accessibility audit were procured with the help of the Equalities Officer.
- 3.9 Full public consultation was carried out between 2nd February and 15th March, during this time a number of public display and events were held with approximately 300 people attending and speaking to officers. 38 formal responses were submitted which has been summarised and responded to in appendix 16 of the final bid document.

4. RISK MANAGEMENT

- 4.1 The most significant risk associated with this stage of the THI process is failure to meet the requirements of the HLF and not being awarded the funding. By ensuring that the consultation was carried out successfully, and that the views of Town Centre users are fed into the final bid and the Conservation Area Appraisal and Management Plan, the risks of failing on this part of the process are minimised.

5. APPENDICES

Appendix 1 - Bromsgrove Town Centre THI: Second Round Bid
Appendix 2 - Bromsgrove Town Centre Conservation Area Appraisal and Management Plan

6. BACKGROUND PAPERS

Bromsgrove Town Centre THI: Second Round Bid appendices

AUTHOR OF REPORT

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CABINET

4th April 2012

STATEMENT OF PRINCIPLES REGARDING THE PROVISION OF AFFORDABLE HOUSING ON SITES AT LONGBRIDGE

Relevant Portfolio Holder	Cllr Kit Taylor
Portfolio Holder Consulted	Yes
Relevant Head of Service	Head of Community Services
Wards Affected	All Wards
Ward Councillor Consulted	N/A
Key Decision - Yes	

1. SUMMARY OF PROPOSALS

- 1.1 The report proposes the adoption of a jointly agreed Statement of Principles regarding the provision of affordable housing at Longbridge.
- 1.2 The Statement is designed to guide the approach of Birmingham City Council and Bromsgrove District Council throughout the regeneration of Longbridge sites in respect of the provision of affordable housing. The guide covers issues including the proportion of affordable housing to be provided, the expected size, type and tenure and the way in which it will be allocated under nomination arrangements.
- 1.3 Members will be aware that our Strategic Planning Officers in partnership with Birmingham CC officers have for some time been negotiating with St Modwens to achieve a number of objectives for the Longbridge development sites including the 'on site' provision of affordable housing. Negotiation is ongoing with the viability of the site currently being considered, and appropriate planning contributions which includes affordable housing being sought.
- 1.4 Whilst Planning Officers have been undertaking this negotiation process, Strategic Housing officers have been working in liaison with Birmingham Housing Officers to identify what type, size and tenure the affordable housing should ideally form. The needs of Birmingham CC are for larger family houses whilst the needs of Bromsgrove are for a wider mix of all types of units with a strong need for 2 bed dwellings as identified by our recent housing needs and market assessments.
- 1.5 It was originally envisaged that BDC would have 100% nomination rights to any affordable housing developed on Longbridge sites within the Bromsgrove District Boundary (East Works) and Birmingham CC would have 100% nomination rights to any affordable housing developed within the Birmingham side of the boundary.
- 1.5 However, at this stage, there is no certainty as to what levels of affordable housing may ultimately be delivered within either sector as the density may vary depending upon location and the type and size of

affordable housing provided by developers may be governed by the surrounding development. Therefore the number of affordable units finally delivered each side of the boundary may not prove to be equally balanced and there is no guarantee that the type and size of affordable housing units provided, for example on the East Works will fully reflect the identified needs of Bromsgrove District.

- 1.6 To overcome any potential imbalance that may occur, a jointly developed Statement of Principles has been formulated to guide the approach of both local authorities throughout the regeneration of Longbridge in respect of the provision of affordable housing.
- 1.7 In short, the statement is proposing that instead of Bromsgrove having 100% nomination rights to whatever affordable housing is delivered on the East works (which could ultimately be less or more than 35% or of a type and size that does not match Bromsgrove District's housing needs), BDC would have 50% nomination rights to all of the affordable housing delivered on all of the Longbridge sites whether they be in Bromsgrove District or Birmingham. Likewise, Birmingham CC would also have 50% nomination rights to all affordable units irrespective of where they fall.
- 1.8 The Statement of Principles which is attached to this report at Appendix 1 comes forward for Member approval.
- 1.9 Whilst the delivery of affordable dwellings on Bromsgrove sites is possibly some way off, the first phase of affordable units on a Birmingham site to which BDC could have nomination rights is due for delivery this year. Birmingham CC are in the process of offering Bromsgrove DC 50% nomination rights to dwellings being delivered by Waterloo Housing on the Lickey Road / Lowhill Lane site which are due to be completed from April onwards. Nomination rights to 5 x 2 bed houses, 1 x 3 bed house and one 4 bed house are being made available to BDC.
- 1.10 To summarise, the key elements of the Statement are:
 - That 35% of housing across all housing sites is to be affordable.
 - The proportion of affordable housing may vary from site to site so long as the overall agreed level and mix of affordable housing is delivered for the development as a whole.
 - Affordable housing should not be concentrated together in excessive numbers.
 - The preference is for Birmingham City Council's requirements for affordable housing to be provided on the North and West Works and Bromsgrove District Council's requirements for affordable housing to be provided on the East Works.
 - However, the actual provision of affordable housing tenures, types and sizes may result in the two local authorities affordable housing requirements being built within the administrative boundaries of the other local authority. In this instance, the priority is to deliver the required total mix of affordable housing in preference to delivering specific tenures, types and sizes on particular sites.

- Bromsgrove District Council and Birmingham City Council is to therefore each have 50% nomination rights to the total affordable housing provision irrespective of where its is provided.
 - The respective local authorities are to have first call upon the type and tenure of affordable units that they have individually identified as meeting their requirements.
- 1.11 The Statement of Principles is not intended to have any long term binding commitment on either authority if it is found to be inappropriate to continue to operate. However, in such a case, the Statement does agree to a reciprocal number of nominations being made available where the one authority has already made available nominations to the other on existing sites.

2. RECOMMENDATIONS

- 2.1 **That Members resolve to approve the ‘Statement of Principles Regarding the Provision of Affordable Housing at Longbridge’, set out at Appendix 1 of the Report.**

3. KEY ISSUES

3.1. Financial Implications

- 3.2 There would be no significant financial implications upon the District Council associated with the approval of the ‘Statement of Principles Regarding the Provision of Affordable Housing at Longbridge’,

4. Legal Implications

The principles set out in the statement would be used to form the basis of the ‘affordable housing requirement’ sections of any Section 106 agreements imposed on developers upon the granting of planning permission. Consideration would also need to be given to the inclusion of any relevant planning conditions relating to the affordable housing elements of the scheme. In principle the arrangements for affordable housing provision would be no different to other developments in the District save for the added factor that some of the Bromsgrove nominations would relate to dwellings built within the Birmingham boundary. On this point there would need to be careful drafting of the agreement and processes for future monitoring put in place to ensure that the identity of the authority holding the nomination rights for the cross-boundary properties is clearly defined and maintained going forward.

5. Service/Operational Implications

- 5.1 The role of monitoring and managing the proposed agreement falls within the existing remit of the Strategic Housing Enabling Role of using planning policy and developing partnership working with providers from the social, charitable and private sectors to achieve the best outcomes for the District.

6. Customer / Equalities and Diversity Implications

- 6.1 The proposed 'Statement of Principles' will potentially provide housing customers with a greater choice of dwelling and location and the local authority with an increased ability to match housing needs with the dwellings delivered. By enabling access to the potentially broader range of size, type and tenure of affordable dwellings that will be developed across the whole of the Longbridge sites will ultimately improve the Council's ability to respond to the diversity of applicants seeking housing.

7. RISK MANAGEMENT

- 7.1 The risks associated with not embracing the proposed Statement of Principles may include:
- The possibility of a lower proportion or density of affordable housing being developed on Bromsgrove sites may lead to nomination rights being limited to a lower number of affordable units.
 - The possibility of the type, size and tenure of affordable units developed on Bromsgrove sites not fully reflecting the range of needs of Bromsgrove residents.
 - Not having access to the full range of dwelling type, size and tenure could lead to a reduced ability to meet the Council's homelessness duty and could ultimately contribute to increased temporary accommodation costs.

8. APPENDICES

Appendix 1 – Statement of Principles Regarding the Provision of Affordable Housing on Sites at Longbridge.

9. BACKGROUND PAPERS

None.

10. AUTHOR OF REPORT

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CABINET

4th April 2012

WORCESTERSHIRE EXTRA CARE HOUSING STRATEGY 2011 - 2026.

Relevant Portfolio Holder	Cllr Kit Taylor
Portfolio Holder Consulted	Yes
Relevant Head of Service	Head of Community Services
Wards Affected	All Wards
Ward Councillor Consulted	N/A
Key Decision - Yes	

1. SUMMARY OF PROPOSALS

- 1.1 Worcestershire County Council with its District and Borough Council partners has developed a strategy for Extra Care Housing for older and disabled people, setting out the framework for the future development of Extra care Housing in Worcestershire for the period 2011-2026.
- 1.2 This report brings forward the Extra Care Housing Strategy for approval by Members at District level. The strategy is attached to this report at Appendix 1.
- 1.3 The strategy plans to make Extra Care Housing an increasingly well known and chosen form of specialist accommodation in every District that will become available for people who want to either buy or rent.
- 1.4 The Strategy identifies local authorities as having a leading role in developing Extra Care Housing by encouraging providers from the social, charitable and private sectors to deliver the Extra Care Housing required in Worcestershire.
- 1.5 This Strategy estimates that an additional 4,651 units of Extra Care Housing are required across Worcestershire by 2026. This level of need reflects the growing population of older people in Worcestershire, the majority of them property owners. It also reflects the desire for people to continue to live in their own homes rather than move to a residential care home.
- 1.6 The basis for the development of the strategy is the estimated need for Extra Care Housing contained in the *Worcestershire Housing and Support Needs of Older Persons Assessment* carried out in 2009/10 which included feedback from meetings with Focus Groups of older people across the County including groups from Bromsgrove and Alvechurch. A broad range of interested parties and 'stakeholders' including local authorities, providers of Extra Care and commissioners from Worcestershire County Council with an interest in Extra Care Housing have been involved in the development of the document.

- 1.7 The strategy identifies that Extra Care schemes can be developed through new build, redevelopment of existing sheltered housing and 'hub and spoke' models of outreach in to nearby communities. Schemes can offer a range of tenure options including rented and shared ownership and full ownership types of occupation.
- 1.8 The impact of the recession and public sector budget reductions makes it increasingly challenging to develop this form of supported housing. The document identifies that new schemes will need to be supported from a variety of sources and providers will need to be increasingly innovative in order to provide multi tenure schemes that respond to the identified need by maximising opportunities through cross subsidy from private sale units and use of planning policy.
- 1.9 Importantly, the strategy provides useful guidance in relation to the types and 'models' of Extra Care Housing for use by Strategic Commissioning managers and Strategic Housing and Planning managers from all local authorities in Worcestershire so that there is consensus on the nature and specification of Extra Care Housing for Worcestershire. A delivery programme is set out for the County which is also broken down to District and Borough Council level.

2. RECOMMENDATIONS

- 2.1 **That Members approve the Worcestershire Extra Care Housing Strategy set out at Appendix 1 of the Report.**

3. KEY ISSUES

3.1. Financial Implications

- 3.2 There would be no significant financial implications upon the District Council associated with the approval of the Worcestershire Extra Care Strategy.
- 3.3 Whilst District and Borough Councils are seen to have a leading role in the development of Extra Care Housing, this falls within the existing remit of the Strategic Housing and Planning Enabling Role of using planning policy and developing partnership working with providers from the social, charitable and private sectors. Delivery of Extra Care Housing in the face of reduced availability of government capital funding will require innovative approaches through the marketing of units for sale in order to cross subsidise the provision of other forms of tenure within schemes.

4. Legal Implications

- 4.1 The Coalition Government has not produced a national policy or strategy in relation to older people or housing that specifically covers extra care housing or indeed any type of housing with support or care for older people. However recent presentations given by civil servants from the Department for Communities and Local Government (CLG) has indicated that the *National Strategy for Housing in an Ageing Society*¹ produced in 2008 by the previous Government remains the policy of the Coalition Government policy.

5. Service/Operational Implications

- 5.1 Strategic Housing and Planning Officers together with Bromsgrove Members have met with BDHT officers and representatives of Adult and Community Services on a number of occasions since 2008 when the 'Housing Choices For Older People Partnership Board was formed. The Board has considered the baseline needs information and the different models of Extra Care Housing and developed a vision for the provision of additional Extra Care Housing in the Bromsgrove District.
- 5.2 The findings of the Board broadly concur with elements of the strategy in that Extra Care Housing needs to be a part of broader 'vision' for housing, care and support for older people as part of a wider 'offer' to the growing older persons population in Worcestershire, including 'aspirational' housing aimed at older people that is separate to Extra Care provision. Schemes need to offer mixed tenure to reflect that in the future their will need to be a shift towards greater numbers of units for sale and/or shared ownership in order for schemes to be financially viable.

6. Customer / Equalities and Diversity Implications

- 6.1 When considering the impact of this report it must be recognised that the proposed service is likely to affect a higher proportion of older people and those with mobility issues. Therefore it is considered that whilst a disproportionate number of older people and those with mobility issues are affected, this strategy is intended to protect their well being.

7. RISK MANAGEMENT

- 7.1 The risks associated with not embracing the strategy for Extra Care would include:

¹ National Strategy for Housing in an Ageing Society: Lifetime Homes, Lifetime Neighbourhoods. CLG, 2008

- Reduced ability to encourage independent living for older people.
- Higher costs of care for older people.
- Increased demand for residential home provision.
- Reduced ability to encourage downsizing opportunities for Bromsgrove residents due to lack of suitable options for older people.
- Reduced availability of family housing in the market due to older people under occupying family housing.
- Reduced downsizing opportunities for social housing tenants may exacerbate the availability of suitable accommodation for homeless households.

8. APPENDICES

Appendix 1 – Worcestershire Extra Care Housing Strategy 2011 - 2026.

9. BACKGROUND PAPERS

- 9.1 Worcestershire Housing and Support Needs of Older Persons Assessment 2009/10.

10. AUTHOR OF REPORT

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CABINET

4th April 2012

CORPORATE PERFORMANCE REPORT

QUARTER 3, PERIOD ENDING 31 DECEMBER 2011

Relevant Portfolio Holder	Cllr Mark Bullivant, Portfolio Holder
Portfolio Holder Consulted	Yes at Leaders Group Meeting
Relevant Head of Service	Kevin Dicks, Chief Executive
Wards Affected	All Wards
Non-Key Decision	

1. SUMMARY OF PROPOSALS

- 1.1 This report also provides Members with an opportunity to review the Council's performance for quarter 3 of the 2011/12 financial year and to comment upon it.

2. RECOMMENDATIONS

- 2.1 **The Cabinet is asked to RESOLVE that:**

- i. the update on key performance indicators for the period ending 31 December 2011 be considered and commented upon.**

3. KEY ISSUES

Financial Implications

- 3.1 Poor financial performance will be detrimental to any Council assessment and overall performance. Specific financial indicators included in the 2011/12 set are listed below:
- Time taken to process housing benefit / council tax benefit new claims and change events;
 - Percentage of invoices paid by the Council within 30 days of receipt or within the agreed payment terms;

Legal Implications

- 3.2 The Government announced that the former National Indicator set was to be reduced. At present there is no legal requirement for the local authority to produce specific performance data.
- 3.3 As the Council progresses with the transformation programme, Members and Senior Management Team may wish to challenge data

requirements placed upon the Council by external organisations if it is felt that they do not contribute to the purposes of the organisation.

Service/Operational Implications

- 3.4 The current reduced number of indicators allows officers to focus on the areas that are of greatest importance and still require management for the remainder of the financial year.
- 3.5 The corporate performance report was agreed by Cabinet in June 2011 and, due to the change in strategic focus, the transformation programme and associated system thinking, targets were not required for the business plans 2011/12 and as such are no longer contained within the report. The corporate performance report compares the year to date outturn with the same period last year and shows those indicators from the Council Plan which were agreed by CMT for corporate reporting for quarter 3 and quarter 4, 2011/12 and whether they have improved, declined or remained static in performance.
- 3.5.1 In total, data has been provided for 15 indicators for quarter 3, 2011/12. Of these, 8 have improved in performance and 7 have declined when compared to the same period last year.
- 3.5.2 Of those indicators which have declined, there is one which may require further analysis (see section 3.5.4).
- 3.5.3 This report shows that of the 15 indicators reported this quarter, 50% have improved when compared to the same period last year (April to December). By way of example:
- The length of time taken to process Housing Benefit / Council Tax Benefit new claims and change events has reduced fallen from 12.5 days to 8.9 days when compared to the same period last year;
 - The number of people using the BURT and Shopmobility services during April to December has continued to rise with 167 and 254 additional users, respectively;
 - Usage of The Artrix has exceeded expectations rising from 51,005 users in the April – December 2010/11 period to 59,854 in the comparative period of 2011/12; an increase of 8,849.
- 3.5.4 There is one indicator giving rise to some concern:
- The number of households living in temporary accommodation has risen again, this quarter rising from 19 to 26 when compared to the same period last year, although it is reduced from quarter 2.

CABINET

4th April 2012

- 3.6 To maintain data quality, the Council uses an electronic data collection (EDC) spread sheet. This shows our current and historic performance against selected performance indicators.
- 3.7 The Council's current Council Plan makes a clear commitment to improve the way in which priority actions are planned and to improve the way in which performance is managed. Appendix 1 reports on the 2011/12 performance indicators agreed for by CMT for corporate reporting in quarter 3. The performance data contained in the attached report relates directly to the Council's priorities and objectives.
- 3.8 The performance indicator set includes one which reports on the number of working days / shifts lost to the local authority due to sickness absence per full time equivalent staff member. Quarter 3, 2011/12 shows a decrease in the amount of time lost due to sickness absence compared to the same period last year (April – December).
- 3.9 There are a total of 2 performance indicators that relate to air quality and climate change within the list of National Indicators all of which are included in the corporate set. These indicators are all reported annually.

Customer / Equalities and Diversity Implications

- 3.10 Customer service performance indicators included for 2011/12:
- Percentage of complaints handled within the agreed time frames.
- Performance for this indicator can be found in Appendix 1.
- 3.11 Enhanced performance will assist to improve customer satisfaction.
- 3.12 Information contained in the attached appendix will be communicated to both internal and external customers via the intranet/Internet following approval at committee.

4. RISK MANAGEMENT

- 4.1 Assessing the Council's performance forms part of the Council's approach to risk management.

5. APPENDICES

Appendix 1 – Quarter 3, 2011/12 Corporate Performance Report, period ending 31 December 2011

6. BACKGROUND PAPERS

The details to support the information provided within this report are held by the Policy Team and on the Electronic Data Collection (EDC) system.

AUTHORS OF REPORT

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Strategy

Overview and Scrutiny Board

Planning Policy Task Group

FEBRUARY 2012

OVERVIEW & SCRUTINY BOARD

Supporting Officer: Amanda Scarce



Bromsgrove

District Council

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FOREWORD (BY THE CHAIRMAN)

One of the most important statutory duties that any council performs is in its role as the Planning Authority. The effectiveness of discharging this duty is measured on the impact on people's everyday lives, wider communities and the environment, as well as development plans of land owners. Whether it is an extension to a residential property or a major development the risks of getting it wrong can be far reaching and costly.

The National Planning Policy Framework directs many of the policies that a Planning Authority builds its local communities upon, whilst the use of planning conditions is a common form of mitigation and planning control. It is for these reasons that the Task Group was set up to investigate the effectiveness of planning conditions and the enforcement of breaches of these conditions.

The role of the Task Group was to look back, using existing case studies, in order to look forward at the effectiveness of planning conditions and the Council's enforcement policy.

Recognising how a service performs, in particular where its strengths and weaknesses are, builds greater confidence in its effectiveness and reputation. Where weaknesses are identified it presents an opportunity to introduce improvements quickly and effectively.

My sincere thanks are extended to the members of the Task Group who have shown a resolve to ensure that the investigations were robust and detailed. The result has been to make recommendations that they believe will improve the wider service delivered to the people of Bromsgrove District.

The willingness and commitment of the Officers should also be recognised in particular for their time and effort in helping the Task Group in its investigations. Their openness and willingness to recognise where services can be improved is appreciated. It is also recognised that where it was agreed that urgent action needed to be taken in some areas this work is already under way.

Finally and importantly, to members of the public who, despite the difficulties they have faced, recognised the scope of the Task Group's investigations in looking back in order to ensure lessons learnt are not ignored.

**Councillor Steve Colella
Chairman of the Planning Policy Task Group**

SUMMARY OF RECOMMENDATIONS

1. The Planning Application and Committee Process

The Task Group recommend:

Recommendation 1	That a mechanism be put in place to ensure that: (a) where conditions cannot be monitored within existing resources, an estimate of the resources required to monitor those conditions be clearly identified; (b) the applicant be made aware at the earliest possible stage of the need to ensure that these conditions are adhered to and properly monitored in line with the conditions applied; and (c) where the planning officer recommends refusal of a planning application and the Planning Committee go against the recommendation, sufficient time should be given within the Planning Committee meeting to discuss conditions.
Financial Implications	N/A
Resource Implications	Officers are confident that existing resources within the teams can support the new processes to ensure that an estimate of monitoring resources is made together with supporting the applicant to understand and comply with the conditions set.

Recommendation 2	That: (a) a review of the Bromsgrove Standard Planning Conditions be carried out as soon as practicably possible, but within six months of this report being presented to Cabinet; and (b) Planning officer training be formalised to ensure appropriate conditions are identified for routine and non-routine applications.
Financial Implications	£2k - £3k (estimate) for the condition training
Resource Implications	The review can be undertaken within existing staffing structures.

Recommendation 3	That monitoring groups are not used in the future. However, it is recognised that on occasion there may need to be some form of community engagement for larger more complex planning applications.
Financial Implications	N/A
Resource Implications	Any support required can be met from existing staffing as it will only be as needed.

2. The Planning Enforcement Process

The Task Group recommend:

Recommendation 4	That a detailed review of the Planning Enforcement Policy, which was adopted in April 2011 (as encouraged in Section 8 – Conclusion), be carried out giving particular attention to Sections 4 – Enforcement Procedures (Informal) and 7 – Council’s Commitment to Complainants.
Financial Implications	N/A
Resource Implications	Review to be undertaken within existing resources.

Recommendation 5	That a case officer be appointed and remain responsible as the point of contact for each enforcement case to ensure continuity and an electronic case file be set up and open to view by colleagues and management.
Financial Implications	N/A
Resource Implications	Resource can be met within existing staffing structures.

Recommendation 6	That a mechanism be put in place in order for control systems to be developed to ensure enforcement cases are recorded and available upon request to Ward Members.
Financial Implications	N/A
Resource Implications	Mechanism will be put in place to ensure cases are recorded and made available. This will be delivered within existing resources.

Recommendation 7	That the Planning Committee receives a quarterly report in respect of all new and outstanding planning enforcement cases.
Financial Implications	N/A
Resource Implications	Reports to be presented on a quarterly basis – no additional resource implications.

Recommendation 8	That through the Transformation programme a review and mapping exercise be carried out in respect of the process post planning application approval stage and that the results of this be shared with the Overview and Scrutiny Board.
Financial Implications	N/A
Resource Implications	Review to be undertaken within existing resources.

3. Internal Audit Ad Hoc Investigation Report: Marlbrook Tip

The Task Group recommend:

Recommendation 9	That the Internal Audit Report recommendations be supported and included within the Overview and Scrutiny Board's Quarterly Recommendation Tracker report to ensure that progress on the implementation is monitored in an appropriate and timely manner.
Financial Implications	N/A
Resource Implications	Officers will ensure that the recommendations are included in the tracker report and progress monitored regularly.

4. Customer Feedback Complaints Process

The Task Group recommend:

Recommendation 10	That a quarterly report be made available to the Overview and Scrutiny Board to enable Members and Officers to be aware of repeat or common themed compliments and complaints (in order to address such complaints).
Financial Implications	N/A
Resource Implications	Reports to be presented on a quarterly basis – no additional resource implications.

Recommendation 11	<p>That all Heads of Service ensure mechanisms are in place to ensure that when a service request escalates to the extent that there is or could be a critical failure of any nature, they are immediately made aware of the situation and</p> <ul style="list-style-type: none"> (a) that Heads of Service ensure all staff are made aware of and understand the definitions of a complaint; and (b) that the Head of Customer Service provides additional guidance in respect of recording service requests which may also be a valid complaint.
Financial Implications	N/A
Resource Implications	Officers will introduce a mechanism to ensure that complaints are reflected, captured and monitored in a timely and accurate way – no additional resource required.

Recommendation 12	<p>That the Head of Customer Service and Human Resources work together to establish a mandatory management training programme to:</p> <ul style="list-style-type: none"> (a) ensure that all managers of the Council are given support to enable them to respond, both verbally and in writing, to all customers in a timely and appropriate manner, with regular reviews of the success of such training carried out; and (b) the Overview and Scrutiny Board receive regular updates to ensure this has been implemented.
Financial Implications	To be identified within the corporate training budget (cost of training to be established but estimated to be up to £2,500).
Resource Implications	Resource of staff time - formal training to all managers to ensure officers have all the skills required to respond to our customers in a timely and considered manner.

BACKGROUND INFORMATION

An Overview and Scrutiny Topic Proposal Form into the planning process was submitted to the Board meeting held on 13th June 2011 with the request that it be included within the Work Programme of the Board for the coming year. The topic had been put forward by a Member of the Board as it was understood that the vast majority of complaints a Ward Member received from residents were in relation to some part of the planning process. After discussion it was agreed that it would be necessary to break the process down into specific areas of planning and to concentrate on the areas of most concern to both Members and residents in the first instance. It was further agreed that initially, a Board Investigation would be carried out into Planning Enforcement. An initial, informal meeting of the Board took place in July 2011.

At a subsequent meeting of the Overview and Scrutiny Board held on 27th September 2011 a further Topic Proposal Form (completed on behalf of the full Council) was received as a result of a number of planning failures being brought to the Council's attention, this included concerns which had been raised in respect of the Former Landfill Site, Alvechurch Highway, Lydiate Ash (more commonly known as Marlbrook Tip). It was agreed by the Board that a Task Group would be established to scrutinise matters relating to planning policy. As there was significant interest from Members on this particular issue it was also agreed that a special meeting of the Overview and Scrutiny Board would be held on 12th October 2011 in order to appoint a Chairman of the Task Group and to agree membership.

Following discussions at the Board meeting held on 21st November 2011 it was further agreed that the work of the Board Investigation in to Planning Enforcement would be amalgamated within the scope of the Planning Policy Task Group.

MEMBERSHIP OF THE TASK GROUP

Membership of the Task Group was confirmed at the Overview and Scrutiny Board meeting held on 12th October 2011 and included the following Councillors:

S. R. Colella (Chairman)
Mrs. R. L. Dent
S J. Dudley
Mrs. J. M. L. A. Griffiths
Mrs. C. J. Spencer
L. J. Turner

The Task Group wishes to acknowledge the assistance received from the Head of Legal, Equalities and Democratic Services and the Head of Planning and Regeneration and her team, who have assisted the Task Group from the start of the investigation, through to the end of the investigation when this report was finalised.

INTRODUCTION

The aim of the Task Group was to review the Council's planning process, in particular the setting and enforcement of conditions, in order to identify strengths and weaknesses and to make recommendations for improvement where deemed necessary.

Public Involvement

Residents from within the vicinity of the Former Landfill Site, Alvechurch Highway, Lydiate Ash were invited to attend a Task Group meeting as part of the evidence gathering process.

Witnesses

The Planning Policy Task Group worked closely with the Head of Planning and Regeneration, the following officers provided information on specific areas: The Development Control Manager (Operations), Planning Enforcement Officer, Customer First Officer and the Lead Auditor.

A full list of witness is provided at **Appendix 2** of this report.

Research

A full list of the documentation and written evidence used in compiling this report is provided in the Bibliography at **Appendix 3**.

Areas Covered

There were a total of ten Task Group meetings. During the first meeting a schedule of work was discussed and the scoping checklist considered, with the following areas of investigation being agreed:

- The planning process and the setting of specific conditions for planning applications and the role of the Planning Committee.
- Gaining an understanding of why conditions are set.
- The effectiveness of conditions and how the Council enforced such conditions.
- How the process could be improved.

The full terms of reference are attached at **Appendix 1**.

CHAPTER 1 PLANNING APPLICATION AND COMMITTEE PROCESS

At the initial meeting of the Task Group held on 1st November 2011, Members discussed the terms of reference and agreed it was important that they received basic background information in order to gain an understanding of the planning process (and the setting and enforcement of planning conditions), and to a lesser extent, the role of the Planning Committee. The Task Group subsequently received a presentation from the Head of Planning and Regeneration at a meeting held on 18th November 2011 which covered the following areas:

- The Planning Process (including Permitted Developments, Type of Planning Permission, Processing Applications)
- The Decision (approvals and refusals)
- Planning Conditions (what they were and what they covered)
- Enforcement of Conditions (what sort of thing does planning enforcement control, formal action to enforce)
- Retrospective Planning (what it is and when it is used)

The Task Group was provided with Circular 11/95 Use of Conditions in Planning Permission which is the definitive document used nationally by planners in setting conditions. It clearly sets out the criteria for the validity of planning conditions and the tests which need to be satisfied before applying those conditions. Conditions should be necessary, relevant to planning, relevant to the development to be permitted and “*enforceable, precise and reasonable*” in all other aspects. It was noted by Members that Circular 11/95 also states that “*in considering whether a particular condition is necessary, authorities should ask themselves whether planning permission would have to be refused if that condition were not to be imposed.*” Members also noted the circular stated that “*the sensitive use of conditions can improve development control and enhance confidence.*”

Circular 11/95 sets out in detail the use of planning conditions and refers to the compilation by local authorities of lists of model conditions and how these can improve the consistency of decisions. However, it also stresses that those standard conditions needed to be treated with caution as the need for conditions should be carefully assessed and not used as a matter of routine. It was also confirmed that these local conditions should be regularly updated as the national approach to planning changes overtime. This exercise could be achieved by comparing conditions with other authorities and looking at appeal decisions which often gave an idea of what conditions should be in place. Members were therefore also provided with a copy of the Bromsgrove Standard Conditions. Both documents were discussed in some detail at a later meeting held with the Development Control Manager (Operations).

Members noted that Circular 11/95 also made clear reference to taking extreme care before imposing unreasonable and numerous conditions in order to allow an application to be granted. It was clarified by the Development Control Manager (Operations) that allowing an application with an unreasonable amount of and detailed planning conditions to make the

application permissible was unacceptable and could be reason enough for it to be refused.

The Task Group was informed that the setting of conditions was delegated to the planning officers and where an application was submitted to the Planning Committee details of the conditions would be included within the report albeit in a coded format, but with a simple explanation provided for the Planning Committee Members. Members were informed that should an officer recommendation be overturned by the Planning Committee, then the Committee must spend time making it clear how the decision had been reached and setting any conditions deemed appropriate. Guidance would be provided in respect of this by the Development Control Manager (Operations) at the meeting where necessary.

Members showed particular interest in the area of Planning Conditions and Enforcement (Enforcement is covered in detail in Chapter 2 of this report), as it had been brought to their attention that concerns had been raised with regards to a specific application where conditions had been applied, but it was understood these had been breached and no enforcement action taken. The Task Group therefore requested further information on this specific application – the former Landfill Site, Alvechurch Highway, Lydiate Ash, (more commonly known as Marlbrook Tip). This application had received a great deal of publicity, much of which had been negative for the Council, over a number of years.

The Task Group received copies of the planning application for this site which had been submitted to the Planning Committee together with the Minutes of the relevant meeting and the subsequent decision notice which had been issued. This decision notice had some 24 conditions attached to it.

The Task Group considered written evidence from residents within the vicinity of this site, and which had also been considered in the preparation of the Internal Audit Report (see Chapter 3 of this report). From the correspondence it was apparent that those residents had raised concerns on numerous occasions in respect of the Planning Conditions being breached by the developer of the site. More recently and following the results of the A D Horner Ltd report into over tipping at the site, a public meeting had been arranged by the Council, which the Chief Executive and senior officers attended, in order to provide residents with the following:

- Some useful background information
- Provide information on the handling of the matter
- Respond to concerns and issues
- Discuss future action with regard to the site
- Ensure public involvement and communication.

The Chairman of the Task Group had also attended the public meeting and following feedback he had provided, Members of the Task Group agreed that in order to get a better understanding of how the process had impacted on those residents in the vicinity, a number of them should be invited to attend a meeting of the Task Group in order for Members to hear, first hand, how those

residents had been affected by the site over a number of years. This meeting took place on 11th January 2012. Prior to this meeting, Members of the Task Group undertook a site visit in order to familiarise themselves with the Marlbrook Tip site and in order to be able to gain a better understanding of how the residents living in close proximity to the site could have been affected. This took place on 5th January 2012 when Members were shown the surrounding areas of the site, where residents lived and inspected the site itself.

Some of the issues raised and discussed at the meeting with the residents are detailed in Chapter 4 of this report. However the overwhelming view of the residents was that despite numerous letters, emails and telephone calls to the Council over a number of years, they had not been listened to and their concerns had not been taken seriously. Reference was made to the role of the Marlbrook Tip Monitoring Group by residents, which Members understood was a condition agreed following the submission of the planning application and set out in the minutes of the Planning Committee meeting dated 7th November 2005.

The Task Group have been unable to find terms of reference or details of how the membership of this monitoring group was agreed. The details in the Planning Committee Minutes simply state *“the developer shall participate in a monitoring group that shall meet at least every two months and shall compromise representatives of the developer, the Parish Council, the highway authority, the Bromsgrove District Council and the Ward Councillors. The Group will receive progress reports and resolve site and access problems.”*

Members noted that although officers from the Council had attended and facilitated meetings of the Monitoring Group, it was clear from the discussions with the residents and the notes of the meetings available to the Task Group Members that the residents and members of the group’s understanding of the role it played were not clearly defined, and although residents believed that concerns raised at these meetings were being feedback to senior officers at the Council, this had not been the case. From the evidence received it was clear to the Task Group Members that the role of the Monitoring Group, albeit set up with the best intentions, had not been successful and had not been set up in an appropriate manner in order to ensure that information and concerns raised would be fed back to the relevant officers.

Members also asked for details of a more current planning application which had a number of conditions attached to it in order to have some form of comparison. The Development Control Manager (Operations) provided Members with similar information for the application at Longbridge East and Part River Arrow, Groveley Lane, Cofton Hackett, which also had 24 conditions attached to it and involved remediation work at the site.

It was immediately clear to Members when comparing the 2 applications that the more recent one contained much more detail in the conditions and referenced, on a number of crucial occasions, to specific plan references. Reasons for setting the conditions were also given in more detail and were set out in a much clearer detailed format. During the discussions with the Development Control Manager (Operations) it was explained that on this

occasion the Council have worked closely with the developer from the earliest stages of the application, for example topographical surveys (funded by the developer) have been undertaken and will continue throughout the stages of the application in order to ensure that the conditions have been adhered to. The plans for the development will be submitted in stages and it would therefore not be in the developer's interests to not comply with the conditions as the stages of the development are dependent upon each other. A time limit had also been set for completion of the "tipping" and the developer must give prior notice of the start date of that work to the Council. Members were appreciative that there was always an element of trust in such circumstances but agreed that from the evidence received, in this case the Council had ensured that a lot more tighter controls were in place than had previously been the case with the Marlbrook Tip application.

From the evidence received the Task Group was able to gain a good understanding of the setting of conditions and the enforcement process (Chapter 2 of this report provides full details of the enforcement process) in respect of 'everyday' planning applications and agreed that this approach had effectively provided Members with a "third" case study.

The Task Group Members therefore recommend the following:

<p><u>Recommendation 1</u></p> <p>That a mechanism be put in place to ensure that:</p> <ul style="list-style-type: none"> (a) where conditions cannot be monitored within existing resources, an estimate of the resources required to monitor those conditions be clearly identified; (b) the applicant be made aware at the earliest possible stage of the need to ensure that these conditions are adhered to and properly monitored in line with the conditions applied; and (c) where the planning officer recommends refusal of a planning application and the Planning Committee go against the recommendation, sufficient time should be given within the Planning Committee meeting to discuss conditions. 	
<p>Financial Implications</p>	<p>N/A</p>
<p>Resource Implications</p>	<p>Officers are confident that existing resources within the teams can support the new processes to ensure that an estimate of monitoring resources is made together with supporting the applicant to understand and comply with the conditions set.</p>

Recommendation 2

That:

- (a) a review of the Bromsgrove Standard Planning Conditions be carried out as soon as practicably possible, but within six months of this report being presented to Cabinet; and
- (b) Planning officer training be formalised to ensure appropriate conditions are identified for routine and non-routine applications.

Financial Implications

£2k - £3k (estimate) for the condition training

Resource Implications

The review can be undertaken within existing staffing structures.

Recommendation 3

That monitoring groups are not used in the future. However, it is recognised that on occasion there may need to be some form of community engagement for larger more complex planning applications.

Financial Implications

N/A

Resource Implications

Any support required can be met from existing staffing as it will only be as needed.

CHAPTER 2 – PLANNING ENFORCEMENT PROCESS

Task Group Members were provided with a copy of the Planning Enforcement Policy which had been considered by the Planning Committee on 28th March 2011 and adopted at Council on 20th April 2011. The Policy was effectively a customer charter for the planning enforcement service, giving details of legislation and the Council's commitment to complainants, including timescales for responding to complaints.

The aims and objectives of the Enforcement Policy are:

- To set out realistic achievable objectives on planning enforcement
- To define the range of options available to achieve objectives, having regard to statutory and non-statutory advice from Government.
- To provide a clear and accountable audit trail of decision-making processes
- To adhere to and implement best practice in terms of planning enforcement
- To remedy undesirable effects of unauthorised development
- To bring unauthorised activity under control to ensure the credibility of the planning system is not undermined.

Members were also provided with notes from an informal meeting which a number of Members of the Overview and Scrutiny Board had attended with the Head of Planning and Regeneration. At this meeting the Head of Planning and Regeneration had provided Members with details of the number of outstanding planning enforcement cases and discussed the Planning Enforcement Policy. The Task Group noted that the main areas of discussion covered at that meeting were the number of outstanding complaints, a system of prioritising current and future cases and staffing resources. It was explained to Members that the enforcement process was complex and multidirectional, with various routes a case could follow, to demonstrate this Members were provided with a flow diagram, which gave an overview of the system. The Task Group was informed that in some cases enforcement was discretionary and the decision not "set in stone", consideration had to be given as to what was in the public interest. When the Planning Enforcement Team was advised of a possible breach, negotiations would take place to see whether enforcement could be achievable and realistic – in some cases it is not always appropriate for the Council to carry enforcement through.

During the meeting with residents (referred to in detail in Chapters 1 and 4 of this report) reference was made on numerous occasions to what they felt had been a lack of response and support from the Enforcement Team. Examples of this were made in respect of requests for copies of the outstanding reports from Faber Maunsell Ltd (appointed by the developer of the Marlbrook Tip site). These reports collated the information, which had been provided to them by the developer, in respect of the number of vehicles making deposits at the site and the weight of the loads carried. The reports formed a crucial part of monitoring specific elements of the planning conditions which had been set. The written evidence the Task Group had examined supported the

concerns raised by residents and the inconsistent responses they had received from officers. It was also noted by Members that numerous officers had dealt with the concerns raised and that there did not appear to have been one single point of contact. Members agreed that it was likely that this had lead to officers not being aware of the number of residents that were contacting the Council with the same (or similar) concerns in respect of the site. If there had been one point of contact those concerns may well have been picked up at a much earlier stage. The Task Group discussed the provision of regular updates for Enforcement cases within each Ward, to enable Members to monitor any concerns and to ensure appropriate action that was being taken.

The Task Group questioned the Head of Planning and Regeneration on the points raised by residents; it was conceded that mistakes and errors of judgment had been made by officers, which together with staffing issues at that crucial time had exacerbated the situation. It was confirmed to Members that Planning Enforcement is re-active as opposed to being proactive in actions taken. The resources were not available to monitor the implementation of conditions; therefore only those breaches which were reported were actually, if it was deemed appropriate, enforced. The responsibility ultimately lies with the applicant to adhere to the conditions detailed within the decision notice. Members noted that the Head of Planning and Regeneration was not in post at the time the initial concerns in respect of the Marlbrook Tip application were raised.

The Head of Planning and Regeneration discussed with Members measures which had been put in place to ensure similar mistakes did not happen again. These included training of staff on the IT software (in order for it to be used to its full potential) by the Planning Enforcement Team and more detailed questions to be asked at the first stage of the process. Members received further evidence from the Development Control Manager (Operations) in respect of Planning Enforcement to support the view that lessons had already been learnt and although it was conceded that it was still “early days” improvements had been made within Planning Enforcement, including the logging of all service requests, holding weekly meetings with the Senior Enforcement Officer in respect of new and ongoing cases and a monthly meeting held to review all outstanding cases individually.

The Task Group Members therefore recommend the following:

<u>Recommendation 4</u>	
That a detailed review of the Planning Enforcement Policy, which was adopted in April 2011 (as encouraged in Section 8 – Conclusion), be carried out giving particular attention to Sections 4 – Enforcement Procedures (Informal) and 7 – Council’s Commitment to Complainants.	
Financial Implications	N/A
Resource Implications	Review to be undertaken within existing resources.

<u>Recommendation 5</u>	
That a case officer be appointed and remain responsible as the point of contact for each enforcement case to ensure continuity and an electronic case file be set up and open to view by colleagues and management.	
Financial Implications	N/A
Resource Implications	Resource can be met within existing staffing structures.

<u>Recommendation 6</u>	
That a mechanism be put in place in order for control systems to be developed to ensure enforcement cases are recorded and available upon request to Ward Members.	
Financial Implications	N/A
Resource Implications	Mechanism will be put in place to ensure cases are recorded and made available. This will be delivered within existing resources.

<u>Recommendation 7</u>	
That the Planning Committee receives a quarterly report in respect of all new and outstanding planning enforcement cases.	
Financial Implications	N/A
Resource Implications	Reports to be presented on a quarterly basis – no additional resource implications.

<u>Recommendation 8</u>	
That through the Transformation programme a review and mapping exercise be carried out in respect of the process post planning application approval stage and that the results of this be shared with the Overview and Scrutiny Board.	
Financial Implications	N/A
Resource Implications	Review to be undertaken within existing resources

**CHAPTER 3 – INTERNAL AUDIT REPORT AD HOC INVESTIGATION:
MARLBROOK TIP**

The Marlbrook Tip planning application had been used as a case study for the Task Group and after receiving evidence from residents who lived in close proximity to that site (see Chapter 4 for further details), the Task Group agreed it was important that, as part of its investigation, they also examined the Internal Audit Report, which had been requested by the Head of Planning and Regeneration following the results of the findings of the A D Horner Ltd report.

As part of the Task Group’s evidence gathering process the author of the report, the Lead Internal Auditor, attended a meeting to discuss the findings of the report. The Task Group also inspected the correspondence from residents referred to in the Internal Audit Report. Following discussions at that meeting, the Task Group Members agreed that from its own investigations and the evidence they had received, the recommendations in the Internal Audit Report were appropriate and should be implemented within the timescales given.

It should be noted that some of the Task Group’s own recommendations duplicate or complement those in the Internal Audit Report. Members agreed that the issues raised in the Report were of such importance that this was a necessary and important duplication.

To ensure that the recommendations from the Internal Audit Report are carried through Task Group Members therefore recommend the following:

<u>Recommendation 9</u>	
That the Internal Audit Report recommendations be supported and included within the Overview and Scrutiny Board’s Quarterly Recommendation Tracker report to ensure that progress on the implementation is monitored in an appropriate and timely manner.	
Financial Implications	N/A
Resource Implications	Officers will ensure that the recommendations are included in the tracker report and progress monitored regularly.

CHAPTER 4 – CUSTOMER FEEDBACK COMPLAINTS PROCESS

As previously detailed in this report, the Former Landfill Site, Alvechurch Highway, Lydiate Ash (Marlbrook Tip) planning application has been a contentious issue for all concerned. Members therefore agreed that it was appropriate when using it as a case study and after studying the correspondence that had been received over a number of years from residents, to invite a selection of those residents to attend a meeting of the Task Group. From the 8 residents invited 6 attended, together with the Councillor for Marlbrook Ward.

The following areas were discussed in detail at the meeting which was held on 11th January 2012:

- The effectiveness of the planning process and conditions in this case (see Chapter 1)
- The effectiveness of the monitoring group (see Chapter 1)
- The effectiveness of communications between all concerned
- The effectiveness of the Council's Complaints procedure and responses received from officers.

Following this meeting and discussions in respect of the correspondence examined, Members agreed it was important to receive background information on the Council's current Complaints procedure. The Customer First Officer was therefore invited to attend the Task Group meeting on 23rd January 2012, Members were also provided with copies of the relevant procedures, which were available to all staff.

The Customer First Officer informed Members that the current system had only been in place since 2008 and gave details of the various ways in which the iCase system could be adapted to suit the needs of the Council. It was noted that, currently, initial notifications in respect of planning enforcement were not recorded on this system as they were classed as "service requested". It became apparent to Members that this was an area which needed clarification in order to minimize the possibility of service requests escalating into complaints which were not captured on the system and therefore not monitored or responded to in the appropriate manner.

The Task Group acknowledged that the iCase system was not in place when the initial correspondence had been received from residents, however from the evidence they examined more recent correspondence had been received (since the inception of the iCase system). This correspondence had been dealt with again as service requests when it may have been more appropriate to have been recorded through the iCase system. If this had been the case, the issues raised would have been brought to the attention of the Head of Planning and Regeneration at an earlier stage.

The Internal Audit Report provided a breakdown of the correspondence received and the number of complaints in respect of the Marlbrook Tip site that had been handled through the Customer Feedback Complaints

procedure; this was a total of 9 complaints. There was a large number of letters and emails that had been received from residents and in some case correspondence from the local MP who had written in on behalf of residents.

When examining the written correspondence (both letters and emails) Members were concerned at both the time taken to respond and the tone (in some cases) of those responses, both of which were inappropriate and not acceptable. Members agreed that the situation which has now arisen could only have been exacerbated by the responses residents had received from officers of the Council. From the discussions held with residents at the meeting on 11th January 2012 it was apparent that the lack of a co-ordinated and timely response had led the residents to feel that the Council was not listening to or taking their concerns seriously. It was however, conceded by residents that since the appointment of a new Head of Planning and Regeneration in May 2010 their concerns had been responded to and they had been given an opportunity to discuss these in more detail, although they continued to be disappointed in so far as the issues raised had not yet been resolved. Residents also welcomed the use of public meetings as a forum for sharing information.

It became apparent from the evidence gathering process that not all officers were familiar with the iCase system and the process of recording service requests (these are not recorded on iCase, but are core business for which there are other systems in use), complaints and responding to residents in an appropriate and timely manner. Although evidence was only examined from the Planning Enforcement area Members agreed that to ensure a consistent approach was being taken throughout the Council any recommendations made should apply to all areas of the Council.

Following discussions with residents and from personal experiences the Task Group recognised that a measure of performance for any organisation was the number, content and manner of complaints or expressions of dissatisfaction received from its customers. Without this knowledge the organisation would be obviously unaware of the view its customers had of its services. In an open market economy the customer is king and has a choice. Whilst Council services are monopolistic, efficiency, value for money, reputation and confidence are major factors in the service delivery.

Taking into account the evidence provided, the Task Group therefore recommend the following:

<u>Recommendation 10</u>	
That a quarterly report be made available to the Overview and Scrutiny Board to enable Members and Officers to be aware of repeat or common themed compliments and complaints (in order to address such complaints).	
Financial Implications	N/A
Resource Implications	Reports to be presented on a quarterly basis – no additional resource implications.

Recommendation 11

That all Heads of Service ensure mechanisms are in place to ensure that when a service request escalates to the extent that there is or could be a critical failure of any nature, they are immediately made aware of the situation and

- (a) that Heads of Service ensure all staff are made aware of and understand the definitions of a complaint; and
- (b) that the Head of Customer Service provides additional guidance in respect of recording service requests which may also be a valid complaint.

Financial Implications

N/A

Resource Implications

Officers will introduce a mechanism to ensure that complaints are reflected, captured and monitored in a timely and accurate way – no additional resource required.

Recommendation 12

That the Head of Customer Service and Human Resources work together to establish a mandatory management training programme to:

- (a) ensure that all managers of the Council are given support to enable them to respond, both verbally and in writing, to all customers in a timely and appropriate manner, with regular reviews of the success of such training carried out; and
- (b) the Overview and Scrutiny Board receive regular updates to ensure this has been implemented.

Financial Implications

To be identified within the corporate training budget (cost of training to be established but estimated to be up to £2,500).

Resource Implications

Resource of staff time - formal training to all managers to ensure officers have all the skills required to respond to our customers in a timely and considered manner.

CONCLUSION

Having considered the evidence provided by all witnesses, the Task Group Members have gained a greater understanding of many aspects of the Planning process.

- By using two particular case studies Members were able to gain a good insight into improvements that have already been made following the Planning Application for the Former Landfill Site, Alvechurch Highway, Lydiate Ash and subsequent problems which had arisen from that particular application.
 - Although this Planning Applications was initially used as a case study the Task Group reiterate the concerns raised by the residents in respect of the safety of the Marlbrook Tip site and support the urgency and need of an expert report on the site.
- The Task Group acknowledged that the Council had made mistakes over the years in this case and although the application for Longbridge East and Part River Arrow, Groveley Lane, Cofton Hackett was at the earliest of stages Members were optimistic from the evidence they had received that lessons had already been learnt and this development would run much more smoothly.
- It has also been recognised that any development, irrespective of size, does have an effect on residents and should any conditions or enforcement be necessary all applications should be handled with the same level of importance.
 - The Longbridge application should be closely monitored in order to prevent the same mistakes being made again. There is however also a need for further improvement, to ensure that mistakes are not repeated and this is reflected in the recommendations contained within this report.
- Several important concerns have been raised within the Internal Audit Report and from the evidence received and investigations carried out by the Task Group, Members concurred with that report and the recommendations within it. For the process to move forward in an appropriate and timely manner it was important that those recommendations were implemented within the timescales given.
 - To ensure the recommendations within the Internal Audit Report are carried through, the Task Group recommends that the recommendations are included within the Overview and Scrutiny Board's quarterly recommendation tracker report.
- Members were concerned at the inconsistency of the recording of service requests and complaints in respect of Planning Enforcement issues. The Head of Planning and Regeneration informed Members that steps had already been taken to rectify this and staff would be

receiving training on the current system, which was not being utilized to its full potential.

- Following discussions with the Customer First Officer, Members requested that service requests also be included within the iCase Customer Feedback Complaints system to ensure that an audit trail was in place should these requests either escalate to customer complaint status or a large number of requests be received which referred to one particular area/planning application.
- In summary, lessons have been learnt and the investigation has raised a number of issues which impact on other areas of the Council's services and its reputation and performance which re-enforces the need to ensure services are pro-active and cost effective and not at risk to unnecessary additional cost and loss of reputation to the Council.
- The Task Group notes and supports the changes already implemented and the pro-active approach taken by the Head of Planning and Regeneration and the Customer First Officer in light of their own observations and critical analysis of the processes in place.
- Members wish to re-iterate that the outcomes of this report are to look forward and to ensure that systems are improved; for staff to receive appropriate training and processes to be tightened.

PLANNING POLICY TASK GROUP

TERMS OF REFERENCE OF THE TASK GROUP

The attached Overview and Scrutiny exercise scoping checklist, was completed by Task Group Members in consultation with both the Head of Planning and Regeneration and the Head of Legal, Equalities and Democratic Services and formed the basis of the investigations carried out and took into account the following specific areas:

- To review the remit of Planning Conditions and their effectiveness.
- To review the Council's activity in terms of Planning Enforcement, to identify strengths and weaknesses and to make recommendations for improvements where necessary.
- To review the way in which the Council responds to enforcement issues and where these can be improved.



OVERVIEW AND SCRUTINY EXERCISE SCOPING CHECKLIST

This form is to assist Members to scope the overview and scrutiny exercise in a focused way and to identify the key issues it wishes to investigate.

▪ Topic: **Planning Policy Task Group**

▪ Specific subject areas to be investigated:

- To review the remit of Planning Conditions and their effectiveness.
- To review the Council's activity in terms of Planning Enforcement, to identify strengths and weaknesses and to make recommendations for improvements where necessary.
- To review the way in which the Council respond to enforcement issues and where these can be improved.

▪ Possible key outcomes:

(i.e. please state what Members hope to achieve through this investigation):

- Recommendations which lead to a more rigorous and consistent implementation of the Enforcement Policy through out the District.
- Recommendations which lead to an improved process for setting realistic and enforceable Planning Conditions.
- A more robust process for managing public concern about enforcement issues.

▪ Should the relevant Portfolio Holder(s) be invited to give evidence? **YES**

▪ Which officers should be invited to give evidence?

(Please state name of officer and/or job title)

Head of Planning and Regeneration
Enforcement Officer
Member of Legal Team
Customer First Officer

▪ Should any external witnesses be invited to give evidence? **YES**
If so, who and from which organisations?

Ward and Parish Councillors
Local Residents (in respect of Marlbrook Tip area)

- What key documents/data/reports will be required?

Planning Enforcement Policy
Planning Conditions

- Is it anticipated that any site visits will be required? **YES ***
If so, where should members visit?

In respect of the Marlbrook Tip site.

- Should a period of public consultation form part of the exercise? **NO***
If so, on what should the public be consulted?

(Please Note: A separate press release requesting general comments/suggestions from the public will be issued in the normal way at the beginning of the investigation.)

- Have other authorities carried out similar overview and scrutiny exercises?
YES
If so, which authorities?

Not recently, however Borough of Pendle carried out an exercise in March 2006 and Ealing in February 2006.

- Will the investigation cross the District boundary? **NO***
If so, should any other authorities be invited to participate? **NO***
If yes, please state which authorities:

- Would it be appropriate to co-opt anyone on to the Task Group/Board whilst the Overview and Scrutiny exercise is being carried out? **NO***
If so, who and from which organisations?

- What do you anticipate the timetable will be for the Overview and Scrutiny exercise?

Anticipated Task Group Report to be presented to February 2012 Overview and Scrutiny Board meeting.

PLANNING POLICY TASK GROUP

WITNESSES

The Task Group considered evidence from the following sources before making its recommendations.

External Witnesses

Written and/or verbal evidence was received from the following external witnesses:

Mr. Roy Hughes	Resident
Mrs. Sue Hughes	Resident
Mr. Tony Ormond	Resident
Mr. Paul Batchelor	Resident
Mr. Keith Woolford	Resident
Mrs. Anne Doyle	Resident
Mr. Lyndon Essex	Environment Agency

Internal Witnesses:

Ms. Ruth Bamford	Head of Planning and Regeneration
Ms. Sharon Sharpe	Customer First Officer
Ms. Thelma Warwick	Lead Auditor (Worcestershire Internal Audit Shared Service)
Mr. Dale Birch	Development Control Manager (Operations)

Councillors:

Kit Taylor	Portfolio Holder for Planning, Core Strategy, Regulatory Services and Strategic Housing.
John Ruck	Ward Councillor (Marlbrook) and Vice Chairman of Planning Committee

PLANNING POLICY TASK GROUP

Bibliography and Research Documentation

Circular 11/95: Use of conditions in planning permission from the Department of Environment.

Highway Conditions

Bromsgrove District Council Standard Conditions

Town and Country Planning (Use Classes) Order 1987 (as amended)

Bromsgrove District Council Planning Enforcement Policy which had been considered by the Planning Committee on 28th March 2011 and adopted at Council on 20th April 2011.

Bromsgrove District Council Planning Committee Agendas and Minutes with reference to the Planning Application for Longbridge East and Part River Arrow, Groveley Lane, Cofton Hackett.

Bromsgrove District Council Planning Permission Decision Notice dated 25th October 2011 for Longbridge East and Part River Arrow, Groveley Lane, Cofton Hackett.

Bromsgrove District Council Planning Committee Agendas and Minutes with reference to the Planning Application for Former Landfill Site, Alvechurch Highway, Lydiate Ash.

Bromsgrove District Council Planning Permission Decision Notice dated 25th January 2006 for Former Landfill Site, Alvechurch Highway, Lydiate Ash.

Minutes from the Marlbrook Tip Working Group – October 2008 to June 2011.

Internal Audit Report Ad hoc Investigation: Marlbrook Tip 16th December 2011.

Summary of Findings of A. D. Horner Ltd at Former Landfill Site, Alvechurch Highway, Lydiate Ash dated 9th June 2011

Making Complaints Count – Bromsgrove District Council Complaints Procedure Guide.

Bromsgrove District Council Customer Feedback Policy

Notes from Public Meeting held on 29th November 2011 in respect of Marlbrook Tip (and attended by the Task Group Chairman)

Presentation on the Planning Process by the Head of Planning and Regeneration

Copy Correspondence from residents in respect of Marlbrook Tip

Written submissions by a resident from the vicinity Marlbrook Tip

Written response from the Environment Agency to questions from the Planning Policy Task Group



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Statement of Principles regarding Affordable Housing Provision

Birmingham City Council and Bromsgrove District Council are committed to working in partnership throughout the regeneration of the former Rover Works at Longbridge. The following is a jointly agreed statement of principles to guide the approach of the local authorities throughout the regeneration of Longbridge in respect of the provision of affordable housing.

1. Affordable Housing to be provided across all housing sites. It is the expectation of the local authorities that 35% of the total housing provision at Longbridge will be affordable. Whilst there is a requirement for affordable housing to be provided on all housing sites it is recognised that the proportion of affordable housing may vary from site to site – this is acceptable so long as the agreed level and mix of affordable housing is delivered for the development as a whole.
2. Affordable housing should be “pepper-potted” within all housing sites. This means that the affordable housing provision should not be concentrated together on particular parts of sites, but spread across each site. In terms of design, it should be difficult to distinguish between affordable and market housing.
3. The preference is for Birmingham City Council’s requirements for affordable housing to be provided on the North and West Works sites (as per the AAP).
4. The preference is for Bromsgrove District Council’s requirements for affordable housing to be provided on the East Works (as per the AAP).
5. In respect of paragraphs 3 & 4 it is recognised that the actual provision of affordable housing tenures, types and sizes may result in the two local authorities affordable housing requirements being built within the administrative boundaries of the other local authority. In this instance, the priority is to deliver the required total mix of affordable housing in preference to delivering specific tenures, types and sizes on particular sites.
6. Bromsgrove District Council and Birmingham City Council to each have 50% nomination rights to the total affordable housing provision.
7. The respective local authorities are to have first call upon the type and tenure of affordable units that they have individually identified as meeting their requirements. This is subject to suitable provision being realised on the site and to the overriding principle stated in paragraph 6. Failure to nominate a suitable household will result in the nomination right defaulting to the other local authority.

8. A protocol for subsequent re-lets will be determined once the details of the actual affordable housing provision is known. However the local authorities will have nomination rights to 75% of re-lets in perpetuity.

9. The same principles as above (point 8.0) will apply for initial lettings.

10. The AAP states that all residential development will meet the following standards as set out in the Code for Sustainable Homes:
 - Level 4 on adoption of the Area Action Plan
 - A target of Level 5 by 2012
 - A target of Level 6 by 2016 (zero carbon)

While the standard for Affordable Housing should comply with level 4 of the Code it is recognised that the target of Code 5 will be dependant upon several factors such as advances in construction technology and commercial viability. Additional funding will be sought from the Homes and Communities Agency to meet the additional costs of compliance at the higher levels.

11. Lifetime homes standard for Market homes will be agreed as a percentage of house types. 100% of the Affordable Housing should be built to the standard. Note: the AAP states that "ALL new homes should be encouraged to meet the Lifetime Homes Standard."

12. For the purpose of clarity, any provision for retirement living (i.e. extra-care) will be treated as market housing, while any provision for Affordable housing within the retirement living development will be treated as Affordable housing.

13. The breakdown of the affordable housing requirement across the whole development will remain under ongoing review and may be adjusted to meet changing needs and pressures. The local authorities will seek to work with the Developer to achieve the required mix over the site as a whole rather than on individual phases of development. Such an approach will require a commitment from all parties to work together to develop a long term plan for housing provision at Longbridge.

14. The Statement of Principles will remain subject to ongoing review. In the event of either authority considering the statement to be no longer suitable or inappropriate there will be no long term binding commitment other than to reciprocate by offering in return, nominations to match any nominations already provided by the other authority.

Bromsgrove Townscape Heritage Initiative

Stage 2 Bid

April 2012

Prepared by Bromsgrove District Council

A bid to the Heritage Lottery Fund

Townscape Heritage Initiative

Stage 2 Bid & Action Plan

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Appendices

1	<p>CVs of new members of the THI Project Team</p> <p>Please note:</p> <p>(BDC = Bromsgrove District Council) (WCC = Worcestershire County Council)</p>	<p>David Thomas (BDC) Mary Worsfold (BDC) Christopher Holmes (BDC) Jack Carradine (BDC) Richard Clewer (WCC) Jennie Delorenzo (BDC) Jon Fraser (WCC) Kevin Hirons (BDC) Jayne Pickering (BDC) Iain Mackay (BDC) Rachel McAndrews (BDC) Fiona Scott (BDC) John Staniland (BDC) Sarah Sellers (BDC)</p>
2	Simple diagram which summarises the structure of the project team	Figure 1 from section 2.0
3	Written confirmation that the main contact is authorised to act on the partnership's behalf	Letter, Kevin Dicks, Chief Executive, Bromsgrove District & Redditch Borough Councils
4	Written confirmation from a senior member of the relevant organisation that their staff's involvement in the project team will be treated as a high priority	<ul style="list-style-type: none"> • Letter, Roger Hollingworth, Leader, Bromsgrove District Council • Letter, John Staniland, Executive Director, Planning & Regeneration, Regulatory & Housing Services
5	Job description and person specification for the THI project officer post, plus grade, salary and position in the management structure	<p>Includes:</p> <ul style="list-style-type: none"> • Structure of Strategic Planning Team • Advertisement for THI Project Officer
6	External consultants – draft specification of services proposed and skills and qualifications needed, and procurement strategy for choosing consultants; or the name, practice or company profile and details of the specific consultants already appointed, the terms of their appointment, and how you chose them	<ul style="list-style-type: none"> • Request for Quotation: Brief to Consultants. August 2011 • Comprehensive Analysis: Tender Evaluation (28/08/2011)
7	Letters of support from new partners, stating why and how they are going to	<ul style="list-style-type: none"> • Archive & Archaeology

	support the scheme	<p>Service, WCC</p> <ul style="list-style-type: none"> • Bromsgrove School • Avoncroft Museum • The Housman Society • English heritage • The Victorian Society
8	If there were any relevant changes within your local planning authority, include a letter of support from the planning authority's chief executive	Not applicable
9	Formal written constitution of partnership	Aim, vision, mission statement, common objectives & terms of reference - Partnership Steering Group
10	Flow-chart summarising the decision-making process for third-party grants	Figure 2 from section 2.5, plus: <ul style="list-style-type: none"> • Bromsgrove THI Guide to Eligible Works • Bromsgrove THI Introduction to Grant Scheme • Bromsgrove THI Specification Requirements for Grant-Aided Work
11	Conservation area appraisal and, if applicable, statement/minutes/resolution confirming the adoption of the document.	
12	Copies of surveys	Condition Surveys & Costings - Heritage & Regeneration Solutions Ltd
13	Copies of valuations	Report & Valuation - Thomas Lister Ltd
14	Photographs of eligible projects	Photographic survey of all properties showing features requiring intervention - Heritage & Regeneration Solutions Ltd
15	A map or maps that precisely define the location of all eligible projects, as well as the boundary of the THI scheme and the conservation area	A3 maps: <ul style="list-style-type: none"> • Bromsgrove Town Conservation Area & THI Boundary • Eligible buildings within the THI Boundary • Priority Plus buildings

		<ul style="list-style-type: none"> • THI & surrounding ward boundaries
16	Letters of support from owners, businesses or chamber of commerce to confirm demand for third-party grants	<ul style="list-style-type: none"> • Questionnaire from Property Owners and Occupiers (2012) • Public Consultation (02/02/2012-15/03/2012)
17	A conservation area management plan	Please refer to appendix 11 for Bromsgrove Town Draft Conservation Area Appraisal & Management Plan
18	If applicable, relevant committee meeting minutes confirming the local planning authority's commitment to adopting, publishing and implementing the conservation area management plan	
19	Copies of relevant and up-to-date strategies and frameworks, or sections thereof	<ul style="list-style-type: none"> • BDC Anti Fraud & Corruption Strategy. April 2010 • Historic Environment Assessment for BDC. June 2010 • Town Centre Health Check. December 2011 • Worcester Local Transport Plan 3: 2011-2016 • Maintain your Building. April 2012 • Draft Shopfronts & Advertisements Design Guide. March 2012 • BDC Planning Enforcement Policy. January 2011 • Bromsgrove Town centre Draft Area Action Plan. January 2011 • BDC Draft Core Strategy 2. January 2011
20	Written confirmation that the partnership funding for the whole scheme is secured at least 'in principle'	Declaration signed by John Hobbs, Director of Environmental Services (WCC) & John Smith OBE, Cabinet Member with Responsibility for Highways & Transport (WCC)

21	Written confirmation that the partnership funding needed to deliver the Year 1 programme is in place	See Appendix 20
22	A signed copy of the Declaration	Declaration signed by Kevin Dicks, Chief Executive, Bromsgrove District & Redditch Borough Councils, dated

1 Executive Summary

Bromsgrove District Council, in partnership with Worcestershire County Council, is seeking to regenerate the historic Town Centre of Bromsgrove through a Townscape Heritage Initiative (THI) – a partnership project between Bromsgrove District Council, Worcestershire County Council and the Heritage Lottery Fund (HLF). The £1.6 million heritage-led regeneration scheme which is scheduled to run between 2012 and 2017 will help to achieve the long-term economic sustainability of Bromsgrove by preserving, restoring and enhancing the historical, architectural and cultural heritage of the town.

The THI area extends from Worcester Road to the Strand and follows the medieval plan comprising the main south-west/north-east route between Worcester and Birmingham.

The Bromsgrove Town Conservation Area was added to the national *Heritage at Risk* register published by English Heritage in July 2010 as a result of a clear deterioration of the area's condition and appearance over the previous 3 years. This is one of only four *at risk* areas in Worcestershire, and one of 51 identified across the West Midlands. The heritage at risk assessment process identified several noticeable problems that are contributing to the erosion of the character and appearance of the Conservation Area:

- Loss of historic detail or inappropriate change to doors and windows, front elevations, decorative features, shopfronts, signs and advertisements, and new extensions

- Vacancies within buildings
- Signs of a lack of maintenance such as poorly maintained gutters or joinery
- The condition of the public realm
- Signs and advertisements, street clutter, highway works, traffic management, poor quality street furniture and a large number of planning enforcement cases were identified as particular problems
- The appearance and vitality of the Conservation Area has deteriorated over the last 3 years and is expected to continue to deteriorate in the next 3 years without intervention
- Condition and vulnerability both ranked at level 4 with a deteriorating trajectory
- Lack of adopted Character Appraisal, current Management Plan or LDF in place

There is an assortment of notable historic buildings dating from predominantly the 18th and 19th centuries but with some earlier surviving timber-framed buildings. A range of architectural styles is represented from English vernacular, to restrained Georgian and more elaborate Victorian Gothic buildings. This variety of elevational treatments and styles demonstrates high quality construction and craftsmanship, giving a rich texture to the town centre – a tangible reminder of the town's past prosperity.

The narrowness of the historic building plots, the varied rooflines and the overall height of the buildings give a general impression of vertical emphasis and a strong sense of enclosure. The more modern, especially post-WW2, buildings unfortunately detract from this as they are set back from the established building line, occasionally a storey lower and with detailing that gives a horizontal rather than vertical emphasis. These infill sites do at least give opportunities for redevelopment in the future without requiring the loss of more historic buildings.

We are agreed that positive measures are urgently required to give the town centre a sustainable future and a new lease of life. Major intervention is vitally needed to reclaim Bromsgrove's once distinctive offer. Our aim is to bring back the traditional life and vitality of the high street and to support the re-introduction of year-round outdoor activity. We are strongly in favour of specialist retailing and the re-establishment of High Street and Worcester Road as an attractive thoroughfare to be envied far and wide. Our vision is nothing short of the transformation of Bromsgrove into the thriving market town it used to be.

The residents of the deprived wards adjacent to the High Street depend upon the town for their employment, retail and entertainment needs, and those residents have already been affected by the decline of Bromsgrove as a retail destination over the last 20 years.

A Draft Area Action Plan has been published to provide a planning framework for the regeneration of the town. The Bromsgrove THI initiative will be integral

to this, by helping to recreate a vibrant and sustainable environment, which will attract visitors and businesses alike.

We aim to:

- tackle condition and appearance problems of historic buildings and frontages along the High Street and beyond
- encourage the future maintenance of notable historic buildings
- find new uses for vacant buildings and upper floors
- upgrade the public realm
- raise awareness of the historic built environment as a cultural asset
- transfer conservation knowledge and skills into the community

This Stage 2 Bid and Action Plan have been written by the THI Project Officer working in close association with the THI Project Team and the THI Partnership Steering Group – a body that represents a wide selection of Bromsgrove’s major stakeholders.

The total overall cost of the 81 eligible projects, including expenditure on public realm, staffing, publicity, education and training, is £4,563,800. The Common Fund has £1,600,000 including £1,200,000 anticipated from the HLF and £400,000 match funded from Worcestershire County Council.

53 properties have been identified as priority (P), including 15 which are regarded as requiring preference (P+) – there are 28 potential reserve properties (R). The long list of eligible properties reflects the genuine need for regeneration in the conservation area where nearly 60 properties are listed buildings and many more are deemed worthy of townscape merit.

It is widely acknowledged that the priority plus properties we have selected demonstrate a reasonable spectrum of works - 1 is completely empty, 8 are empty in part and all 15, taken as a whole, represent those buildings in the worst condition but with the highest heritage value.

Community involvement and skills training are vital factors in Bromsgrove’s THI. We have allocated £50,000 for training, education and learning opportunities and these have been carefully programmed to appeal to all groups in the community. The THI Partnership Steering Group has pressed for a diverse range of complementary initiatives and most of these activities and events are highlighted in this application. There will be seminars, open days, short courses, competitions, opportunities for volunteering, guided walks and a great deal more over the course of the scheme’s 5-year lifetime.

As we progressed the Stage 2 Bid we were able to develop and improve upon a number of strategies and policies. For example, we have reviewed and significantly updated and adopted our Conservation Area Appraisal and Management Plan and further updated our already adopted SPG on the design of shopfronts and advertisements.

The Project Team and Partnership Steering Group - including the local community via a period of public consultation - have collaborated extensively over many months on drafting this second-round document, and are now pleased to present their final version to the Heritage Lottery Fund. We remain committed and focussed on regenerating our town centre and look forward to delivering a scheme of quality and integrity on behalf of the people of Bromsgrove.

1.1 Our Organisation

Bromsgrove District Council
Planning and Regeneration
The Council House
Burcot Lane
Bromsgrove
Worcestershire
B60 1AA

(The THI area postcodes are B60 and B61, with the centre of the THI in B60).

2 The Project Team and Partnership

The scheme will be led by Bromsgrove District Council which will: -

- act as the Lead Body
- hold the contract with the Heritage Lottery Fund
- manage, and be responsible for, the Common Fund
- enter into contracts with individual property owners

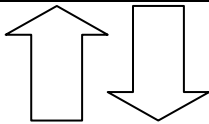
The Project Team and Partnership Steering Group will provide a key element towards the Town Centre Regeneration Programme and will support and inform the projects developed by the Bromsgrove Regeneration Programme Steering Group.

Figure 1: THI Project Team & Partnership Links and Structure

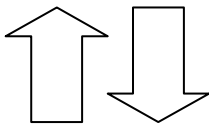
Line management

Responsibilities

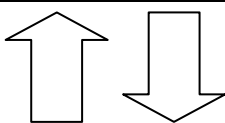
Town Centre Regeneration Steering Group <ul style="list-style-type: none">- Leader- Chief Executive	Strategic issues Public Realm Funding Package Linkages with adjacent projects <ul style="list-style-type: none">- Approves THI grants over £150,000
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THI Partnership Steering Group (see 2.4 below)	Tactical issues, Directing, Monitoring, Community/Training <ul style="list-style-type: none">- Views sought on THI grants over £30,000- All grants reported to group quarterly for feedback on quality and design.
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THI Project Team (see 2.1 below)	Operational issues Scheme development <ul style="list-style-type: none">- Strategic Planning Manager approves THI grants up to £30,000 (Executive Director for Planning & Regeneration, Regulatory & Housing Services approves THI grants between £30,000 & £150,000)
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THI Project Officer David A. Thomas	Day-to-day management Engagement Management
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(see 2.2 below)	Administration Implementation
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2.1 The THI Project Team

At a corporate level the THI scheme will be championed by John Staniland the Executive Director for Planning and Regeneration, Regulatory and Housing Services under his wider responsibility for the Town Centre regeneration, John has taken an active role in the project to this date as the chairman of the Steering group and will continue to fulfil this role throughout the lifetime of the project.

We have set up a 6-strong core THI Project Team including staff from both Bromsgrove District (BDC) and Worcestershire County Councils (WCC). The responsibilities of this core team encompass operational issues, decision-making and scheme development. Individual core team members and their skills are detailed in table 1 below.

Table 1: Core THI Project Team Members

Name	Title	Skills
Martin Ashcroft	Projects and Partnerships Manager (BDC)	Planning processes, project management & procurement
Dale Birch	Development Control Manager (BDC)	Development control & planning enforcement
Mike Dunphy	Strategic Planning Manager (BDC)	Strategic planning -policy development and implementation
Richard Savory	Senior Projects Manager (WCC/BDC)	Project management, regeneration & economic development
David Thomas	THI Project Officer (BDC)	Building conservation, urban design, architecture & financial management
Mary Worsfold	Conservation Officer (BDC)	Building conservation & heritage tourism

(BDC = Bromsgrove District Council WCC = Worcestershire County Council)

The core THI Project Team, which will meet 6-weekly during implementation, now has 3 new members, namely:

- **David Thomas** who has filled the vacant post of THI Project Officer

- **Mary Worsfold** who has replaced Judith Carstairs as Conservation Officer providing specialist advice on building conservation and heritage issues
- **Dale Birch**, the Development Control Manager for the town centre

Christopher Holmes (Accountancy Technician), currently a member of the supporting Project Team, will be moved to the core team during the implementation stage. In a further change, Ross Walker, has now left Worcestershire County Council.

The Project Team, which includes the Project Officer, will have the requisite technical ability to manage all aspects of the scheme on a day-to-day basis conferring with the Partnership Steering Group either once every 2 months or when necessary to do so, e.g. should a grant be under development for greater than £30,000.

David Thomas was appointed Project Officer in June 2011 and has since taken responsibility for the development of the THI Stage 2 bid. His Line Manager is Mike Dunphy who will assume overall responsibility for management of the scheme.

The THI Project Officer will prepare recommendations on grant applications which will be reviewed by the Line Manager before being passed for comment through the Project Team and - if greater than £30,000 - the Partnership Steering Group.

Delegated authority to approve grant applications is set out in Section 2.5 below and the executive decision approving the delegated powers and grant scheme application and approval process is shown in figure 2 below.

Table 2: Supporting Project Team Members

Name	Title	Skills
Andrew Bucklitch	Tree Officer (BDC)	Tree management & landscape works
Jack Carradine	Media Officer (BDC)	Media and Communications
Richard Clewer	Senior Highways Officer (WWC)	Highway engineering, maintenance and public realm
Jennie Delorenzo	Housing Initiatives Officer (BDC)	Housing/vacancy initiatives
Jon Fraser	Highways Manager (WCC)	Highways, public realm

Kevin Hirons	Street Scene & Communities Manager (BDC)	Public realm – street scene & communities
Jayne Pickering	Executive Director Finance & Corporate Resources (BDC)	Financial / Resources
Christopher Holmes	Accountancy Technician (BDC)	Financial
Iain Mackay	Planning Enforcement Officer (BDC)	Planning enforcement
Rachel McAndrews	CCTV & Telecare Services Manager (BDC)	Public realm - CCTV
Fiona Scott	Equality Officer (BDC)	Equality/accessibility issues
Sarah Sellers	Senior Solicitor (BDC)	Legal issues

(BDC = Bromsgrove District Council WCC = Worcestershire County Council)

In a change from the first-round bid the Project Team has grown from 7 to 18 members. All supporting Project Team members have been involved in various aspects of preparing this stage 2 bid

During the Delivery Stage they will be kept up to date with minutes from the core Project Team and will be asked to attend meetings as matters requiring their particular expertise need addressing. Guided by the Project Officer, all members of the Project Team, core or otherwise, will provide specialist support and share in decision-making. During the delivery phase the Project Team will assist the Project Officer with strategic direction as well as reporting to, and working alongside, the Partnership Steering Group.

CVs of the Project Team accompanied the Stage 1 submission indicating the requisite skills needed for delivery of the THI. We are confident that within our 18-strong Project Team we now have a full complement of skills. CV's for new members of the Project Team are attached (appendix 1).

2.2 THI Project Officer

Following the award of a first-round pass of £1,250,000, which included development funding of £50,000, Bromsgrove District Council employed a THI Project Officer to carry the scheme forward towards Stage 2 submission - a job description and person specification for this post can be seen in appendix 5. The THI Project Officer will continue at Bromsgrove District Council for the duration of the 5-year scheme, the contract funded through the THI Common Fund, following HLF approval of the second-round bid.

The Project Officer has worked on another successful THI scheme elsewhere in the UK and as a result has significant experience of heritage-led

regeneration. He is also the Chairman and Area Representative of the UK Association of Building Preservation Trusts in the Midlands, a role that has furnished him with additional negotiation, project management and communication skills.

The Project Officer will be based amongst colleagues in the Strategic Planning Team where he will take on the day-to-day running of the scheme, regularly reporting on progress and any issues to his line manager, the Strategic Planning Manager, as well as the Project Team and Partnership Steering Group. Written confirmation that the Project Officer is authorised to act as the main contact on behalf of Bromsgrove District Council can be read at appendix 3.

In addition to support from the Project Team, the Project Officer will be granted administrative support from the Strategic Planning Team. Further guidance will be given from other District and County Council officers as and when necessary. The Conservation Officer and the Development Control Manager will provide significant and dedicated support throughout the 5-year scheme.

The Project Officer's responsibilities include: -

- First point of contact for all THI enquiries
- Day-to-day responsibility for implementation of the THI
- Providing guidance to property owners on THI application process
- Making principal assessment on all THI applications
- Monitoring THI approvals - both financially and physically
- Developing and implementing THI complementary initiatives
- Liaising with the Media Officer to market and promote the THI
- Engaging with the community, voluntary sector and property owners
- Liaising with the council's accountant to ensure grant claims and financial record keeping is completed efficiently
- Preparing agendas for Project Team and Partnership Steering Group meetings
- Providing the primary contact for the HLF Monitor and Officers

Key competencies required from the Project Officer include: -

- experience in project management
- experience in building conservation
- robust financial management skills
- organisational and negotiation skills
- a focused and proactive approach.

A job description and person specification for the Project Officer along with a structure chart for the strategic planning section is attached as appendix 5.

The salary of the Project Officer will be set at Grade 7 (SCP 30 – 36), currently £25,472 to £30,011 (pay award pending). The post will be established on a temporary 5-year contract basis. A budget of £196,490 has been allocated for the Project Officer which is split as detailed below:

Salary over 5 years (at current rate)	£135,260
Annual salary increase allowance	£2,096
Inflation allowance	£16,934
National Insurance	£11,091
Pension Contribution	£31,109
<u>Total over 5 years</u>	<u>£196,490</u>

2.3 Other partners and their commitment to the scheme

The main partners involved in the scheme are detailed in section 2.4 below, this partnership will be kept under constant review for the lifetime of the project ensuring that if new people wish or need to become involved in the project they can be included as necessary.

The Partnership Steering Group meetings attended by the Ward Councillors and Portfolio Holder / Heritage Champion alongside the approval process up to cabinet level that this bid has gone through demonstrates the commitment from the elected members of the Council. It has been recognised not only through this bid but other regeneration incentives being progressed by the Council that the economic well-being and an attractive, well-maintained historic environment are mutually inclusive and constitute a vital factor in the revitalisation of the town centre.

As well as showing the required leadership by attending the various meetings both Bromsgrove District and Worcestershire County Councils have both lent their considerable support to the successful submission of this Stage 2 bid financially . Worcestershire County Council has match-funded £400,000 to the overall scheme while Bromsgrove has contributed £16,700 towards the development phase.

The Project Team meets every six weeks to safeguard the scheme's momentum and ensure that the appropriate departments - local and county - are not only updated on progress but given the opportunity to contribute to delivery.

The Project Team has lined up a thoroughly representative cross-section of the local community to sit on the Partnership Steering Group as detailed below .

Letters of support from the Chief Executive of Bromsgrove District and Redditch Borough Council and the Leaders of Bromsgrove District Council (appendix 4) outline the Council's continued commitment to the scheme and the involvement of key officers to ensure its success. There is also considerable and enthusiastic support from our newly-designated Heritage Champion Cllr. C. B. Taylor (Linthurst Ward), Portfolio Holder for Planning, Regeneration, Regulatory Services and Strategic Housing.

2.4 The Partnership Steering Group

Since the first-round bid was submitted the Partnership Steering Group has changed in the make-up of its members – there has been the addition of representatives from the retail sector, a religious leader and a specialist in archaeology. Their support letters demonstrating their valuable contribution to the Steering Group are attached (appendix 7). District and County Council officers will continue to contribute to the steering group as and when required.

We felt it especially important to invite shopkeepers and small businesses to the Partnership forum in that their daily lives are so tightly interwoven with the vicissitudes of the high street. This measure has been much appreciated and is leading to greater transparency and co-operation among town centre retailers, etc. the contributions of each Steering Group member are highlighted below

We recognise that members of the Steering Group may come and go during the lifetime of the scheme and so we will be especially vigilant that a representative balance is constantly in place at meetings and other consultative events.

The Steering Group has approved the following terms of reference:

- To endorse and agree the details of the second-round bid to the HLF
- To oversee the implementation of the funded works and review progress

and will be called upon to give technical guidance and support to the Project Team and Project Officer as the scheme runs its 5-year course. Normally, the Steering Group will meet every 2 months to be appraised of progress and other matters. For terms of reference and other commitments and objectives the Steering Group has approved please see appendix 9.

The Partnership Steering Group is chaired by the Executive Director for Planning and Regeneration, Regulatory and Housing Services and meets bi-monthly having met as many as 5 times now that the Stage 2 bid is complete. The Steering Group membership includes:

- Lesley Ashworth, Lesley Ashworth Associates
- Andrew Oulsnam, Oulsnam Estate Agents
- Representatives of the Weston family, local landowners
- Avoncroft Museum of Historic Buildings
- The Victorian Society
- The Housman Society
- Artrix - Bromsgrove's Theatre, Cinema, Live Music and Comedy Venue
- The Bromsgrove Society
- Bromsgrove School
- North East Worcestershire College
- English Heritage
- Historic Environment and Archaeology Service at Worcestershire County Council
- St. John's Church
- Representative for the town centre retailers
- Councillor Dr. D. W. P. Booth JP
- Councillor Mrs. R. L. Dent
- Councillor. C. B. Taylor (Heritage Champion)
- Bromsgrove District Council
- Worcestershire County Council
- Clare Haines, Grants Officer, HLF West Midlands (by open invitation)
- Phil South, HLF External Monitoring Officer (by open invitation)

The Steering Group's function is to assist in the delivery and management of the scheme, to ensure that the direction that is taken benefits the overall requirement to revitalize the town centre. Many Steering Group members are likely to be heavily engaged in complementary initiatives such as training or community. At the inaugural meeting of the Steering Group the principal aims of the Steering Group as highlighted below were agreed

- Promote conservation of the heritage and respect the distinctive quality of the historic buildings
- Work together to develop vision and strategy for the implementation of the THI scheme
- Develop a THI scheme that will regenerate and develop the town centre as a prosperous, vibrant, safe and accessible work place and visitor destination, providing employment in a high quality environment
- Promote the THI scheme actively and to work together to secure Bromsgrove's second-round bid to the HLF

- Help raise civic pride and promote an image demonstrating Bromsgrove town centre as a sound investment opportunity for new uses that will aid sustainable regeneration
- Develop community involvement in the regeneration of Bromsgrove town centre

The roles of each partner are as follows:

- The Director of **Avoncroft Museum of Historic Buildings**, just south of Bromsgrove, is providing valuable knowledge of traditional construction and repair techniques. The museum will host 3 days of courses for homeowners on historic building maintenance. There is also a commitment to procure traditional rural craft and trade workers for an archaeology open day scheduled for August 2013
- The Bromsgrove Casework Reporter at the Birmingham and West Midlands branch of the **Victorian Society** is providing guidance on the reinstatement of missing architectural features as well as participating in our training and outreach projects
- The Chairman of the **Housman Society**, through the THI scheme, is promoting knowledge and appreciation of the life and works of A. E. Housman - a poet and pre-eminent classicist from Bromsgrove
- The Director of **Artrix**, Bromsgrove's versatile multi-disciplinary arts centre, is working closely on a number of art in the public realm initiatives. Innovative artists, designers or makers with the vision to make their mark on the High Street will be invited to tender as an integral part of an exciting public realm scheme
- The Chairman of the **Bromsgrove Society** is providing the lead on a number of projects such as landscaping the Spadesbourne Brook, redesigning the town trail guide and a plan to address visually the backs of High Street properties from cars passing by on Market Street
- The Headmaster of **Bromsgrove School** is keenly supporting the history and regeneration of Bromsgrove. Representation from the school on the Steering Group will provide a valuable connection to local residents and young people specifically
- The Principal of **North East Worcestershire College**, through the Assistant Principal Learner Experience, is working closely with the THI Project Team and the Society for the Protection of Ancient Buildings (SPAB) on developing masterclasses in construction for 16 – 19 year olds
- The Historic Areas Advisor for **English Heritage** in the West Midlands is providing specialist advice on the proposed repair and improvement works, as well as guidance on our training and outreach projects
- The **HLF** Monitor and Officers will be invited to attend the Steering Group meetings to provide an understanding of HLF priorities and the THI progress
- Officers from Worcestershire County Council **Historic Environment and Archaeological Service** are helping to develop plans for a community dig which is proposed for Mill Lane in Easter, 2013. There

will be a second community dig in Sanders Park culminating in an open day later that year

- **St. John's Church** is an important link to the local community and has a vital high street presence, this will help in publicising the THI and in developing discussion about the history of High Street/Worcester Road
- The Town Centre **Retail Representative** will help us contact and consult local shopkeepers and small businesses to find out what the real issues on the high street are and how these might be tackled so that Bromsgrove becomes an attractive destination for retailing
- **Shopkeepers and small businesses** make a significant contribution to the overall running of the scheme. As they are freeholders or leaseholders, some of whom may wish to draw down grants, and encourage others to do so, their experiences of real high street trading is paramount
- **Bromsgrove District Council** has allocated senior staff members to provide conservation and planning knowledge to the Steering Group. Local councillors will represent and deal with some of the issues affecting town centre owners, tenants and users.
- **Worcestershire County Council** includes the Highways Authority and is providing match funding of £400,000. County officers will see that other Town Centre regeneration programmes dovetail with THI initiatives as well as providing advice to the Steering Group on the proposed public realm works.

Bromsgrove District and Worcestershire County Councils have prioritized senior staff for inclusion on the Steering Group who can have a direct impact on the work of the group meaning progress has already been made in delivering key strategies in relation to the scheme. The Conservation Officer, for example, has updated the Bromsgrove Town Conservation Area Appraisal and written a Conservation Area Management Plan to accompany it. The Strategic Planning Team have produced a Bromsgrove Town Centre Draft Area Action Plan and a Town Centre Health Check as well as revised design guidance on shopfronts and advertisements (SPG), and the group has been able to endorse the Project Brief for the public realm upgrade, a significant part of which (£400,000) will be funded through the THI Common Fund. All these documents are included in appendix 19.

Partnership Steering Group tasks include:

- Attending bi-monthly meetings to receive regular updates on progress and provide feedback on the design and quality of implemented schemes.
- Approving any changes to the scheme
- Providing views on all grant applications over £30,000
- Monitoring progress against the action plan

- Promote the THI scheme to the wider community
- Providing technical expertise and guidance

The THI Project Officer will provide the secretariat for the Partnership Steering Group.

2.5 Decision-making processes

Figure 2: Bromsgrove decision-making flow chart

The THI will be the responsibility of Bromsgrove District Council (the lead body) who will sign the declaration to the Heritage Lottery Fund. The Project Team will manage the £1.6 million Common Fund having the appropriate technical skills to deliver every aspect of the scheme. Within the Project Team the Project Officer will administer the day-to-day running of the THI, recommending where, and under what circumstances, the District Council will enter into contracts with individual owners or tenants. The Steering Group will review progress, share knowledge of initiatives and plans and generally encourage grant applications.

The District Council is committed to providing the exact number of specialist staff required to deliver the scheme – disciplines include enforcement, planning, conservation, property and economic development.

The Portfolio Holder for Planning, Regeneration, Regulatory Services and Strategic Housing who is also the Heritage Champion will supply the political profile that the scheme demands.

In all likelihood the Steering Group, having provided encouragement and expertise throughout the scheme, will continue to regularly meet and provide input on town centre regeneration matters once the delivery phase has completed in 2017. Such commitment will help to ensure that the £1.6 million Heritage Lottery Fund investment is protected beyond the lifetime of the scheme.

Additionally, the *Conservation Area Appraisal and Management Plan* and the *Shopfronts and Advertisements Design Guide SPG* will be used as material considerations when determining planning applications and will assist in dealing with breaches of planning control ensuring good practice continues during and after scheme completion.

The District Council has a great deal of previous experience in managing public funds - the Town Centre Regeneration Programme Manager (who is a member of the Project Team) has nearly 20 years experience of running major, publicly-funded grant schemes in the economic development and regeneration arena. These included Foot & Mouth Recovery, Rover Recovery and Rural Regeneration Zones - each with multi-million pound budgets.

The Project Team will take particular care with records and accountability, strictly observing the principles set out in the Stage 2 guidance, so that internal and external auditing can proceed with all due clarity right up to scheme completion.

2.5.1 Pre-Application

Applicants for grants will be given 3 A5 booklets which explain different aspects of the scheme:

- Guide to Eligible Works
- Introduction to Grant Scheme
- Specification Requirements for Grant-Aided Work

The Project Officer will meet applicants on site to discuss which remedial or reinstatement measures might be eligible under the scheme.

Other pre-application processes are expected of the applicant and include:

- The need for three competitive and detailed tenders - if the grant contribution is likely to be over £10,000
- Agreed specifications, priced schedules of work and drawings
- Any required consents such as listed building consent, planning permission, building regulations approval or advertisement consent

These will need to be submitted with a completed full application form as well as other relevant information as set out in the booklet: *Introduction to Grant Scheme* (see Appendix 10) before an application can be assessed.

2.5.2 Grant Application Decisions

In figure 2 above the Project Officer shares responsibility with the Project Team in deciding which works are eligible for grant – should a decision be required on a grant of less than £30,000 then the Strategic Planning Manager is authorised to sign the contract on behalf of the District Council. Over £30,000 the views of the Steering Group will be sought although there may not be any need to wait for the next bi-monthly meeting for a decision to be made. For grants over £30,000 the designated signatory is the Executive Director for Planning and Regeneration, Regulatory and Housing Services who can sign on behalf of the District Council to the value of £150,000. Grant applications in excess of £150,000 are passed through Cabinet – and the Steering Group – for approval.

The Project Officer, in collaboration with the Project Team, reviews all applications before submitting them for approval to the Strategic Planning Manager. The Project Team is able to bring to bear all its collective expertise – conservation, development control, etc. – to oversee each separate application. Where necessary, the Project Team will defer to the Steering

Group to guarantee that the applicant's request meets the assessment criteria and priorities laid down in the action plan.

Once a critical and objective assessment has taken place the Project Officer will recommend a decision to either grant or refuse an application request. The Steering Group may be called upon to endorse a request should the value of the grant be in excess of £30,000. The Strategic Planning Manager or the Executive Director for Planning and Regeneration, Regulatory and Housing Services will then have the delegated authority to confirm the applicant's request.

Occasionally, a grant application may need referral to the Heritage Lottery Fund, for example: -

- If an application is made by a member of the Steering Group
- Where the grant is likely to exceed £100,000

The application form is included in appendix 10.

Assessment Criteria

Every application for grant aid will be measured against the following criteria:

- Is the cost of the project reasonable and does it provide *Value for Money*
- Is an historic shopfront to be put back
- Are specialist contractors and accredited consultants to be used (conservation-trained architects or surveyors must be used where the grant element is in excess of £20,000)
- How great is the need for repair
- Does the proposal satisfy the grant requirements in the *Guide to Eligible Works*
- Has the building townscape merit and to what extent will the grant enhance this
- Is the property *Priority Plus, Priority or Reserve*
- Is there the will to use traditional materials and techniques according to national conservation standards

The Project Team, and where necessary the Steering Group, must also be assured that the following are provided:

- Copies of any required consents such as listed building consent, planning permission, building regulations approval or advertisement consent
- Proof of either freehold or leasehold status
- Historical evidence for any elevational changes, e.g. the reinstatement of traditional shopfronts
- A structural survey if necessary

- A development appraisal together with a valuation of the property in its current state plus an estimated valuation once the project has been completed - for projects where vacant historic floorspace is brought back into use
- A full specification and priced schedule of works
- Details of buildings insurance and any additional insurance required
- Scaled drawings should be submitted showing *all existing architectural detailing*, plus relevant details of the buildings on either side at a scale of 1:50. Applications will also be expected to show clearly *all details of the proposed shopfront* and its relationship with the whole elevation, including any existing features that are proposed to be altered or removed. Plans, elevations and sections should be at a scale of 1:20 and it may be necessary to show architectural detailing at a scale of 1:2. At least one sectional drawing of the shopfront should show its profile and relationship to the upper part of the building
- Outstanding enforcement matters or unauthorised works should be settled in writing under the direction of the Project Team
- The need for 3 competitive and detailed tenders if the grant contribution is likely to be over £10,000 - 2 detailed quotes are required when the grant is less than £10,000
- Copies of letters informing the applicant of any other grant offers from sources other than the Heritage Lottery Fund
- The lender's consent should the building be mortgaged and/or the freeholder's consent should the building be leased

Members of the Project Team and the Steering Group will be careful regarding conflicts of interest and should any arise they will not be invited to take part in deciding a grant for that particular property.

The range of grants will be from a minimum of £2,000 to a maximum of £200,000 for each property.

2.6 Skills and skills gaps of the Project Team and Partnership

The Partnership Steering Group has been established to include all the skills and experience we feel necessary to successfully deliver the 5-year scheme. Similarly, the Project Team includes officers whose professional remit encompasses conservation, heritage management, training, planning, property management, economic regeneration, community engagement and project management.

In reviewing the range of skills in the Project Team and Steering Group we have perceived few gaps. Should additional skills be needed then specialist officers from within the District and County Councils will be contacted for additional advice.

The key new member to have joined the Project Team since the first-round bid is the Project Officer, David Thomas, who can offer skills in building conservation, urban design, architecture, financial management and heritage tourism as outlined below: -

- THI Project Officer – a specialist in the conservation and management of historic buildings with considerable experience of Heritage Lottery Fund grant processes. An Affiliate Member of both the IHBC and ASCHB who has five years experience of conservation and urban design in a local authority. Chairman, Area Representative and Treasurer of the UK Association of Preservation Trusts in the Midlands and Chair of the Shropshire Building Preservation Trust, David was previously a THI Project Manager in Kent.

At an early stage in the development phase we appointed consultants to undertake a more detailed assessment of the historic buildings within the Bromsgrove Town Conservation Area and develop proposals for repairs and improvements to those buildings eligible for costs. The work produced accurate building condition surveys and detailed financial assessments of potential projects.

The study addressed the following issues in relation to the buildings and spaces of the area using photographs, plans and illustrations:

- disrepair, dereliction and mutilation of buildings
- condition survey and identification of scope of work
- use and level of occupancy
- ownership
- missing architectural details
- professional valuation of buildings
- schedule of grant eligible works and associated realistic and accurate costings.
- poor quality building facades including shopfronts
- intrusive and inappropriate shop signage and advertising
- unsympathetic modernisation schemes.

We stressed that in order to meet the requirements of the Heritage Lottery Fund under the Townscape Heritage Initiative, studies should comprise and address the following issues: -

- a) a detailed photographic survey of the important features of properties requiring intervention in the study area
- b) a comprehensive condition survey of these properties to concentrate on the external fabric, but to include brief assessments of internal condition and to establish whether buildings are structurally sound. These assessments should consider: -
 - Building Repair
 - Reinstatement of lost historical and architectural detail

- Bringing vacant floor space back into use
- c) Schedule of grant eligible works for individual identified properties and accurate costings for the above categories of eligible work under the THI scheme
- d) An overall detailed cost breakdown for all proposals including a financial appraisal of those elements eligible for grant assistance

We feel that quality training will underpin the success of the THI scheme and have therefore developed a training regime in close consultation with North East Worcestershire College and Avoncroft Museum of Historic Buildings both of which are represented on the Steering Group. The Society for the Protection of Ancient Buildings is a third consultee in this process.

Please refer to Section 3.4 below to understand why the THI boundary has changed from that previously given in the first-round bid.

3.1 The area's social and economic context

There are 23 wards across Bromsgrove District (appendix 15). Bromsgrove Town Conservation Area sits within St. John's Ward which covers an area of 1.14 square miles and has a population of 4,655 (2010).

The Town Centre plays an important role in supporting the needs of the adjacent wards of Charford, Sidemoor, Slideslow and Whitford. A high proportion of residents in and around the Town Centre are low-income families who rely heavily upon the town centre both in terms of employment in the retail sector and for their own retail requirements. Indeed these wards contain pockets of deprivation and Super Output Areas (SAs) that are ranked nationally in the top 3 Indices of deprivation.

High Street and Worcester Road form a long, predominantly commercial/shopping street in the centre of the ward but are disadvantaged by the greater range and size of stores and facilities in neighbouring centres such as Birmingham, Worcester, Redditch, Solihull and Merry Hill.

In Bromsgrove the business make-up consists of 4.6% in the wholesale trade, 8.5% in the retail trade, 14.8% in professional, scientific and technical roles, 14.1% in construction and 7.1% in health and education. Construction businesses are more numerous than in Worcestershire (11.3%), or the West Midlands (10.9%), but retail has less significance when compared with Worcestershire (10.3%) or the West Midlands (11.8%).

The majority of businesses within Bromsgrove are small to medium enterprises (SMEs) which have less than four employees. Only 7% of businesses employ over 20 people and just 0.8% have over 100 employees.

St. John's Ward has the following demographic character:

- 14.6% of the population are aged 16 or under compared to 18.1% in the whole of Worcestershire
- The population aged between 16 - 64 make up 55.9% of the total population - this compares with 62.6% in Worcestershire
- Individuals aged over 65 years make up 29.5% of the total population compared to a county average of 19.3%

Employment

The Town Centre is currently home to a variety of employers. In addition to those employed in the retail sector, significant numbers of people work in office-based jobs as well as some light industrial businesses. It is important that a wide mix of employment opportunities is maintained and expanded to allow for a Town Centre that can be successful in all market conditions.

An important part of this will be the significant improvement in the provision of commercial accommodation within the Town Centre. The expected expansion and increase in the population of the District, as identified in the Core Strategy, will bring with it a requirement for new employment opportunities. Whilst some of this will be provided for on existing employment sites and new development on expansion sites around the town, it is important that the Town Centre also offers new opportunities. Office-based development within the Town is seen as important, particularly with the increased catchment area for business and employees offered by the planned electrification of the cross city railway line and the provision of a new train station. These improvements will make Bromsgrove even more readily accessible from Birmingham. In order to capitalise on this it is important to offer a pleasant and affordable choice for businesses and commuters choosing to relocate out of very costly city centre accommodation.

The Council announced in October 2011 that it will be relocating over the next two years into the currently unused Parkside School building in the town centre, a measure not only ensuring that the Council's ability to provide accessible services is maintained but also that a significant number of employees are kept in the Town Centre adding to its overall vibrancy and vitality.

Education is a particularly large employer in Bromsgrove, accounting for over 13% of the workforce. In October, 2010, however, the Coalition Government Spending Review announced large scale reductions in public spending. It is anticipated that in the coming years this will have a marked impact on employment levels in public-sector dominated industries, particularly in Education, Public Administration, Defence and Health.

Education and Qualifications

In 2009 the percentage of pupils living in St. John's Ward with 5 – plus GCSE A* - C Grades was 90.9%, a figure that reflects the presence of Bromsgrove School, a private and co-educational day and boarding school for children aged between 7 and 18. On this basis the figure compares favourably with the

percentages for Worcestershire (69.5%) and Bromsgrove as a whole (78.7%). In neighbouring Sidemoor, however, the picture is markedly different as the percentage falls considerably to 55%, faring little better in Charford at 63%.

Housing

The average price of a house in St. John's Ward during 2009 – 2010 was £171,721 considerably less than the £225,676 average for Bromsgrove as a whole. More dispiritingly, average house prices in the neighbouring wards of Charford and Sidemoor were £137,751 and £144,019 respectively. The percentage of dwellings in Council Tax Band A recorded in St. John's in 2009 was 23.1% compared to 8.4% for Bromsgrove as a whole. In Council Tax Band B the percentage rises to 26.8% compared to 18.2% for Bromsgrove. Among neighbouring wards Charford and Sidemoor are exceptional in that they have even higher percentages of Band B category dwellings (58.2% and 45.7% respectively).

Town Centre residential development can be accommodated in a number of different ways although it is envisaged that capacity can be provided;

- In the conversion of vacant spaces above shops on the High Street and surrounding areas
- Within mixed use development schemes identified in the Draft Town Centre AAP
- And on Recreation Road in a dedicated retirement living complex, as highlighted in the Draft Town Centre AAP

Any new residential development in the town will provide a welcome addition to the overall housing offer and as such should reflect the needs of the District. New housing should focus on the provision of smaller affordable units, and housing suitable for the elderly, although more aspirational housing will also be welcomed in appropriate schemes and locations.

Community Uses

All community groups need their Town Centre to be one that they can use and enjoy. The design of the public realm and open spaces will incorporate room for evening and day time events. These include Farmers Markets, Specialty Markets, Christmas Events, Street Theatres, and Park Programmes etc., which bring many visitors into the vicinity of the Town Centre at certain times.

Index of Multiple Deprivation

The neighbouring wards of Charford and Sidemoor contain Super Output Areas (SOAs) that are ranked nationally in the top 3 decile of the Indices of Multiple Deprivation published by the DCLG 2010:

Sidemoor

SOA E01032161 (10d)

Charford

SOA E01032132 (13c)

SOA E01032131 (13b)

Earnings

In St. John's the proportion of households earning less than £10,000 a year is 12% while in neighbouring Sidemoor and Charford the percentage is slightly more alarming at 13%. Across Bromsgrove as a whole the picture improves at 9%. The average household income in St. John's Ward is £35,012, dropping to £33,309 in Charford and £32,336 in Sidemoor. In Bromsgrove households bring in £41,513 and across the County the mean income is £37,370.

Although Bromsgrove District's population earns higher salaries than average, it is known that they earn them in employment locations outside the District. Due to Bromsgrove's close proximity to a major urban area, many residents commute to jobs in and around Birmingham. Therefore, it appears that there is an imbalance between the types of jobs and pay available within Bromsgrove compared with the average wages of the population. Industries with higher paid jobs need to be encouraged to stay or locate in the District so as to correct this imbalance and reduce the daily flow of the population to other employment centres which is unsustainable.

Benefits

In St. John's there were 300 claimants of Out of Work benefits recorded in Feb, 2011, a figure representing 11.7% of the ward's population aged between 16 – 64 years. In neighbouring Charford, however, this figure rises to 575 claimants while Sidemoor records 370 for the same period. By October, 2011, St. John's Ward had 89 people claiming Job Seekers Allowance, representing 3.4% of the population aged between 16 – 64 years. Charford's claimants for Job Seekers Allowance reached 215 in October 2011 with even neighbouring Whitford showing 96 people making similar claims.

Travel to Work

Although commuting by car or van is the most common mode of transport, Bromsgrove has a significantly higher percentage of people using cars or vans and less using public transport than the regional and national percentage. The car ownership levels in Bromsgrove are 87%. Among them, 40% have 1 car/van, 36% have 2 and 11% have 3 or more.

Compared with the regional and national average, which both have a car ownership of 73%, Bromsgrove's car ownership is significantly higher than the regional and national average. Together with the rural nature of the district, it is therefore not surprising that the car is the main mode of transport for local residents visiting the town centre.

Crime

St. Johns ward remains the worse (rank 1) ward in terms of total crimes across the District. This is fully expected as this is the most urban and frequently used ward, especially late at night where people go to socialise and are subjected to alcohol.

The High Street in Bromsgrove town centre is a pedestrianised area and it creates a strong sense of enclosure. Although this creates a nice shopping environment, it affects the perception of safety to pedestrians after dark. The high enclosure means that pass-by traffic is unlikely to see what is going on in the street. The upper floors of shops currently are mainly used as shop storage or offices and there is a lack of natural surveillance outside shops' trading hours and office hours.

In the Bromsgrove Town Centre AAP survey (2008), respondents (59%) considered that a safe environment is the most important thing that will attract them into Bromsgrove Town Centre in the evening.

2011 Town Centre Health Check

The Town Centre Health Check is produced for a number of reasons:

- It is in accordance with PPS4 which supports the monitoring of town centres
- It helps assess the success of retail policies within the adopted Bromsgrove District Local Plan
- It will be used to assist the development of town centre and retail policies within the Local Development Framework, particularly the Town Centre Area Action Plan (AAP)
- It helps assist with retail planning and development management in Bromsgrove town centre
- It helps assist with the ongoing information required for the **Townscape Heritage Initiative** in the town centre

Bromsgrove town centre is constantly changing and therefore elements of the 2011 Health Check will only provide a snap shot in time, for example, the ground floor survey and pedestrian count. However, as the Health Check is updated comparisons can be made with previous years. There are also a number of other benefits this document will offer:

- It allows positive and negative aspects of the town centre to be identified, and in turn regenerated or enhanced
- It provides data that can be used to make sure that the centre remains competitive with neighbouring centres in the region
- It provides baseline data for comparative links to be made with future health checks

The 2011 Bromsgrove Town Centre Health Check follows on from the 2009 and 2010 documents, monitoring vitality and viability through the consideration of economic, environmental and social factors. Bromsgrove District Council has identified that a holistic approach to the redevelopment of the town centre is required, one that takes into account the prime sites for regeneration and includes systematic consideration of other opportunities. The annual Town Centre Health Checks are a vital component to this regeneration process and a useful evidence based tool for the Bromsgrove Town Centre Area Action Plan (AAP) and Townscape Heritage Initiative (THI). For the full report see appendix 19.

3.2 Community Consultation

3.2.1 Retailer Representation

Despite the presence of multiple retailers, 83% of respondents in the Bromsgrove Town Centre AAP survey (2008) considered the range of shops in Bromsgrove as very poor or poor, only 16% considered them as adequate or good and none considered it as excellent. The top choices which respondents considered would make the town centre a better place to shop are:

1. More small independent and specialist shops (63%)
2. A department store (59%)
3. More national chain stores (53%)
4. Regular farmers markets (44%)

5. A high quality national food store for the Market Hall site (39%)
6. Occasional special markets such as a French street market (39%)

3.2.2 Frontage Improvement Scheme

Bromsgrove's frontage improvement scheme was approved in May 2010 and launched shortly afterwards with an initial budget of £20,000 allocated which was raised by a further £50,000 in August, 2010. The scheme was originally launched with a leaflet posted to all the eligible property owners and handed to all eligible tenants (Nos. 61 – 97 High Street only). The scheme was further publicised via a press release and on the District Council's website. During the Town Centre Area Action Plan (AAP) consultation which took place on the high street in February 2011 further publicity for the scheme was undertaken.

Applications were approved for 4 properties totaling £15,460 and 3 of these had been for the maximum £4000 with the other one being for £3460. The grants were approved for minor window and brickwork improvements, and some limited external decoration on historic properties.

A number of inquiries were received from other landowners and tenants requesting assistance under the frontage improvement scheme for work which would cost more than the stipulated £4000 and one in particular was for the reinstatement of an historically-accurate, early twentieth-century shopfront together with traditional, hand-painted fascia. For these works to be carried out the assistance available under the Frontage Improvement Scheme was not sufficient. At the time there was a grant rate of 80% of the cost of works (repair or reinstatement) to a maximum of £4,000 per building. In order to carry out more substantial works, however, such as reinstating an historic shopfront - a measure in keeping with the architecture of the rest of the building - it was necessary to remove the £4,000 limit which required approval from the District Council's Cabinet. It was felt that whilst the £4000 limit was making a modest improvement to the character of the High Street, it was also preventing other opportunities from coming forward which would have a more substantial impact.

Thus there is an opportunity in the town centre to set an example of good shopfront design based on historic precedent as a benchmark for the Stage 2 Townscape Heritage Initiative. Work will be carried out in accordance with best practice in the enhancement of historic buildings and to a quality appropriate for an assistance scheme of importance to the national heritage. The welcome publicity that such a project will bring ahead of second-round approval is expected to provide a positive message to shopkeepers and small businesses on the high street.

3.2.3 Bromsgrove Fair Day, Annual Street Market

The well-known Court Leet event is the Annual Fair Day Street Market which in 2011 was held on Saturday, 25th. June. Members of the Court Leet, a sort of medieval forerunner of our modern Magistrate's Court, walked in procession from Housman Hall on Kidderminster Road to the Housman Statue in the centre of Bromsgrove dressed in full robes and regalia. Street market stalls were operated predominantly by fundraisers also in traditional costume. At this well-attended event a THI A5 flyer was handed out, and advice and information given, to the crowds thronging the town centre. The same flyer was also handed out on the same day at a Community Consultation Conference opened by Kevin Dicks, joint Chief Executive, Bromsgrove District and Redditch Borough Councils.

3.2.4 Avoncroft Museum of Historic Buildings

On Saturday, 19th November, 2011, the THI Project Officer and Conservation Officer manned a stall at the *Caring for your Traditional Building* event held at Avoncroft Museum as part of the SPAB National Maintenance Week. THI flyers were handed out and advice on the proposed THI scheme given throughout the day.

3.2.5 Equality and Diversity Forum

This was set up in 2005, originally to meet the requirements of Level 2 of the (now superseded) Equality Standard for Local Government. It has become a key link between the council and the community and has achieved a great deal over those years with many successful projects arising from issues raised by community members in Forum meetings. As the name suggests, this Forum covers all areas of equality including disability.

The THI Project Officer gave a presentation to the Forum on 8th December, 2011 with the Chief Executive for Bromsgrove District and Redditch Borough Councils in attendance. An update was given on the second-round bid and the results of the street access audit were discussed. Following the presentation questions from the floor were taken.

3.2.6 Questionnaire

In the week beginning Monday, 30th January, 2012, the THI Project Officer met with the owners of priority and priority + properties, as well as those properties on the reserve list, to discuss their needs and the opportunities for heritage protection in light of the proposed THI funding. Where properties had vacant historic floorspace above the ground floor discussions were also held to test the viability of bringing these spaces back into viable use. A *Questionnaire for Property Owners and Occupiers* was handed out at these discussions and the would-be applicants were encouraged to complete the form in order that the future potential of their buildings might be assessed

(appendix 16). The results from this survey were tabulated on 19 March 2012 though more forms were still anticipated. In the sample we analysed 83% (i.e. 15 owners/occupiers) wished to draw down grants in the first year of the grant scheme. Of the remaining 63 properties within the THI boundary some redirected their questionnaires to the head offices of the parent company or else passed them on to the freeholder. Others have not been collected where the premises rely on the evening trade as takeaways or restaurants or are simply vacant. The sample showed 3 priority plus properties, 11 priority and 3 in reserve. The owner of 46 Worcester Road, identified as a potential year one project, has indicated his desire to carry out repairs to the structure and external fabric of his property as well as works to bring vacant historic upper floors back into use. At 1-3 New Road, an attractive, medieval timber-framed building in a landmark location at the gateway to the town centre from New Road, the leaseholder wishes to demolish the modern single-storey extension which is obscuring a handsome double-height oriel window.

3.2.7 THI website

The District Council website contained all the documents relating to the second-round submission, the Conservation Area Appraisal and Management Plan and the public realm proposals. There was a comments form which could either be filled in online or printed off and submitted as a paper copy. Web pages will be subsequently updated so that ultimately the site will act as a hub of information for the public, stakeholders and potential investors. A primary objective which we are committed to developing is *You Tube* and the filming of a number of 2-3 minute videos on themes associated with the THI scheme, for example, street interviews, oral history and the casting of the Hallelujah lamp. Other material might include:

- all forms, guidance notes and help guides
- newsletters
- progress updates
- case studies
- interactive maps and images for every building in the THI scheme
- facility to upload pictures (Flickr)
- Blogs
- 3-D visuals

3.2.8 Accessibility Audit

Volunteers from the Worcestershire Association of Service Users (WASU) carried out an Access Audit on Wednesday, 20th. July, 2011. Their summary begins: *The town of Bromsgrove would not attract visitors in its current state. Some of the architecture of the building design lacks character and is depressing. There are many Health & Safety issues in the High Street ... the environment is gloomy.*

The report continues:

- Trees look neglected, causing semi-darkness. Wrought ironworks around the bases of trees are lifted through root growth and weeds. Other trees in the High Street lean to one side and have electric cables running through them which have embedded themselves into the expanding branches. There are cables which have an attachment/connector that hangs down at a level that can be touched/reached by the public. Some surveillance cameras were visible, but their view is obstructed from the height of the trees
- Signposts are inappropriately placed, not easy to follow and cause confusion and lead visitors in the wrong direction
- Some black bollard posts are not fixed firmly in place and leaning to one side
- Ground/block paving bricks move when walked upon
- Brick work and broken pavement slabs/bricks are extremely unlevel and make the surface an effort for people to walk on. It jolts and dislodges wheelchairs and pushchairs, causing the user to weave and struggle to balance
- Drains and manhole covers either protrude above or are sunk below the tarmac, the holes are wide enough for the rubber end of a walking stick to get stuck and become a trip hazard for people
- Some of the town's seats/benches are damaged and the back of the seats are warped resulting in the seat not being suitable, unsafe and uncomfortable to sit on
- The post box outside the post office protrudes far out into the pavement. The red support rail to the left of the post office (building) serves no purpose and is obscured from view if walking from the left of the town
- Movable tables and chairs from outside café's were randomly scattered outside the designated areas, causing obstruction to non-users and a reduction to the space of the pavement to walk down
- "A" boards blocked areas of the road and acted as obstacles for wheelchair and push chair users and people with visual impairment having to try and negotiate their way through
- Cyclists and skateboard users were speeding through the High Street. There were also cycles thrown down outside shop entrances restricting or limiting access
- Motor vehicles transporting goods accessing the High Street during the day time after 10.30am were observed weaving and swaying around the black bollards without warning lights flashing on their vehicles
- There is fast flowing traffic at the corner of High Street and New Road. The pedestrian crossing lights when changing are out of alignment with people's walking speed and is a danger point for people with visual impairment and people with hearing impairment
- The dropped kerb is flush with the road surface and wheelchair users can cross with reasonable ease, but the surrounding bricks work and pavement slabs are cracked and unlevel

- The pedestrian area by *Iceland* has no clear route through as it is obstructed by a flower stall. There is hardly sufficient space to accommodate a wheelchair user. The pavement slabs in this area are cracked and undulating
- In the bus area there is no dropped kerb which makes it inadequate for wheelchair users to use when being dropped off by private transport
- There is double parking (buses and taxis) which causes congestion and blocking up of the road means large vehicles/taxis transporting wheelchair users may find it difficult to unload in a suitable place. This may force them to drop off passengers in the road (Crown Close).

WASU are consultees to the Bromsgrove Town Regeneration Programme and their comments on the public realm upgrade have been fed into the design architect's brief, along with the comments of the less formally constituted Bromsgrove Disabled Access Group.

3.2.9 Public Consultation

Information about the THI scheme and the Conservation Area Appraisal and Management Plan was disseminated over a 6-week consultation period beginning 2 February, 2012. Exhibition boards were prepared, a summary A5 8-page booklet printed, feedback forms distributed and a press notice released. The booklet summarized key points of the proposed THI scheme. Residents groups, business and amenity bodies were contacted at the start of the process and their initial responses and comments have informed the final draft.

The plans were exhibited at the Dolphin Centre on School Drive and Bromsgrove Library on Stratford Road for the duration of the consultation.

Furthermore, officers were on site and available to talk about the plans at the Library from 10am to 4pm on Monday 20 February through to Wednesday 22 February. The information was also displayed on a High Street market stall from 10am to 4pm on Friday 24 February. There was one early evening exhibition at Bromsgrove's Council House on Burcot Lane on February 23 from 4pm to 7pm. As a result of this consultation the bid has been altered in the following ways.

We have made a number of small but significant changes to the Stage 2 bid in response to the public consultation, for example: -

- Pennant sandstone will be considered as a paving material as opposed to Yorkstone flags
- Should the medieval stocks be replicated these will be set on a sandstone plinth

- Works to Spadesbourne Brook will be guided by an archaeological appraisal or evaluation in acknowledgement that this feature is archaeologically sensitive
- There will be broader historic environment awareness training for development control officers
- All references to use classes in the text will make it clear that it is primarily the ground floor that is being referred to
- The architectural character of George House will be made clearer in that although it is post-war and modern it is not necessarily a poor quality building. However, *it is jarringly out of character with the rest of the High Street and sticks out like a sore thumb*

Additionally, we were able to confirm points we had already upgraded through sundry revisions, for example: -

- Suggesting the line: *Enhance the local historic environment to Bromsgrove's Sustainable Community Strategy (2010-2013)*

One consultee advised that we should contact local heritage organisations such as Avoncroft Museum, the Victorian Society and the Bromsgrove Society a measure we have hitherto undertaken in the make-up of our Partnership Steering Group.

A full summary of comments from this stakeholder consultation are included in appendix 16.

3.3 Statutory Powers and Planning Policies

There are nearly 60 Listed Buildings within Bromsgrove Town Conservation Area. No scheduled monuments exist in the conservation area although there are two statues in the High Street that would benefit from refurbishment and possible re-siting. The THI area includes 30 listed buildings including one - 7 Worcester Road - at Grade II*.

The District Council has 1 Conservation Officer who will liaise with the Project Officer on repair or reinstatement works to grant-eligible properties. There are also 3 officers on the Planning Enforcement Team who will assist where breaches of development control have occurred within the THI boundary.

The Project Officer, the Conservation Officer and the Planning Enforcement Team form an effective frontline tool in the safeguarding of the Heritage Lottery Fund's £1.6 million investment. The Strategic Planning and Development Control teams in the District Council oversee and act upon all policies and SPDs.

The Conservation Area Appraisal and Management Plan, as well as sundry associated SPDs, sit within an overarching strategy of local and national planning policy regarding the historic built environment. Information on the control of development and use of land in Bromsgrove town centre can be found in the current Bromsgrove District Local Plan (adopted 2004), the draft Core Strategy 2 (January 2011) and the Draft Area Action Plan (January 2011).

3.3.1 Bromsgrove Town Conservation Area Appraisal (January 2012)

The Conservation Area Appraisal (Appendix 11) has been written following English Heritage guidance in *Understanding Place: Conservation Area Designation, Appraisal and Management* (2011). As a result the Appraisal divides the Conservation Area into four smaller *character zones*. These character zones collectively form a quite detailed record of the nature and special qualities of the Bromsgrove Town Conservation Area. The Appraisal in general makes assessments of architectural quality, character and general condition and for each character zone negative features are outlined.

The council has adopted the appraisal as a material consideration and as such it will be used as a technical document to provide both a sound basis for formulation of policies contributing to the Local Development Framework as well as being used to inform development control decisions, and if required support any planning appeals.

3.3.2 Conservation Area Management Plan (January 2012)

The Management Plan in appendix 17 has been written to clarify the policy for the management of Bromsgrove Town Conservation Area. It provides a strategy for safeguarding and enhancing the character and appearance of the conservation area as with the appraisal It will be used as a technical document to provide both a sound basis for formulation of policies contributing to the Local Development Framework as well as being used to inform development control decisions, and if required support any planning appeals. It will also serve to guide the District Council's method regarding works or issues that might be considered as having a potential impact on the character of the Conservation Area.

The current Plan has been upgraded since its appearance in the June 2011 Appraisal. As well as updating the local and national planning policies, the new Plan includes comments on training, monitoring and community engagement in line with the requirements of the Heritage Lottery Fund. Both the Plan and Appraisal had a 6-week public consultation between 2nd February and 16th March, 2012.

The special interest of the Conservation Area is described in the Plan and a number of management proposals are made:

- The public realm
- Shop fronts and signage
- Market Hall site
- Modern infill
- Historic buildings in poor condition
- Loss of historic detailing
- Traffic management
- Historic rear areas
- Spadesbourne Brook

Like the Appraisal the Plan has been compiled according to the advice given in English Heritage's *Understanding Place: Conservation Area Designation, Appraisal and Management* (2011). The proposals consulted on in the Plan were given strong backing at the public consultation events.

The properties in the conservation area are generally of mixed use and consist of retail and commercial units, public bars, restaurants and some residential units in which permitted development rights are much more restricted given that the entire town centre is designated a conservation area. The generally non-residential nature of the High Street and Worcester Road, combined with the restricted space for extension to buildings, means that the effect of permitted development will be negligible. Accordingly, the use of an Article 4 Direction has not seemed warranted.

Similarly, the District Council has decided not to introduce an *area of special control* which would have given stricter policies for controlling advertisements. It was felt that having additional control would be of limited benefit in the town centre since advertisements in conservation areas are already strictly controlled through their statutory designation.

It is intended that a guidance manual on *Maintaining and Repairing your Historic Building* which has well-presented and illustrated notes, including information on consents (appendix 17), will be passed to new property owners through the conveyancing process - a measure aimed at preserving character of the conservation area. The manual will be distributed with any land searches inquiries within the Conservation Area.

There is also a commitment to continue work on a *Buildings at Risk Register* (BARR) for the District, possibly with the assistance a temporary, part-time volunteer.

Draft Project Brief: Town Centre Public Realm Upgrade (July 2011)

The early upgrade of the public realm in Bromsgrove is vital to enhance the heritage of the area and to recreate an attractive Town Centre with a more positive sense of place. These are the key factors in reinstating Bromsgrove as a unique and striking destination of character. It will signal that change in Bromsgrove is permanent, with a statement of intent that sets a benchmark for the standard expected of further regeneration and development initiatives that follow across the town. This project is central to Strategic Aim One of the Regeneration Programme, namely, a revitalised and attractive town centre. The Bromsgrove Town Centre Public Realm Upgrade will be a design-led scheme using a high quality palette of natural materials to deliver a definitive statement of intent.

Shopfronts and Advertisements Design Guide SPG (March 2012)

The District Council's *Shopfronts and Advertisements Design Guide* was adopted in 2004 as a means of tackling the increase in inappropriate shop fronts and advertisements then affecting the quality and attractiveness of the high street. The document gave best practice advice for all conservation areas though its principal aim was especially applicable to Bromsgrove. Guidance on design was intended to foster good quality shopfronts and advertisements leading to a better environment, one that respected the character both of individual buildings and of the setting within the conservation area. A revised Supplementary Planning Document has since been prepared (appendix 19) and will be supplemented later by a proactive programme of investigation into breaches of advertisement control.

Draft Core Strategy 2 (January 2011)

The key challenge which the district faces has been identified in the draft core strategy document as the regeneration of Bromsgrove town centre. The creation of a thriving and vibrant centre providing facilities to meet the needs of Bromsgrove's residents is recognized as an important factor with a specific policy (CP15 Town Centre Regeneration) to help guide the regeneration of the Town Centre. The historic environment is key in making Bromsgrove unique and a source of local identity and pride, new guidance also exists with the Core Strategy in the form of policy CP16 Managing the Historic Environment which further strengthens the heritage protection options open to the Council.

Draft Area Action Plan (January 2011)

Bromsgrove Town Centre is subject to a major regeneration programme as well as a comprehensive restructure of the prevailing Conservation Area Appraisal and Conservation Management Plan. Where significant change or

conservation is needed Area Action Plans can be used to provide the planning framework. This is the case in Bromsgrove, where the AAP will be a significant addition to the planning policy providing long term vision, a spatial plan and the requisite detailed policies. The AAP will:

- Identify planned growth areas
- Stimulate regeneration
- Protect areas particularly sensitive to change
- Resolve conflicting objectives in areas subject to development pressures
- Focus delivery of area-based regeneration initiatives.

3.4 The Conservation Area and the THI Area

The Conservation Area Management Plan has been significantly upgraded from the draft June 2011 version in the Bromsgrove Town Conservation Area Appraisal. The new Management Plan was publicly consulted on between 2nd February and 16th March, 2012.

The THI boundary has been changed slightly since the first-round bid - the Strand area in the north-east section has been removed and the boundary redrawn towards High Street (appendix 15). The Project Team and Steering Group felt that this re-adjustment would concentrate the impact of grant-aid in a tighter, more property-eligible area. The Strand area was removed because it presents a streetscape almost entirely composed of listed buildings and unlisted buildings that make a positive contribution. There were only 4 buildings labeled as reserve projects plus a mere 3 priority buildings. The small section of High Street removed contains no proposed THI projects. During the consultation period the owners of an unlisted building of townscape merit outside the proposed THI boundary but within the conservation area made an appeal to have their property included within the scheme. The THI boundary, as a result, has been redrawn slightly to accommodate the small north-easterly section where their historic building is situated. The property is in a prominent location facing Market Street and partly frames a key view across the conservation area. The lateness of the request has made it not possible to allocate funds towards this building but there may be an opportunity at a later stage to grant the building a reserve status.

There are two further small changes to the THI boundary, measures merely designed to remove buildings that make a negative contribution and again in order to maximize the impact of the THI scheme on the High Street.

The Project Team and Steering Group recognized the benefits of removing all 3 critical projects from the scheme though the first of these is currently subject to an enforcement action process: -

- 22–24 High Street has been re-classed as Priority Plus
- 75 High Street has been re-classed as Priority
- 73 High Street has been re-classed as Reserve

No. 73 High Street (the Red Lion public house) has been downgraded to a reserve project in that this buildings has already benefitted from funds from the earlier Frontage Improvement Grant Scheme. A thorough appraisal of all town centre properties has been carried out during the development phase. Between Church Street and New Road we have added 2 buildings in *reserve* whose improvement, by way of replacing inappropriate shopfronts, would have a significant impact on this section of High Street where buildings that make a negative contribution predominate on the south side. Similarly, replacing the shopfront canopy at 89 High Street would complement a good section of quality townscape. Another addition is 6 High Street where again, the reinstatement of a traditional shopfront would significantly improve a key view into the town centre. There is 1 property that has been upgraded from a reserve to a priority plus, namely 134-136 High Street. This building follows the northern edge of the new THI boundary and along with the Post Office building opposite heralds the true beginning of architectural character to pedestrians accessing the High Street from the Strand area. The priority plus, priority and reserve buildings can be seen in appendix 15 where the numbers in coloured circles refer to street numbers.

3.5 The Character of the Conservation Area

Bromsgrove Town Draft Conservation Area Appraisal and Management Plan (April 2012) is included in appendices 11 and 17. The conservation area was originally designated by Worcestershire County Council in 1968 and contained *Area A - High Street* and *Area B - St John's*. The boundary was extended in 1983 and again in 1989 to include the Spadesbourne Brook, the Strand, Crown Close, 9-15 New Road, 64-78 Worcester Road and Hanover Street. At some point the use of Areas A and B ceased and the area was formally designated as one complete Conservation Area.

An appraisal of the Bromsgrove Town Conservation Area was carried out in July 2009 in accordance with the advice given by English Heritage in their *Guidance on Conservation Area Appraisals* publication. As a result, the boundaries of the conservation area were reconsidered and revised. The area around St John's Church was removed from the conservation area and a new St John's Conservation Area created. The area from Hanover Street to Bromsgrove School was removed because this area has a limited relationship with the rest of the Town Centre and all valuable historic buildings are already listed.

A further appraisal was carried out in December 2011 in light of the application for THI funding from the Heritage Lottery Fund. The appraisal was carried out in accordance with the most recent guidance from English Heritage *Understanding Place: Conservation Area, Designation, Appraisal and Management*. Although produced by the Council, local societies and residents were encouraged to contribute to and comment on the draft document. This has resulted in a well-rounded assessment of the area incorporating local knowledge, perceptions and suggestions.

A further period of public consultation was undertaken to support this bid. The draft appraisal and management plan was made available on the District Council's website, in the local library, at the Customer Service centre in the Dolphin Centre and the Council House to ensure that it reached a wide audience. There was also a small, manned exhibition in the main foyer of the local library to explain the purpose of the document and collect local comments. The summary of the comments of this consultation can be seen in appendix 16. This appraisal has now been adopted as material consideration by the Council.

Bromsgrove had been an important Royal Manor but it was not until the second half of the 12th Century that the town really developed, particularly after the right to hold a weekly market was granted in 1200. The street system in and around the High Street is very clearly medieval, consisting of the main South West/North East route between Worcester and Birmingham which is the High Street itself. The 1839 tithe map (appendix 15) shows many small lanes leading from the High Street to the backs of burgage plots, many of which are medieval in origin, with narrow frontages to the High Street. The buildings within the Bromsgrove Town Conservation Area are now predominately in retail use with a mixture of A1, A2, A3, A4 and A5 uses - traditional retail, financial institutions and some pubs and cafes. Some upper floors are in ancillary use, office space and storage; many others are vacant which has led to some condition and maintenance problems. Worcester Road is very much a secondary street to the High Street, with smaller local retail units.

The Conservation Area Appraisal states that several historic styles and periods are represented in High Street and that the oldest buildings are timber-framed dating from the 17th Century, some of which have been re-fronted at a later date, though with evidence of the earlier structure remaining internally or to the rear. There are also numerous good examples of later periods of architecture such as Georgian, Victorian and Edwardian, as well as a significant number of vernacular buildings characterised by being two or three stories high, the upper storey comprising an attic space with a dormer window. Worcester Road is a continuation of the High Street and its west side

is predominately Victorian with mainly three-storey buildings of brick construction beneath pitched tiled roofs. Occasionally there are simple decorative details to the windows, including some projecting first floor bay windows. Ground floors are predominantly retail including takeaway restaurants, whilst the upper floors are mostly used for storage or are vacant. There are around 266 properties within the Conservation Area Boundary nearly 60 listed buildings, a statistic that underlines the significance of the historic townscape.

The Appraisal also notes that many of the shop fronts suffer from poor design and with such a large quantity of vacant or underused upper floor space there is real concern that the structural condition of many historic buildings may be at risk. Matters are not helped by the intricate and irregular rooflines where valleys and gutters are difficult to access and maintain.

The THI boundary was drawn to include and address the following issues: -

- an historic, linear streetscape that is vulnerable to further decline, as identified by English Heritage in their *at risk* report
- the need for revitalization in High Street and Worcester Road - identified in the Bromsgrove Town Centre AAP Survey (2008) as the number one priority
- a *cluster* of historic buildings in need of repair and reinstatement works
- an unwelcoming and neglected townscape in which the general impression is one of a tired and run-down high street, unattractive and undesirable, with block paving that is dull, dirty and uneven

The THI boundary comprises Worcester Road and High Street which follow the medieval plan comprising the main South-West/North-East route between Worcester and Birmingham – an area that represents a notable collection of historic buildings.

The character of Bromsgrove Town Conservation Area can be summarized as follows: -

- its many surviving sash windows some having frames that are flush with the external brickwork, typical in early Georgian architecture
- its important views such as the Grade 1 listed St John's Church on an area of raised ground
- its steeply-pitched, clay tile roofs and the fact that some Georgian buildings have parapets
- its historic market town status containing an assortment of notable historic buildings, nearly 60 of which are listed, dating predominantly from the 18th and 19th centuries but with some earlier surviving timber-framed buildings
- its continuous period of settlement from Roman times to the present day

- its vernacular buildings with dormer windows in the attic space, as at Nos. 89 to 93 High Street
- its rich variety of architectural styles ranging from English vernacular to restrained Georgian and more elaborate Victorian Gothic buildings
- its diverse range of elevational treatments and styles demonstrating high quality construction and craftsmanship and acting as tangible reminders of the town's past prosperity
- its medieval street pattern which is based upon an even older Roman Road between Droitwich and Wall
- its narrow building plots, varied rooflines and the overall height of the buildings which give a general impression of vertical emphasis and a strong sense of enclosure
- its predominant use of red brick and clay tiles, plus a number of notable timber-framed buildings – some with wattle and daub, some with brick infill panels
- its many buildings with decorative features in stone including keystones, quoins and window detailing, notably on the high status buildings at the Market Place end of the High Street though even the later Victorian buildings have stone cills and lintels to break up their elevations
- its decorative brickwork, notably the Slug and Lettuce Public House which is constructed in blue brick with light brick polychromatic detailing (unusual for the area)

The Conservation Area encompasses the historic market town and is bounded by St. John's Conservation Area to the west (containing St. John's Church – the oldest building in Bromsgrove), Bromsgrove School to the south-west (whose oldest building is dated 1695) and the Strand to the north-east - an area formerly known as Rotten Row.

An archaeological desk-based assessment of Bromsgrove town centre was carried out in the late 1990s though our understanding of the town's archaeology and historic built environment has changed since then. It has seemed beneficial, therefore, to update this assessment and include new techniques and other datasets that are now available. This assessment will benefit the public realm redevelopment programme as it will highlight areas of archaeological significance. This will allow the District Council to plan for any archaeological issues well in advance and incorporate them into the redevelopment strategy as an opportunity for community engagement and educational experience. Reacting to archaeological issues on a case by case basis as areas come up for redevelopment will lead to greater risks for delay and missed opportunities.

3.6 The heritage need in the conservation area

The protection and improvement of the heritage buildings within the Conservation Area is fundamental for the future of the local economy and the means to ensure its conservation. Although much of the historic townscape has been retained, there are a number of considerations for the future of the heritage that need to be addressed. A SWOT analysis has identified the key issues that affect the local economy and impact on heritage need.

Strengths:

- The catchment and the role of Bromsgrove as a local market centre
- The importance and quality of the 19th/early 20th century historic buildings and townscapes
- The medieval layout of the old town and the retention of the 13th century burgage plots resulting in an expressive mix of styles within each streetscape
- The retention of historic architectural detail and materials on a number of buildings

Weaknesses:

- The decline in the economy with weaker demand for local goods, services and property
- The low profitability of some businesses discouraging appropriate maintenance
- The visual impact of vacant shops and upper floors
- The replacement shopfronts damaging original heritage building designs
- The replacement shop signs dominating shop frontages and disrupting original architecture
- The poor quality of replacement materials and detailing on many heritage buildings
- The lack of appropriate maintenance and care for heritage details
- The inappropriate designs and materials of some new and enveloping development
- The poor environments at 'gateways' to the conservation area dominated by parking areas
- The previous enhancements to the public realm are confused and inappropriate

Opportunities:

- Improved heritage building maintenance and management
- Further sensitive regeneration of key sites
- The reuse of underused and vacant floor space

- An increase in town centre economic viability and sustainability through the targeting of niche retailers and the development of specialist shopping and leisure sectors
- The marketing of town centre heritage with interpretation initiatives including walks tracing the history of the town and its buildings
- An increase in planning and design controls and guidance

Threats:

- The continuing economic difficulties for businesses which may discourage further private investment
- An increase in unused buildings leading to a sense of neglect and decline
- A resistance to appropriate controls on historic building maintenance and alterations
- Inappropriate designs of new infill buildings, extensions, shopfronts and alterations
- A lack of resources to maintain high quality public realm within the conservation area
- The continuing competition from retailing and services at other centres

Examples of need for improvements to heritage buildings:

46 High Street - vacant building/shop front replaced

54-56 High Street - missing architraves plus mouldings/replacement windows

87 High Street - replacement shopfront/obtrusive signage

29 High Street - replacement shopfront also defining building form

36 Worcester Road - oriel window replaced by inappropriate window

52-54 Worcester Road - replacement windows/loss of mouldings

Buildings and the Public Realm

Many of Bromsgrove's historic buildings suffer from various levels of disrepair, inappropriate alteration, and under-use. The area within the Conservation Area targeted for THI improvements is especially important for the image of Bromsgrove as it contains not only the most prominent and potentially attractive townscapes and buildings in the town centre but also includes a number of vacant premises, neglected buildings and examples of the loss of heritage details with poor quality or inappropriate replacements – particularly shopfronts and signage.

The THI is focusing on the central core of the town with the streets that belong to the earliest phase of the town's development as a market town. Although

many are in reasonable structural order, many others require repair to the fabric and there are a significant number that have vacant floor space – predominantly above ground floor level.

A significant number are in a poor state of maintenance and some require comprehensive repairs and architectural replacements. In particular, individual buildings along Worcester Road require comprehensive works and repairs due to lack of maintenance.

The whole area has suffered from the gradual loss of architectural detail. Many of the properties, even those occupied and in reasonable structural condition, have lost original windows, doors, chimneys and shop-fronts, and iron work is missing or damaged. Although some of these original features have been replaced with inappropriate materials, this is now felt to be a priority for grant aid within the THI. The problems elsewhere in the Conservation Area will be addressed through planning controls.

Buildings throughout the THI area have empty upper floors but a few are completely vacant and on the market for new occupiers. Both the High Street and Worcester Road include buildings that require significant works to ensure their future sustainability.

The Bromsgrove Town Conservation Area Appraisal and Management Plan provides a full description of the historic qualities of the area and the heritage need for protection and improvements (see appendices 11 and 17). A complete photographic survey is attached as appendix 14 providing current photographs of all properties selected for the THI, and comparing them with old photographs to demonstrate the potential repairs and replacements that are needed. A THI building condition survey and costings report can be seen as appendices 12 and 13. This provides a full listing of the potential repairs and replacements to protect and improve the heritage qualities of each building and respond to the heritage need.

Public Realm

The existing poor quality public realm affects both the character and appearance of the Conservation Area and detracts from its historic setting. At present there is a mix of brick pavements and concrete paving slabs throughout the Conservation Area and some oddly random strips of buff concrete paving. There is no obvious pattern or delineation between *pavement* and *road space* and a lack of maintenance has resulted in a rather shabby appearance. Vehicles still use the High Street for deliveries which has resulted in a proliferation of protective barriers and bollards to the detriment of the wider street scene.

The existing street furniture appears to be randomly located, with street signage, bins, seating and trees obscuring some of the possible views through the Conservation Area. Most of this was installed in 1985 and has been poorly maintained adding to the run-down appearance of what should be an attractive retail area.

In general the public spaces within the Conservation Area have a tired feel that detracts from the appearance of the historic buildings.

The early upgrade of the public realm is vital to enhance the heritage of the area and recreate an attractive town centre with a more positive sense of place. These are key factors in reinstating Bromsgrove as a unique and striking destination of character. It will signal that change in Bromsgrove is permanent, with a statement of intent that sets a benchmark for the standard expected of further regeneration and development initiatives that follow across the town.

The high street in the early twentieth century was roughly surfaced and dusty with a horse-drawn wagon making regular trips up and down sprinkling water to dampen the road surface down. Research into what the public realm may have looked like in bygone times has uncovered the following quotes:

- *“The harte of the town is metely well paved”* (Leland, 1540)
- *“flagstones and pebbles, white and brown, to walk on through this pretty town”* (Crane, c.1806)

What remains are areas of cobbles surviving in alleys leading to the rear of buildings which were laid to keep feet out of the mud and these will be preserved as part of the resurfacing project - the use of recycled dolerite cobbles seems a preferable option. Research carried out using the expertise of geologists from Worcestershire County Council has provided the following comments, which although very fascinating and informative prove inconclusive when trying to determine the exact nature of the historic surfacing: -

- Paving slabs in many Worcestershire towns have either been brought over from the Welsh Borders, as at Bewdley, or else extracted from sandstone quarries in Yorkshire
- Bromsgrove quarrymen and masons were famous in the sixteenth century and no doubt earlier. They were the most highly paid craftsmen who built Grafton Manor. Much of the sandstone with which many of Bromsgrove’s oldest buildings are built comes from the Rockhill quarries. These were filled in after the Second World War, and for the first time in many centuries there are now no working sandstone quarries in Bromsgrove. The greatest monument to the skills of the town’s quarrymen and masons is St. John’s church. The relative

cheapness and availability of sandstone in Bromsgrove explains its ubiquitous use in foundations and walls

- Dolerite, a heavy igneous rock, has been used across the region as shaped blocks, or setts, for road paving, driveways and kerb stones. There are no longer any active quarries though recycled stones can usually be procured.
- Carboniferous sandstone, from the Forest of Dean or Huddersfield districts, can be split to form gray paving slabs as seen in many Midlands towns

Restoration and Improvement

Paving materials – we consider that distinctiveness should be a result of quality rather than localness so flags will be cut and laid from Yorkstone and setts will be shaped from granite.

Street furniture & local distinctiveness

Our aim is to restore lost structures that once contributed to the character of Bromsgrove town centre, such as the *Hallelujah* gas lamp (see below). The medieval stocks (see below) are also proposed but there may not be enough firm historical evidence for the design of these.



3.7 Schedule of Eligible Projects

3.7.1 Eligible Projects

The eligible projects have been identified as those buildings built before the First World War – plus any more recent period buildings of notable design which are important in the historic townscape and are in need of repairs and/or replacement of heritage detail or have vacant floor space which can be reused. As explained above, the THI area has been selected to include the part of the conservation area of important historic interest and includes the most notable townscapes, properties of greatest historic interest and those in greatest need for heritage improvements which will benefit the local economy and have the potential to be self-sustaining.

Within the proposed boundary of the THI, 81 properties in separate ownerships have been identified as satisfying the criteria to be included in the scheme.

Surveys have been completed to assess the conditions and costs of carrying out the THI eligible works on all properties. Internal structure and condition surveys have been completed in a good sample of buildings but it has not been possible to gain access to all properties with empty floors above shops (appendix 12).

All properties have ground floor commercial uses and whereas a significant number of the buildings along the High Street are owned by multiple store companies, many on Worcester Road are owner-occupied. All should be able to reclaim VAT. Current valuations with future estimates based on three levels of improvements have been prepared by Thomas Lister Ltd, Bromsgrove valuers/surveyors (appendix 13). Photographs of each building with historic

photographs and a costed list of potential improvements are included in appendix 14.

Consideration of any prioritisation as Critical, Priority and Reserve has led to the recommendation that it is not appropriate to identify any buildings as Critical projects as none satisfy the requirements on:

- The importance of their location and group value to the overall heritage townscape
- The need for urgent works to protect key heritage buildings.

As a result, the selected buildings have been identified as either Priority (P) or Reserve (R) to reflect the proposed efforts to ensure their inclusion in the implementation of the Initiative. 53 properties have been identified as Priority – including 15 noted as requiring precedence (marked P+) with 28 potential Reserve properties (appendix 15).

The property condition survey carried out in September 2011 by a Conservation Architect and Quantity Surveyor reviewing each eligible building in the proposed THI area has identified the scale of disrepair and damage to individual buildings and lists the eligible works with potential costs. These results are listed in appendix 12.

The main issues of concern throughout the THI area are:

1. Buildings in poor condition requiring significant works to repair structure and fabric

These display a range of conditions from semi-derelict, through to problems with roofs, fenestration, wall finishes and brickwork, etc. These include properties requiring major expenditure such as:

- Market Place, 6 High Street
- British Heart Foundation, 50 High Street
- Carpet Centre, 28-32 Worcester Road
- Adrian Kriss, 47-49 Worcester Road

2. Buildings with heritage detail removed and inappropriate shop fronts and signage which detract from the 'image' of the THI area

Although the traditional townscape scale has been retained lack of maintenance and widespread individual improvements have resulted in the significant loss of heritage details and materials. As examples, these include replacing inappropriate windows and doors, replacing removed dormers and

replacing shop fronts. The large number of buildings with significant loss of heritage detail and requiring major investment include:

- Peacocks, 120 High Street
- Bromsgrove Advertiser, 3 High Street
- Vacant shop, 51 Worcester Road
- Worcester Road News, 52-54 Worcester Road

On some buildings, previous changes are in reasonable condition and it is unrealistic to expect that all owners will afford the cost for reinstatement with heritage materials solely to ensure historic accuracy when they are not immediately needed to maintain the buildings. The expected percentage of properties likely to apply for grants takes account of these owners.

3. Properties with vacant floor space

There are a few vacant properties and a significant number of buildings within the THI area with empty upper floors having potential for reuse.

- Prezzo, 22-24 High Street
- Vacant 46 High Street
- Ryman's, 95 High Street
- M & M's Hair Shack, 46 Worcester Road

4. Public Realm

An area in the centre of High Street between the Housman Statue and the junction with New Road has been scheduled for a complete upgrade using THI funding matched by £400,000 from Worcestershire County Council. A brief detailing the HLF perspective and best practice design guidance regarding works to the public realm in conservation areas has now been passed to the architects - a copy of this brief is attached as appendix 19.

Enhancements to the public realm will be based on a detailed appraisal of those elements that make the town centre special and distinctive and all proposals for enhancements will be based on the Bromsgrove Town Conservation Area Appraisal (2012). For example, at intermittent intervals, particularly on the West side of High Street, there are alleyways of varying width leading to the rear of buildings. These are all that remains of the historic burgage plots and courts to the rear of buildings that were once used as workshops etc. Some small areas of cobbles survive in these locations and they should be preserved as part of any future resurfacing project.

The priority is for the reinstatement of historic surfaces in a traditional way and works should involve the use of traditional techniques, natural materials and local resources. No works to Gap Sites are proposed.

Diagram: Location and layout of public realm work

3.7.2 Condition and costs of eligible projects

In September 2011 we commissioned heritage consultants to undertake a detailed assessment of the historic buildings within the Bromsgrove Town Conservation Area and develop proposals for repairs and improvements to those buildings including detailed costs for works. It was important that this work produced accurate building condition surveys and detailed financial assessments of potential projects. There were over 100 buildings potentially eligible for THI funding in the area, 38 of which are statutorily listed buildings.

The selected buildings within the THI area display a loss of some of their traditional heritage qualities that are gradually changing the overall historic townscapes. Of particular impact are the inappropriate replacement shop frontages and signage, and the poor design of the public realm. The main examples of unsatisfactory building alterations, repairs and maintenance are:

- loss of heritage details and materials including low-quality repairs
- use of inappropriate roof materials
- replacement of front doors with inappropriate designs and finishes
- replacement of painted wooden sash windows with aluminium or uPVC frames and different window bar designs
- removal of heritage mouldings and other details
- removal of chimney stacks and pots
- addition of aerials and satellite dishes
- extensions of inappropriate design, scale and materials

a. Priority and Reserve buildings - condition and costs

The overall costs for conservation and renovation of the three listed THI categories of works (including contingencies and professional fees etc. but not VAT) on all the 81 selected heritage buildings in the THI area, both Priority and Reserve buildings, are expected to be in the order of:

- **£ 756,300 for repairs to structure and fabric**
- **£ 2,055,500 for replacement of heritage detail**
- **£ 1,047,000 for reuse of vacant floor space**

a total of £ 3,858,800

The THI building condition survey and costings (appendix 12) provide a full breakdown of estimates for the 81 selected properties. These tables include:

- The property address
- Ownership and use
- The works that are eligible for grant
- Detailed costings of the eligible works

b. Public Realm eligible costs

The good repair and routine maintenance of pavement and road surfaces is a statutory responsibility of Worcestershire County Council. As a result, the eligible costs of improvement to this type of public realm, and the grant towards them, must reflect the extra costs that arise from carrying out the works to high conservation standards. To work out the eligible costs, the costs of repair to a basic, non-conservation area standard (£210,450) was subtracted from the costs of repair to more costly conservation standards (£587,450)– the grant will cover 100% of the eligible costs, i.e. £377,000

Grant for types of public realm improvement where statutory responsibilities do not apply can cover all of the costs of the works as long as the property is in public ownership. In this case, there is no need to compare the costs of repair to a basic standard with the costs of repair to more costly conservation standards. Grant will cover 100% of the eligible costs. The proposed reinstatement of the Hallelujah gas lamp (£20,000) and medieval stocks (£3,000), being in public ownership, can be grant-aided at 100% of the eligible costs.

3.7.3 Assessing the financial need for THI grant

a. Justification of grant rates

THI grants need to be justified in financial terms on the basis that the work required cannot be achieved without public subsidy and must make sure that any financial gain on the part of the owner is minimal. This means establishing the impact of the work on the property's value. This has been estimated by using the judgements of a Conservation Architect and Quantity Surveyor as well as a Chartered Surveyor/Valuer with experience of the local property market – a Director of Thomas Lister Ltd who have a local office within Bromsgrove town centre.

The other consideration when assessing potential grant levels is the likely success of the scheme in encouraging owners to participate and invest their own money. There are many areas with urgent heritage need where an additional problem is the inability of owners to raise even limited funds to

protect their properties. This is an additional measure of the case for public subsidy.

The low commercial and residential rents, particularly for upper floors, mean that there is little incentive to undertake repairs that have no direct financial return. While other regeneration initiatives will tackle social and economic problems, none is specifically addressing the historic built environment.

The current property market throughout the Bromsgrove Conservation Area is slow and very patchy with very mixed market demand depending on location and resulting in few sales. Property values vary widely throughout the THI area and the effect of the recent economic difficulties has increased the number of properties with vacant floor space. This problem has been identified by the chartered surveyors though meaningful historic data on vacancies has not been found.

The selected properties included within the THI area are predominantly commercial with ground floor shops and the floors above used for a mix of uses – residential, office and storage, but many have been left vacant.

In the current uncertain and fluctuating market, where properties can be on sale for many months, even years, a process of typical building valuations to assess expected increases in market value after various improvements is difficult to prepare with great accuracy and then to use as percentages for overall guidance.

The report by the local valuer/estate agent (appendix 13) has provided some judgements but any sophisticated analysis based on valuations is likely to be of limited accuracy.

An assessment of appropriate grant rates for different categories of works also needs to be identified by judgements based on recent past experience of the take-up on other grant-aided schemes in Bromsgrove and the West Midlands, a general knowledge of the local property market and the changing economic conditions, as well as by using the examples of potential valuations from the local valuer.

b. Grant-aided Schemes

The current levels of grant availability on similar initiatives provide some examples of comparable levels of assistance that are needed to achieve owner participation. In table 3 below Bromsgrove's THI grant rate has been compared with the THI grant rates of other West Midlands towns.

Table 3: Comparison of THI grant rates across the West Midlands

	Repairs	Reinstatement of heritage details	Vacant floorspace
	%	%	%
Wellington	60%	85%	40%
Bliston	70%	90%	60%
Willenhall	70%	90%	50%
Bloxwich	70%	90%	58%
Leek	65%	90%	40%
Bromsgrove	60%	85%	55%

A recent, small-scale, council grant-aided improvement scheme for shops in Bromsgrove is in the process of renovating No. 65 High Street using a general grant rate of 80%.

Within the West Midlands the THI initiatives have been operating with various levels of success depending on local circumstances as well as the levels of grant. The examples above provide some guidance of expectations when determining a grant level that will succeed in Bromsgrove town centre.

c. Surveyors and valuers assessment

In recent years, commercial property sales in the Bromsgrove THI area have been slowing down with a number of the traditional stores closing down - including most recently Bon Marche - and only a few new national chain stores locating in the town centre. The difficult market has been most noticeable where commercial buildings display poor maintenance or are at a distance from the pedestrianised length of High Street and the town centre core. This is particularly the case for the properties along Worcester Road. Due to the lack of commercial demand and the poor image of some of the building groups, the sales have frequently been limited to the purchase of properties by small traders with low value goods, often with limited or no income from upper floors above shops.

The varying property values for such an established town centre location are primarily due to the recent difficulties in the local economy, the variations of

distance from the core shopping area, and the attractions of competing centres – out of town and other larger centres.

There is unlikely to be a significant increase in demand for property within the conservation area until there is an improvement in the national economy and a regeneration of the economic opportunities within the town, matched by physical improvements and a resulting change in the public perception of this area.

The current downturn in property values and sales will have the greatest impact on those buildings in poor condition which are in the fringe town centre locations and not seen to be a retail attraction. Any decrease in value will also limit the likelihood of owners being able to repair and maintain their properties with appropriate conservation standards. As a result, investment in properties has been withheld by many owners until there is a clearer picture of the implications for future demand.

As a result, property valuations within the conservation area may vary according to the short term realities and the longer term hopes for the area. There will be significant uncertainty and this will particularly impact on the reuse of vacant upper floor space. Most operational THIs can influence changes in valuations.

The low valuation examples prepared by the chartered surveyor for some of the commercial buildings point towards the difficulties for achieving sales which result from the low levels of current demand. Equally, rental rates for flats and offices above shops are low because of the quality of the floorspaces and the excess supply.

Selected locations within the THI Area have different requirements and potential:

- **High Street (the Strand to New Road)**

The pedestrianised length of the High Street within the THI Area is the section of the shopping centre that achieves the highest commercial rental values and includes most national multiple stores. Even though this area has significant footfall and provides the prime shopping area, it still includes empty properties (eg. No. 46 - vacant), buildings in poor condition (eg. No. 87 French Connection) and empty first and second floorspace (eg. No. 67 Oswald Bailey).

- **High Street (New Road to Market Place)**

Between the New Road and Market Place junctions on High Street, the road is open for vehicles, though traffic is not usually heavy. The lower footfall results in less demand for properties, and though the ground floors are mainly in retail use, few national multiples are located on this length and values are significantly lower.

This reduced demand is reflected in the empty properties (eg. Nos. 9 and 46), and the poor condition of some buildings – especially upper floors (eg. Nos. 33 Salvation Army and 22 Prezzo). The economic conditions are limiting the ability of many owners to maintain their properties or to ensure improvements achieve conservation standards.

• **Worcester Road (Market Place to Hanover Street)**

A fringe town centre shopping street with two and three storey properties in retail use. The buildings are smaller – both narrower and lower than on High Street, with less space for larger retail users or spacious accommodation above.

The lower demand for properties in this area, and lower values, results from both its location – the distance from the core shopping area - and the lack of space suitability for many potential occupiers. As a result, most units are occupied by single-shop businesses, often serving more specialist markets. These owners are less likely to have funding available for conservation standards of improvements.

In general within the THI area, expected improvements in valuation following repairs and enhancement to structure and fabric, heritage detail and vacant floor space are limited and it will only be when there is a combined impact of a large number of property improvements, supported by the changes proposed through other regeneration initiatives, that values will significantly change.

d. Proposed Grant Rates for each Category of Works

The prime concerns of a THI scheme are to ensure that the selected heritage properties are improved and to make certain that they can have viable uses, while promoting the local economy and appreciation of the townscape, without significant financial benefit to the owner. The selection of the appropriate grant rates for each category of works needs to identify levels that will ensure implementation.

An additional issue is that some owners and their advisors are aware of the current grant levels available for similar works (see table 3 above) and as a result will press local representatives for equal treatment.

Therefore each of the three categories of work on privately owned buildings will require different levels of assistance, with the grant levels based on a

judgement reflecting the calculated grant rates from valuations and the other factors discussed.

Grant levels for properties requiring building repairs to the structure and fabric, and replacement of architectural heritage details will be identified from a judgement based on the range of calculated grants required for the properties that have been valued and the recent and current experience with the THI grants in neighbouring towns.

Within Bromsgrove town centre, much of the vacant floor space is found on the upper floors above shops. To be realistic, improvements to these areas for rental income will only find new occupiers at a slow rate. A combination of the impact of the THI improvements and the other regeneration initiatives will be needed to increase demand. A 'chicken and egg' situation, but both actions are necessary. As a result, owners cannot guarantee early rental returns and this increases the uncertainties of calculations based on this approach.

Calculations for properties with vacant floor space have been made using the total of the condition survey costs for each property, the expected increase in valuation and consideration of the potential additional annual rental income to calculate the possible rates of return. Whereas an average percentage will be chosen for use on all structure and fabric, heritage detail improvements, the appropriate rate for buildings with vacant floor space will have to be recalculated at the time of each application.

• **Structure and fabric repairs**

Selected buildings require work to the structure and fabric of the external envelope. The examples cover a range of problems from building deterioration which may in the future cause the need for major renovation, and those with more minor concerns requiring action before serious problems result from delay.

The calculations of the potential grant rates using a gap deficit based on current and improved valuations vary widely with rates reflecting the particular considerations of each building. As the management of a THI requires an average grant rate for these types of work, it is necessary to identify a percentage that will ensure that key properties are viable and included.

In most cases, the added value to the property of the work being completed will be limited in the constraining and fluctuating market conditions. For owners, who often have limited resources, the benefits of structure and fabric improvements may only be clear in the most urgent cases. The financial inducement required will need to be significant to encourage most owners to invest their own money, while providing only a reasonable sum to cover the average expected development deficit. The wider benefits to the local

community and economy do not often affect the decision making of the individual property owner.

The grant calculation findings shown in appendix 12, table 1, identify a wide range of potential rates providing no clear guidance except that most calculated rates are below those found in other THIs.

Therefore as a result of comparable grant scheme take-up experience, the local valuer/estate agents advice and valuations, and the review of the local economic conditions, we are suggesting a grant level for the THI scheme to be set at **up to 60% for structure and fabric repairs which will be used in the Grant Requirement tables for all selected commercial properties.**

A range of percentages may be appropriate depending on the type of works required for each building, but in most cases this will be complex to administrate except where the THI Project Officer deems suitable. Previous local experience shows that with improved proactive methods to encourage owners, assistance with applications and the potential for helpful funding arrangements with local banks etc., it should be possible to achieve a reasonable uptake of grants to ensure the implementation targets are achieved.

• **Architectural heritage details**

Most property owners, though attracted to the concept of historically appropriate architectural detailing on their buildings, are less certain about the direct benefits to increase property value or business levels.

In most cases, the added value to the property of improved and appropriate heritage architectural details will be very limited. Historically accurate replacement fenestration or shop fronts instead of existing inappropriate detailing will not often significantly increase individual property values. The economic benefits and increase in valuation will only accrue over time from the general improvement of the heritage qualities of the local townscape. As a result, the funding gap between implementation costs and short term increases in values will be large. Sample valuations have demonstrated this problem.

The findings from the valuations show that all of the examples, except for one, are within the 65% to 100% range, with most around the 80% range – see appendix 12, table 2.

Therefore as a result of current grant scheme take-up experience in nearby THI schemes, the local valuer/estate agents advice and valuations, and the review of the local economic conditions, we are suggesting a grant level for

the THI scheme to be set at **up to 85% for replacement of architectural heritage details which will be used in the Grant Requirement tables for all selected commercial uses.**

This level will be required to ensure that these works, which will have a significant impact on the overall heritage townscape appearance of the town centre, will be carried out with the involvement of property owners.

• **Reuse of vacant historic floor space**

There are significant areas of vacant floor space above the shops within the town centre and a number of shops that have remained vacant over a considerable period. As current demand for the use of the floors above shops in this part of Bromsgrove town centre is limited, the costing calculations and estimates of rental return have been based on preparation of the property for office use – as it would be less realistic to use the higher levels that should be expected for residential occupation except along Worcester Road. The potential costings are based on this use – higher levels would have been required for residential conversions.

The costs for individual property owners to reuse vacant floor space will vary greatly depending on access arrangements and internal layouts. The methods to be used to evaluate grant levels will involve a 'case by case' review of the likely development conservation deficit when the application is made with the calculations based on a residual valuation covering the combined costs of all works to the building (repairs, replacements and reuse).

Individual assessments for each project will need to identify:

1. Existing value
2. Potential values to calculate a residual valuation
3. Construction costs
4. Abnormals
5. Fees
6. Interest
7. Potential rents and required rates of return
8. Profit

in order to calculate the developers' deficit and a funding deficit.

Appendix 12, table 3, demonstrates the method for calculating the vacant floor space grant levels. Due to recent fluctuations in property values it is

particularly difficult to identify an average grant level for use in the Grant Requirement tables that will be useful over a three-year period. Previous experience in similar towns, suggests that the deficit valuations provide much more appropriate findings than the rate of return method. The results, and the current uncertainties which limit the viability of even medium term forecasts, do emphasise the need for the calculations to be carried out for each property when the scale of improvement works is accurately known at the time of the application.

The Grant Calculation results show a range between 38% and 79%, with a clustering between 50% and 68%.

As a result of previous experience in other THI areas, current local grant aid schemes and advice from the local chartered surveyor - **an average grant level to be used in the Grant Requirement tables for all selected commercial uses of 55% is expected for Vacant Floor Space**, when combined with repair and replacement works.

• **Public Realm**

The Heritage Lottery Fund *Guidance Notes* show 2 different means of working out grants for public realm works in Bromsgrove town centre.

The majority of the match-funded £400,000 from Worcestershire County Council is allocated for Yorkstone flags and granite setts and to carry out this work to a high conservation standard appropriate to a conservation area the sum of £587,450 has been estimated. The good repair and routine maintenance of pavement and road surfaces is a statutory responsibility, however, of the County Council Highways Authority and to achieve a finish according to a non-conservation standard the estimate costs are £210,450. To work out the eligible costs the costs of repair to a basic, non-conservation area standard has been subtracted from the costs of repair to more costly conservation standards and the grant of £377,000 grant will cover 100% of the eligible costs.

Grant is also sought for possible reinstating the Hallelujah gas lamp and perhaps the medieval stocks, though the latter of these is not supported by firm historical evidence. For the gas lamp certainly we understand that the HLF can cover all the cost of works just as long as this item is in public ownership. There is no need then to compare the costs of repair to a basic standard with the costs of repair to more costly conservation standards as the grant will cover 100% of the eligible costs, i.e. £20,000 for the lamp (and £3,000 for the stocks).

e. Summary:

Proposed Grant Intervention Rates – Bromsgrove THI

Structure and Fabric	Heritage Detail	Vacant Floor Space	Public Realm
Up to 60%	Up to 85%	Average 55%	100%

4 The Conservation Area Management Plan

4.1 Adoption and publication of the Conservation Area Management Plan

Cabinet met to recommend adopting, publishing and implementing the Conservation Area Management Plan on 4th. April 2012 and minutes confirming the District Council's commitment to the Plan are included in appendix 11. The Plan will be used to strengthen SPDs and to better inform strategic planning policy. The Steering Group formally adopted the Plan on 23rd February 2012.

The document can be downloaded from the Conservation section of the Environment and Planning pages. There are also paper copies available from the Council House and copies will be taken along to any event promoting the THI.

4.2 Putting the Conservation Area Management Plan into practice

The 2 officers charged with putting the Management Plan into practice are from within the Strategic Planning Team. They are the Strategic Planning Manager and the Conservation Officer. The Conservation Officer has overall responsibility for the strategies identified as protecting and enhancing the character and significance of the conservation area. Development control and planning enforcement are represented on the Project Team by Bromsgrove's Development Control Manager and one of three Planning Enforcement Officers.

The following policies are in accordance with national policy guidance and local policies and follow on from the Conservation Area Appraisal.

Public Realm

The existing poor quality public realm affects both the character and appearance of the Conservation Area and detracts from its historic setting. At present there is a mix of brick pavements and concrete paving slabs throughout the Conservation Area and some oddly random strips of buff concrete paving. There is no obvious pattern or delineation between 'pavement' and 'road space', and a lack of maintenance has resulted in a rather shabby appearance. Vehicles still use the High Street for deliveries which has resulted in a proliferation of protective barriers and bollards, to the detriment of the wider street scene. The existing street furniture appears to be randomly located, with street signage, bins, seating and trees obscuring some of the possible views through the Conservation Area. Most of this was installed in 1995 and has been poorly maintained adding to the run down appearance of what should be an attractive retail area. In general the public spaces within the Conservation Area have a tired feel that detracts from the appearance of the historic buildings.

Proposed Action

Work with other departments at Bromsgrove District Council and Worcestershire County Council to implement a new public realm scheme. This will involve renewing the surface materials including the introduction of a more cohesive design, a new street lighting scheme, including more appropriately designed lamp posts, improved and more thoughtful illumination of some areas, the removal of redundant signage and CCTV poles, and the integration of new signage and other street furniture.

Ensure that new signage, street furniture and surfacing materials contribute positively to the character and appearance of the Conservation Area.

Shop fronts and Signage

The majority of the modern shop fronts bear little relationship to the historic building above, and they also lack consistency in terms of style, proportions, materials and colour schemes. Most of the shop signage is also equally poor with over large fascia signs, excessive signage, the use of plastic and lighting. All of which detracts from the character and appearance of the Conservation Area.

Proposed Action

Seek improvements to or replacement of shop fronts and signage where opportunities arise through development proposals.

New proposals will be assessed against local and national policies in respect of listed buildings and conservation areas and the revised Shopfront Design Guidance.

Address unauthorised alterations to shop fronts through enforcement action where appropriate in accordance with Enforcement Policies.

Historic Market Site

The market hall has now been demolished and the site is currently being used as a surface car park. Although outside the Conservation Area, as it is immediately adjacent to it, it obviously impacts on the setting of the Conservation Area.

Proposed action

Pay particular attention to siting, scale and design of any new development proposals that come forward for this site in accordance with local and national policies in respect of conservation areas, to ensure that any new scheme enhances the setting of the Conservation Area.

Modern Infill

Several sites in the conservation area have been subject to redevelopment during more recent times. Notwithstanding the loss of older buildings many of the modern buildings erected exhibit design characteristics that are quite different to the established characteristics of the area. The purpose of highlighting these buildings is not necessarily to aim at their redevelopment, although in the long term such discussions would be welcomed, but to prevent them becoming too dominant through future additions or alterations. These buildings will not be regarded by the Council as a guide or precedent for future development proposals.

Proposed Action

Seek improvements to buildings where opportunities arise through development/redevelopment proposals particularly at key sites including Mill Lane and 138 to 140 High Street.

New proposals will be assessed in accordance with local and national policies in respect of conservation areas, to ensure that any new scheme achieves better integration into the historic environment and enhances the character and appearance of the Conservation Area.

Historic buildings in a poor condition

Under investment in building repair and maintenance of some buildings on the High Street and Worcester Road detracts from the appearance of the Conservation Area and results in the long-term risk of loss of historic building fabric.

Currently only one building 22-24 High Street can be described as being a 'Building at Risk'. However the vacant upper floors of a number of others are also giving cause for concern.

Proposed Action

Seek retention of historic fabric where opportunities arise through development proposals.

Identify Buildings at Risk and develop a strategy for their repair, including the potential use of Section 215, Urgent Works Notices and Repairs Notices to improve the condition of some of the most at risk properties in the Conservation Area.

Investigate initiatives to make use of the upper floors such as 'Living above the shop', in conjunction with the Housing Section at Bromsgrove District Council, or a local housing association.

Produce guidance on the maintenance of historic buildings for property owners.

Loss of Historic Detailing

A number of properties, particularly on Worcester Road, have had replacement windows in uPVC or aluminium.

Window replacements with new ones of a different design, detail, materials or finish, erodes local building detail, which is an essential part of the distinctive character and appearance of the conservation area.

Proposed Action

Address unauthorised alterations to buildings through enforcement action where appropriate, in accordance with our enforcement policy.

Undertake a photographic survey of all the properties in the Conservation Area. This will provide a record of the condition and appearance of each property, which would be useful in any future enforcement situations.

We will consider the need for an Article 4 Direction to bring any permitted development works under planning control, to ensure that the special qualities of unlisted buildings of local significance are protected.

Traffic Management

The traffic management measures in The Strand have had a significant impact on this part of the Conservation Area.

The layout of the road system connecting Stourbridge Road/Birmingham Road and Stratford Road has created a visual and physical intrusion in the Conservation Area, severing the two sides of The Strand, and The Strand from the High Street.

Overall this section of the Conservation Area is unfriendly to pedestrians. It has fragmented these historic spaces, undermining their architectural and historic integrity and the visual quality of the historic environment as well as detracting from the setting of the historic buildings.

Proposed Action

Work with other departments at Bromsgrove District Council and Worcestershire County Council to devise a traffic scheme which will give more priority to pedestrians. Improvements to the pavement widths, parking layout, road markings and surface materials would soften the appearance and enhance the setting of the surrounding historic buildings.

Rear Historic Areas

A number of historic buildings to the rear of buildings on the High Street and Worcester Road still exist, and some have been refurbished and gained new uses. Many are underused or vacant, and are generally in a poor condition but are highly visible from Market Street.

The presence of these buildings, are evidence of the town's history and development and are part of its character and interest. In their current state they therefore detract from the character of the Conservation Area.

Proposed Action

Investigate the possibility of carrying out some historical research into these buildings and identify ways they could be repaired and brought back into use.

Spadesbourne Brook

The Spadesbourne Brook is a neglected feature of the Conservation Area.

Although some sections are culverted, there are significant stretches which are visible, and the brook still provides an essential wildlife corridor through the town centre.

A number of the visible sections are heavily overgrown and in their current state do not contribute to the character of the conservation Area.

Proposed Action

The Bromsgrove District Council are committed through the Area Action Plan to the naturalisation of Spadesbourne Brook. Work on this is ongoing.

Local List

The Conservation Area Appraisal has identified a number of 'positive' buildings in the Conservation Area which are unlisted, and could form the basis of a Local List for the Town Centre.

Proposed Action

Introduce local criteria for identifying important unlisted buildings, which would then form the basis for the creation of a local list.

Engaging the Community and Circulating the Plan

Bromsgrove District Council will undertake a number of initiatives during the life of the plan to ensure stakeholders and the community are engaged in decisions

affecting their community.

The Conservation Area Appraisal and Management Plan will be reviewed every four years to ensure that it is up to date in respect of current issues, including any changes in national and local policies. The consultation on the plan will include a public meeting and exhibition, following engagement with key stakeholders at the time of the review.

Bromsgrove District Council will ensure that all planning applications are available online to allow for ease of access to information, allowing community engagement.

Bromsgrove District Council has designated an elected member, Mr Kit Taylor, as a Heritage Champion. These champions are supported by the Commission for

Architecture and Built Environment (CABE) and English Heritage. They will receive the relevant free training and ensure that design and heritage issues are considered in all areas of the Council's business.

Bromsgrove District Council is committed to widening local knowledge and heritage skills: -

- When appropriate, and subject to resources, the Council will develop, with stakeholders and the local community, a Heritage Training and Education Plan. Many activities would establish a legacy of materials for future use
- Bromsgrove District Council will take advantage of the free training provided for its planning staff through the Historic Environment Local Management Initiative (HELM)
- Bromsgrove District Council will improve the awareness of heritage issues through the annual Heritage Open Days Programme, held in September each year.

During the six-week consultation period, the draft documents were available at the Council House, Bromsgrove Library, the Dolphin Centre and on the council's website. Letters of notification were posted to a wide-ranging list of consultees and invitations were issued to an evening exhibition on Thursday, 23rd February. There was also a 3-day council officer presence at the library and 1 day included a presentation on a market stall in the high street. Details of all consultation events were circulated to the local press. A questionnaire was available either as a download or for filling in on-line while paper copies were deposited at all the above consultation events.

The Project Officer has discussed a number of initiatives with the Chairman of the Bromsgrove Society who sits on the Partnership Steering group. Since the early 1980s this local civic group has campaigned to save many of Bromsgrove's best historic buildings and in November 2008 an application to English Heritage resulted in the successful listing of the Grade II, Parkside School. One of Bromsgrove Society's more current activities is as adviser on the new public realm works scheduled for early October, 2012 should the THI second-round approval be granted.

Resources

A large amount of expenditure will be required for some of the proposals put forward and Bromsgrove District Council will continue to pursue various opportunities for funding including through the Heritage Lottery Fund, or possibly through planning obligations. Some proposals maybe secured through discussions with property owners.

Monitoring

The monitoring of the condition of the Conservation Area over the lifetime of the Management Plan and beyond will be essential to establishing the success of the plan. The following are proposed: -

- The Council will work actively with building owners and occupiers in pre planning application discussions to achieve the best design solutions

- The Council will carry out a photographic survey of all the buildings in the conservation area to aid monitoring, and in particular to aid enforcement action
- The Council will ensure that appropriate enforcement action is taken, to preserve the character of the conservation area. Defined timescales will be pursued
- The Council will produce an Annual Monitoring Report to include the statistics on the number of enforcement cases investigated, number of enforcement breaches and number of successful enforcement cases in the town centre conservation area

Review

Subject to available resources, the conservation Area will be reviewed on a four yearly basis and the Conservation Area Appraisal and Management Plan will be updated where necessary.

Conclusion

The successful management of the Conservation Area will depend not only on the commitment of the local planning authority, but also other stakeholders especially those who work and live in the area.

Section 5 – The Action Plan

5.1 Visions and Strategies

5.1.1 The Overall Vision for the Conservation Area

The overall vision will be delivered through the Bromsgrove Town Centre Draft Area Action Plan and the Bromsgrove District Council Draft Core Strategy 2. Both of these documents have undergone extensive public consultation.

Bromsgrove Town Centre Draft Area Action Plan (Jan 2011)

“Bromsgrove will be a thriving market town which attracts residents and visitors into the Town Centre, both for the shopping experience and its programme of events, activities and markets. The Town Centre will be significantly enhanced with an attractive and safe environment which will provide a focal point for the community.”

This vision was created by the townspeople and businesses of Bromsgrove. The District Council had asked the people of Bromsgrove and many other key stakeholders what they would like to see happen in the Town Centre. A total of 1,198 responses were received for the previous Bromsgrove Town Centre Regeneration Area Action Plan Survey, showing why the respondents visited the centre and what they would like to see done to improve the centre. New paving, the improved appearance of historic buildings and making the look of shop fronts and signs remain in keeping with the historic architecture over them were the top 3 responses received.

Regeneration Strategy

Bromsgrove town centre as identified in appendix 15 will be the focus of a number of complementary strategies and policies which will secure its long-term future enhancing its vitality and vibrancy, fixing its place within the West Midlands and beyond as a desirable place to live, work, shop and invest.

The strategy focuses on the historic core of the high street and conservation area and its surrounding streets and lanes, opportunities for physical public realm improvement and new development which complement this core area are detailed in subsequent policies. All development in the town centre must have regard to the policies of the Area Action Plan (AAP) and the Bromsgrove Core Strategy.

The regeneration will be phased over 15 years in conjunction with the development identified in the Bromsgrove Core Strategy.

The Objectives

Retailing and the local economy

- Improved retail offer through the development of new sites and an extended Primary Shopping Zone
- Improved range and quality of evening economy uses within the Town Centre, including a choice of bars, cafes and restaurants
- Number of employment sites for light industrial usage maintained
- Promoted local and niche shops in traditional High Street premises
- A regular high quality outdoor market in the High Street
- Instigation of an extended events programme

Living and working in Bromsgrove

- To deliver new high quality housing which provides a mix of unit sizes and tenure
- To ensure that residential unit numbers, densities and affordable housing provision is sufficient and appropriate for the local area
- Modern commercial office accommodation will be made available
- New technology businesses attracted as part of improved links with the technology park and A38 technology corridor
- The conversion of empty space above shops converted into flats
- A Care Village in the Town Centre to meet the needs of Bromsgrove

Public Realm and Open Spaces

- Upgrading the public realm and Primary Shopping Zone to a high quality including resurfacing and refurbishing the High Street
- Preserving and enhancing the conservation area's character and appearance
- Wherever viable renovating, refurbishing, rejuvenating or redecorating the town centre's historic buildings
- Utilising the natural assets in the town centre to provide enhanced green and open spaces including the Spadesbourne Brook and Recreation Ground
- Ensure a safe environment for all and a town centre enjoyable for everyone

Accessible and efficient public services in Bromsgrove Town Centre

- New Customer Service Centre and Civic Suite incorporating a review of public administration and library services
- New Leisure Centre
- New Health Centre
- New / Refurbished Public Toilets

Transport, movement and accessibility

- To reduce reliance on car use and reduce transport related carbon emissions
- An improved road network including the re-engineering of junctions and traffic flows
- Improved pedestrian priority, accessibility, permeability, linkages and mobility within and across the Town Centre for pedestrians and cyclists
- Improved public transport infrastructure including the new or upgraded Bus Station, and new town centre bus routes
- Improved pedestrian and cycle linkages between Bromsgrove Station and the town centre, and the promotion of shuttle bus services between the two destinations
- A rationalisation of car parking provision in the town centre

The critical factors in the regeneration programme are to upgrade the public realm whilst preserving the heritage of the town centre, in order to reinstate Bromsgrove as a unique and attractive destination of character. The Townscape Heritage Initiative is vital to enable the Regeneration Programme.

The deprived town wards the Town Centre serves do not have the spending power to maintain the town centre themselves and yet depend on it for both shopping and employment. The threat to its viability is compounded as the town centre loses local small businesses and jobs. Empty shops mean a lack of investment and a further deterioration of the town's historic buildings and public realm.

The Townscape Heritage Initiative is therefore vital to help restore the virtuous cycle of investment leading to economic vitality, by helping to recreate an attractive and sustainable environment: One that will attract visitors into town; increase the number of people living in town; support the investment proposition for leading retailers; tangibly demonstrate the deliverability of the Area Action Plan to developers; encourage Bromsgrove to be the location of choice for locating technology corridor business. All of which will create commercial, retail and high value production jobs for the residents of Bromsgrove.

Bromsgrove Sustainable Community Strategy (2010-2013)

The Sustainable Community Strategy (SCS) sets out the overall strategic direction and long-term vision for the economic, social and environmental well-being of the local area and the Local Strategic Partnership (LSP) is responsible for delivering it. In September 2010, the Worcestershire Partnership (in consultation with District Partnerships) approved proposals for a new Single Countywide Sustainable Community Strategy for Worcestershire. This was finalised in November 2011 and it includes a chapter specifically on Bromsgrove District from the Bromsgrove Partnership.

Bromsgrove Partnership Priorities

The Bromsgrove Sustainable Community Strategy for 2010 -13 and the priorities within that were based on an understanding of the available evidence and the views of the public. These priorities were reviewed in 2011 and simplified to the top 3 priorities. Key outcomes agreed for each priority and the Theme Groups responsible for delivering on those priorities, are shown in the table below.

Bromsgrove Partnership operates a Board and four Theme Groups and it is those Theme Groups which are the delivery arm of the Partnership. Theme Groups will decide the best way to meet the agreed priorities and their measures of success. Any barriers to delivery which they face will be dealt with by the Board. As many of the issues being tackled overlap across more than one Theme Group, all cross cutting challenges and identified gaps will be considered at Board level to ensure a truly effective and cohesive partnership approach is taken.

The Trunk is the Bromsgrove Partnership's Areas of Highest Need Project and is a multi-agency partnership which began in 2009. EPIC, a community interest company, was commissioned by Bromsgrove Partnership to run the Trunk and it is now delivering a programme of learning, skills acquisition, support activities and community resources for the residents of Charford and Sidemoor primarily with an outreach programme for Catshill residents. We will continue building on the project's success to ensure sustainability for the future. With many organisations seeing a reduction in resources, Bromsgrove Partnership believes good partnership working is now even more crucial. Therefore, we will continue to work hard to meet the existing and future needs of our local community in the most effective and efficient way.

Priorities	Key Outcomes	Theme Groups
Economic Growth	<ul style="list-style-type: none"> • Regeneration of the town centre • Effectively market Bromsgrove District • Encourage business growth (including retention of 	Economic Development Theme Group

	businesses)	
Balanced Communities	<ul style="list-style-type: none"> • Reduce alcohol misuse and smoking, encourage healthy diet and exercise and improve perception of mental health issues • Implement an age well scheme and focus on falls prevention • Deliver accessible, localised and sustainable services for vulnerable neighbourhoods via The Trunk (Areas of Highest Need Project) • Provide positive activities for young people 	Balanced Communities Theme Group
	<ul style="list-style-type: none"> • Reduce the fear of becoming a victim of domestic burglary • Maintain safe clean streets by tackling night time economy and reducing graffiti • Protect communities by tackling domestic abuse, youth related anti-social behaviour and supporting vulnerable people 	Bromsgrove Community Safety Partnership
Environment	<ul style="list-style-type: none"> • Reduce CO2 emissions through improved energy efficiency in housing and businesses • Explore improving biodiversity and nature in key strategic sites, and how land use influences carbon emissions/carbon sinks • Ensure shared priorities are delivered in a cohesive way e.g. environmentally sustainable town centre 	Better Environment Theme Group

In addition, the Strategic Planning Team proposes to ensure that Bromsgrove's Sustainable Community Strategy recognises the historic environment as a finite and non-renewable environmental resource.

The historic environment is the repository of a wealth of information about how people interacted with their surroundings in the past. For this reason alone it should be sustained for the benefit of people in the future.

Local Enterprise Partnership

Local Enterprise Partnerships (LEPs) are currently being set up to deliver, amongst many things, coordinated economic stability and growth across areas which are typically bigger than one District Council. Bromsgrove District Council is currently a member of 2 LEP's, one which focuses on the greater Birmingham and Solihull area and some of the surrounding Districts, and another which deals with issues within Worcestershire. The nature of where Bromsgrove District is within the region means it is important to look in all directions for new partnerships which can help the town enter to flourish. These LEPs are now beginning to take shape with Bromsgrove District Councils leader being a board member of the greater Birmingham LEP, and whilst not a board member similar representation on the Worcestershire LEP also exists.

Deliverability

- A **mixed-use urban extension** is envisaged across 3 sites in Bromsgrove creating a sustainable and balanced community that will integrate into the existing residential areas of Bromsgrove. This development will fully address the social, economic and environmental facets of sustainable development and will consist of a minimum of 1850 dwellings, 5 hectares of employment land, local centre(s) and retail and community facilities.
- The **historic market site** occupies an area of 0.7 hectares and sits at a key southern gateway into the Town Centre where routes from Worcester and Kidderminster meet. This is a key strategic location as it marks the end of the linear high street and one of the major pedestrian gateways into the town centre. It is important as a potential new retail-led, mixed-use location, adding to the overall retail offer and creating an anchor at the southern end of the town, thus ensuring active retail uses along the entire length of the Primary Shopping Zone. To have a national food store on the Market Hall site was selected by respondents as one of the choices to make the town centre a better place to shop. The proximity to a proposed street café area and concentration of pubs and restaurants along High Street South and Worcester Road make this site suitable for other supporting uses which could contain a small cinema and/or other leisure uses such as cafes and restaurants - residential or offices are also other acceptable supporting uses on this site. The establishment of a new anchor store at the Southern end of the High Street is seen as a key element of the District Council's land use strategy and the historic market site – in public ownership and highly visible - will therefore be a priority for early development.

- The former **Parkside Middle School** is a Grade 11 Listed Building made redundant in 2008 and the District Council has worked closely with Worcestershire County Council to find a use for the building which ensures its long-term future and maintains it as a heritage asset for the town centre. That use has now been confirmed as a sympathetic conversion to office use for Worcestershire County and Bromsgrove District Council services. The move comes after agreement was reached in detailed negotiations over how public services could come together in one building central to Bromsgrove town. The proposals include moving into Parkside the Worcestershire Hub Customer Service Centre from School Drive and Bromsgrove Library, along with back office staff from the Council House on Burcot Lane. If approved, this process is likely to take around two years.
- The **Dolphin Leisure Centre** located on the main route into Bromsgrove from Redditch is approaching the end of its useful life and with this comes an opportunity to replace it with a modern facility that more successfully meets the needs of the residents. The possible relocation of public sector facilities could also form part of a dual use building. The scoping of a new multisport and fitness complex for the residents of Bromsgrove required a consultation exercise to establish the leisure habits and needs of the community. The Bromsgrove Leisure consultation occurred during the summer of 2010 and received 866 completed questionnaires as well as determining current and future customer demand, travel habits, linked trips and preferred location for a new leisure centre. 42% of the respondents were supportive of the Leisure Centre being sited in the town centre. Almost a third of people currently visit Bromsgrove to use the Dolphin Centre. The site is predominantly in public ownership and the limited life of the Dolphin Centre makes this development an early priority, integrating the Artrix, Bromsgrove North High School, NEW College and the proposed replacement Fire and Police station into the town centre community.
- The District Council is currently working with Sainsbury's on a **supermarket store** for Birmingham Road on a site that currently has 3 warehouse-style retail premises. Pedestrian linkage with the town centre is essential and as such the development is contributing to public realm improvements in Birmingham Road, the Strand and High Street North. This will facilitate the extension of the Primary Shopping Zone to the new supermarket by ensuring a common public realm from the centre of the town to the store. The redevelopment of the site will deliver a number of social benefits and the introduction of a large retail store will increase the range of retail facilities on offer in the town providing choice for residents. The planning permission ensures that the development of the site will retain the character and setting of the 2 listed buildings which provide a limited street frontage along Birmingham Road. Environmental improvements will occur due to the naturalization of the Spadesbourne Brook at the rear of the site contributing to a network of green infrastructure within the town centre.
- The **movement strategy** for Bromsgrove will make the town centre more accessible for all modes of travel. It attempts to change the

emphasis of the road network away from being a through route to other locations across north Worcestershire. A detailed town centre traffic management study, scheduled for publication later in the year, will add to various studies already carried out. Through traffic will be discouraged, and the notion of Bromsgrove as a destination, rather than a cut-through will be promoted by a variety of actions and policy measures. Many of these actions and measures will take place much further afield from the town centre. They include alterations to signage and road junctions around the town centre, and on main routes into Bromsgrove. The District Council will work with Worcestershire County Council to ensure these proposals are developed within the Local Transport Plan (appendix 19). The success of this will depend on the provision of viable alternative routes for the through traffic that is currently using Bromsgrove, combined with the implementation of measures to make routes through the town centre less desirable to through traffic. These measures will include signposting, change of priorities in favour of public transport and pedestrians, weight limits etc. Improvements to the Stourbridge Road and Birmingham Road junction, a new regular bus link between town centre and rail way station, de-clutter pedestrian routes into the High Street and retain the bus stops in current location are considered as actions most useful to help respondents getting around town.

- A business case has been presented to the Department of Transport for a new 4-platform **railway station** to accommodate trains from Birmingham every 20 minutes. The proposal is now being developed by Centro, Network Rail and Worcestershire County Council and includes a 350 space car park. The design is forecast to be completed later this year. Ongoing negotiations are being held with the Department of Transport to look at the demand revenue forecast – the level of service and revenue expected.
- The early upgrade of the **public realm** is vital to enhance the heritage of the area and recreate an attractive town centre with a more positive sense of place. A safe and attractive public realm will attract visitors and shoppers and lengthen their stay, increase the number of people living in town, and help attract businesses from all sectors by tangibly demonstrating public investment in the town. It is envisaged that the revitalised public realm will form part of a own centre that is an accessible asset for the whole community.

5.1.2 Other regeneration strategies, projects or schemes impacting on the Conservation Area and surroundings

Vacant Retail Space

We are reviewing and promoting the potential for converting empty shops into a wide range of temporary uses. Empty spaces within Bromsgrove town centre make perfect places for short, temporary projects that embrace the *meanwhile* – the time between the last commercial activity and whatever comes next. Closed shops can provide space for

- Pop-Up shops
- Community activities like exhibition spaces and information points
- *Art in Shop Windows* exhibitions
- Local archaeological collections – there will be two community digs in Bromsgrove scheduled for Easter and Summer, 2013

By contacting the owners of empty retail units the District Council hopes to secure their premises for artistic groups and individuals to display their work. One of the best means of animating town centres during the economic downturn is by using the arts to make them attractive and vibrant places. The objective is to help regenerate the town centre and at the same time give the appearance of productivity making the units more attractive to potential purchasers and improving the area for shoppers and visitors. Empty shops will provide the space for celebrating the locally distinct, culturally diverse and creatively rich nature of Bromsgrove's town centre.

Vacant Upper Floors

The aim is that the District Council will enable the development of new private sector dwellings within the town centre which will help meet the local area agreement themes:

- Meeting the needs of young people – through the provision of more housing options for young people in the district.
- Economic success that is shared by all – increasing the residential element of the town centre will help support the town centre economy both day and night.
- Communities that are safe and feel safe – having a residential presence in the town centre will contribute towards a passive surveillance of the town centre and help to discourage anti-social behaviour.
- Stronger communities – by offering young people a choice to stay in the district rather than finding cheaper accommodation in adjoining areas will contribute towards them being able to access their support networks thereby developing stronger communities.

Currently we have an imbalance in our housing market in that there is insufficient affordable housing to meet the identified needs of the district. In particular there is insufficient affordable housing for young people resulting in an outward migration to cheaper surrounding areas such as Redditch and Birmingham. In Bromsgrove District the average house price is £241,000 with the cheapest housing being just under £100,000, although these figures will now be falling as a result of the recession it is very difficult for a household with a moderate income to access market housing.

In response to a growing need for new housing, the District Council is continually focussed upon exploring opportunities for new housing developments and also making the best use of existing accommodation within the district.

The Countywide Housing Strategy 2011-2015 *The right home, at the right time, in the right place* has identified the priority to make:

Better use of existing homes and set the action to achieve this as being:

Develop a countywide toolkit for bringing empty homes back into use, including:

improving informal advice and encouragement through practical measures such as flats above shops, working with RPs (Registered Providers) to purchase or lease and to use enforcement powers but as a last resort

The Strategic Housing Team at Bromsgrove District Council has also set their strategic vision to guide the Council's approach to housing as being:

Making best use of existing accommodation by improving the quality and accessibility, and addressing the in-balance in the housing market through the provision of more affordable housing.

Whilst the District Council has always looked where possible at opportunities to encourage empty properties back into use, it's lack of resources has meant that this has been on a more reactive basis and therefore has had limited success.

In a Housing Market Study of Bromsgrove that was jointly commissioned by Bromsgrove District Council and Bromsgrove District Housing Trust it was identified that:

"... the challenges facing the district in creating a more balanced housing market - especially to improve the choice of housing for local people - the priorities for intervention (include):

to stimulate the supply of private sector homes, for example, through bringing empty properties back into use and by developing flats over shops, including giving consideration to making Private Sector grants and loans directly to landlords to stimulate such activity."

As part of this, work has started in conjunction with the Town Centre Regeneration Project to identify available space above shops in the town centre that could be potentially converted into residential premises, to assist in the regeneration of the centre and also to contribute towards meeting the unmet housing need of the district.

It has been identified that there are 174 units in the town centre which do not have residential units above. Bromsgrove District Council has undertaken a survey to all freeholders of units in the town centre to identify what this available space is used for and to ask them whether they would consider what options and assistance would encourage them to consider conversion opportunities, such as:

- Financial assistance to convert empty space.
- Advice on what options may be available to maximise potential.
- Opportunities to assist in privately renting residential space.
- Opportunities to assist in renting space for commercial use.
- Provide opportunities for medium to long-term leasing of empty space.

It is hoped that by entering into dialogue with owners, officers will be able to discuss the most suitable and advantageous option with owners. It is anticipated that as part of this, owners may need to take advantage of the financial assistance available to convert space. Currently, the only grant that is available to owners is the *Empty Homes Grant* which is funded through Bromsgrove District Council's Discretionary Grant budget. This grant is available up to a maximum of £5,000, must be match funded by the applicant who must agree to give the Council nomination rights to that property for a period of 5 years. The grant is also repayable if the property is disposed of within 10 years, which allows the funding to be recycled for further schemes.

Since the grant has been available it has had limited take up, which is felt to be due to the fact that the owner must give the Council nomination rights and also that £5,000 is not enough to cover works required. In addition to this the budget for Discretionary Grants has been significantly cut in recent years with further projected cuts expected, which means that there will be significant limitations on the number of grants available in the future.

Financial Year					
	08/09	09/10	10/11	11/12	12/13
Budget	£164,000	£115,000	£100,000	£63,000	£25,000

These cuts will make it increasingly difficult to offer owners of empty space the financial assistance required to encourage them to do the works to convert empty space into residential accommodation.

The Strategic Housing Team has developed strong links with the private rented sector as part of their role to encourage the development of this sector.

As part of this, therefore, they are prepared to assist owners of empty space to make them aware of their options when converting empty space with the intention to make it available to privately rent. These options will include identifying current local need, and taking into consideration issues such as Housing Benefit changes, newly emerging trends, rent ability and rental amounts in the town centre. The team has also agreed to offer owners the option to maximise from the District Council's *Step Up Private Tenancy Scheme* which will help landlords to find suitable tenants for their properties.

The District Council's Private Sector Housing Team currently have a responsibility to inspect private properties within Bromsgrove District to ensure that they conform to the Housing Health and Safety Rating System as part of the Housing Act 2004. We are conscious therefore that as part of the administration of any future grant with respect to the conversion of empty space into residential accommodation that we show due regards to this legislation. The Private Sector Housing Team have agreed that during the grant application that they will review all plans and schedule of works to ensure that they comply to the standards that they would expect. They have also agreed to be able to make themselves available to attend a site inspection if required to ensure that owners of empty space in the town centre are given specific tailored advice to maximize the potential of the property in line with the current housing market trends.

Bromsgrove Town Centre Accessibility Audit

The aim of this study carried out on Wednesday, 20th July 2011 by the Worcestershire Association of Service Users (WASU) was to undertake an objective assessment of the current town centre streetscape, focussing on the ability of people and/or goods and services to reach places and facilities. Elements such as ground surface quality, interaction with traffic, obstructions or trip hazards to pedestrians and lighting provision (including shop windows and floodlit buildings) were explored to produce an overall qualitative assessment of the town centre. This is now helping us to understand the way in which the public spaces are used, identify existing gathering points and desire lines and highlight issues which are hindering pedestrian movement.

The full results of the Accessibility Audit received in September 2011 has influenced our public realm strategy for the town centre, and supported the aims of the Town Centre Area Action Plan to ensure our regenerated town centre promotes the spirit of the Disability Discrimination Act whilst creating a safe and welcoming environment.

The study addressed the following issues using photographs, plans and illustrations as appropriate:

- Identify existing problems for mobility impaired and sensory impaired users and suggest options for improvements
- Highlight existing barriers to permeability and circulation
- Suggest opportunities to improve through-movement of pedestrians
- Assess the adequacy of existing signage provision and the ability of user groups to orientate themselves
- Identify hotspots of street clutter and suggest options to rationalise these
- Explore the potential for reintroduction of cycle access to the High Street including dedicated cycle paths
- Investigate existing CCTV and lighting provision and any gaps in coverage which need to be addressed

Better access to Bromsgrove's shops and public buildings is a need for disabled people who live in or visit Bromsgrove and in Summer and Autumn 2010 we held a consultation to ascertain views on an official award scheme for shops and businesses who provide excellent access and customer service for disabled people across Bromsgrove. In total there were 231 replies, all very positive.

Nominations for the 2011-2012 Bromsgrove No Barriers Disabled Access Awards closed on 13th May. Over 20 nominations were received for 14 businesses and service providers in Bromsgrove ranging from retail outlets, sports centres to market traders and day care providers. The nominations were considered by a panel of disabled volunteers who visited those businesses nominated or contacted them for further information to confirm the nominations received.

The panel met on 20th June 2011 to agree the final list of award winners who were then invited to a presentation by the Council Vice Chairman, Cllr. Mrs C. Spencer, on Saturday 25th June. The awards give recognition to those who make positive efforts to assist disabled people and will demonstrate to disabled customers that those businesses or services are accessible to them. An Access Guide for Disabled People is in production for Bromsgrove showing the businesses and services who have been awarded recognition under the Bromsgrove "No Barriers" - Disabled Access Awards Scheme.

Bromsgrove BID Initiative

It is proposed to introduce a Business Improvement District (BID) in Bromsgrove Town Centre as a central mechanism for funding maintenance and ongoing investment in the fabric of the town centre. A BID is a partnership between a local authority and the local business community that supports the long-term sustainability of the town centre. A committee is formed that develops and takes forward projects and services that benefit the trading environment and the public realm.

Non-domestic rate-payers within a BID area pay for the BID through a supplement on their rates bill. A BID proposal will state whether all rate payers will be charged or if the charge only applies to a particular group. Businesses will decide via a ballot whether the BID should be established and the amount of the levy.

The potential implementation of a BID, combined with Bromsgrove District Council's role as the Local Planning Authority means that good practice measures introduced through the THI will be supported in the long term.

New Technology Park

The Central Technology Belt runs from Aston University to Malvern Hills Science Park. The Belt is home to the Universities of Aston, Central England, Birmingham and University of Worcester. There are Science Parks at Aston, Birmingham and Malvern with developing Technology Parks at Bromsgrove, Longbridge and Pebble Mill. Malvern is the site of QinetiQ's electronic and signals research and development facility.

The Central Technology Belt aims to harness the potential of the region for existing and incoming businesses. The success of this activity will help to diversify the manufacturing activity in Worcestershire and offer opportunities to a trained workforce.

Development is currently taking place on the Bromsgrove element of the technology belt with more expected in coming years bringing new employment opportunities into the Town. Along with other strategies identified it is envisaged that development that takes place as part of the technology belt will help to strengthen Bromsgrove's position within the region and provide additional people who will regularly use the Town Centre

Bromsgrove Town Centre Transport Study - Parking

See John S about Car parking Review

Bromsgrove Museum

Situated near the town centre on Birmingham Road Bromsgrove's Museum is now closed. Within it you would once find displays of local crafts and industries, including glass, salt and nail, and the Bromsgrove Guild, an organization of craftsmen founded in 1894. This Guild of highly-skilled craftsmen had its finest hour when commissioned to design and make the gates and railings of Buckingham Palace. Another popular exhibit is a street scene of Victorian shops.

A request has now been received, however, from the Norton Collection Museum Trust to be granted a 12-month option to purchase the Bromsgrove Museum building for the sum of £285,000 which would enable third parties to commit funds to the project on a more secure basis. Negotiations with the Trust and the original donor have been very positive and Cabinet members have acknowledged the value of the Museum and their desire to maintain the provision thereof to the community of Bromsgrove.

The Cabinet has determined through the business plan provided by the Norton Collection Museum Trust that the proposed project would benefit the town centre and enable the Council to further the objects of the Museum Trust.

Bromsgrove in Bloom

Heart of England in Bloom will be a key objective for Bromsgrove District Council and there is a desire to achieve recognition within the Campaign. It is therefore our intention to seek funding and support for future years' submissions which will allow us to develop and strengthen our abilities to meet the Heart of England in Bloom criteria. Although 2012 will hopefully be our first year entering the competition we are striving to ensure that the ethos of the competition and the diverse manner in which it can be incorporated becomes part of our normal working practices. The competition is in keeping with the Council's core objects in providing a clean, green and safe district. Within the town centre we are likely to consider: -

- pole-mounted 2-tier baskets
- 3-tier planters
- wall-mounted planters baskets
- dedicated and skilled horticulturists to maintain the town centre and other key sites in the district
- cleanliness of streets and roads within the town – no litter, graffiti or dog fouling
- excellent marketing and promotion of In Bloom campaign
- excellent local and national media coverage
- continued encouragement and support of local schools for the In Bloom campaign
- dialogue with local villages, e.g. Belbroughton, Dodford
- support and sponsorship from local business

There will be high visibility impact planting that not only provides a traditional-style, formal landscape theme but softens the impact of a mixture of architectural styles and colours in and around the conservation area. We will seek to use low maintenance and drought tolerant plants such as Geraniums, Begonias, Ageratum and Cineraria. The planters will all have water reservoirs in them which will help with lowering the watering maintenance that is

required. They will also serve a practical use in that they will be mobile and capable of being removed or rearranged should the town space be required for an event.

We will use a number of media to broadcast Bromsgrove in Bloom to the public, such as:

- Together Bromsgrove – quarterly magazine delivered to every household in the district
- Friends Groups
- Press releases in local papers
- Worcestershire Walks Magazine
- Public consultation in areas where projects are to be carried out
- Bromsgrove District Council Website
- Letter / leaflet drops
- Staff and councillor roadshows
- Facebook and Twitter
- Local radio
- Notice boards around parks and allotments

Sanders Park is Bromsgrove's Premier Park attracting over 350,000 visitors per year. The park, located close to the town centre of Bromsgrove, was opened in 1968 and covers 16.3 hectares to the west of Bromsgrove linking to countryside beyond. The area of Sanders Park and the small valley of the Battlefield Brook has for centuries been an important green space for the town. In the area of the park by Watt Close there used to be an Elizabethan water mill powered by the Battlefield Brook. This was converted in the late eighteenth century to one of the first cotton spinning factories in England finally ending its life as the first open air swimming pool in the area which is now a water feature in the park.

Sanders Park was named after two sisters who bequeathed the site to Bromsgrove District Council to be used for the health, relaxation and wellbeing of the people of Bromsgrove. The District Council manages the park to meet the modern day needs of the local community.

The park offers a wide range of facilities for informal and formal recreation as well as a varied event programmes throughout the year. These facilities include a flat outdoor bowling green, 2 tennis courts, putting green, outdoor skate park, 2 Multi Use Games areas and a state of the art children's play area, Jubilee Bandstand and a pavilion housing a cafe, information desk, ladies, gents and disabled toilets.

Naturalisation of the Spadesbourne Brook

The Spadesbourne Brook rises in the Lickey Hills to the north and flows south through the town. The length of the Brook envisaged for enhancements runs from All Saints Church in Burcot Lane to Brook Lane in Sanders Park and is 2.15 kilometres in length. It runs past the existing Council House, through NEW College land behind Birmingham Road, past the Strand, along Market Street through the Bus Station, and across the historic market site into Sanders Park.

Parts of the Brook are naturalised, including areas between Birmingham Road and School Drive, and at the bus station. However, the majority of the Brook has been re-routed, culverted and effectively relegated to function as a storm drain through the town centre, hidden from view, and sometimes covered entirely by access roads to properties. Even in its urban context the brook contains some plant and animal life, and the water quality is good and clear. However it fails to provide any real amenity value for users of the town centre and its ability to support a wider variety of plants and animals is reduced by its unnatural form.

The Environment Agency has confirmed, however, that Spadesbourne Brook currently supports dispersed colonies of water voles (a protected species) to the north and south of the town centre. However, the water voles and other wildlife find traversing the culverted sections of the brook difficult and cannot create habitats at certain sections due to the concrete sides.

The naturalisation of Spadesbourne Brook is a key component of the Land use (TC2) Movement (TC3) Public Realm (TC4) Urban Design (TC5) and Historic Market Site (TC8) strategies of the AAP. The relocation and naturalisation of specific parts of the brook will allow for greater use by the community. It will ensure that shoppers in the high street are never more than a few minutes away from an attractive area of green and open space and it will improve permeability and legibility within the town centre. It will include relocation and naturalization of the watercourse where possible, a raised water level, improved flood capacity, a habitat appropriate for many plants and animals including water voles, high quality paving, seating areas, new trees and planting.

The naturalised watercourse will be designed with full consideration of highways and public safety requirements and developed in line with other key public realm areas to provide a holistic approach to design and access throughout the town centre. The Brook will form part of a green corridor running along Market Street providing links to other areas of the town. Access requirements will be maintained and utilities and other services will be moved where necessary. Where the watercourse is relocated, existing culverts may be utilised to improve flood capacity. Existing trees and planting will be retained where possible or replaced with like-for-like specimens where

removal is necessary. The watercourse will be engineered to allow wildlife, including water voles, to traverse its length and to allow for the creation of new habitats to assist with the ongoing protection of biodiversity assets.

The Brook is in both public and private ownership, naturalising and in some cases relocating the Spadesbourne Brook will be achieved via different approaches dependent on whether the section is part of a development site or not. Other sections at locations that are not development sites such as the section running parallel to Crown Close will be funded from sources including (but not limited to):

- European Commission: Environment Funding
- Natural England Biodiversity Fund
- Biffaward grants
- SITA trust: Enriching Nature Programme
- Big Lottery Fund: Community Wildlife
- Heritage Lottery Fund
- WREN: Biodiversity Action Fund
- Veolia Environmental Trust
- Big Lottery Fund: Changing Spaces / Community Spaces
- Esmee Fairbairn Foundation: Biodiversity Strand

Public Realm Improvements

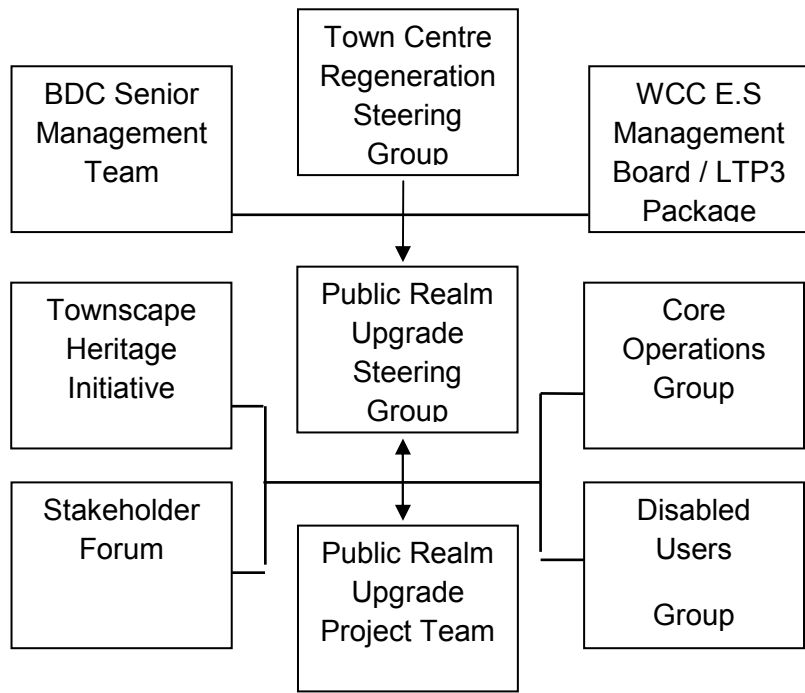
The town centre public realm upgrade is central to strategic aim one of the Regeneration Programme, namely, a revitalised and attractive town centre. The scheme objectives will be achieved through the following design principles:

- Paving - durable and sustainable natural materials such as granite and york stone that are in keeping or contrast positively with the character and appearance of the conservation area
- Lighting – a scheme which ensures public safety but minimises street clutter and highlights the high quality architecture and attractive soft landscaping along the high street
- Public safety – safety considerations will be integral to all design proposals
- CCTV – an effective CCTV network that ensures public safety but minimises street clutter
- Accessibility – ensure straightforward navigation and movement and enable an easy flow into key spaces and from one micro destination to another
- Physical definition - use paving materials to create visually different linear and spatial zones that are recognisable as distinct areas within an overall coherent design
- Market – a defined optimum layout to include dedicated speciality market areas and ensure an unfettered carriageway and an ease of

- pedestrian movement in, around and through the town centre on market days
- Street entertainment – defined open areas of varying sizes for the purposes of displays, street theatre, musical performances, dancing, busking etc.
 - Trees and soft landscaping – to be integrated within the design and located to provide an avenue and reinforce rather the compromise or diminish the linear open nature of the high street
 - Street furniture – minimise street furniture such as bollards, signage, lighting, CCTV columns and notice boards. Designate street café areas. Cluster benches, planters and remaining furniture within linear zones defined for the purpose
 - Gateway sites – must be defined as welcoming and an entrance to the town centre to provide a sense of arrival
 - Shared services – define using subtle level changes and the use of contrasting colours and textures: In this way they are shared services only in so much as they can be used by vehicles and pedestrians and are part of a common materials palette
 - Public highway - discharge defined functional and technical requirements as are necessary to fulfil its function as a highway in respect of the prevailing Traffic Regulation Order that may apply to it
 - Traffic Regulation Orders (TROs) – to facilitate TROs used to define the necessary (time bound) vehicular access movements defined by consultation including decisions on:
 - Service Vehicles
 - Market Vehicles
 - Blue Badge Vehicles
 - Emergency Vehicles
 - Taxis
 - Cycles
 - Parking and Loading Bays / Taxi Ranks – as required to facilitate TROs
 - Carriageway - a demarcated and distinct straight carriageway constructed to accommodate TRO defined vehicular traffic and designed using natural materials to create an avenue down the high street.
 - Maintenance – the design will not be unduly or unnecessarily compromised by future maintenance liabilities, which will be mitigated from a construction and financial point of view

The Partners in the Public Realm Upgrade are Worcestershire County Council (WCC) and Bromsgrove District Council (BDC) and the scope of works covers a range of schemes to be carried out during 2012 and 2013.

Figure 3: Schematic of Project Governance Structure



Street Café Quarter

The enhancement of the public realm will also help facilitate a new café quarter at the southern end of the High Street near the junction with Worcester Road. Such an improvement can support and extend the concentration of bars and restaurants in that area. Similar but smaller zones could then be created in other suitable areas of the Town. Strict licensing agreements will be used and a common design of seating, tables and canopies etc will be imposed to ensure consistency and uniformity.

Bromsgrove High Street Market

Moving the market onto the high street has been a success in terms of increased activity in the town centre. However, at the moment the public realm is not designed or adequately constructed for it. Stalls have to be laid out around trees, bollards and bins. The uneven surface compounds these problems. The result is that the market appears somewhat ramshackle and accessibility on market days is extremely difficult for all users of the high street.

The new public realm design will ensure that the principles of ease of movement down the high street will be maintained on market days. To accommodate this, a revised layout has been devised to optimise use of the space and to improve upon the appearance and scale of the market.

Permanent fixing points and services will be installed to ensure safe operation of markets and creating opportunities for staging other events in the future.

Our design brief for Bromsgrove High Street Market adheres to the following principles:

- The venue will be run as a *stalls-provided* market with marquee-type fabric stalls provided by the management - providing stalls rather than allowing a *trader-erect* market attracts larger numbers of traders and enables control to be maintained over their appearance
- At full capacity the Market will stretch the full length of the high street from Worcester Road (*Poundland*) to the Strand (*Argos*) - the current designation of the highway as pedestrian-priority will be supplemented by additional Traffic Regulation Orders on trading days to restrict service deliveries
- The estimated maximum number of stalls on the High Street will be 80 catering for, say, 50 individual businesses - the recommended colour of the covers is a mixture of bright red, yellow or blue stripes on a white background with transparent side curtains
- The user-types, i.e. the range of products allowed to be sold on the market will be strictly-controlled by management. This is essential to both maintain quality standards and ensure the variety that attracts shoppers - maintaining the correct *balance of trades* also avoids

conflicts between traders wishing to sell the same lines as adjacent shopkeepers

- It is intended to increase occupancy of the general Market and introduce additional events e.g. a fortnightly antiques and bric-a-brac market on a Saturday or Sunday - trading hours will be extended (particularly in the winter months) by improving lighting provision for stalls and improved welfare facilities for traders
- The minimum number of bollards, lighting standards, CCTV masts, bicycle racks, litterbins etc is desirable - they impose constraints on trader numbers and revenue. The street is too narrow to accommodate raised flowerbeds
- The design will recognise the importance of accommodating historic features newly reinstated, for example, medieval stocks and Hallelujah Lamp as well as the extant Housman statue and cherub, etc
- The appearance of the paving on non-trading days is the primary concern for designers - we recommend natural, more traditional materials with an inherently non-slip finish suitable for wintry conditions and mechanical cleaning
- A Traffic Regulation Order will be required to prevent service deliveries to shopfronts on trading days – we have proposed 0300 - 2300hrs on trading days

5.2 Scheme Outcomes and Benefits

5.2.1 Capital Projects

Buildings:

The selection of the Capital Projects has been based on the findings of the:

- Conservation Area Appraisal and Management Plan (appendix 17)
- the historic photographic survey (appendix 14)
- the condition and cost surveys of the town centre and the potential THI area (appendix 12)

The selected THI area is slightly smaller than that proposed in the THI Stage 1 bid to enable the investment to create a more significant heritage townscape impact and to focus on the oldest parts of the town centre.

Within the selected THI area - parts of the High Street and Worcester Road - potential projects were identified on the basis of age, historic qualities and characteristics, heritage need for repair and replacement, and the townscape impact and group value.

- Project sheets for each of the selected buildings have been prepared which include current and historic photographs (appendix 14).

81 properties have been identified as being eligible projects within the THI scheme. The eligible projects have been categorised as Priority Plus, Priority and Reserve. Although the round-one bid had identified 3 critical projects (22-24 High Street, 73 High Street and 75 High Street) it was subsequently felt that these should revert to Priority Plus or Priority projects as a further review did not identify their characteristics as warranting a critical designation.

This further review of the 81 properties to enable prioritisation as critical, priority and reserve has led to the recommendation that it is not appropriate to identify any buildings as Critical projects as none satisfy the requirements on:

- their historic and design value
- the importance of their location and group value to the overall heritage townscape
- the need for urgent works to protect key heritage buildings

As a result, the selected buildings have been identified as either Priority Plus (P+), Priority (P) or Reserve (R) to reflect the proposed efforts to ensure their inclusion in the implementation of the initiative.

- 53 properties have been identified as Priority – including 15 noted as requiring precedence (Priority Plus)
- with 28 potential Reserve properties

It is estimated that the THI scheme can realistically target over 30% of the eligible projects during the 5-year life span of the programme (see section 5.3.1). This will have a significant impact on the town centre, both visually and economically, while at the same time being achievable. The management of the scheme will clearly wish to target those properties which have been assigned as Priority projects, although it is difficult to ascertain exactly which property owners will come forward for a grant. Properties from the Reserve list will be targeted if necessary.

- There are 49 Listed grade II properties within the THI area. Of the 81 properties identified as eligible, 39 are Listed – nearly 50%. The majority of the eligible buildings date from the mid to late 19th century. The age and type of properties found within the THI area reveals the growth and development of Bromsgrove during the prosperity of the 19th century through to gradual decline in the late 20th century.
- The majority of the buildings are considered to be fair in condition. The defects associated with these buildings mainly relate to: -
 - lack of routine maintenance
 - inappropriate past repairs
 - vacancy

Whilst many are not currently in a serious state of disrepair, if their condition is left to decline then further deterioration and loss of historic fabric is inevitable.

- There are a number of buildings whose condition is considered as poor, and have been identified as priority projects. If urgent action is not taken to halt their decline, then there is likely to be significant and irreversible loss of historic fabric.
- Grant aid is needed to reverse the decline in the condition of these properties and to encourage viable uses as few owners are able to count on the success of their businesses to fund the improvements that are needed to protect the heritage.

The condition and cost surveys (appendix 12) and the project sheets with photographs (appendix 14) demonstrate that the selected eligible projects reflect a good balance of works with a realistic view of value for money.

These surveys identify the types and seriousness of the problems affecting the historic building stock within the Bromsgrove THI area. The works required to arrest

further deterioration of the fabric, to reverse inappropriate repairs and alterations undertaken in the past, and to bring vacant floor space back into use are listed for each eligible building.

The THI scheme will provide an opportunity to replace inappropriate shopfronts and windows in order to reinstate the original or historic composition of the buildings. Building repairs will typically include replacement of roof tiles/slates, repairs to defective flashings (various buildings) and replacement of rainwater goods with cast iron, etc.

Although often minor in nature and having a low visual impact, collectively these repair works will make a major contribution to securing the future use of many of the town's buildings. Through addressing water penetration, in particular, repair works will help to halt the slow deterioration taking place, particularly to the upper floors of buildings.

Restoration of architectural features will typically include reinstatement of traditional shopfronts and windows. Together with signage and windows, inappropriate shopfronts are considered to have had the most detrimental impact on the character of the conservation area.

The effects are evident on both High Street and Worcester Road - the main shopping streets in the THI area. Even where efforts have been made to reflect the character of the area in new work, the gradual replacement of original detailing with poorly observed repairs has led to erosion of detail. Throughout the THI, work will focus on reinstating shopfronts and signage to a scale and design and with materials appropriate to the age of the building and its function. Special attention will be paid to recreating details such as console brackets and pediments where there is evidence of their authenticity. Where it is possible to restore an original shopfront, this will be the preferred solution.

The majority of the listed buildings in the THI area retain their original or historic windows and works will focus on restoration to full working order. Elsewhere, inappropriate uPVC or top-hung windows will be replaced principally with vertical sliding sashes appropriate to the building. In some cases, window openings have been enlarged or reduced so that they are not only detrimental to the building but interrupt the regular pattern of fenestration in the townscape. Here, the objective will be to reinstate the proportions of the original opening so that the *rhythm* of fenestration is restored.

Urgent action is needed to protect and restore this important historic area and it is important to note that the town centre was added to the national 'Heritage at Risk' register prepared by English Heritage in July 2010.

As there is no certainty about the proportions of different types of properties that will apply for assistance, so in order to estimate outcomes, it is only possible at this stage to assume an average percentage as a basis for monitoring. Therefore for guidance and monitoring purposes only, it can be assumed that:

- Of the total 81 properties, 67 are shops (usually with room for storage or offices above and a few with accommodation), 5 are offices, 3 are public houses, 4 are restaurants, 1 is a club and there is 1 Post Office
- It is expected that about 32% (see Section 5.3.3) of the eligible works in the area will be improved with grant aid
- 26 properties are expected to be improved during the THI including 22 shops, 1 or 2 offices and 2 or 3 public houses/restaurants/clubs
- Of the 81 eligible buildings, 18 have vacant historic floor space that could be brought back into use. As a result, it can be expected that up to 6 properties with vacant floor space can be reused.
- Of the 81 eligible buildings, 53 have been identified as requiring replacement or reinstatement works. As a result, it can be expected that up to 17 traditional shop fronts will be restored.

Gap Sites:

No gap sites within the THI area have been identified as suitable for redevelopment. Though the heritage townscapes are interrupted by inappropriate modern development, there are no significant empty plots that disrupt the historic views that need to be included in the THI.

Improvements to the Public Realm:

An area of High Street between Housman Square and New Road will be upgraded through the THI scheme. This is a long strip of 183 x 12 metres, or 2,196 sqm. To repair this section to a basic, non conservation areas standard would cost £210,450 including site clearance, trenching and tarmac. However, under the THI scheme this pedestrianised section of primary shopping frontages can be upgraded to more costly conservation standards by the laying of a central carriage way of granite setts with pavements either side of Yorkstone flags. Normally, at £587,450, this would be cost-prohibitive to most local planning authorities but with grant aid of 100% to fund the difference – i.e. £377,000 – the works can be carried out using local, skilled contractors working to a detailed specification and conservation-proof schedule of works.

5.2.2 Maintaining and managing the conservation area during the lifetime of the scheme

Article 4 Directions

An Article 4 (1) Direction has not been proposed for the town centre as there are no dwelling houses to which the removal of permitted development rights might apply. High Street and Worcester Road form a linear assortment of shops, restaurants, public houses, offices, cafes and banks, etc. either with vacant floors above or else flats or storage.

However, the Council has produced design guidance to instruct owners and agents on appropriate alterations or replacement features. The 2 documents below should ensure the preservation and enhancement of the conservation area:

- Maintain your Building
- Shopfronts and Advertisements Design Guide

Area of Special Control

This measure had been investigated so that stricter controls might be placed upon advertisements in the conservation area. After careful consideration, however, the decision has been made not to adopt this measure. It was felt that sufficient control was already in place by virtue of the conservation area status and the *Shopfronts and Advertisements Design Guide*. Areas of Special Control are more generally prevalent in National Parks and other significant rural areas such as North Yorkshire, Norfolk, Devon and Cornwall.

Discontinuance Notices

This measure might well be expedient where a particular advertisement is disfiguring either the conservation area or the setting of a listed building. We will try to bring about an improvement in the appearance of the conservation area through the removal of, for example, illuminated box signs and their replacement with more suitable signs. If we consider that any signage is out of keeping with the remaining original features of the shopfront surround then that may merit the serving of a Discontinuance Notice.

Other Enforcement Action

A Section 215 Notice and an Urgent Works Notice are being prepared, with guidance from English Heritage, for 22-24 High Street. This building is Grade 11 Listed and described as a priority plus (P+) project in the THI scheme - formerly it was on the THI Stage 1 Critical list.

Staff Resources

The Development Control and Strategic Planning Teams have responsibility for managing and maintaining the conservation area. The Conservation Officer and the 3 Officers of the Planning Enforcement Team will be responsible for addressing planning enforcement issues in the conservation area.

5.2.3 Community Activities

Many community activities were highlighted in the first-round bid and during the development phase many more activities have since been identified. The sum of £75,000 has been allocated for complementary initiatives and these will be carried out each and every year of the scheme. The responsibility for developing and delivering training, education and community projects will fall to: -

- The Project Officer (and other District and County Council officers)
- North East Worcestershire (NEW) College in partnership with SPAB
- The Historic Environment and Archaeology Service at Worcestershire County Council
- Community groups with an interest in the future of the high street

Key to the success of the THI scheme is that local people become involved in the various complementary initiatives running alongside the town centre revitalization. It is essential that community groups care about their heritage, and heritage maintenance matters, and that they understand the regenerative aims of the THI scheme. An informed and engaged public is far more likely to encourage the fostering of a renewed sense of civic pride.

As well as some of the local groups on the Steering Group many more community players will be needed to deliver the activities we have envisaged for the scheme. Help will be required from the Bromsgrove Photographic Society, town trail supporters and guides, volunteers for In Bloom, building preservation trusts, Earth Heritage Trust helpers and members of archaeological societies etc. There will be opportunities for the whole community to get involved particularly since the THI consultation events showed just how keen members of the public are to participate in activities that celebrate Bromsgrove's unique and special character. It seems that many are fascinated by their town's history and the look of the high street shops in old photographs (many of which can now be reinstated) - the Bromsgrove Rousler, published every December, is a much read journal.

The main complementary initiatives we have planned are listed below: -

- **Community Digs (*Dig Bromsgrove*) - £29,200**

A community dig is proposed for Mill Lane, an triangular area of land bounded by shops on 2 sides. The land is in private ownership and permission has been sought from the owners as well as the shopkeepers bordering the site. It is expected that a vacant shop reasonably close to the dig area might serve to advertise the archaeological activities, any findings discovered, plus other relevant information. In addition to the Mill Lane site another dig is proposed for Sanders Park in the area once occupied by the cotton mill/button factory (Buck House). The two digs will be timetabled in two consecutive phases – Mill Lane during Easter and Buck House in the summer 2013. It is anticipated that geophysics technology will be required at both sites. Another digging operation is currently under review in the vicinity of St. John's Church where traces of Anglo-Saxon artifacts may be sufficient to tempt the makers of Channel 4's Time Team.

- **Heritage in the Park Open Day - £1,500**

A major public event to present results of the excavations detailed above, an opportunity to engage the public in the investigations at Mill Lane and Buck House. The event is scheduled for the end of August 2013 in Sanders Park. Points of interest include: -

- Tours of the excavation led by staff and volunteers
- Historical re-enactors – especially the Ermine Street Guard but also medieval and Victorian themes
- Traditional rural crafts
- Hands-on medieval archery and swordsmanship
- Exhibition of finds
- Links – Avoncroft/Worcester Archive Source Project/Museum on the Move (van)/Worcester HER/etc
- Handling sessions and displays of artifacts from excavation with interpretation by archaeologists
- Mock excavation area
- Activities for people to take part in, including creating artworks based on objects seen or reconstructions of the archaeological site
- Balloons for children to take away with them to carry the ‘message’ into Bromsgrove and into homes
- Promotional leaflets for all visitors to take away from the digs. These will also be distributed by local libraries and museums and by tourist information centres. The leaflets will display generic information about the digs and exhibition as well as details of the Open Day itself
- Advertisements in Bromsgrove/Worcestershire papers and in *Together Bromsgrove*, *What’s On* (including website) and *Worcestershire Now*
- On BDC/WCC website
- Press releases

The Open Day will be co-ordinated with the District Council’s Events Team, primarily the Marketing/Promotions and Events Officer and the Arts Development and Special Events Officer.

- **Art-based project - £1,000**

It is hoped the medieval stocks and the 1840s Hallelujah gas lamp will be reinstated as part of the new public realm works. These will be used to inspire art work, drama and poetry leading to a publication, a performance and an exhibition in the public library

- **Oral History - £1,000**

We will work with older people to record their memories and stories of the town centre and how it has changed over time. This will be an inter-generational event whereby young people will be skilled up to record the oral histories of older people in the community.

- **Bromsgrove Town Centre Walks - £300**

We aim to work with Bromsgrove Society, the Housman Society, the Victorian Society and local community groups to create a trail of places identified as being of local interest or importance. The emphasis will be on places of significance to the community as well as obvious civic or religious buildings. Groups will research these places not only creating a leaflet but also giving guided walks to the general public. An additional element to this will be setting up a training scheme for local young people to become guides for the trail.

- **Heritage Interpretation Panels - £3,000**

One will be sited in the vicinity of the medieval stocks and Hallelujah gas lamp while the second is proposed for Housman Square able to give information on the community dig scheduled for Easter 2013

- **Bromsgrove Summer School – no cost**

The Project Officer is scheduled to give a talk at the Bromsgrove Summer School on 12 July 2012 on *the future of Bromsgrove high street*. The programme of lectures runs for 3 days and is housed in school buildings provided by Bromsgrove School. The organizers of the event are trustees of Bromsgrove Society. Another talk will be given by archaeologists working on Bromsgrove's proposed community digs

- **Heritage Open Days – no cost**

The Project Officer has registered Bromsgrove District Council for Heritage Open Days 6 – 9 September 2012. There will be buildings open to the public, including free entry to local National Trust properties and the Avoncroft Museum as well as townscape trails and events and activities aimed at bringing local history and culture to life.

- **Architectural Competition – prizes to be awarded by the Bromsgrove Society (cost to scheme £500)**

Architectural students will be invited to enter a competition aimed at looking at appropriate ways of screening the rear of high street properties facing Market Street which marks the south west boundary of the Bromsgrove Town Conservation Area and is a main thoroughfare through the town. Creative skills in design will be called for as well as an understanding of the dimensions and context of the buildings and the practicalities of the project. Eligibility to this competition will embrace students who are currently training at a University. A coloured sketch of the proposed design will give the judging panel the best possible impression of what the finished work will look like. The Competition will be judged by a panel of Judges appointed by the Bromsgrove Society and the 1st Prize will be £1,500

- **Bromsgrove Now and Then – Photography Competition 2012 - £500**

In order to enter competitors will submit 1 to 3 photographs that they think reflect unique and interesting perspectives on heritage in Bromsgrove town centre. A specific definition of heritage will not be prescribed but in 5 years time a second competition will be held to highlight just how the High Street has changed.

The competition opening date will be in September 2012 and the winning images in each category will be decided by the Steering Group and Bromsgrove Photographic Society. The winners and a selection of shortlisted entries will make up an exhibition to be held at a venue in Bromsgrove town centre in the autumn 2012. There will be a first prize and two runners up prizes in three age categories, Adults 21 +, Youth 13 - 20 years, Junior 7- 12.

There will also be a number of other activities as identified by the Project Officer during his day-to-day management of the scheme, for instance: -

THI Newsletters

A dedicated, well-written and illustrated newsletter will be issued every spring and autumn with the first one scheduled for September 2012 when the scheme is launched. The second issue will go out in the spring 2013. THI newsletters will have information on: -

- Opportunities to influence and be involved in the THI scheme
- Progress of the THI scheme
- Before and after photos, rectified photography
- Memories or comments on particular buildings or areas
- Individual histories of buildings
- News stories
- Project documents
- Architects' drawings
- Investment information
- Entertainment and leisure
- E-newsletter sign up
- Events information
- Questionnaires
- Consultation feedback
- Contact details

THI newsletters will be hand-delivered to local shopkeepers and small businesses within the THI boundary as well as being freely available at sundry events and local centres such as the Artrix art venue, St John's Church and school and district libraries. The newsletter may even be distributed at the same time as the Bromsgrove Society newsletter as an enclosure.

Press Releases

There will be press releases every month during the course of the THI and many exciting newsworthy events have already taken place, for example, the Project Officer tweeted on 8 March 2012 as part of the nationwide Retweet for Towns Day.

Upgrading the THI Website – *Building a Better Bromsgrove*

The amount of change which is proposed over the next 2-3 years in Bromsgrove means that an effective way of getting accurate information to and from the public is crucial. The potential for a successful THI scheme is another imperative to increase awareness and allow for the easy and effective on-line engagement with interested parties.

The Regeneration Programme therefore requires a greater web presence in the form of a dedicated website or set of web pages. The website will be branded differently and sit outside the Council's current website, but linked to it.

The site will serve to market Bromsgrove as a prime location for inward investment and act as hub of information for the public and all other stakeholders. The Bromsgrove THI will be a major part of the website and will play its part in: -

- * Attracting property owners, retailers and the public to engage in the Bromsgrove THI
- * Attracting new retailers to Bromsgrove
- * Attracting shoppers to Bromsgrove
- * Acting as a medium for consultation with Bromsgrove Residents
- * Providing up-to-date and accurate information for all stakeholders

The new website, due to be launched in May 2012, though heavily supported by the District Council will nonetheless have its own identity. We expect to include: -

- Opportunities to influence and be involved in the THI scheme
- Progress of the THI scheme
- Interactive maps and images for every building in the THI scheme
- Before and after photos, rectified photography, facility to upload pictures (*Flickr*)
- Memories or comments on particular buildings or areas
- Individual histories of buildings
- News stories
- Blogs and links to social networking sites such as Facebook and Twitter
- You Tube videos
- Project documents
- architects' drawings
- 3-D visuals
- Investment information
- Entertainment and leisure
- Download (PDF) facilities links to partner websites
- Sponsorship banners
- Easy use content management system for non-IT staff

- E-newsletter sign up
- Events information
- Questionnaires
- Consultation feedback
- contact us facility (e-mail enquiries and questions)

Some Primary Objectives

You Tube – we will seek to the plan, design, produce, distribute and evaluate 3 pieces of THI-based creative, factual, digital content suitable for online broadcast.

Interviews in the High Street - we will speak to as many people as possible about Bromsgrove town centre as part of our commitment to consultation - gathering 'words' 'descriptions', 'perceptions' and 'ideas' about the town. By conducting street interviews on different days, and with different ages and backgrounds, we expect to find a useful way to engage with people who live, work and shop in Bromsgrove.

Interviews, as planned, will form an educational project to demonstrate the effective engagement of key, hard-to-reach 16-19 year-olds - as digital media consumers such an age group will be more ready to engage with a format they have both a familiarity and understanding with. It is expected that Bromsgrove School/NEW College students will interview passers-by using their own equipment and then the THI Project Officer will receive their edited films.

Output – our aim will be three 2/3 minute films based on Bromsgrove THI issues, released on a staggered schedule. Filmed at locations on High Street and Worcester Road these short films will include historical information as well as interviews with young people and various other audiences. The videos will be embedded into a redesigned heritage page (*Building a Better Bromsgrove*) but originated from a THI/HLF/BDC/WCC branded *You Tube* channel. The initiative will be supported with press releases and a magazine piece.

Rectified Photography

There exists a great selection of b/w photos from 1943, taken at an oblique angle on High Street and Worcester Road and we have plans to *straighten* these up, or rectify them, make them linear and then colour them in. The images produced will be fitted onto a scaled shopfront elevation. A rapid EDM survey of the street elevations will be required to create an accurate basis for rectifying the photographs.

The process will make selling the idea of the THI grant scheme more acceptable to wavering shopkeepers. There may also be an application for the technique in the development of an *Unlocking Bromsgrove's Past* project such as Stourport has achieved after research carried out by their local civic society.

New Business Start-up Programme

A Business Start-up Programme, which is an initiative consisting of business training and grants, has assisted a number of independent stores that have opened in the High Street. Bromsgrove District Council has a proactive policy aimed at filling shops

when they become available. The quarterly 'Industrial and Commercial Property Guide' is produced and forwarded following any enquiry for commercial property. Likely prospects are also canvassed when a premise is known to be closing.

Building Preservation Trusts (BPTs)

Worcestershire Building Preservation Trust has been wound up and a proportion of its trustees have joined the West Midlands Historic Buildings Trust. It is hoped that either this Trust or a newly-constituted one dedicated to Bromsgrove District will take on a building, or buildings, in the High Street should any become available. While works are on site there will be a unique opportunity to involve members of the public, perhaps timetabled to link with the Heritage Open Days programme held annually in September as discussed above. In addition, the trustees of the campaign to re-open Bromsgrove Museum are in talks with the Charity Commission and the Architectural Heritage Fund to consider setting themselves up as a single-trust BPT able to draw down grants and low interest loans.

5.2.4 Training Activities

Training activities are a key component of the THI scheme and we have established a busy programme of traditional building skills courses catering for a wide cross-section of the community. Courses will be tailored specifically to the needs of homeowners, contractors and sub-contractors and 16 – 19 year old students, though others, architects/surveyors etc. will be encouraged to attend. Our aim is to create a traditional building skills base in Bromsgrove which might act as an exemplar to enliven and stimulate debate and practical support to the local heritage industry.

The training courses will be held either at North East Worcestershire (NEW) College or Avoncroft Museum and feature: -

- masterclasses in brickwork, plastering and joinery
- general maintenance for historic buildings
- seminars on the need of older buildings to breathe
- up-skilling of contractors, sub-contractors and college trainers
- a reappraisal of apprenticeships and the entry of 16 – 19 year olds into the heritage industry

Where required, specialists procured by the Society for the Protection of Ancient Buildings (SPAB) will be bought in to run courses.

A Contractor Survey has been undertaken to determine what experience contractors have of working on historic properties:

- if they felt they lacked any skills in terms of heritage construction/conservation techniques
- if they would like any training to either improve or learn new skills
- what length of training was most preferable.

The outcome of this survey has helped shape the type of training we are likely to offer.

Homeowners are generally aware that they lack the appropriate skills to properly care for their historic buildings so with this in mind, in addition to the dedicated traditional building skills courses, the Conservation Officer has written and published *Maintain your Building* (appendix 19), a guide to repairing and safeguarding the historic environment.

Construction Training

NEW College – 16 to 19 year olds (£3,500)

- The Society for the Protection of Ancient Buildings (SPAB) has been approached to run tailor-made courses for NEW College. These courses will cover a number of introductory conservation topics but will also include practical elements such as lime mortar specification and timber sash window repair.
- SPAB have much experience in running courses for townscape heritage initiative schemes and will be procuring local craftspeople to deliver the courses. At NEW College, which caters for 16 – 19 year olds, there are currently three construction courses available to students - bricklaying, plastering and wood occupations/carpentry – and the aim is to deliver masterclasses in all 3 of these. The specific craft skills most likely required on projects within the THI area include bricklayers, carpenters, decorators, lead workers, roofers (in both slate and tile), stonemasons and specialists in lime. In consultation with the Assistant Principal Learner Experience at NEW College it is envisaged that masterclasses will take place over three consecutive Fridays during the winter term 2013.
- The Council's Conservation Officer and the THI Project Officer will also provide a series of half-day seminars on building repair, conservation techniques, urban design and architectural history.

NEW College - Continuing Professional Development (CPD) - £4,000

- The THI aims to provide places to local contractors, sub-contractors and other practitioners supporting them to up-skill in relevant areas. The Contractor Survey has highlighted the need for courses aimed at developing *new* traditional buildings skills amongst the current construction work force.
- Heritage specialists procured by SPAB will be contracted to run these courses, using the facilities at NEW College. Courses will take place on weekdays during the summer months, 2013.

Homeowner Training – Avoncroft Museum - £5,500

These courses will be hosted by Avoncroft Museum. The THI aims to provide places to domestic homeowners to increase their awareness of the need for skilled craftspeople to work on historic buildings. We have sought to provide education

regarding the need for sympathetic conservation and repair. The homeowners' introduction to the repair of old houses will highlight the need for regular maintenance and bring practical and straightforward advice on maintenance and repairs to everyone charged with maintaining an historic property. SPAB have been approached to run this course too and will again procure local craftspeople. In consultation with Simon Carter, Director of Avoncroft Museum, it is envisaged that courses will take place over three consecutive Saturdays during the late spring 2013. As above the Conservation Officer and the THI Project Officer will provide half day seminars on heritage themes.

We aim to keep the training programme under constant review and seek ways to continue the courses in traditional building skills beyond the life of the THI scheme in 2017. We will keep an open mind on the type of courses on offer and investigate new skills training regimes in consultation with our partners at NEW College, Avoncroft Museum and the SPAB.

5.2.5 Benefits for People

Our broad objective is to enjoin the local community in improving the quality of life and sense of well-being of everyone in Bromsgrove and the wider district. We wish to empower key individuals and groups to share in the responsibility of maintaining and developing the rich potential of Bromsgrove. During the 6-week public consultation period we were encouraged by the determination of many residents to bring back *good old Bromsgrove*, a thriving market town they were once proud to boast of. We will seek to help them achieve their aspirations by: -

- Making the high street attractive again by reinstating traditional shopfronts onto pre-WW1 buildings of townscape merit
- Encouraging the establishment of niche retailers in the town centre
- Repaving the high street in Yorkstone flags and granite setts and improving access for people with disabilities
- Revamping the street market and introducing a new events space in the town centre
- Bringing vacant upper floors back into profitable use for residential and commercial purposes thus increasing activity and shopping etc. on the high street
- Encouraging cafes and bars to spill out onto the street and create a metropolitan or continental café-like culture
- Raising the profile of architecture, heritage and culture of the town through new town trails, street activities and the attention received by the reinstatement of the medieval stocks and Hallelujah gas lamp
- Encouraging shopkeepers and small businesses to become members of the THI Partnership Steering Group where they will have a forum to debate and advise on matters of commerce and the vitality of the town centre

A measure of the outcomes we are likely to achieve include: -

- 16 – 19 year olds on construction courses at NEW College will have received unique masterclass training in traditional building skills and, as a result,

discovered the real value of our historic building stock. They will have also understood the wider options available to them in the heritage construction industry

- NEW College Construction Staff will have acquired new skills in building construction, an expertise that will improve the overall quality of training and widen their options as building professionals
- Contractors and sub-contractors will learn how to adapt their working methods to enable them to win tenders on historic building projects
- Development Control Officers at the District Council will become increasingly familiar with the technical specifications and detailed drawings associated with THI grant-aided projects.
- Environmental sustainability will be foremost when checking specifications and schedules of work for THI grant-aided projects, a debate will be instigated in to just how far the needs of historic integrity should override the requirement for Part L of the Building Regulations

5.2.6 The Environmental Effect

The THI scheme will have the following positive effects on the environment:

- Improvements to the public realm in the High Street, including improving the quality of the paving in the pedestrianised area, improving the quality of shop fronts and reducing street clutter
- Involvement of the local community in the Town Centre public realm improvements
- Implementation of a regular maintenance programme for the High Street
- Re-landscaping/culverting of the Brook and improving the environmental quality of the surrounding area - restoring the natural habitat of the Brook as much as possible in order to enhance biodiversity

Of the 81 eligible projects 11 are likely to receive grants over £50,000 (table 4) - 6 of these are priority plus projects, 4 are priority and 1 is in reserve. 9 properties have a re-use element while the remaining 2 require modest repair and reinstatement works, including shopfronts.

We have read and understood HLF guidance on *Planning Greener Heritage Projects* and are aware of the need to: -

- recommend natural insulation materials for stall risers where traditional shopfronts are reinstated
- advise on draught proofing, weather stripping and secondary glazing for windows and doors
- specify lime on all building projects where modern cements are now generally used
- pay particular attention to reducing and recycling waste, in particular during the public realm works when the current brick pavoids will become redundant
- source eco-suppliers, especially for oil-based paints

- insist on timber that is a well-seasoned, good quality joinery softwood from a well managed source approved by the Forestry Commission, for example, larch, western red cedar, Douglas fir or British Columbian pine

Our A5 booklet on *specification requirements for grant-aided work* (appendix 10) fully details the green agenda we propose for THI grant-aided projects. Additionally, we will guide applicants and their agents to the English Heritage site *Climate Change and your Home*.

5.3 Scheme delivery and costs

Table 4: showing which projects are likely to receive grants over £50,000

No	Occupancy	Works	Cost (£)
22-24 HS (P+)	Vacant 1, 2 & 3 floors	Re-use inc modest repair & reinstatement	314,000
2-4 HS (P+)	Occupied	Modest repair & reinstatement	114,200
46 HS (P+)	Vacant 1 & 2 floors	Re-use inc modest repair & reinstatement	192,000
134-136 HS (P+)	2 nd floor vacant	Re-use inc modest repair & reinstatement	91,000
89-91 HS (P)	Vacant 1 & 2 floors	Re-use inc modest repair & reinstatement	85,600
67 HS (P+)	2 nd floor refurbishing	Re-use inc modest repair & reinstatement	91,000
33-35 HS (P+)	Vacant 1 & 2 floors	Re-use inc modest repair & reinstatement	131,000
3-5 HS (P)	Occupied	Modest repair & reinstatement	93,200
15 HS (R)	Vacant 2 & 3 floors	Re-use inc modest repair & reinstatement	97,000
Tudor House, New Street (P)	Part vacant	Re-use inc modest repair & reinstatement	112,000
46 WR (P)	Vacant 1 & 2 floors	Re-use inc modest repair & reinstatement	101,500

P+ = priority plus P = priority R = reserve

5.3.1 Delivering the action plan.

THI target programme:

The key targets are:

1. to implement projects which require the full public sector Common Fund and result in leverage of private sector finance at the levels identified in Table 5 within the 3/5 year life of the THI scheme
2. to ensure that a significant percentage of the Priority Plus projects are completed within this timescale, with particular efforts to ensure that approvals are given and implementation commences within 2 years
3. to encourage owners of Priority Plus and Priority projects to apply for grant aid, leaving some opportunities for Reserve Projects, to ensure that all of the Common Fund identified for capital building projects is *approved* within three years

Approval of projects are expected to be spread throughout the first 3 years from receipt of the HLF contract to proceed, with implementation and expenditure from the Common Fund expected to spread over five years.

The targets for **approvals** should aim at:

- a minimum of 15% of the Common Fund during year 1
- a minimum of 50% of the Common Fund by the end of year 2
- 100% of the Common Fund by the end of year 3

The table below sets out an indicative budget and programme for **approvals** for the first 3 years of the THI.

The targets for **completion** should aim at:

- a minimum of 20% expenditure of the Common Fund at the end of year 2
- a minimum of 40% expenditure of the Common Fund at the end of year 3
- a minimum of 70% expenditure of the Common Fund at the end of year 4
- 100% expenditure of the Common Fund by the end of year 5

The outline programme presented in the table below identifies annual expenditure based on approvals:

- Potential properties given approval in year 1
- Annual expenditure on Education & Training (see section 5.2 for detailed breakdown)
- Annual expenditure on Staffing & Publicity (see section 2.2 for detailed breakdown)
- identifies the minimum targets for each year

Table 5: Bromsgrove THI Budget for Grant Approvals & Common Fund expenditure

Grant Rate end of year 5	TOTAL	607,000	850,000	415,500	106,750	2,032,000	2,032,000
		Building Repairs	Replace Archit features	Vacant floor space	Pub Realm Comp Staff etc	Total	Cumulative Total
Year 1 Properties							
46,High Street		16,000	75,000	101,000		192,000	
2-4 High Street		9,200	45,000	60,000		114,200	
46 Worcester Road		17,000	31,000	53,500		101,500	
High Street Public Realm Complementary Initiatives					200,000	200,000	
Staffing & Publicity					15,000	15,000	
					45,000	45,000	
Sub Total to end year 1		42,200	151,000	214,500	260,000	667,700	667,700
<i>Minimum target for year 1 approvals (15%)</i>		<i>62,500</i>	<i>79,500</i>	<i>61,500</i>	<i>260,000</i>	<i>463,500</i>	
Year 2 Properties							
Estimated Building Repair approvals in Year 2 (35%)		146,000				146,000	
Estimated Heritage Detail approvals in Year 2 (35%)			185,500			185,500	
Estimated Vacant Floorspace approvals in Year 2 (35%)				143,500		143,500	
High Street Public Realm Complementary Initiatives					200,000	200,000	
Staffing & Publicity					15,000	15,000	
					45,000	45,000	
Sub Total to end year 2		188,200	336,500	358,000	520,000	1,402,700	1,402,700
<i>Minimum target for approvals to end of yr2 (50%)</i>		<i>208,500</i>	<i>265,000</i>	<i>205,000</i>	<i>337,500</i>	<i>1,016,000</i>	
Year 3 Properties							
Estimated Building Repair approvals in Year 3 (<50%)		228,800				228,800	
Estimated Heritage Detail approvals in Year 3 (<50%)			193,500			193,500	
Estimated Vacant Floorspace approvals in Year 3 (<50%)				52,000		52,000	
Complementary Initiatives					10,000	10,000	
Staffing & Publicity					45,000	45,000	
Sub Total to end of year 3		417,000	530,000	410,000	575,000	1,932,000	1,932,000
<i>Minimum target for approvals to end of yr 3 (100%)</i>		<i>417,000</i>	<i>530,000</i>	<i>410,000</i>	<i>575,000</i>	<i>1,932,000</i>	
Complementary Initiatives + Staffing, etc. for Year 4 and 5					10,000	10,000	
					90,000	100,000	

Year 1 Potential Building Projects:

Potential Year 1 projects include both Priority Plus projects and buildings where there is a likelihood of early action as the owner has expressed particular interest in immediate implementation involving THI funding. The following properties have been selected from discussions with the owners and the local experience of the THI Project Officer, Development Control Officers and the Conservation Officer and their confidence that the projects will start during year 1:

- Vacant corner site - 46 High Street
- Motorworld - 2-4 High Street
- M &M's Hair Shack - 46 Worcester Road

There is confidence that these buildings will come forward in Year 1 though an accurate summary of the likely Common Fund expenditure on all the buildings to be approved during Year 1 is not currently feasible. If any of these projects do not proceed during year 1, alternative properties are certain to be considered as there was a backlog of unsatisfied expressions of interest. Accurate estimates of the projects likely to be given approval or likely to start is currently impossible. A Year 2 programme will be prepared at the end of Year 1 with the Annual Report when there should be further information on expected progress. Potential Year 1 projects and their likely costs are shown below, but the primary aim will be to achieve the target for total approvals listed in table 5 for Year 1.

The following listing provides an indication of the potential approval of expenditure on likely projects – including contingencies, etc. but not VAT, and the HLF contribution if the buildings listed above are approved in Year 1: -

46 High Street

Eligible project costs for repairs to structure and fabric, replacement of architectural heritage detail and vacant floor space – approximately £192,000:

	eligible costs	% grant	potential grant	HLF contribution
Structure & Fabric	£ 16,000	60%	£ 9,600	£ 9,600
Heritage Detail	£ 75,000	85%	£ 63,750	£ 63,750
Vacant Floor Space	£101,000	ave 55%	£ 55,550	£ 55,550

Grant requirement calculated from figures above: £ 128,900

2-4 High Street

Eligible project costs for repairs to structure and fabric, replacement of heritage detail and vacant floor space – approximately £114,200:

	eligible costs	% grant	potential grant	HLF contribution
Structure & Fabric	£ 9,200	60%	£ 5,520	£ 5,520
Heritage Detail	£ 45,000	85%	£ 38,250	£ 38,250
Vacant Floor Space	£ 60,000	ave 55%	£ 33,000	£ 33,000

Grant requirement calculated from figures above: £ 76,770

46 Worcester Road

Eligible project costs for repairs to structure and fabric, replacement of heritage detail and vacant floor space – approximately £225,500:

	eligible costs	% grant	potential grant	HLF contribution
Structure & Fabric	£ 17,000	60%	£ 10,200	£ 10,200
Heritage Detail	£ 31,000	85%	£ 26,350	£ 26,350
Vacant Floor Space	£ 53,500	ave 55%	£ 29,425	£ 29,425

Grant requirement calculated from figures above: £ 65,975

With approval of the sum for these potential year 1 projects of over £270,000 from the Common Fund, the total will be above the year 1 target of 15% approvals.

It must be emphasised that the above list and costings indicates potential Year 1 projects and that there will also be variations to the individual costings of the listed projects when detailed condition appraisals for each building are carried out. At this stage this is only an indicative list and cannot be considered a detailed *programme*. Once the THI starts, the THI Project Officer will define a potential programme of likely properties after the public meetings to launch the initiative.

Actual expenditure on these projects is even more difficult to determine. This will depend on the actions and timetable of individual owners. We are certain that at least one project will be underway and some grant will have been paid towards capital expenditure on construction.

Year 1 Public Realm expenditure:

Assume actual expenditure during year 1 will be £200,000 – 50% of the total £400,000 for the Public Realm.

(see section 3.7 for breakdown and justification of costs)

Year 1 Education and Training expenditure:

Assume actual expenditure during year one will be £15,000, with another £15,000 during year 2, £10,000 during year 3, and the final £10,000 during years 4 and 5 – a total of **£50,000**
(see section 5.2 for breakdown and justification of costs)

Year 1 Staffing and Publicity:

Staffing costs over the five years will total £200,000 and £25,000 to be available over the 5 years for other overheads including publicity, exhibitions and publications. This is averaged out at £45,000 per year.
(see breakdown and explanation in section 2.2)

5.3.2 Risk Management

Risk	How likely is the event ?	How serious would the effect be?	Consequence	Action you will take to help prevent the risk	Who is responsible for dealing with the risk?
THI Project Officer leaves job early	Low	Medium	Delivery of the scheme might get delayed. Community engagement suffers. Knowledge drain	Keep Project Team up-to-date with progress. Maintain records so that project not over-reliant on one individual. Start recruitment process asap.	Lead Partner
External funding not secured or reduced	Low	High	Scheme unable to proceed or greatly reduced in scope	Retain close relationship with County Council match funder	Lead Partner
Difficulty in persuading owners to take up grants	Medium	High	Under-spend. Buildings left unrepaired. Impact of scheme reduced	Continuous engagement with owners of eligible properties – site visits, promotional events. Increase level of grant as last option	Lead Partner, Project Officer
Lack of community engagement	Medium	High	Loss of support and lack of interest in grants	Base the project officer within the heart of the community and organise a series of consultation events & other community activities, making sure that the community is represented in the THI Partnership Steering Group	Lead Partner, Partnership Steering Group
Lack of local conservation	Medium	High	Sub-standard work which does	List of able and experienced	Lead Partner,

skills			not meet conservation standards. Reduced impact on townscape. Possible breach of contract	contractors drawn up. Programme of skills training for local companies. Detailed specifications of works approved by District Council. Regular monitoring and management of work - by architect and by applicants. Payments stopped for poor work	Project Officer, Partnership Steering Group
Lead partner approves poor quality developments in conservation area that detract from THI scheme	Low	High	Reduced impact of the THI scheme. Conservation area not enhanced	Ensure development control is aware of scheme aims. Inform council members and officers of the aims of scheme. Education/skills training for development control team. Good contacts with local press and public groups to inform public opinion	Lead Partner, Project Officer
Unexpected additional works revealed during the delivery phase	High	High	Results in extra costs & possibly to fewer projects being tackled, reduced impact of scheme	Produce detailed surveys of critical projects and those eligible projects where the risk is greatest during the development phase to reduce cost uncertainty. Try to gain internal access to estimate costs of projects in need of structural repairs.	Lead Partner, Project Officer
Adverse change in property market	Medium	High	Businesses and property owners see no advantage in applying for a grant and investing their own money	Difficult to address, but generally important to develop a good understanding of the local property market and a clear vision for the area to help businesses/owners understand what the scheme is about and how they can benefit	Lead Partner, Project Officer
THI-funded public realm brief not sensitively adhered to	Medium	Medium	Regeneration strategy, vision for the area and implementation of conservation	Joint working with county highways department, input from relevant county/district departments into	Lead partner

by Highways Authority			area management plan put at risk	conservation area management plan, shared vision	
Lack of staff resources	Medium	High	Unable to deliver scheme to its full potential	Reaffirm high level commitment to the scheme from all members of the Partnership Steering Group and appropriate budgetary provision. Obtain commitment from all key council departments/ teams that staff resources will be made available.	Lead Partner, Project Team

5.3.3 The eligible costs and the common fund

The total expected cost to complete all potential eligible works to the selected buildings in the THI area could total almost £ 3.9 million. The expected funds available to carry out these works including both Common Fund and private owners contribution should total over £2.0 million. After deducting an expected £ 675,000 required for works to the public realm, complementary initiatives and staff training costs (see section 5.3.1), this could enable a local take-up of grants for property improvements of £1,357,000 - about 32% of the works to the eligible properties.

An explanation of these totals is presented below following the valuations, building condition and cost surveys of all eligible properties within the proposed THI boundary:

Total estimated approx cost for all eligible properties:	£ 3,858,800
Assume expenditure on 32% of properties:	£ 1,234,000
Add total average (at 2.5yrs) inflation over 5 yrs of 10%:	<u>£ 123,000</u>
Likely cost of expected building works	£ 1,357,000
Add VAT costs – as all properties are in commercial use, VAT is reclaimable	<u>£ 0</u>
Approx likely total expenditure on properties during THI period	£ 1,357,000
<hr/>	
Assume on average over 30% of costs are funded by owners	<u>£ 432,000</u>
Remaining funds available for properties from THI Common Fund	£ 925,000

Expenditure on Public Realm	£ 400,000
Add overheads, staffing and publicity costs over 5 yr	£ 225,000
Add Complementary Initiatives + education and training costs over 5 years	<u>£ 50,000</u>
Total of Common Fund required for the THI over 5 years:	£ 1,600,000

⁼
This assumes that the total expenditure over 5 years on:

• THI properties (Common Fund Grants+ owners contribution) will be:	£1,357,000
• + public realm	£ 400,000
• + complementary initiatives and staffing, etc	<u>£ 275,000</u>

Total THI expenditure (THI Common Fund + owners contribution) = approx
£2,032,000

- The assumption that over 30% of costs will be funded by owners is based on the findings for proposed grant rates set out in section 3.6 and on tables 6 and 7 below. Grant rates have been derived from valuations and set at the minimum amount needed to achieve results.
- The condition and cost surveys include sums built into project costs for each property that cover fees, preliminaries and contingencies.
- As all of the selected THI properties are in commercial ownership they should all be able to reclaim VAT, and therefore additional sums are not included in this appraisal to cover this cost.
- The Common Fund contribution to public realm works and gap site developments is limited to a maximum of 25%. Staff costs and overheads are less than 15% of the common fund, with complementary initiatives less than 5%.
- The percentage of properties that will be able to be funded by the Common Fund grants will be reduced by inflation over the 5 year period, so the assumption is presented above that over the 5 years we can expect budget costs to increase by inflation of 10%.

Expenditure at this level should have a significant impact on the appearance of the heritage properties in the Bromsgrove town centre THI area, will create new floor space and assist with local economic regeneration. In combination with other regeneration initiatives, this will improve the image of the centre, assist local market demand from surrounding areas and support the sustainability of the wider town centre.

The following **tables 6 and 7** set out the THI financial arrangements and allocations with a presentation of funding by agency, and as the THI Action Plan summary:

Table 6: Bromsgrove THI Financial Arrangements/Allocations (£000s/rounded)

Eligible THI Works	HLF	Worcs CC	Broms DC	Total THI common fund	THI grant %	private sector	Total eligible cost	% common fund allocation between category	HLF grant % of total common fund	HLF grant % of total eligible cost
A Building repairs to structure and fabric	250			250	60%	167	417	16%	100%	60%
B Restoring architectural features	450			450	85%	80	530	28%	100%	85%
C Bringing vacant historic floor space back into use	225			225	ave 55%	185	410	14%	100%	55%
D Gap Sites				0			0			
E Public Realm		400		400	100%		400	25%	0%	0%
F Complementary initiatives	50			50	100%		50	3%	100%	100%
G Staffing/ Publicity	225			225	100%		225	14%	100%	100%
Total	1200	400		1600		432	2032	100%	75%	59%

Table 6 showing financial arrangements identifies the breakdown of potential expenditure and grant availability by category of works and funding organisation. The % of these totals provided by the HLF THI funds is also presented. The breakdown between agency and types of work is indicative. **Table 7** shows a breakdown of the same figures in the format requested by the HLF as the THI Action Plan summary.

Table 7: Bromsgrove town centre THI Action Plan summary

A. Category of work	B. Total Eligible costs	C. THI Common Fund	D Grant Rates	E. HLF contribution to THI grant	E. % Common Fund allocation between category
No Critical Project listed					
PRIORITY+ Projects totals	<i>To be completed</i>				
<i>PRIORITY + projects included in totals below:</i>					
Repairs to buildings	<i>417,000</i>	<i>250,000</i>	<i>60%</i>	<i>250,000</i>	<i>16%</i>
Restoring architectural features	<i>530,000</i>	<i>450,000</i>	<i>85%</i>	<i>450,000</i>	<i>28%</i>
Bringing vacant historic floor space back into use	<i>410,000</i>	<i>225,000</i>	<i>55% average</i>	<i>225,000</i>	<i>14%</i>
New-buildings for gap-sites	<i>0</i>	<i>0</i>	<i>-</i>	<i>-</i>	<i>-</i>
Public realm works	<i>400,000</i>	<i>400,000</i>	<i>100%</i>	<i>0</i>	<i>25%</i>
Complementary initiatives	<i>50,000</i>	<i>50,000</i>	<i>100%</i>	<i>50,000</i>	<i>3%</i>
Staff costs and overheads	<i>225,000</i>	<i>225,000</i>	<i>100%</i>	<i>225,000</i>	<i>14%</i>
TOTAL	<i>2,450,000</i>	<i>1,900,000</i>		<i>950,000</i>	<i>100%</i>

Most of the proposed THI selected buildings are shops. Of the total 81 properties, 67 are shops (usually with room for storage or offices above and a few with accommodation), 5 are offices, 3 are public houses, 4 are restaurants, 1 is a club and there is 1 Post Office. It is expected that about 32% (see Section 5.3.3) of the eligible works in the area will be improved with grant aid.

As there is no certainty about the proportions of different types of properties that will apply for assistance, it is only possible at this stage to assume an average percentage as a basis for monitoring. Therefore for guidance only, it can be assumed that:

- 26 properties are expected to be improved during the THI
- including 22 shops and traditional shopfronts
- 1 or 2 offices
- and 2 or 3 public houses/restaurants/clubs

5.3.4 Partnership funding for the scheme

The proposed Common Fund - the total public sources of finance, has been based on the following totals being available over the 5 year construction period without annual constraints on expenditure:

- * £1,200,000 available from the HLF
- * £400,000 available from Worcestershire County Council

The resulting Common Fund total will be £1,600,000

The funding provided by Worcestershire County Council will be used solely for the Public Realm works – see section 3.7. This funding is expected to be completely used during years 1 and 2.

All other expenditure will be funded by the HLF THI grant. Drawdown of the total is expected to occur over the 5 years of the project approval and implementation stages. See below for an indicative drawdown:

Table 8 below identifies the likely fund scenario for the next 5 years:

Anticipated Funding Expenditure

Funding Source	2012/13	2013/14	2014/15	2015/16	2016/17	TOTAL	%
Heritage Lottery Fund	80,000	240,000	320,000	360,000	200,000	1,200,000	75.0

Worcester County Council	200,000	200,000				400,000	25.0
Total Common Fund	150,000	350,000	500,000	500,000	400,000	1,600,000	100.0

Evidence to demonstrate the availability of the matching funds from Worcestershire County Council, the funding partner, and the certainty of year 1 funding is included in appendix 20. See Sections 3.7 and 5.2.1 and table 6 to identify how the partnership funding is allocated according to the project or type of work.

6.1 Exit Strategy and Success Measures

6.1 What is our Exit Strategy?

When THI scheme completes in 2017 it is expected that the Partnership Steering Group will continue to meet and further the goals and aims established over the preceding 6 years. There will be much discussion at that time on what means there are to ensure that the good works achieved by the THI continue into the future. From the perspective in 2012 we can forecast that the following measures should be observed: -

- Ensure that the *Conservation Area Management Plan*, the *Shopfronts and Advertisements Design Guide* SPG and the *Maintain your Building* guidance act upon development control to regulate quality and enhance the planning regime. The use of Discontinuance and Amenity notices should be carefully considered
- Seek statutory powers from the Conservation Officer and Planning Enforcement Officers where breaches have been identified
- Explore the potential for a further grant-aided scheme to further the work of the THI
- Remain in close contact with specialist builders, architects and surveyors through various fora to ensure that new-found traditional building skills do not dissipate. Pay particular attention to NEW College and Avoncroft Museum, always investigating new training opportunities and the continuance of extant courses
- Seek to share the THI programme of events and activities with the dedicated District Council Events Team so that long before the scheme has ended the 2 programmes have naturally coalesced
- Maintain contact with the shopkeepers and small businesses and continue to offer them conservation advice. Always seek to include landlords and tenants when seminars, workshops and other heritage-themed events are advertised

Implementation in the THI area

The timetable of repairs and reinstatement works and the bringing back into profitable use of vacant, historic upper floors will especially succeed where owners and tenants can: -

- Appreciate the viability of reinstating missing architectural features, such as shopfronts
- Understand the benefits of re-using vacant floorspace which may not be seen as viable unless proper advice from experienced agents and surveyors has been given
- Fund their percentage of the costs.

The THI scheme will not succeed in its aims unless there is high priority private sector investment. Property owners need to be interested in the future of the high street and in the economic prosperity of the town as a whole. When the scheme is launched in September 2012 there will be a further, more intensive round of individual consultation with landlords and tenants. It would seem that there needs to be continual assurances from the District Council that the vision in place for the town centre, as identified in the Area Action Plan as well as the THI and public realm proposals, is a real objective and not the product of some protracted talking shop. We are fortunate that some good works have already taken place around the town centre, for example: -

- new *state of the art* public conveniences at the bus station
- the reinstatement of a traditional shopfront at 65 High Street under the outgoing frontage Improvement Scheme (appendix 14)
- the phased commencement of public realm works using section 106 monies from Sainsbury's and ASDA (due to start in 2014)

6.2 How will we measure and evaluate the success of our scheme

The THI Project Officer will have overall responsibility for drafting the evaluation report and questionnaire. These will be written up with the complete agreement of the Strategic Planning Manager, Project Team, Partnership Steering Group, tenants and landlords, contractors and sub-contractors, architects and surveyors and community volunteers on the various outreach events.

We have been amassing data and statistics since before the Bromsgrove Town Centre Draft Area Action Plan in 2011 and all this accumulated information will be fed, where appropriate, into our THI evaluation. As of April 2012 our evidence includes: -

- A full survey of the condition and value of all THI-eligible buildings on the high street
- Brief minutes of meetings between the Project Officer and the owners and tenants of grant-eligible properties
- Attendance at National Maintenance Week (November 2011)

- A photographic survey of all 81 THI–eligible properties on the high street. A further survey is updating the photographic record of every historic building within Bromsgrove Town Conservation Area. This work is supplemented by an up-to-date Land Registry record of all THI properties
- A survey of every town centre business as collected for the Town Centre Health Check 2011. This document also includes data on vacancy rates, types of retailer and footfall
- A survey of local builders and their skills sets/deficiencies
- Meetings with the Worcester Association of Service Users and Bromsgrove Disability Action group

From September 2012 our evidence will gradually grow to include: -

- Data on the number of courses and events etc. we oversee, the number of people taking part in these and their individual feedback
- More data on the meetings between the Project Officer and the owners and tenants as THI project proposals are firmed up
- Financial records showing the grant drawn down month by month

In light of an enforcement audit of Bromsgrove Town Conservation Area and the establishing of a proactive enforcement regime we will be gathering further evidence on: -

- How many enforcement breaches there are
- How many enforcement cases are investigated
- How many enforcement cases are successful

The anticipated outputs of the THI scheme will be reported annually by the Project Officer and the following information will be collected: -

1. Approvals during previous year
2. Implementation started on site during previous year
3. Completion of projects during previous year
 - a) Number
 - b) Floor space of buildings (sq ft)
 - c) Facades with heritage features (no.)
 - d) Vacant floor space brought back into use (sq ft)
 - residential (habitable rooms)
 - commercial (sq ft)
 - e) Financial summary identifying
 - costs including construction/fees/interest/other
 - the expected change in values and development profit
 - leverage of private sector expenditure
 - f) % of total Common Fund approved
 - g) % of total HLF THI funds approved
 - h) Assessment of progress on Priority + Projects

- i) Project benefits
 - identified use of converted floor space
 - net new jobs expected to be created
 - jobs expected to be safeguarded
 - people benefiting from project
 - heritage outputs
- j) Before and after photographs (for each implemented project)


Meetings will be held every 2 weeks between the Project Officer and the Strategic Planning Manager to flag up any issues for concern and to ensure that the THI is progressing to plan. Particular attention will be paid to monitoring and achieving designated outputs. In addition to a yearly report, quarterly reports will be sent to the HLF following their referral to the Project Team and Steering Group. All such reporting will be key to informing the content of the Evaluation Report and providing a summary document of lessons learned.

Once the THI scheme has concluded there will be further opportunities for monitoring through an appraisal of planning and listed building applications.

The Project Officer will collect all evaluation data and, according to the guidance provided by the HLF, submit evaluation feedback by way of: -

- an evaluation report – containing quantitative and qualitative data which tells the story of the scheme and contrasts early aspirations with the real outcomes
- an evaluation questionnaire

The evaluation will be available on the District Council website and published copies will be sent to the THI Partnership Steering Board, Cabinet members and senior officers at the District and County Councils. In addition, the Project Officer will promote the findings of the THI evaluation at conference seminars and regional/national conservation events. Talks to the Bromsgrove Summer School and Bromsgrove Society both during and after the scheme will help disseminate information on both anticipated and achieved outputs./



BROMSGROVE TOWN

CONSERVATION AREA APPRAISAL AND MANAGEMENT PLAN

APRIL 2012



BROMSGROVE
DISTRICT COUNCIL

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This is a consultation draft of the Bromsgrove Town Conservation Area Character Appraisal. Comments are welcome and should be sent to the Strategic Planning Team, Bromsgrove District Council, Burcot Lane, Bromsgrove, B60 1AA.

Email conservation@bromsgrove.gov.uk or telephone 01527 881326



PART 1

CONSERVATION AREA APPRAISAL

1.0 INTRODUCTION



- 1.1 The purpose of a Conservation Area Character Appraisal is to identify the factors and features which make an area special, based on an in-depth assessment of an area's buildings, spaces, evolution and sense of place. This is the first step in developing a management plan for the continued preservation and enhancement of a Conservation Area. An appraisal evaluates the positive, neutral and negative features of the area and suggests opportunities for improvement. It is not unusual for the boundary of a Conservation Area to fluctuate over time as the area evolves, and an assessment of the current and potential boundaries is normally part of the appraisal process.
- 1.2 The Bromsgrove Town Conservation Area was originally designated by Worcestershire County Council in 1968 containing "Area A High Street" and "Area B St John's". The boundary was extended in 1983 and again in 1989 to include the Spadesbourne Brook, the Strand, Crown Close, 9-15 New Road, 64-78 Worcester Road and Hanover Street. At some point the use of Areas A and B ceased and the area is formally designated as one complete Conservation Area.
- 1.3 An appraisal of the Bromsgrove Town Conservation Area was carried out in July 2009 in accordance with the guidance given by English Heritage in their 'Guidance on Conservation Area Appraisals' publication. As a result the boundaries of the Conservation were reconsidered and revised. The area around St John's Church was removed from the Conservation Area and a new St John's Conservation Area created. The area from Hanover Street to Bromsgrove School was removed because this area has a limited relationship with the rest of the Town Centre and all valuable historic buildings are already listed.

- 1.4 A further appraisal was carried out in December 2011 in light of the Application for Townscape Heritage Initiative funding from the Heritage Lottery Fund. The appraisal has been carried out in accordance with the most recent guidance from English Heritage 'Understanding Place: Conservation Area, Designation, Appraisal and Management' (2011). Although produced by the Council, local societies and residents will be encouraged to contribute to and comment on the draft document. This will result in a well rounded assessment of the area incorporating local knowledge, perceptions and suggestions.
- 1.5 The draft appraisal will be made available on the Council's website, in the local library, at the Customer Service Centre in the Dolphin Centre and the Council House to ensure that it reaches a wide audience. There will also be a small exhibition in the main foyer of the local library to explain the purpose of the document and collect local comments.
- 1.6 Map 2 identifies positive, neutral and negative buildings within the Bromsgrove Town Conservation Area. This is not an exclusive list and omission of any particular building should not be taken as an indication that it has no value. Positive buildings make a notable contribution to the character and appearance of the Conservation Area and are usually good examples of historic buildings with only minor alterations or additions. Neutral buildings make a limited contribution and are generally the much altered historic buildings, but may provide opportunities for enhancement. Negative buildings are those properties which detract from the character and appearance of the conservation area, where replacement with a new building would be encouraged, subject to compliance with other planning policies.





Aerial view of Bromsgrove Town Centre

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2.0 PLANNING POLICY CONTEXT

- 2.1 A Conservation Area is defined in the 1967 Civic Amenities Act as “an area of special architectural or historic interest, the character or appearance of which it is desirable to preserve or enhance”. It is not the purpose of a Conservation Area to prevent development, but to manage change in a positive and proactive way that benefits current and future generations.
- 2.2 Conservation Area status means that a special form of Planning Permission called Conservation Area Consent is required for the total or substantial demolition of any building over 115m³ in size, the demolition of a boundary wall over 1m in height next to the highway or 2m elsewhere and the removal of any agricultural building constructed before 1914. There is a general presumption against the loss of buildings which make a positive contribution to the character or appearance of the Conservation Area. Additional controls are also placed over trees within the area, meaning that an owner must submit a formal notification of works to the Council six weeks before starting work.

2.3 The primary legislation governing Listed Buildings and Conservation Areas is the Planning (Listed Buildings and Conservation Areas) Act 1990. This legislation includes certain statutory duties which the Council as Local Planning Authority must uphold. S69(1) of the Act requires Local Planning Authorities to designate any areas which they consider to be of special architectural or historic interest as Conservation Areas, and under s69(2) to review such designations from time to time. The Council has a further duty under s71(1) to formulate and prepare proposals for the preservation and enhancement of its Conservation Areas from time to time.

2.4 When assessing applications for development within designated Conservation Areas, the Local Planning Authority must pay special regard to the desirability of preserving or enhancing the character or appearance of the Conservation Areas under s72(1) of the Act. This does not mean that development will necessarily be opposed, only that this should not be detrimental to the special interest of the wider Conservation Area. Specific guidance relating to development within Conservation Areas can be found within PPS5, 'Planning for the Historic Environment' and the English Heritage Guidance Document PPS5 Planning for the Historic Environment: Historic Environment Planning Practice Guide.

2.5 The Bromsgrove District Local Plan adopted in 2004 contains a series of specific policies relating to the historic environment (see Appendix 3). These policies help guide the Local Planning Authority when assessing planning applications, to ensure that new developments and alterations preserve or enhance the character or appearance of the Conservation Area. The Council is also in the process of producing an Area Action Plan (AAP) for the town centre which sets out the Council objectives for housing, employment, transport, retail etc over the next 15-20 years. The Conservation Area Character Appraisal will form a key part of the evidence supporting the AAP.



Manchester House, High Street



Manchester House, High Street

3.0 DEFINITION OF SPECIAL INTEREST



83-95 High Street



Slug and Lettuce, High Street



58-66 High Street

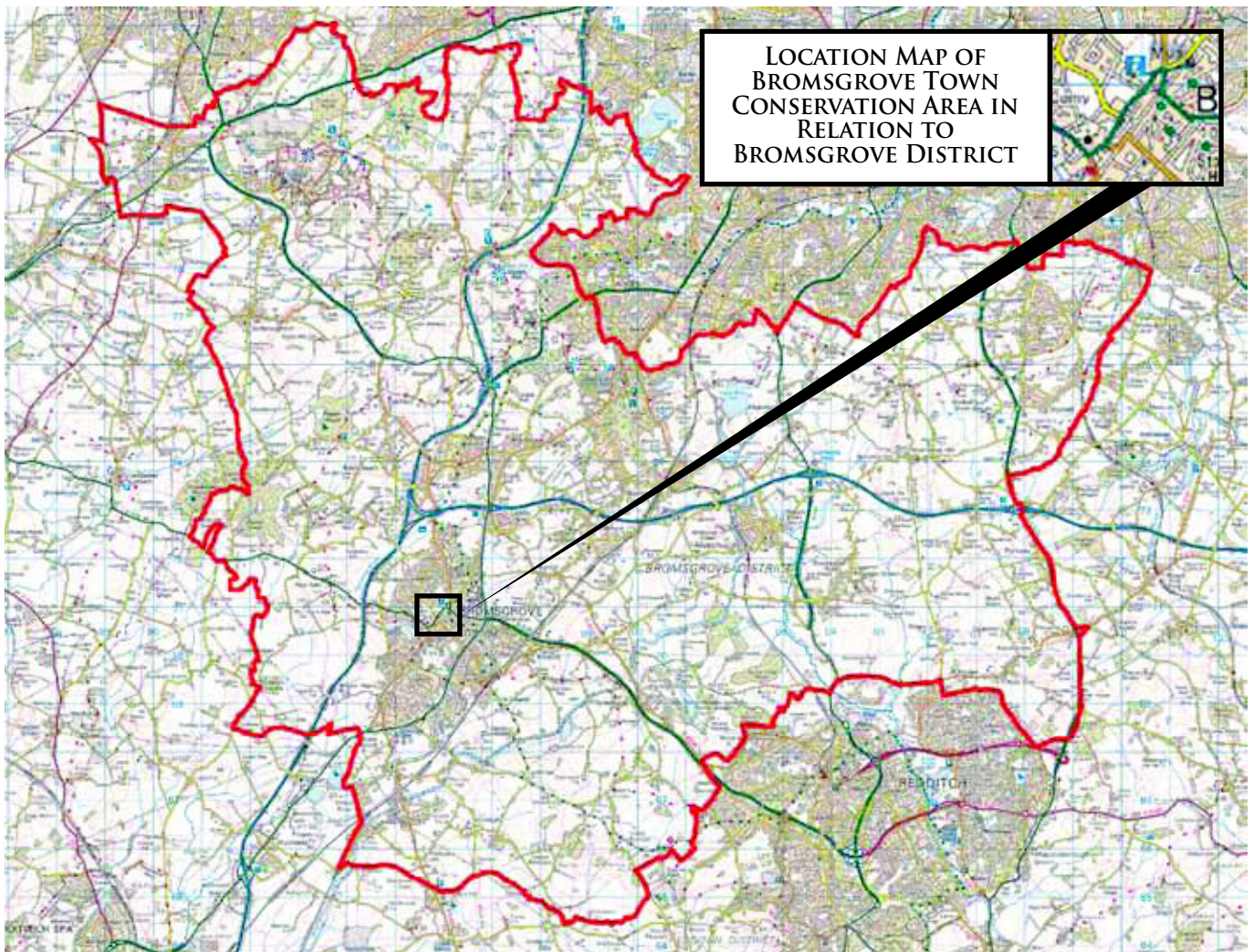
- 3.1 The special interest of a Conservation Area is defined by more than its appearance and includes the atmosphere, texture, sense of place and setting as well as more obvious qualities such as groups of historic buildings. Notable buildings and the spaces between buildings set an overall context for an area, but a designated Conservation Area should be more than just a collection of attractive buildings
- 3.2 The Bromsgrove Town Conservation Area contains an assortment of notable historic buildings dating from predominantly the 18th and 19th centuries but with some earlier surviving timber framed buildings. A range of architectural styles is represented from English vernacular, to restrained Georgian and more elaborate Victorian Gothic buildings. This variety of elevational treatments and styles demonstrate high quality construction and craftsmanship, giving a rich texture to the town centre, and are tangible reminders of the town's past prosperity. The medieval street pattern, based upon the older Roman Road between Droitwich and Wall, the original market place and the remains of some burgage plots have all survived.
- 3.3 The narrowness of the historic building plots, varied rooflines and the overall height of the buildings give an overall impression of vertical emphasis, and a strong sense of enclosure. The more modern developments unfortunately detract from this being generally set back from the established building line, sometimes a storey lower and include detailing which gives a horizontal rather than vertical emphasis. These infill sites do at least give opportunities for redevelopment in the future without requiring the loss of more historic buildings.

4.0 ASSESSMENT OF SPECIAL INTEREST

4.1 Location and Setting

The Bromsgrove Town Conservation Area is located in the centre of the town, which itself lies in the South West of the District of Bromsgrove, approximately 15 miles South West of Birmingham and 15 miles North East of Worcester.

The Spadesbourne Brook defines the boundary to the West of the Conservation area (although the more recently realigned Market Street is now the more obvious boundary) and the predominately 20th Century Windsor Street is the boundary to the East. The medieval street pattern, including burgage plots and the Market Place (where the High Street is noticeably wider) are still visible. The High Street follows the main south west/north east Roman Road from Droitwich.



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The town centre lies in the valley of the Spadesbourne Brook, with the ground rising to St John's in the south west and up Station Road and Stratford Road to the south east and north east. The immediate surrounding area to the Conservation Area is largely built up, leaving the Conservation Area totally ingrained within the larger market town. To the south west is the St John's Conservation Area, centred around the Church of St John, which sits on top of a hill overlooking the centre of Bromsgrove, and can also be seen several miles away as well as from the Town Centre Conservation Area. The two conservation areas are separated by Market Street which forms a 'bypass' around the town centre. The buildings along its north side provide a contrast to those of both conservation areas being large detached units and include the Grade II listed St John's Nursing Home, a large Asda supermarket, the recently constructed St John's Health Centre (in a dominant modern style) and the Grade II listed, Wrenian Baroque, Parkside School. The area immediately around St John's Church and stretching down to Market Street is predominately green, comprising the grounds to the St John's Nursing Home, which was originally constructed as the vicarage to the church. To the rear of the churchyard is the cemetery. Beyond the church to the south west, further along the Kidderminster Road is Sanders Park. To the south east of the Town Centre Conservation Area is the largely Victorian residential area off New Road and the main Bromsgrove School Campus. To the north east is the Victorian/interwar residential area off the Stratford Road and Birmingham Road.



4.2 Historic Development and Archaeology

The main axis of the town is the Roman Road from Droitwich, which probably formed part of an older saltway. Bromsgrove was probably the site of an Anglo Saxon Minster. A 'reeve' (an official elected annually by the serfs to supervise lands for a lord) and a 'beadle' (a parish constable of the Anglican Church often charged with duties of charity) are recorded as being employed in 1086 which indicates that Bromsgrove was an important Royal manor. The town of Bromsgrove developed in the second half of the 12th Century, with the right to have a weekly market being granted in 1200. The town would seem to have been very prosperous at this time, however this prosperity diminished shortly afterwards.



Historic maps taken from Council archives

In 1533 records show that Bromsgrove had an established trade in narrow cloth and friezes, and as early as the 16th century cloth manufacture was Bromsgrove's chief industry. This industry was due in part to the large number of mills sited in Bromsgrove and supplied by water streaming off the Lickey Hills. The linen and cloth industries thrived into the 18th century alongside, from the 17th century, the manufacture of nails, which later became the predominant industry. Bromsgrove continued to flourish in the 19th century, with nail production and button making being the main industries. The completion of the Lickey Incline in 1840 allowed the town to be connected to Birmingham by rail.

The High Street and immediate vicinity clearly exhibit a number of medieval elements. The churchyard lies immediately to the West of the town on an area of raised ground overlooking the main road. This area may have been the site of an earlier Anglo Saxon Church, but the earliest remnants in the existing Church date from the 12th century. The street system in and around the High Street is very clearly medieval, consisting of the main South West /North East route between Worcester and Birmingham which is the High Street itself. From this road two roads go off to the West (Kidderminster Road and Stourbridge Road) and one to the East (Stratford Road). These roads are probably of medieval date along with Hanover Street and St John Street, which lead to the Church. The 1839 tithe map shows many small lanes leading from the High Street to the backs of burgage plots, many of which are medieval in origin, with narrow frontages to the High Street. It also indicates that the High Street, Worcester Road and The Strand were almost completely developed by 1840. In addition it would appear from the tithe map that the infilling of medieval burgage plots behind the main street frontage with courts and yards was also well underway, however there would appear to be fewer lanes leading through to the rear of the High Street, but small accessways by the time of the first Ordnance Survey in 1883. Both maps show that the area beyond the High Street was predominately rural and agricultural. New Road was cut through in 1865 and significant development can be seen in the 1883 Ordnance Survey Map.

The weekly market, originally granted in 1200, was probably held in the wider part of the High Street, a common feature of medieval high streets. The street market was re-established in 2008 following the closure of the Market Hall, but is largely located towards The Strand end of the High Street with occasional specialist farmers' and continental markets.





Street Market, High Street



St. John's Church from Worcester Street



Rear of High Street

4.3 Architectural Quality and Built Form

4.3.1 Plan Form

The High Street, Worcester Road and The Strand follow the main south west/north east route between Worcester and Birmingham, which was originally part of the Roman Road from Droitwich, resulting in Bromsgrove having a linear plan form. This is particularly noticeable in area photographs and early maps. The remaining street pattern has a medieval influence, with the much wider market place at the south eastern end of the High Street and still evidence of the narrow burgage plots to the rear of the High Street and The Strand mainly on the west side. Later development on the eastern side of the High Street has largely obliterated the remains of the burgage plots. At intermittent intervals, particularly on the west side of the High Street are some of the original alleyways of varying width leading to the rear of High Street buildings, a reference back to the burgage plot and rear courts of buildings used as workshops etc.

4.3.2 Views

The elongated pattern of development within the town centre means that it is not possible to view the Conservation Area in its entirety from any one point. Key views can be identified however within each character zone, and from outside the Conservation Area boundary through to the main retail areas (see Map 2). Views of the Grade I listed St John's Church are also possible from gaps between the buildings on Worcester Road and from the Market Place. Unfortunately, the poorly landscaped area on Mill Lane detracts from views through to the Spadesbourne Brook. The view from High Street to Market Place has been spoiled by the loss of the old Town Hall in the 1930s and its replacement with a bulky modern office building.

4.3.3 Prevailing and Former Uses

The original medieval burgage plots resulted in a number of narrow units, with significant ancillary accommodation to the rear, some now in unconnected uses. Many of the rear workshops were originally part of the nailmaking industry in Bromsgrove. The upper floors of some buildings (particularly at the southern end of the High Street) are relatively grand indicating that they were originally constructed as houses for wealthy merchants. Unfortunately many of the ground floors have been altered extensively and often unsympathetically to accommodate modern retail uses.

The buildings within the Bromsgrove Town Conservation Area are now predominately in retail use with a mixture of A1, A2, A3, A4 and A5 uses - traditional retail, financial institutions and some pubs and cafes at around floor level. Some upper floors are in ancillary use, office space and storage; many others are vacant which has led to some condition and maintenance problems. Worcester Road is very much a secondary street to the High Street, with smaller local retail units.

4.3.4 Overall Character

Many of the buildings in the Conservation area, particularly in the High Street are of extremely good quality in terms of architecture, although this is rarely evident at ground floor level, but can be observed from looking at the upper floors. Several historic styles and periods are represented. The oldest buildings are 16th Century, mainly timber framed. There are also a number of timber framed buildings that were refronted at a later date but the evidence of the structure remains internally or to the rear. There are a numerous good examples of later periods of architecture, Georgian, Victorian and Edwardian. There are also a significant number of vernacular buildings characterised by being two or three storey, the upper storey comprising an attic space with a dormer window. In excess of 50 buildings are listed (see map 2) and an equally significant number of unlisted buildings can be described as making a positive contribution to the streetscape.

Although the area has an overall character as a complete Conservation Area, four main character zones can be identified.

Zone 1 contains the primary shopping area along the High Street. Zone 2 is centred on The Strand, which is physically separated from the rest of the Conservation Area by the busy junction at Stratford Road. Zone 3 stretches along Worcester Road from the junction with Market Place and has a tighter building line with narrower building plots than along High Street. (Zones 1 and 3 do blur together on the Eastern side of the High Street). Finally Zone 4 are the two small areas to the east of Windsor Street on Chapel Street and New Road.



Some examples of key buildings are identified in the assessment of each character zone and also in Map 2 attached as an appendix. It should be made clear that this is not a definitive list and as trends in conservation change some buildings which are now identified as having a neutral or negative impact could be more valued in the future. The identification of specific buildings in this document will not prejudice the determination of an application for Conservation Area Consent or redevelopment by the Local Planning Authority.

4.3.5 Zone 1: The High Street

The High street comprises the main area in the Conservation Area. It includes the former Market Place of the town at the junction of St John's Street and the High Street, where the road is notably wider. Although the market has recently moved back to the High Street it is currently held at the other end of the High Street around the junction with Mill Lane. The High Street is the principal retail street with shops, cafes, restaurants, banks and pub. The High Street is almost completely pedestrianised with vehicular traffic passing only along the stretch between New Road to the junction with St John Street and Worcester Road. Delivery vehicles still have access to the High Street. The earliest buildings date from as early as the 16th century, although the majority are 18th and 19th century, with a significant number of 20th century buildings.

The linear street is lined with individual buildings which sit tight against each other at the back of the former pavement. The building line is only broken by the modern development on the east side of the High street, which was set back in the hope of achieving a road widening scheme in the post war era prior to the pedestrianisation scheme. The only breaks in the buildings occur where Church Street and New Road meet the High Street and Mill Lane cuts across it. There are a few pedestrian exits from the High Street to rear parking areas and rear buildings. At intermittent intervals, particularly on the west side of the High Street are alleyways of varying widths leading to the rear of buildings, a reference back to the burgage plots and courts of buildings to the rear used as workshops. Properties are mainly three storeys in height, with a few two storey with attic space and on the west side a significant number of two storey buildings, although generally they are 20th century buildings. These are however of various scales and designs which has created a lively street scene.



West side of High Street, South End



82-102 High Street



View of High Street from South

Buildings range largely in date from the 18th to the 20th century with a handful of older buildings, and are now all in commercial use. The older buildings, particularly those at the south end of the High Street were probably originally constructed as merchants houses, with ground floors being later converted into shop units and upper floors being converted into ancillary uses, sometimes offices or residential. A significant number of upper floors are vacant. Other buildings were quite possibly constructed as shops with living accommodation above. The 20th century units are generally purpose built as retail premises.

Many of the High Street buildings are of extremely good architectural quality and a variety of historic styles and periods are represented. Many of the 18th century buildings and early 19th century are large in size indicating status, particularly at the southern end of the High Street. They are typically more than four bays wide, some as wide as six bays, and over three storeys in height, one being a full four storeys. Although they have all lost their original ground floors frontages, their large first floor windows reflect high internal floor to ceiling heights. The principal elevations of most of the 18th and many of the early 19th century buildings reflect classical architectural influences of the period with symmetry and verticality in the elevations including sash windows, stone quoins and keystones, as well as some stone capped parapets and cornice detailing. One building has impressive stone pilasters to its upper three floors. The Victorian buildings are less grand but many are three storeys in height and several are two or three bays wide. They often have more simple detailing such as stone cills and rubbed brick lintels, but there is some polychromatic brick work and timber detailing to gables. The oldest buildings date from the 16th century and are timber framed, some of which have been re-fronted at a later date - but evidence of the earlier structure remains internally or to the rear. There are also a significant number of vernacular style buildings characterised by being two or three stories high, the upper storey comprising an attic space with a dormer window.

There are a number of 20th century buildings which have been integrated into the street scene with varying degrees of success. Most are two or three stories in height, with sometimes the third floor added in the roof space in a vernacular style.



23-29 High Street



91-93 High Street



134-136 High Street



To the rear of the High Street spaces and buildings are ill defined. There is evidence of the original burgage plots in places, but backland development over a number of years has destroyed many plots, and where major redevelopment has occurred on the High Street several plots have been completely lost. This has resulted in the west side of Windsor Street and parts of the east side of Market Street lacking any real character as they primarily comprise service entries to High Street buildings. However to the rear of the west side of the High Street (east side of Market Street) some plots have surviving historic workshops and other ancillary buildings which have been converted to new uses, although others are unused. These features are evidence of Bromsgrove's manufacturing history and development and are part of its special interest and character, although in most cases they have little or no relationship with the High Street frontages.



A significant number of buildings on the High Street are listed. The unlisted buildings are generally from the 19th and 20th centuries. The older unlisted buildings reflect their context in terms of their size and form, retaining most of their architectural features. Most of them make a positive contribution to the character of the conservation area. The quality of the 20th century buildings is more variable. With some an attempt has been made to fit into the street scene particularly in terms of height, verticality of upper floors windows and materials. Some, notably the 1950s buildings at 62 - 68 High Street, are of a distinctive architectural period, with sufficient detailing to add interest to the street scene. Some of the 20th century buildings can therefore be described as having a neutral impact on the character of the conservation area. Other modern units, particularly the development around Mill Lane and the buildings at the north east end of the High Street do not make a contribution to the character of the High Street but detract from it.



Slug and Lettuce, High Street

Due to the High Street now being the main commercial street in Bromsgrove, most shop fronts and signage have been replaced, many with little thought for the architecture of the individual buildings, or their historical context, and clearly detract from the architectural quality of the street scene.

Zone 1: High Street Key Buildings

The High Street character zone contains a high number of notable listed and unlisted historic buildings. 126-130 High Street (Grade II listed) was built in 1851 in blue brick with pale buff diaper pattern brickwork, tiled roof and stone mullioned windows. The timber bargeboards have both trefoil and quatrefoils patterns and add significant interest to the upper level of the building. 120 High Street (Grade II listed) is an 18th century building in the Georgian style with a low pitched pediment, moulded cornice and camber headed dormers. The ground floor has unfortunately been compromised by the addition of a modern shop front which is not in keeping with the character of the building

The exterior of Lloyds TSB Bank at 112 High Street (Grade II listed) dates from the early 19th century and has a classical stone portico and Doric columns, although its interior was entirely remodelled while retaining its exterior walls in 1970.

This building forms a key group with No's 104-112 High Street including the timber framed 16th century building at No's 108-110 High Street. This was constructed in 1533 and is the oldest building in the Conservation Area, although it has some later 19th century alterations including the shop fronts. This building was once the Unicorn Inn and the horn details can still be seen on the gables now adorned by Victorian bargeboards

Opposite Lloyds bank is a fine collection of 18th and 19th century buildings which have significant group value as well as being individually Grade II listed. The Red Lion PH at No.77 includes what was once the Roper Nail Warehouse to the rear, which originally formed part of a historic courtyard bordered by nail workers' cottages.

The timber framed former Hop Pole Inn on New Road (Grade II listed) was originally built in the High Street in 1572 but was later dismantled and relocated to this site in 1865. The upper floors retain the original framing with central jettied gable and carved bargeboards, but various features were added upon its reconstruction including the Bromsgrove District Council Conservation Bromsgrove... a thriving market town Victorian Gothic style porch and the chimneys.

The Golden Cross Hotel, 20 High Street (unlisted) was originally a 18th century coaching inn, but was substantially rebuilt in 1932. The brass menu holders on the front elevation were designed by the Bromsgrove Guild.

1 High Street (Grade II listed) dates from the early 17th century, as evident in its fine timber framing with fleur-de-lis motifs, but has been altered throughout the 19th and 20th centuries. The shop front is particularly unsympathetic and the building's setting adjacent to a major road junction has seriously compromised its significance.



108-112 High Street



Hop Pole, New Road



The Golden Cross, High Street



1 High Street

4.3.6 Zone 2: The Strand Architectural Character



The Strand



2 Stourbridge Road

Historically The Strand was a continuation of The High Street, and this becomes clear when looking at the aerial photographs and maps. Some of the listed buildings still have a 'High Street' address. Unlike the majority of the High Street, The Strand is open to vehicular traffic and forms part of the main route through Bromsgrove for traffic coming down the Stourbridge and Birmingham Roads and heading towards the Stratford Road. This has not only cut The Strand off from the High Street, but crossing from one side to the other is also difficult. The Spadesbourne Brook is now submerged beneath the road, historically there was a bridge. The road layout has undermined the group value significantly although the retention of the island containing the Grade II listed building, adds some coherence and connection between the two sides of the Strand. This area was the horsefair end of the town, which is probably why the horse trough was placed here. The small public space created in front of 2 Stourbridge Road with the reinstated 'Sanders Horse Trough' is underused because of the lack of pedestrian links and unattractive position in the centre of a busy road.

Like the High Street the buildings sit tightly against each other at the back of pavement. There is a small gap between 12 and 16/18 where Cupitts The Jewellers is set back, just beyond this road splits with The Strand continuing north east towards the Birmingham Road, although there is no vehicular access to this road, and the Stourbridge Road running off to the North. This leaves 2 Stourbridge Road, a large two storey building terminating The Strand on the east side before the junction with Market Street/Stourbridge Road/Birmingham Road. There is also access to the side of the Queens head Pub leading to the buildings at the rear.

Properties in The Strand comprise a mix of predominately 18th and 19th Century buildings all in commercial use, although unlike the High Street there are some offices uses in addition to the retail units and the public house. Upper floors to the retail units are a mix of ancillary uses or vacant.

The buildings in The Strand comprise an eclectic mix of largely historic buildings. The buildings on the north west side of the street are predominately small scale, two storey properties, beneath steeply pitched tiled roofs, in a vernacular style. The Queens Head provides a contrast being a larger scaled building, three storeys with a later two storey side extension. It is more similar in scale and height to the buildings opposite, although they still exhibit a vernacular style. Further along The Strand towards the Birmingham Road the buildings comprises more simple early 19th century properties, culminating in a larger 18th century building in a vernacular style. This character zone terminates the Conservation Area boundary and is notable in views through and into the wider Conservation Area, contributing to its setting. The varied roofline and use of dormer windows adds interest to this group of notable historic buildings, many of which have benefitted from an earlier restoration and have had timber sliding sash windows reinstated.

To the rear of the north west of The Strand there is some evidence of the original burgage plots and a number of ancillary buildings remain or have been rebuilt to a similar scale. The age of the older buildings on this stretch is more apparent from the rear, where timber framing is visible. The general setting is not enhanced by a large surface car park situated between the rear yards and Market Street. To the northeast side the rear plots are less visible but would appear to contain ancillary buildings and extensions of various ages.

The 18th century buildings in the Strand are all listed, as well as the Victorian Queens Head Public House. Most of the unlisted buildings make a positive contribution to the character of the conservation area, being of a similar scale and style.

The commercial location of The Strand has resulted in a proliferation of signage, particularly on the corner of Stratford Road and a balance needs to be sought to adequately advertise retail business on the edge of the Town Centre with preserving the character and appearance of the conservation area.

Zone 2: The Strand Key Buildings

The Queens Head PH is Grade II listed and dates from the early 19th century with a later extension to left hand side. The central stone door case with pediment and a carved depiction of Queen Alexandra (Queen consort to Edward VII and dowager Queen until her death in 1925) indicate the pub probably had alterations and modifications between 1901 and 1910. There are recessed 16 pane sliding sashes above with rather heavy rusticated lintels. The row of buildings next to the Queens Head (beyond the 1970s pastiche infills) at No. 25-27 The Strand are also Grade II listed, and were once timber framed but have been now re-fronted in red brick. Remnants of the timber frame have been found at the former Mitre Inn, a 19th century cider house which has now been converted to offices.



The Queens Head, The Strand



2 Stourbridge Road



The Strand



28 Birmingham Road and the Museum



The Strand

2 Stourbridge Road, in an island in the centre of the Strand, is now the offices of Thomas Horton but was originally built in 1701 as a gentleman's residence known as Cock Hall. In 1723 the building became the town's first workhouse and then a tannery - possibly the reason why this part of the town was once known as Rotten Row. The horse trough in front of the building was recently reinstated to its original position, after several years in Sanders Park.

On the other side of The Strand is a range of listed and unlisted historic buildings dating from the 18th, 19th and 20th centuries, unfortunately let down by the blank frontage to No's 22-24 and poor quality signage to the retail units. The Grade II listed building at No's 6 to 12 The Strand dates from the 18th century with added Victorian dormers and surviving timber sliding sash windows. The adjacent building at No's 2 to 4 The Strand (now the Strand Centre) is a 20th century mock classical building, which wraps around the corner into Stratford Road terminating views out of the High Street.

Further past The Strand facing onto Birmingham Road is the former Town Museum and the Grade II listed building at No. 28 which is now a doctor's surgery. The Museum closed in 2009 and a new use for the building has yet to be found. This area was looked at for removal from the Conservation Area boundary, but discounted as there is still a historic connection with The Strand.



Horse Trough in front of 2 Stourbridge Road

4.3.7 Zone 3: Worcester Road Architectural Character

Worcester Road is a continuation of the High Street running south west from the High Street after Market Street /St John Street. There is vehicular access to the street but only one way from Market Place to Hanover Street.

The street is lined with individual buildings which generally sit tight against each other at the back of the pavement. The building line is broken by George Road and then by the Dog and Pheasant, half way along the street, which is set back from the building line, with an adjacent gap created by the access to the pub's rear car park. The gaps created allow views across to St John's Church to the south west as well as the Marker Hall site, immediately to the rear of Worcester Road. On the east side of Worcester Road the buildings again follow the back of pavement building line which is only broken by a modern development of shop units adjacent to Station Road which step back and the car showroom on the other corner, which has been excluded from the conservation area.

The properties on Worcester Road comprise a mix of largely 18th and 19th century buildings, with some modern retail and office buildings, which have attempted to reflect the scale and design of their neighbours. The buildings along Worcester Road are now almost entirely in commercial retail use at ground floor level, with a mix of ancillary storage, office and residential use above. It is likely that the buildings at the southern end of Worcester Road were originally constructed as residential but ground floors have gradually been converted to retail use.

The majority of the buildings on Worcester Road are 19th century, three storeys in height and one bay wide. Although simple in appearance they all exhibit some level of detailing including stone cills and decorative lintels. The narrow form of the buildings and the sense of verticality is enhanced by narrow sash windows to first and second floors, many of which have survived. The east side of Worcester Road has a significant number of two storey buildings, some more vernacular in appearance with dormer windows to attics and overall comprises more of an eclectic mix, which has produced a more varied appearance.



West side of Worcester Road



Corner of St. John's and Worcester Road



28-40 Worcester Road

This side of the road does noticeably increase in height to three storeys as it approaches the High Street, and the scale of the buildings also increase to two or three bays in width. Also located on this side of the road are the 'Lurve' Nightclub with an art deco frontage and the Hyundai garage, a new car showroom. Both buildings being considerably larger in foot print and scale than their neighbours. In addition on the corner of Worcester Road and St John Street is a dominant 1950's building, highly visible given the prominent location where the High Street is at its widest, and where it turns the corner into St John's Street. This building is somewhat out of character with those surrounding it.



41-47 Worcester Road

As with the High Street, spaces to the rear are ill defined. Some of the ancillary buildings which were once an important feature of Bromsgrove remain, but their original use is not apparent, and many are now in a poor state of repair. To the east side there has been some modern development which would appear to sit on the footprint of older buildings. The presence of the remains of these older buildings are evidence of Bromsgrove's history and development and are therefore part of the special interest and character of the conservation area.

Six buildings on Worcester Road are listed, all 18th century, located on the east side. The unlisted buildings are predominately Victorian, and particularly on the west side of the street are of a similar scale and style. Many have retained their period details, although a number of windows have been lost, and therefore most of them make a positive or neutral impact on the character of the High Street.

Worcester Road is very much a tertiary retail street and like the High Street and The Strand most of the shop fronts and signage has been replaced with little thought for the impact on the overall street scene, and they clearly detract from the quality of the High Street.

Zone 3: Worcester Road Key Buildings

There are only a few listed buildings in this part of the Conservation Area, interspersed with attractive unlisted historic buildings and some more neutral additions.

No.7 Worcester Road is Grade II* listed and forms a notable group with 3 and 5 Worcester Road which are Grade II listed. No.5 is now known as Kembrey House and converted to offices. The building dates from the late 18th century and has interesting 18th century gothic venetian windows on the ground and first floor and a pedimented doorpiece with Doric columns to the ground floor.

The group of unlisted buildings at No's 4 to 16 Worcester Road are mostly three storeys with a variety of architectural detailing at upper levels. Unfortunately the character of some of these buildings has been undermined by the poor quality shopfronts below, but they do retain sufficient architectural interest above ground floor to be worthy of retention.

No's 33, 35 and 37 Worcester Road are Grade II listed and date from the 18th century. The fine timber shopfronts date from the early 20th century and add interest to the wider streetscene. Consent has recently been granted to link No's 33 and 35 into one restaurant unit, preserving the external appearance of two individual units whilst bringing the building back into economic use.

The larger terrace of unlisted buildings towards the end of the Conservation Area have been harmed by the introduction of PVC windows to the upper floors and a series of inappropriate modern shopfronts and poor quality signage. A few original sash windows remain, window openings have not been altered and other period details still exist. They therefore currently make a contribution, albeit limited, to the Conservation Area.



5 and 7 Worcester Road



33, 35 and 37 Worcester Road



6 Worcester Road



New Road from the West



Chapel Street

4.3.8 Zone 4: New Road/Chapel Street

The two small areas around New Road and Chapel Street were considered for removal from the Conservation Area boundary in the 2009 review of the Conservation Area. This was discounted as they do contain some interesting historic buildings. Tudor House is the re-sited Hop Pole Inn taken down in 1840 and rebuilt in the 1867 to make way for New Road, and its two adjacent houses built at the same time are an important group indicative of the Victorian approach to buildings conservation and historical revival styles. The area beyond Tudor House on New Road includes two detached Victorian villas which retain their original sliding sash windows, number 15 New Road being particularly intact with all its original fenestration, barge boarding and porch and front door details. These properties could potentially be at risk of demolition if the conservation area protection was removed. On Chapel Street can be found two Grade II listed buildings - the Congregational Chapel and associated Sunday school plus an unlisted terrace 19th century terrace unfortunately undermined by the addition of PVC windows. The Congregational Church dates from 1833 and is in the Greek Revival style with a stuccoed façade and large arched windows (with a small non-conformist graveyard behind). The former Sunday School (now the United Reform Church Hall) was built in 1852 and is single storey, red brick building with blue brick dressings and tall arched windows similar in style to the church windows. No15 Chapel Street retains plasterwork designed by the Bromsgrove Guild on the ground floor.

4.3.9 Building Materials

Much of the character of Bromsgrove comes from the variety of the building materials used, especially in the detailing. The earliest buildings typically use materials that were available locally while the materials used in later buildings reflect the increasing availability of materials from further afield and changing architectural fashion. Although the buildings are essentially constructed from the same materials, there is much variation in the detailing to the buildings using other materials to provide interesting variations in the elevations as a whole. The retention of these traditional materials is important to the character and appearance of the conservation area.

Walls

The predominant walling material in the conservation area is red brick. However to the rear of the High Street one finds buildings and the remains of boundary walls constructed in the local red/buff sandstone. There are a few timber frame buildings, and timber framed rear elevations with either wattle and daub, and brick infill panels. In addition some brick buildings have been painted and white stucco and render has also been used in a few cases.



Roofs

Roof coverings are predominately plain clay tiles of a red/brown hue. The tiles are largely machine made probably from the 19th century, with some examples of surviving earlier handmade tiles. There are a few examples of slate. Some of the more modern buildings have concrete tiles in a similar colour to the clay tiles.

Windows

Window frames are generally timber. Some buildings have frames that are flush with the external brickwork, typical in early Georgian architecture. There are also examples of vernacular buildings with dormer windows in the attic space, as at 89 to 93 High Street.

Shop fronts

A few historic timber shop fronts remain some with their original traditional roller blinds. The majority of shopfronts however are of a modern design constructed in either timber or aluminium.

Road Surfaces

Road surfaces are tarmac and pavements are a mix of block paving, concrete paviors and tarmac. Kerb stones are predominately concrete, but some natural stone kerbs have survived in The Strand. The alleyways and rear access ways are predominately of block paving, although some original blue bricks survive.

Local Detailing

A large number of buildings have decorative detailing in stone including keystones, quoins and window detailing, notably on the high status buildings at the Market Place end of the High Street, but even the later Victorian buildings have stone cills and lintels to break up their elevations. There are some examples of decorative brickwork, notably the Slug and Lettuce PH which is constructed in blue brick with light brick polychromatic detailing (unusual for the area). The Lloyds Bank in the High Street makes use of sandstone but only in detailing, it is predominately red brick. There are also a number of buildings to the rear of the High Street constructed in sandstone. Archaeological studies would seem to indicate that these buildings were more numerous, originally they were houses and workshops.



42 Worcester Road



4.3.10 Important Trees and Green Spaces

The Conservation Area only has one significant green space around the Bus Station area and the adjacent section running along Crown Close/Market Street to the Market Place junction. Whilst this area is of considerable amenity value relative to the built environment of the rest of the town centre, the effect is reduced considerably at times due to the close proximity of the busy traffic running along Market Street and the considerable noise and dust that results.

The Spadesbourne Brook runs along the whole length of the Conservation Area from the rear of properties on The Strand down to Hanover Street in the South-East. The larger part of the brook course has been heavily canalised and culverted with several sections disappearing completely. Despite this, the brook still retains considerable value for biodiversity and provides an essential wildlife corridor through the town centre for a number of species including Brown Trout and Water Voles, both of which have been recorded where the course passes through the Bus Station site.

Only about 10% of the channel within the Conservation Area is naturalised and of both wildlife and amenity value. 30% of the course is hidden within closed culverts beneath roads & buildings and 60% in steep sided canal sections providing little opportunity for wildlife habitat other than that 'passing through'. Within this, the naturalized area at the Bus Station site provides an important 'stepping stone' for wildlife using the corridor but this 1km section still forms fairly hostile territory for most species. Naturalisation of additional sections of the brook course would greatly improve this situation and increase the biodiversity value both locally and for wildlife habitats further up and down the brook. In particular, aiding and allowing Water Vole colonies to intermix can be a vital factor in their survival.



Three other areas within the Conservation Area boundary are notable for their amenity value as a result of their possession of both some tree cover together with seating areas. These are the area adjacent to Strand House and Cupitts Jewellers, a small area on the corner of Market Place and Market Street, and the High Street itself. At the two sites at The Strand and the Market Place, the presence of large mature trees provides a contrast with the built environment and a shading and cooling effect on hot summer days. The trees also contribute significantly to improved local air quality. The amenity of all three sites suffers considerably however, from traffic noise & dust as a result of their close proximity to major roads through the town centre.

Along the High Street itself, a number of trees were planted over the last 30 years as part of past improvements. Although nearly 50% of those trees originally planted had been lost and not replaced, those that remained contributed to the amenity of the area by providing shading and improved air quality in summer, a medium for Christmas lights in winter, and visual amenity all year round. Those trees were causing a few problems, however, such as the obscuring of site lines for both amenity value and CCTV purposes, maintenance and issues of encroachment close to nearby buildings, and the effects of roots on paving and surfacing. For the most part, these problems were the consequence of poor planning, design and tree species selection in previous years which resulted in incompatible positioning of trees, CCTV cameras and other street furniture.

As part of a major programme of street enhancement works in the High Street, all the remaining trees in the High Street were removed in February 2012. They are to be replaced by a greater number of trees of a more appropriate species during 2012/13.



5.0 CHALLENGES AND OPPORTUNITIES



High Street



High Street



2-4 High Street

Bromsgrove is fortunate in having retained a significant number of its historic buildings, even though this is not immediately apparent at ground floor level. There are, however, features that compromise or detract from its character and appearance. These include:

The Public Realm

The existing poor quality public realm affects both the character and appearance of the Conservation Area and detracts from its historic setting. At present there is a mix of brick pavoirs and concrete paving slabs throughout the Conservation Area and some oddly random strips of buff concrete paving. There is no obvious pattern or delineation between 'pavement' and 'road space', and a lack of maintenance has resulted in a rather shabby appearance. Vehicles still use the High Street for deliveries which has resulted in a proliferation of protective barriers and bollards, to the detriment of the wider street scene.

The existing street furniture appears to be randomly located, with street signage, bins, seating and trees obscuring some of the possible views through the Conservation Area. Most of this was installed in 1995 and has been poorly maintained adding to the run down appearance of what should be an attractive retail area.

In general the public spaces within the Conservation Area have a tired feel that detracts from the appearance of the historic buildings.

Shop fronts and signage

The majority of the modern shop fronts bear little relationship to the historic building above, and they also lack consistency in terms of style, proportions, materials and colour schemes. Most of the shop signage is also equally poor with over large fascia signs, excessive signage, the use of plastic and lighting. All of which detracts from the character and appearance of the Conservation Area.

Historic Market Site

The market hall has now been demolished and the site is currently being used as a surface car park. Although outside the Conservation Area, as it is immediately adjacent to it, it obviously impacts on the setting of the Conservation Area.

The redevelopment of this site requires to be carefully considered, as it could set the tone for high quality contemporary design which complements the wider historic context of Bromsgrove.



Historic Market Site

Modern Infill

Several sites in the conservation area have been subject to redevelopment during more recent times. Notwithstanding the loss of older buildings many of the modern buildings erected exhibit design characteristics that are quite different to the established characteristics of the area. The purpose of highlighting these buildings is not necessarily to aim at their redevelopment, although in the long term such discussions would be welcomed, but to prevent them becoming too dominant through future additions or alterations. These buildings will not be regarded by the Council as a guide or precedent for future development proposals



99-115 High Street

Historic buildings in a poor condition

Under investment in building repair and maintenance of some buildings on the High Street and Worcester Road detracts from the appearance of the Conservation Area and results in the long-term risk of loss of historic building fabric. Currently only one building, 20- 22 High Street, can be described as being a 'Building at Risk'. However the vacant upper floors of a number of others are also giving cause for concern.

Loss of Historic Detailing

A number of properties, particularly on Worcester Road, have had replacement windows in uPVC or aluminium. Window replacements with new ones of a different design, detail, materials or finish, erodes local building detail, which is an essential part of the distinctive character and appearance of the conservation area.

Traffic Management

The traffic management measures in The Strand have had a significant impact on this part of the Conservation Area. The layout of the road system connecting Stourbridge Road/ Birmingham Road and Stratford Road has created a visual and physical intrusion in the Conservation Area, severing the two sides of The Strand, and The Strand from the High Street. Overall this section of the Conservation Area is unfriendly to pedestrians. It has fragmented these historic spaces, undermining their architectural and historic integrity and the visual quality of the historic environment as well as detracting from the setting of the historic buildings.



Rear of High Street



Rear of High Street

Rear Historic Areas

A number of historic buildings to the rear of buildings on the High Street and Worcester Road still exist, and some have been refurbished and gained new uses. Many are underused or vacant, and are generally in a poor condition but are highly visible from Market Street. The presence of these buildings, are evidence of the town's history and development and are part of its character and interest. In their current state they therefore detract from the character of the Conservation Area.

Spadesbourne Brook

The Spadesbourne Brook is a neglected feature of the Conservation Area. Although some sections are culverted, there are significant stretches which are visible, and the brook still provides an essential wildlife corridor through the town centre. A number of the visible sections are heavily overgrown and in their current state do not contribute to the character of the conservation Area.

Neutral Areas

There are some parts of the Conservation Area which, in their present form, neither enhance nor detract from its character or appearance, these areas are indicated on Map 2. Generally they comprise the modern developments which have respected the character of the conservation area in terms of their scale and form, or the historic buildings which have lost some of the historic detail, this is particularly true of some of the buildings on Worcester Road.

Locally important Buildings

Bromsgrove has a wealth of historic buildings but only just over 60 of them are designated heritage assets. Many of the other historic buildings are of local importance but not national importance. The establishment of a local list would identify these important local historic assets.

6.0 SUMMARY OF ISSUES

The appraisal has highlighted the following problems and pressures in the Bromsgrove Town Centre Conservation Area

- The Public realm
- Shop front and signage
- Market Hall Site
- Modern infill
- Historic buildings in poor condition
- Loss of historic detailing
- Traffic Management
- Rear historic areas
- Spadesbourne Brook
- Locally Important Buildings

The Management Plan in the next section considers how these might be addressed to ensure the continuing preservation and enhancement of the character and appearance of the conservation area.

PART 2 MANAGEMENT PROPOSALS

1.0 INTRODUCTION

1.1 Purpose

1.1.1 The purpose of this Management Plan is to provide a clear strategy for the management of Bromsgrove Town Centre Conservation Area in a way that will protect and enhance its character and appearance. It should be read in conjunction with the Bromsgrove Town Centre Conservation Area Appraisal (January 2012) in which the character and special interest of the Conservation Area was identified, along with the features and other issues that currently compromise or detract from its character and appearance.

1.1.2 Section 71 of the Planning (Listed Buildings and Conservation Areas) Act 1990 requires Local Planning Authorities to draw up and publish proposals for the preservation and enhancement of its conservation areas. The Management plan is intended to provide guidance to those involved in dealing with development and change not only within the Conservation area but also in respect of its setting. The Plan sets out policies to maintain and reinforce the character of the Conservation Area, and also to guide and manage change and in particular to respond to the negative features and threats to the character which have been defined in the appraisal. It also outlines the resources required for implementation and provides for monitoring and review. The Management Plan has been prepared in accordance with national policy contained in PPS5 'Planning for the Historic Environment' and follows the most recent guidance from English Heritage 'Understanding Place: Conservation Area, Designation, Appraisal and Management' (2011).

1.1.3 The Management Plan is an update to the draft proposals prepared in November 2009. It has been updated to take account of the Council's bid for Townscape Heritage Initiative funding to secure the regeneration of Bromsgrove Town Centre.





1.2 Public Consultation

Public Consultation will take place between 2nd February and 15th March.

1.3 Status of the Management plan

The Management Plan will be used as a technical document to provide guidance for owners and businesses in the conservation Area. It will inform and guide the development control process and policy formation and assist with the implementation of the Townscape Heritage Initiative scheme in the Town Centre. It is intended that following a period of public consultation it will be formally adopted as a material planning consideration by Bromsgrove District Council.

2.0 PLANNING POLICY CONTEXT

- 2.1 The Management Plan lies within a framework of local and national planning policy for the historic environment. General planning policies and proposals for the control of development and use of land within Bromsgrove Town Centre can be found in the Bromsgrove District Local Plan (Adopted in January 2004), The Draft Bromsgrove Core Strategy and the Bromsgrove Town Centre Draft Area Action Plan.
- 2.2 The key objectives in the Bromsgrove District Local Plan in respect of the preservation and enhancement of the character or appearance of the conservation area are; S35A, Development in Conservation Areas; S36, Design of Development in Conservation Areas; S37, Demolition in Conservation Areas; S38, Protection of Buildings of Merit; S41, Listed Buildings in Shopping Areas; S42, Shopfronts in Conservation Areas; S43, Traffic Calming Schemes; S45, Improvements to Conservation Areas and S47, Advertisement Control. Copies of the Local Plan are available on the Council's website at www.bromsgrove.gov.uk or from the Council House in Burcot Lane, Bromsgrove, B60 1AA.



2.3 Key Policies in the Draft Bromsgrove Town Centre Action Plan (published in January 2011) include;

- Upgrading the public realm and Primary Shopping Zone to a high quality including resurfacing and refurbishing the High Street.
- Preserving and enhancing the Conservation Area's character and appearance.
- Wherever viable renovating, refurbishing, rejuvenating or redecorating the Town Centre's historic buildings.
- Utilising the natural assets in the Town Centre to provide enhanced green and open spaces including the Spadesbourne Brook and Recreation Ground.
- Ensure a safe environment for all and a Town Centre enjoyable for everyone.

The key policies are contained in TC5, Urban Design and Conservation.

2.4.1 In 2004 Bromsgrove District Council adopted SPG 2, Shop fronts and Advertisement Design Guide. In respect of the Conservation Area the aim of the guidance is to encourage shopfront design and advertisements which preserve and enhance the character and significance of the Conservation Area. This document is to be revised and updated shortly.

2.4.2 The Council is committed to plan led development and the plan making process, it has produced draft plans for both the whole district in the form of the draft Core Strategy and also a more detailed Town Centre Area Action plan. Both of these plans are progressing towards the advanced stages of production, it is hoped once the current reforms of the plan making system are published both plans can be progressed quickly to the final stages and formal adoption.

2.5 This policy framework, along with national policy guidance contained in PPS5, 'Planning for the Historic Environment' and the English Heritage Guidance Document PPS5 Planning for the Historic Environment: Historic Environment Planning Practice Guide will be used to further the preservation and enhancement of the character of the Conservation Area.



3.0 SUMMARY OF SPECIAL INTEREST, CHALLENGES AND OPPORTUNITIES

3.1 Special Interest

The Bromsgrove Town Conservation Area contains an assortment of notable historic buildings dating from predominantly the 18th and 19th centuries but with some earlier surviving timber framed buildings.

A range of architectural styles is represented from English vernacular, to restrained Georgian and more elaborate Victorian Gothic buildings. This variety of elevational treatments and styles demonstrate high quality construction and craftsmanship, giving a rich texture to the town centre, and are tangible reminders of the town's past prosperity.

The medieval street pattern, based upon the older Roman Road from Droitwich, the original market place and the remains of some burgage plots have all survived.

The narrowness of the historic building plots, varied rooflines and the overall height of the buildings give an overall impression of vertical emphasis, and a strong sense of enclosure.

3.2 Challenges and Opportunities

3.2.1 The appraisal has highlighted the following problems and pressures in the Bromsgrove Town Centre Conservation Area

- The Public realm
- Shop front and signage
- Historic Market Site
- Modern infill
- Historic buildings in poor condition
- Loss of historic detailing
- Traffic Management
- Rear historic areas
- Spadesbourne Brook



4.0 MANAGEMENT PROPOSALS

4.1 Introduction

The following strategies have been identified as ways in which to protect and enhance the character and significance of the Conservation Area, by addressing the negative features identified above.

The policies are in accordance with national policy guidance and local policies, and follow on from the Conservation Area Appraisal.

4.2.1 Public Realm

- The existing poor quality public realm affects both the character and appearance of the Conservation Area and detracts from its historic setting. At present there is a mix of brick paviors and concrete paving slabs throughout the Conservation Area and some oddly random strips of buff concrete paving. There is no obvious pattern or delineation between 'pavement' and 'road space', and a lack of maintenance has resulted in a rather shabby appearance. Vehicles still use the High Street for deliveries which has resulted in a proliferation of protective barriers and bollards, to the detriment of the wider street scene.
- The existing street furniture appears to be randomly located, with street signage, bins, seating and trees obscuring some of the possible views through the Conservation Area. Most of this was installed in 1995 and has been poorly maintained adding to the rundown appearance of what should be an attractive retail area.
- In general the public spaces within the Conservation Area have a tired feel that detracts from the appearance of the historic buildings.



High Street



High Street

4.2.2 Proposed Action

- Work with other departments at Bromsgrove District Council and Worcestershire County Council to implement a new public realm scheme. This will involve: 1) renewing the surface materials including the introduction of a more cohesive design, 2) a new street lighting scheme, including more appropriately designed lamp posts, 3) improved and more thoughtful illumination of some areas, 4) the removal of redundant signage and CCTV poles, 5) the integration of new signage and other street furniture.
- Ensure that new signage, street furniture and surfacing materials contribute positively to the character and appearance of the Conservation Area.
- These actions are in accordance with S35A a) and b) of the Bromsgrove District Council Local Plan and TC5.2 of the Draft Area Action Plan.



120 High Street

4.3.1 Shop fronts and Signage

- The majority of the modern shop fronts bear little relationship to the historic building above, and they also lack consistency in terms of style, proportions, materials and colour schemes. Most of the shop signage is also equally poor with over large fascia signs, excessive signage, the use of plastic and lighting. All of which detracts from the character and appearance of the Conservation Area.

4.3.2 Proposed Action

- Seek improvements to or replacement of shop fronts and signage where opportunities arise through development proposals.
- Assess proposals against local and national policies in respect of listed buildings and conservation areas, and SPG 2, Shopfronts and Advertisements Design Guide 2004, until the revised Shopfront Design Guidance is produced.
- Address unauthorised alterations to shop fronts through enforcement action where appropriate in accordance with Enforcement Policies.
- These actions are in accordance with S.41 and S.42 of the Bromsgrove Local Plan (2004) and TC5.8 of the Draft Area Action Plan (2011)



48-50 High Street

4.4.1 Historic Market Site

- The market hall has now been demolished and the site is currently being used as a surface car park. Although outside the Conservation Area, as it is immediately adjacent to it, it obviously impacts on the setting of the Conservation Area.

4.4.2 Proposed action

- Pay particular attention to siting, scale and design of any new development proposals that come forward for this site in accordance with local and national policies in respect of conservation areas, to ensure that any new scheme enhances the setting of the Conservation Area.
- This action is in accordance with S.35 A (b) of the Bromsgrove Local Plan and TC5.2, TC5.3, TC5.4, TC5.5 and TC 5.6 of the Draft Area Action Plan (2011).



Historic Market Site

4.5.1 Modern Infill

- Several sites in the conservation area have been subject to redevelopment during more recent times. Notwithstanding the loss of older buildings many of the modern buildings erected exhibit design characteristics that are quite different to the established characteristics of the area. The purpose of highlighting these buildings is not necessarily to aim at their redevelopment, although in the long term such discussions would be welcomed, but to prevent them becoming too dominant through future additions or alterations. These buildings will not be regarded by the Council as a guide or precedent for future development proposals

4.5.2 Proposed Action

- Seek improvements to buildings where opportunities arise through development/redevelopment proposals particularly at key sites including Mill Lane and 138 to 140 High Street.
- New proposals will be assessed in accordance with local and national policies in respect of conservation areas, to ensure that any new scheme achieves better integration into the historic environment and enhances the character and appearance of the Conservation Area.
- Encourage the preservation of important views within the townscape and preserve vistas towards historic buildings.
- Seek to preserve the architectural design of modern infill buildings when these are of a high quality and add significance to the streetscape
- This action is in accordance with S.35 A (b) of the Bromsgrove Local Plan and TC5.2, TC5.3, TC 5.4, TC 5.5 and TC 5.6 of the Draft Area Action Plan (2011).



118 High Street



115 High Street



22-29 High Street



89 High Street



42 Worcester Road

4.6.1 Historic buildings in a poor condition

- Under investment in building repair and maintenance of some buildings on the High Street and Worcester Road detracts from the appearance of the Conservation Area and results in the long-term risk of loss of historic building fabric.
- Currently only one building, 20- 22 High Street, can be described as being a 'Building at Risk'. However the vacant upper floors of a number of others are also giving cause for concern.

4.6.2 Proposed Action

- Seek retention of historic fabric where opportunities arise through development proposals.
- Identify Buildings at Risk and develop a strategy for their repair, including the potential use of Section 215, Urgent Works Notices and Repairs Notices to improve the condition of some of the most at risk properties in the Conservation Area.
- Investigate initiatives to make use of the upper floors such as 'Living above the shop', in conjunction with the Housing Section at Bromsgrove District Council, or a local housing association.
- Produce guidance on the maintenance of historic buildings for property owners.
- This action is in accordance with S. 38 of the Bromsgrove District Local Plan and TC 5.2 of the Draft Area Action Plan (2011).

4.7.1 Loss of Historic Detailing

- A number of properties, particularly on Worcester Road, have had replacement windows in uPVC or aluminium.
- Window replacements with new ones of a different design, detail, materials or finish, erodes local building detail, which is an essential part of the distinctive character and appearance of the conservation area.

4.7.2 Proposed Action

- Address unauthorised alterations to buildings through enforcement action where appropriate, in accordance with our enforcement policy.
- Undertake a photographic survey of all the properties in the Conservation Area. This will provide a record of the condition and appearance of each property, which would be useful in any future enforcement situations.
- The reinstatement of historic detailing will be encouraged where opportunities arise through development proposals.
- We will consider the need for an Article 4 Direction to bring any permitted development works under planning control, to ensure that the special qualities of unlisted buildings of local significance are protected.
- This action is in accordance with S. 38 of the Bromsgrove District Local Plan and TC 5.2 of the Draft area Action Plan (2011).

4.8.1 Traffic Management

- The traffic management measures in The Strand have had a significant impact on this part of the Conservation Area.
- The layout of the road system connecting Stourbridge Road/Birmingham Road and Stratford Road has created a visual and physical intrusion in the Conservation Area, severing the two sides of The Strand, and The Strand from the High Street.
- Overall this section of the Conservation Area is unfriendly to pedestrians. It has fragmented these historic spaces, undermining their architectural and historic integrity and the visual quality of the historic environment as well as detracting from the setting of the historic buildings.



52-60 Worcester Road



The Strand



Rear of the High Street

4.8.2 Proposed Action

- Work with other departments at Bromsgrove District Council and Worcestershire County Council to devise a traffic scheme which will give more priority to pedestrians. Improvements to the pavement widths, parking layout, road markings and surface materials would soften the appearance and enhance the setting of the surrounding historic buildings.
- This action is in accordance with S. 38 of the Bromsgrove District Local Plan and TC 5.2 of the Draft Area Action Plan (2011).



Rear of the High Street

4.9.1 Rear Historic Areas

- A number of historic buildings to the rear of buildings on both sides of the High Street and Worcester Road still exist, and some have been refurbished and gained new uses. Many are underused or vacant, and are generally in a poor condition and those on the west side of the High Street are highly visible from Market Street.
- The presence of these buildings, are evidence of the town's history and development and are part of its character and interest. In their current state they therefore detract from the character of the Conservation Area.

4.9.2 Proposed Action

- Investigate the possibility of carrying out some historical research into these buildings and identify ways they could be repaired and brought back into use.
- This action is in accordance with S. 38 of the Bromsgrove District Local Plan and TC 5.2 and TC 5.3 of the Draft Area Action Plan (2011).



Spadesbourne Brook

4.10.1 Spadesbourne Brook

- The Spadesbourne Brook is a neglected feature of the Conservation Area.
- Although some sections are culverted, there are significant stretches which are visible, and the brook still provides an essential wildlife corridor through the town centre.
- A number of the visible sections are heavily overgrown and in their current state do not contribute to the character of the conservation Area.

4.10.2 Proposed Action

- The Bromsgrove District Council are committed through the Area Action Plan to the naturalisation of Spadesbourne Brook. Work on this is ongoing.
- This action is in accordance with S. 35 A a) of the Bromsgrove District Local Plan and TC 6.1 of the Draft Area Action Plan.

4.11.1 Locally Listed Buildings

- Bromsgrove has a wealth of historic buildings but only just over 60 of them are listed or designated heritage assets.
- Many of the other historic buildings are of local importance. The establishment of a local list would identify these important local historic assets.

4.11.2 Proposed Action

- Introduce local criteria for identifying important unlisted buildings across the district including the town centre.
- On the basis of criteria draw up a list of locally important buildings or undesigned heritage assets.



5.0 COMMUNITY ENGAGEMENT AND TRAINING



5.1 Community Engagement

Bromsgrove District Council will undertake a number of initiatives during the life of the plan to ensure stakeholders and the community are engaged in decisions affecting their community.

The Conservation area Appraisal and Management Plan will be reviewed every four years to ensure that it is up to date in respect of current issues, including any changes in national and local policies. The consultation on the plan will include a public meeting and exhibition, following engagement with key stakeholders at the time of the review.

Bromsgrove District Council will ensure that all planning applications are available online to allow for ease of access to information, allowing community engagement.

Bromsgrove District Council has designated an elected member, Mr Kit Taylor, as a Heritage Champion. These champions are supported by the Commission for Architecture and Built Environment (CABE) and English Heritage. They will receive the relevant free training and ensure that design and heritage issues are considered in all areas of the Council's business.

5.2 Bromsgrove District Council is committed to widening local knowledge and heritage skills.

- When appropriate, and subject to resources, the Council will develop, with stakeholders and the local community, a Heritage Training and Education Plan. Many activities would establish a legacy of materials for future use.
- Bromsgrove District Council will take advantage of the free training provided for its planning staff through the Historic Environment Local Management Initiative (HELM)
- Bromsgrove District Council will improve the awareness of heritage issues through the annual Heritage Open Days Programme, held in September each year.

6.0 PUTTING THE PLAN INTO PRACTICE: RESOURCES, MONITORING AND REVIEW

6.1 Resources

A large amount of expenditure will be required for some of the proposals put forward and Bromsgrove District Council will continue to pursue various opportunities for funding including through the Heritage Lottery Fund, or possibly through planning obligations. Some proposals may be secured through discussions with property owners.

6.2 Monitoring

The monitoring of the condition of the Conservation Area over the lifetime of the Management Plan and beyond will be essential to establishing the success of the plan. The following are proposed;

- The Council will work actively with building owners and occupiers in pre planning application discussions to achieve the best design solutions.
- The Council will carry out a photographic Survey of all the buildings in the Conservation Area to aid monitoring, and in particular to aid enforcement action.
- The Council will ensure that appropriate enforcement action is taken, to preserve the character of the Conservation Area. Defined timescales will be pursued.
- The Council will produce an Annual Monitoring Report to include the statistics on the number of enforcement cases investigated, number of enforcement breaches and number of successful enforcement cases in the Town Centre Conservation Area.

6.3 Review

Subject to available resources, the conservation Area will be reviewed on a four yearly basis and the Conservation Area Appraisal and Management Plan will be updated where necessary.

7.0 CONCLUSIONS

The successful management of the Conservation Area will depend not only on the commitment of the local planning authority, but also other stakeholders especially those who work and live in the area.

General advice on all matters related to the historic environment, including Conservation areas and listed buildings can be obtained from the Conservation Officer at Bromsgrove District Council.



APPENDIX 1

List of properties within the revised Conservation Area Boundary

Davenal House Surgery, 28 Birmingham Road
Former Bromsgrove Museum, Birmingham Road
St. James Court, The Strand
1-27 The Strand (odds)
2-26 The Strand (evens)
Strand House, 2 Stourbridge Road
18-22 Market Street (evens)
1-135 High Street (odds)
2-140 High Street (evens)
2-12 Mill Lane
1-6 Chapel Street
1-15 Church Street (odds)
4-12 Church Street (evens)
1,2,4,5,6 New Road
Cleggs Entry (to rear of 15 High Street)
2-6 Market Place
1 George Street
1-55 Worcester Road (odds)
2-60 Worcester Road (evens)

APPENDIX 2

Listed buildings within the revised Conservation Area Boundary

1 High Street (Grade II)
2 & 4 High Street (Grade II)
7 High Street (Grade II)
9/9a High Street (Grade II)
14 High Street (Grade II)
16 High Street (Grade II)
18 High Street (Grade II)
22 High Street (Grade II)
24 High Street (Grade II)
25 High Street (Grade II)
27 High Street (Grade II)
29 High Street (Grade II)
31 High Street (Grade II)
33 High Street (Grade II)
46 High Street (Grade II)
47 High Street (Grade II)
48 High Street (Grade II)
49 High Street (Grade II)
50 High Street (Grade II)
52 High Street (Grade II)
67 High Street (Grade II)
69 High Street (Grade II)
71 High Street (Grade II)
73 High Street (Grade II)
75 High Street (Grade II)
87a High Street (Grade II)
89 High Street (Grade II)
89a High Street (Grade II)
91 & 93 High Street (Grade II)
95 High Street (Grade II)
104 & 104a, 106 High Street (Grade II)
108 & 110 High Street (Grade II)
112 High Street (Grade II)
120 – 122 High Street (Grade II)
126 – 130 High Street (Grade II)
26 The Strand (Grade II)
The Queen's Head, 1 The Strand (Grade II)
6 to 12 The Strand (Grade II) is listed as 146-148 High Street
21 & 23 The Strand (Grade II)
25 & 27 The Strand (Grade II)
Strand House 68 & 70 The Strand (Grade II)
3 Worcester Road (Grade II)
5 Worcester Road (Grade II)
7 Worcester Road (Grade II*)
33, 35 & 37 Worcester Road (Grade II)

APPENDIX 3

Bromsgrove District Local Plan - adopted January 2004

S20 Main Shopping Location
S23 Shopfront Enhancement
S24 Retention of Traditional Shopfronts
S24A Original Features on Shopfronts
S25 New Shopfronts
S26 Shopfront Fascias
S27 Standards of Fascia Design
S27A Projecting Signs
S27B Design and Materials within Conservation Areas
S35A Development in Conservation Areas
S36 Design of development within Conservation Areas
S37 Demolition in Conservation Areas
S39 Alterations to Listed Buildings
S39a Demolition of Listed Buildings
S41 Listed Buildings in Shopping Areas
S42 Shopfronts in Conservation Areas
S43 Traffic Calming Schemes
S44 Reinstatement of Features in Conservation Areas
S45 Improvements to Conservation Areas
S46 Areas of Special Advertisement Control
S47 Advertisement Control
C17 Retention of existing trees
C19 Tree Preservation Orders
C36 Preservation of Archaeological Resources
C37 Excavation around Archaeological Remains
C38 Development Criteria for Archaeological Sites
C39 Site access for Archaeologists
E4 Extension to existing Commercial Uses
E9 Criteria for New Employment Development
E10 Retail or Recreational Uses on Employment Land
RAT4 Retention of Open Space
RAT33 Visitor Facilities
ES2 Restrictions on Development where Risk of Flooding
ES11 Energy Efficiency in Buildings

Appendix 3 continued

Worcestershire County Structure Plan

CTC.5 Trees and Woodlands

CTC.6 Green Open Spaces and Corridors

CTC.8 Flood Risk and Surface Water Drainage

CTC.17 Archaeological Sites of Regional or Local Importance

CTC.18 Enhancement and Management of Archaeological Sites

CTC.19 Areas and Features of Historic and Architectural Significance

CTC.20 Conservation Areas

CTC.21 Reuse and Conversion of Buildings

D26 Office Development

D31 Retail Hierarchy

D43 Crime Prevention and Community Safety

APPENDIX 4

Glossary

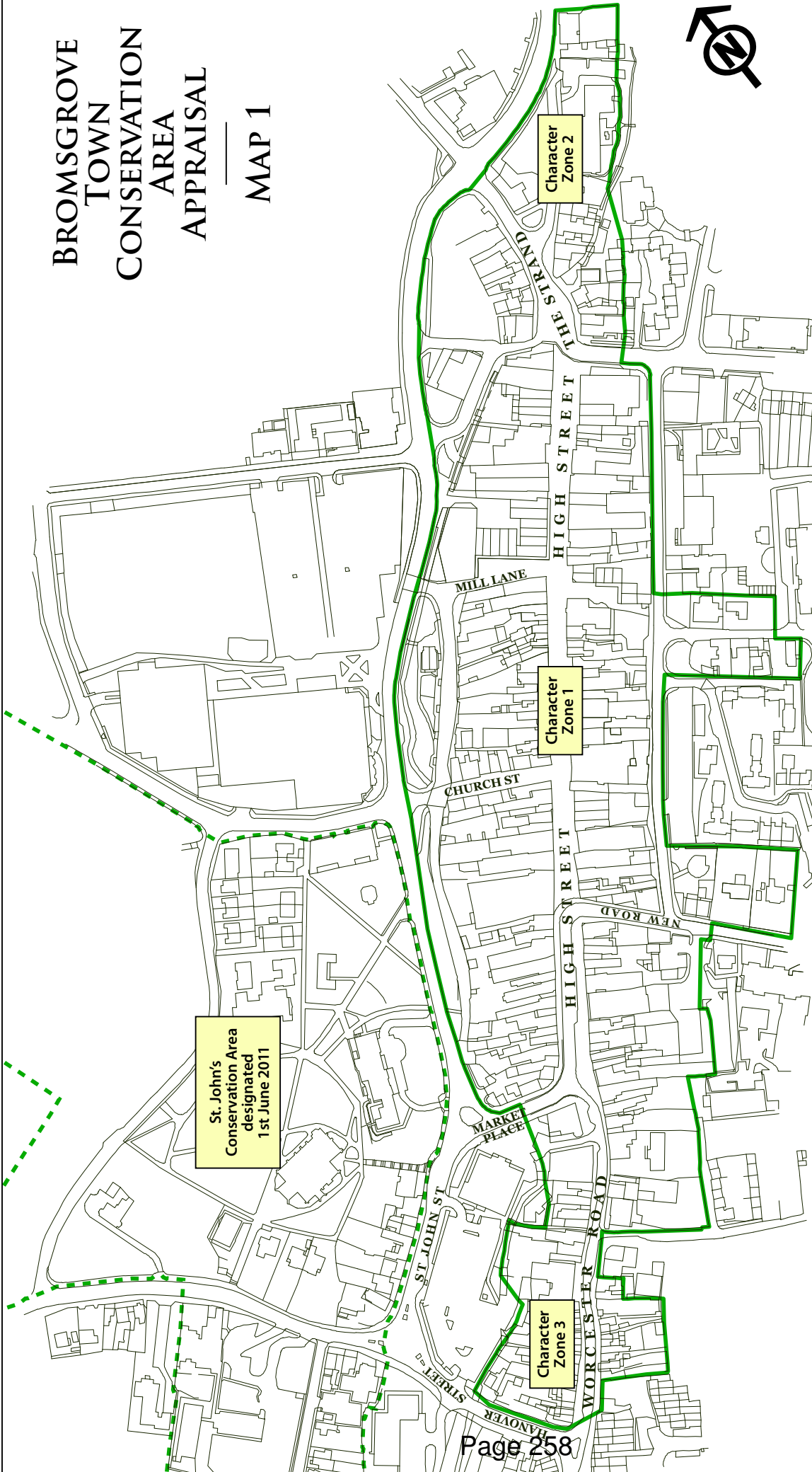
Listed Building	A building of special architectural or historic interest included on a national register. English Heritage is responsible for adding new entries to the statutory list.
Conservation Area	An area of special architectural or historic interest, the character or appearance of which, it is desirable to preserve or enhance. Local authorities are responsible for designating new Conservation Areas.
Bargeboards	An angled decorative timber board at eaves level (see Slug and Lettuce, 126-130 High Street)
Burgage plot	A medieval term describing a long strip of land, with the narrowest section facing the street
Camber headed	A slightly curved window head
Canalized	Contained with artificial man-made sides
Classical	An architectural style from ancient Rome and Greece, revived in the Georgian period. Detailing is simple and refined with columns, moulded doorcases and sash windows. (see Davenal House, 28 Birmingham Road)
Cornice	Projecting moulding often found at eaves level, or as part of a pediment
Culvert	A man-made channel beneath a road or building
Diaper pattern	Repetitive decorative arrangement of bricks, often in diamond shapes or squares.
Doorcase	A moulded case or frame lining a doorway
Doric columns	The plainest of the three types of columns found in classical architecture, with simple vertical flutes and an unornamented capital. (The three types are Doric, Ionic and Corinthian)
Dormer	A window projecting from the roof (see 33-37 Worcester Road)
Edwardian	Dates from 1901-1910
Fleur-de-lis	A stylised lily with three pointed leaves (see 1 High Street)
Georgian	Dates from 1714-1830
Gothic	An architectural style from 12th to 16th centuries but revived in the late Victorian period. Typical details include elaborate tracery, heavily mullioned windows and pointed arches.
Jettied gable	Projecting upper storey overhanging the lower floors, often a feature of timber framed buildings (see former Hop Pole Inn, New Road)
Keystones	A wedge shaped block found at the centre of an arch (see 120 High Street)

Glossary continued

Medieval	Dates from 950-1547
Mullioned windows	Vertical posts separating the sections of a window, usually in stone or timber
Naturalize	Make more natural
Pediment	Low pitched moulded triangle often found over doorways or windows and at roof level. (see Strand Centre, 14-18 The Strand)
Polychromatic brickwork	A feature of Victorian Gothic architecture, using a variety of alternating colours of brickwork
Portico	A feature of classical architecture, moulded projecting hood on supporting columns to form an open sided porch (see Lloyds TSB Bank, 112 High Street)
Quatrefoil	A tracery detail in the shape of a flower with four lobes separated by cusps. A trefoil has three lobes.
Quoins	Angular often slightly raised stones added to the corner of a building (see 18 High Street)
Regency	Dates from 1810-1820
Rusticated	Roughened texture added to stonework with sunken joints (see The Queens Head PH, The Strand)
Stucco	An external plaster finish, often finely textured
Tannery	A building where animal skin and hide is tanned
Venetian window	A window with three openings, the central one of which is arched and wider than the others
Victorian	Dates from 1837-1901
Wattle and daub	Sticks and twigs interwoven to form a panel packed with plaster and then limewashed. Commonly found in timber framed or thatched buildings.

BROMSGROVE TOWN CONSERVATION AREA APPRAISAL

MAP 1



KEY

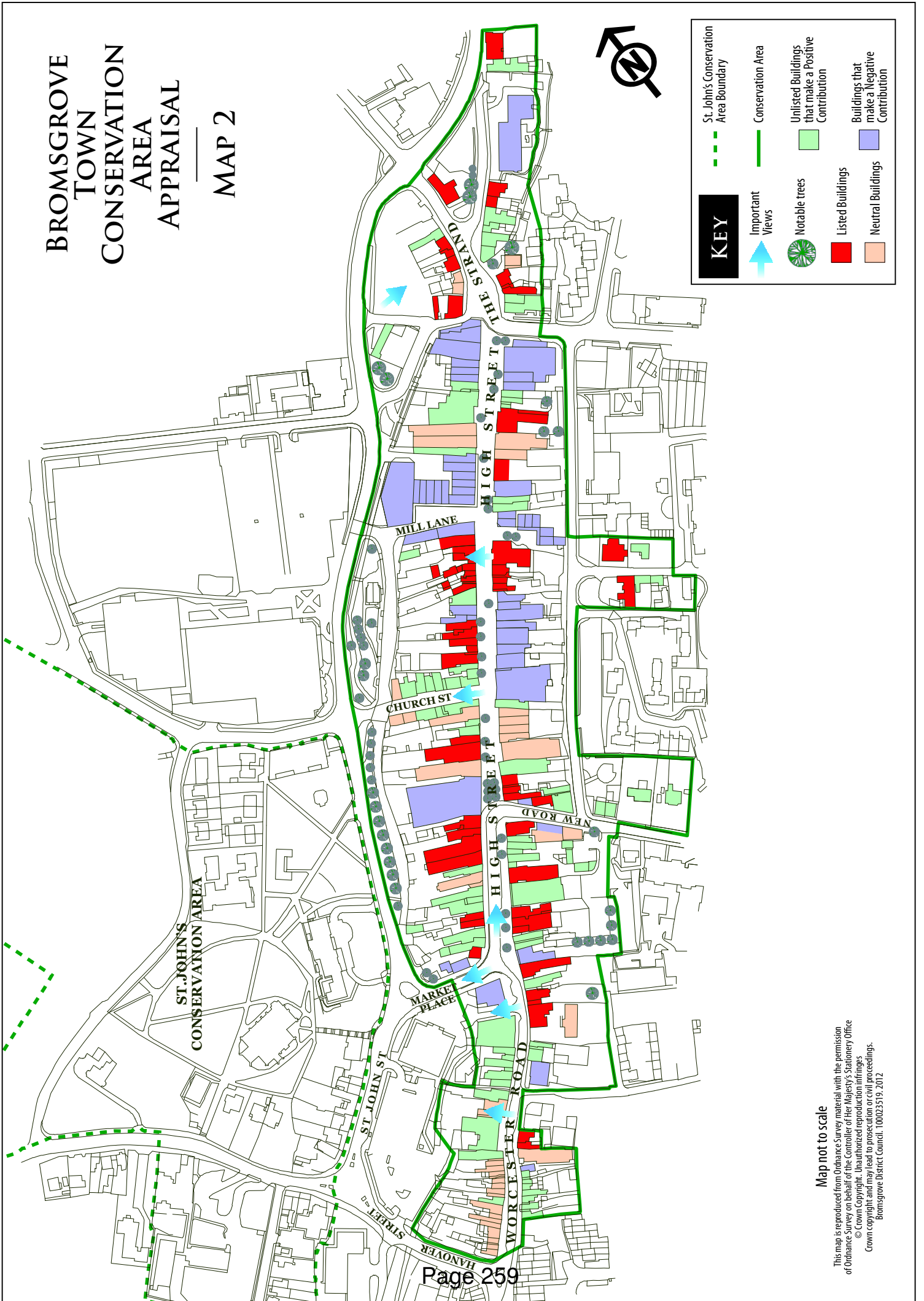
- St. John's Conservation Area Boundary
- Conservation Area

Map not to scale

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BROMSGROVE TOWN CONSERVATION AREA APPRAISAL

MAP 2



Map not to scale

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**BROMSGROVE DISTRICT
COUNCIL**

HEAD OF
PLANNING AND REGENERATION
THE COUNCIL HOUSE,
BROMSGROVE

Page 260
BROMSGROVE B60 1AA

*Worcestershire Extra Care
Housing Strategy
2012-2026*

Final version

*March 2012
Not for public circulation*

Logos of all Councils to be inserted.

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Executive Summary

Introduction

Worcestershire County Council with its District and Borough Council partners has developed a countywide strategy for extra care housing for older and disabled people. The strategy sets out the framework for the future development of extra care housing in Worcestershire. It covers the period 2012-2026.

The term 'extra care housing' has become one of the most widely used and adopted as the generic term for purpose designed, self-contained, housing for older and disabled people with care and support.

This strategy has been developed through:

- ◆ Updating the estimated need for extra care housing contained in the Worcestershire Housing and Support Needs of Older Persons Assessment 2009/10.
- ◆ The involvement of a broad range of interested parties and 'stakeholders' including:
 - The six local authorities with housing and planning responsibilities in Worcestershire.
 - Providers of extra care housing from social, charitable and private sectors.
 - Commissioners from Worcestershire County Council with an interest in extra care housing.
 - A group of local senior citizens with an interest in extra care housing.
- ◆ An understanding of the relevant national and local policies and priorities.

Through this strategy, over the years ahead, it is planned to make extra care housing an increasingly well known and chosen form of specialist accommodation in every District of the County. It will be available for people who want to buy and for people who want to rent. The local authorities will take a leading role in enabling extra care housing and they will encourage and work with providers from the social, charitable and private sectors to deliver the extra care housing required in Worcestershire.

Need for Extra Care Housing

The strategy estimates that an additional 4,703 units of extra care housing are required across Worcestershire by 2026. This level of need reflects the growing population of older people in Worcestershire, the majority of them property owners. It also reflects the desire for people who otherwise could be in care homes, to continue to live in their own homes. Of these, 3,450 units are suggested as being required for sale (including shared ownership) and 1,253 units are suggested as being required for rent. The table below shows the estimated number of units required by local authority area.

Local Authority	Total estimated units required
Bromsgrove	792
Malvern Hills	872
Redditch	438
Worcester	591
Wychavon	1,118
Wyre Forest	892
Worcestershire Total	4,703

Strategic Approach to Extra Care Housing

The strategic approach taken is deliberately intended not to be overly prescriptive. Instead the intention is to encourage imaginative and innovative approaches from providers and developers as a way of responding to the challenging economic climate, the decline in availability of grants for social housing on one side but substantial increases in projected need driven by demographic changes and a tenure mismatch in most districts. A specification for extra care housing has been developed as a basis of guiding housing and care providers, planners and interested agencies based on detailed consideration of the key variables within extra care housing.

Principles to guide developments are:

- ◆ Extra care is seen as an option for a wide range of needs stretching from older or disabled people who need more suitable accommodation, in which to continue to live independently in the company of others through to those who need high levels of care equivalent to residential or even dementia care.
- ◆ For the vast majority of older people it should not be necessary to move again simply because more care or support is needed.
- ◆ Mixed tenure rather than mono-tenure schemes are preferred in which case leases and tenancy agreements should, as far as possible, convey similar rights and obligations. Services, service charges and dwellings should also be as similar as possible. Because there are some differences in the legal position and rights of leaseholders and tenants generally the (stronger) rights, for example consultation on service charges of leaseholders, should apply to all.
- ◆ Space, design, environmental and other standards should be as high as possible in order to ensure long term letability and saleability.
- ◆ Extra care development will include 'village' type developments and individual 'schemes'.
- ◆ Extra care developments can provide a base to serve a wider community with staff providing an outreach service to a locality while local residents 'in- reach' to use communal facilities.
- ◆ Continuing Care Retirement Communities, in which different buildings, some of which may be consistent with the key variables of extra care, are devoted to meeting different types of need, are acceptable.

Funding

Funding for new schemes will need to come from a variety of sources and extra care providers will need to be increasingly innovative due to the impact of the recession and public sector budget reductions. This will increase the need to develop significant volumes of units for sale to respond to the identified need and also to support the delivery of units available to rent. The financial issues are in summary:

- ◆ Public funding to subsidise the capital costs of extra care housing development will be significantly reduced or possibly withdrawn completely.
- ◆ In order for extra care development to be viable a much greater proportion of the units developed will need to be for leasehold sale, either outright or through some form of shared equity.
- ◆ In order for this to happen, older people who are currently owner occupiers will need to find new extra care developments sufficiently attractive to want to purchase an apartment/property.
- ◆ Housing and extra care providers involved in the development of this strategy identified that selling 60-70% of properties in a scheme would be typically required to ensure viability.
- ◆ Provision of affordable rented units in new extra care developments, in the absence of grant, will need to be funded through subsidy from units for sale and/or contributions of land at below market value.
- ◆ It is anticipated that local authority budgets for care and support will be constrained over the next few years.
- ◆ The majority of older people entering extra care in the future are likely to have to fund their care from their own resources; the proportion of older people living in extra care housing who can expect to have their care costs funded by Worcestershire County Council Adult and Community Services is likely to reduce.
- ◆ In order to fund their care many older people may need to use some form of equity release product or 'mechanism' to release funds from their existing home or extra care apartment/property.

Delivery

There are a number of ways in which extra care housing will be developed and delivered including:

- ◆ Through suitable development sites of both new build extra care schemes and 'village' type development.
- ◆ Encouraging private development of extra care housing.
- ◆ Identifying existing sheltered housing schemes that could be upgraded through capital investment to enhance the building to provide the necessary infrastructure to deliver extra care, or a more limited form of extra care.
- ◆ Identifying the potential for 'core and cluster' models of service delivery in the vicinity of existing extra care schemes, potentially providing care to the wider local community and making the catering and social activity provision within extra care available to the wider local community.

The local authorities in Worcestershire will work actively with developers, extra care providers, and housing organisations, both social and private; to identify potential sites that are suitable and viable for extra care schemes and village type developments particularly as some of these types of schemes will only be viable on larger sites.

Benefits of the strategy

The table below summarises the key benefits of adopting and implementing this strategy:

Stakeholder	Benefits
Older and disabled people	<ul style="list-style-type: none"> ◆ Strategy will lead over time to a growth in the volume, mix and range of extra care housing options and choices available. ◆ Addresses the requirements of the whole population of older and disabled people including both self funders and those people who will need public subsidy to meet their housing and care costs. ◆ Extra care housing will become much better known amongst the older population and their families and encourage better individual planning for future housing and care requirements. ◆ Will create options for older people to use their own resources to best effect to meet both their future housing and care needs and costs ◆ Will create attractive, aspirational housing options that are suited to people who either have or want to plan for changing housing requirements and potentially increasing care needs, including dementia.
Extra Care Housing Providers	<ul style="list-style-type: none"> ◆ Provides a clear 'Worcestershire wide' position from all local authorities in relation to what types of developments are needed and desirable and would be supported by local authorities (and which would not). ◆ Provides a local authority 'endorsed' evidence base of need for extra care housing by District. ◆ Provides clear guidance in relation to the 'essential/desirable' components of any extra care housing development across Worcestershire. ◆ However, is not 'over prescriptive' providing flexibility for developers/providers to promote innovative and imaginative scheme proposals to local authorities within the context of the guidance in the strategy. ◆ Encourages mixed tenure developments and private/social sector partnerships. ◆ Provides a strategic statement that scheme proposals and delivery (in aggregate) need to address the needs/requirements of the whole population of older/disabled people. ◆ Sets out a clear expectation that there need to be schemes that can cater for people with more complex needs including dementia, spinal injuries, and older people with learning disabilities.

Stakeholder	Benefits
District Housing and Planning authorities	<ul style="list-style-type: none"> ◆ Complements the new countywide housing strategy ◆ Provides a clear evidence base of the estimated need for extra care housing. ◆ Provides a basis for specifying the type and volumes of extra care units required as part of local development frameworks and s106 agreements. ◆ Provides clear guidance about the characteristics, ‘essential’ and ‘desirable’, of extra care housing when providing guidance to developers and considering planning applications. ◆ Is not ‘over prescriptive’, i.e. it permits the best use of potential development opportunities. ◆ Provides the basis for a consistent approach and response to developers, particularly in the private sector, in relation to proposals for extra care housing and similar proposals. ◆ Over time the strategy has the potential to release family housing back into local housing markets as individuals purchase extra care apartments.
Worcestershire County Council Adult & Community Services	<ul style="list-style-type: none"> ◆ Support and complements <i>Ageing Well</i> and the Worcestershire Dementia Strategy. ◆ Growth in volume of extra care housing allows potential reduction in use of and spending on residential care. ◆ Potentially more cost effective option than using residential care. ◆ Will create attractive housing with care options that encourage self funders to meet their housing and care needs and costs. ◆ Allows individuals to use forms of equity release/‘downsizing’ to meet both housing and care costs. ◆ Provides a mechanism for consensus with the District housing and planning authorities about ‘definition’, role of and approach to developing extra care housing. ◆ Provides housing with care options for the whole older people population. ◆ Specifically promotes housing with care options for people with dementia and older people with learning disabilities.

1. Introduction

1.1. Purpose and scope of this strategy

Worcestershire County Council with its District and Borough Council partners have developed a strategy for extra care housing for older and disabled people that covers all areas of Worcestershire. This strategy sets out the framework for the future development of extra care housing in Worcestershire. This strategy covers the period 2012-2026.

The term 'extra care housing' has become one of the most widely used and adopted as the generic term for purpose designed, self-contained, housing for older and disabled people with care and support.

Through this strategy, over the years ahead, it is planned to make extra care housing an increasingly well known and chosen form of specialist accommodation in every District of the County. It will be available for people who want to buy and for people who want to rent. The local authorities will take a leading role in developing extra care housing and they will encourage providers from the social, charitable and private sectors to deliver the extra care housing required in Worcestershire.

Future development will include new schemes, redevelopment of some existing sheltered housing and 'hub and spoke' models of outreach in to nearby communities. A range of tenure options should be developed including shared ownership types of home ownership.

This strategy estimates that an additional 4,703 units of extra care housing are required across Worcestershire by 2026. This level of need reflects the growing population of older people in Worcestershire, the majority of them property owners. It also reflects the desire for people to continue to live in their own homes rather than move to a residential care home.

Funding for new schemes will need to come from a variety of sources and extra care providers will need to be increasingly innovative due to the impact of the recession and public sector budget reductions. This will increase the need to develop significant volumes of units for sale to respond to the identified need and also to support the delivery of units available to rent.

1.2. Background and approach.

This strategy takes the Worcestershire Housing and Support Needs of Older Persons Assessment that was carried out in 2009/10 as a starting point and uses the information captured and analysed as part of that work.

This strategy has been developed through:

- ◆ Updating the estimated need for extra care housing contained in the Worcestershire Housing and Support Needs of Older Persons Assessment 2009/10.
- ◆ The involvement of a broad range of interested parties and 'stakeholders' including:
 - The six local authorities with housing and planning responsibilities in Worcestershire.
 - Providers of extra care housing.
 - Commissioners from Worcestershire County Council with an interest in extra care housing.
 - A group of senior citizens with an interest in extra care housing.
- ◆ An understanding of the relevant national and local policies and priorities.

1.3. Content of strategy

The strategy in summary contains:

- ◆ An assessment of the levels of need for types of extra care housing required in Worcestershire broken down by District.
- ◆ The key messages from a range of stakeholders in relation to the types and 'models' of extra care housing that are appropriate and suitable for different localities and areas within Worcestershire.
- ◆ Guidance in relation to extra care housing that can be used by Strategic Commissioning managers, Strategic Housing and Planning managers from all local authorities in Worcestershire so that there is consensus on the nature and specification of extra care housing for Worcestershire.
- ◆ The funding options, both in terms of capital and revenue, in relation to any proposed development of extra care housing in the context of significant reductions in public spending on housing and care/support.
- ◆ A delivery programme for the County. A separate detailed delivery programme will be developed which will have delivery plans at District and Borough Council level.

2. Context: Policy and Practice

To put the development of extra care housing in Worcestershire in a wider context this section outlines:

- ◆ National housing policy in relation to older people and the direction of relevant social care policy.
- ◆ Relevant policy and plans developed in Worcestershire.
- ◆ A brief summary of guidance and research evidence in relation to extra care housing.

2.1. National policy

The Coalition Government has produced a national housing strategy, *Laying the Foundations: a housing strategy for England*. (2011) and it includes references to a 'new deal for older people's housing'. Recent presentations given by civil servants from the Department for Communities and Local Government (CLG) have indicated that the *National Strategy for Housing in an Ageing Society*¹ produced in 2008 by the previous Government also remains valid.

This strategy, known as *Lifetime Homes, Lifetime Neighbourhoods*, sets out a wide range of objectives in relation to widening the range of housing, care and support options and opportunities available to people as they become older and/or experience disability.

Lifetime Homes, Lifetime Neighbourhoods seeks to respond to what older people say they want. It outlines new approaches and investment in information and adaptation services, adoption of Lifetime Homes standards in the public sector and a positive vision for specialist housing.

It is based on a recognition that as the population ages, by 2026 older people will account for almost half (48 per cent) of the increase in the total number of households, resulting in 2.4 million more older households than there are today. The strategy recognises that good housing is critical to manage the mounting pressures of care and support expenditure and envisages making it easier and safer for older people to stay in their own homes.

There is no lack of discussion of the right social care policy for an ageing society. Influential publications over the last 5 years include the following:

- ◆ *Our Health, Our Care, Our Say*: a new direction for community services (Department of Health 2006).
- ◆ *Putting People First - Concordat* (Department of Health 2007) and the linked *Transforming Adult Social Care* (Department of Health 2008).
- ◆ *Living Well With Dementia – A National Dementia Strategy* (Department of Health 2009).
- ◆ *Under Pressure – 'Tackling the financial challenge for councils of an ageing population'* (Audit Commission 2010).

¹ National Strategy for Housing in an Ageing Society: Lifetime Homes, Lifetime Neighbourhoods. CLG, 2008

It is apparent that recurring themes in social care policy are:

- ◆ Supporting people to live at home.
- ◆ Preventing dependency.
- ◆ Encouraging independence and an active, healthy lifestyle in later life.

There is an emerging philosophy of viewing people as individual customers of services, a concern to improve quality but also about how social care can be afforded. In concrete terms, we see in policy and practice:

- ◆ An emphasis on extending the range of **choice**.
- ◆ A shift away from more institutional provision in favour of supporting people to be **independent**.
- ◆ Giving people greater direct **control** over their life and how they are supported most recently manifest in the concept of 'personal budgets' for social care.

2.2. Local strategies and plans

This extra care strategy is a part of a wider set of recent housing and social care policies within Worcestershire. These are summarised below.

2.2.1. Worcestershire housing strategy 2011-2016

The Worcestershire Housing Strategy has been developed by all six local housing authorities. It sets the future direction of housing related services within the county over the next 5 years.

It contains a number of priorities and actions that relate either generally or specifically to extra care housing including:

- ◆ Supporting older people to make choices through availability of trustworthy advice on options, provision of support and practical help around the home where needed.
- ◆ Encouraging people to downsize, including older people.
- ◆ To develop financially sustainable models of extra care provision to meet the needs of older people within the county.

The Local Investment Plan (LIP) sets out the vision for Worcestershire in terms of housing, planning, transport, regeneration, social care, health, infrastructure and employment. It is anticipated that as the LIP is updated over time, local partners will clearly refine their lists of individual housing schemes to reflect the delivery of sites and schemes, new investment opportunities that emerge and the availability of public and private sector funding. One of the identified priorities in the LIP is housing for older people including extra care housing.

In addition some of the housing authorities have developed specific older person's strategies, for example Redditch Borough Council has a Strategy for Older Persons' Housing and Support 2008-2026,

which sets out the local agenda and framework for the future of older persons' housing and support, including extra care housing.

2.2.2. Worcestershire Strategic Market Housing Assessment

The housing authorities in Worcestershire have commissioned GVA and Edge Analytics to prepare a Strategic Housing Market Assessment (SHMA), which estimates future demand for new housing including affordable housing over the period to 2030. As well as considering the future overall housing demand, the SHMA looks at some specific 'household groups' including older people.

The SHMA and the Extra Care Strategy are complementary in terms of the demographic projections for older people's households and the growth in this population and the housing implications. As with this strategy the SMHA also draws on research into the Housing and Support Needs of Older People within Worcestershire that was undertaken by the Housing and Support Partnership in 2009/10.

2.2.3. Ageing Well: Worcestershire older person's commissioning strategy 2011 - 2016

This strategy sets out the overall context, approach and priorities in relation to care and support for older people. The local context for this strategy is:

- ◆ An ageing population.
- ◆ Improving health and potential for high quality of life for older people.
- ◆ But, also more years of poor health and limited ability for some, leading to increasing care and support needs.
- ◆ Hence, the focus will be on social care and community based support especially personal care and household tasks.
- ◆ The need to support effective use of high levels of equity amongst owner occupiers and support older people to enjoy a quality of life.

The strategy is focussed on key priorities related to maintaining and enhancing the independence of older people including:

- ◆ Providing information and advice.
- ◆ Promoting self care and community support.
- ◆ The role of 'low level support'.
- ◆ Commissioning and facilitating supported housing, including extra care housing.
- ◆ Rehabilitation support.
- ◆ Dementia and mental wellbeing.

There are a number of key themes within this strategy that are relevant to the development of extra care housing in Worcestershire:

- ◆ Focus on wellbeing agenda – "keep yourself well".
- ◆ Ensuring that people take personal responsibility for their care and wellbeing.
- ◆ Ensuring that public and private resources are effectively used.

- ◆ Optimise the number of older people able to make informed choices regarding their health, care and support needs.
- ◆ Ensure information and advice is available to self funders to ensure optimal use of personal resources

There is an expectation that extra care housing development needs to both support the aspirations of self funders and also help to limit demand from older people for more costly residential care.

2.2.4. Worcestershire Dementia Strategy 2011-2016

The dementia strategy is predicated upon the development of services that support people to 'live well with dementia' within the community following early diagnosis and subsequent delivery of information, advice, and emotional and practical support.

One priority of this strategy is for the care and support of people with dementia in their own home rather than in an institutional care setting. As a part of delivering this priority the role of both extra care housing and sheltered housing is promoted:

The needs of people with dementia and their carers should be integral to the development and delivery of supported housing schemes. It has been demonstrated that people with dementia can benefit from the flexible care packages and support offered in sheltered or extra care housing, provided that appropriate opportunities for social interaction are available.

As with other health and social care staff those working in supported housing schemes need the understanding and skills to deliver person centred care.

National policy, consistent with many older people's own wishes, is to extend housing and care options, support people to remain at home as far as possible, with assistance when required. The emphasis has consequently been on improving information about possible options, reducing reliance on more institutional forms of accommodation with greater use of equity by owners. Plans and strategies in Worcestershire incorporate these ambitions

2.3. Guidance and research

The Housing Learning & Improvement Network (LIN)² is the national network for promoting new ideas and supporting change in the delivery of housing, care and support services for older and vulnerable adults, including people with disabilities and long term conditions. The Housing LIN had the lead for supporting the implementation and sharing the learning from the Department of Health's previous extra care housing programme.

More Choice, Greater Voice, the Department of Health Housing LIN toolkit (2008) reviews the changing aspirations of older people and summarises that accommodation and care should ensure:

² www.housinglin.org.uk

- ◆ Real options for people in a range of personal and housing circumstances.
- ◆ Locations that provide access to a range of facilities and services.
- ◆ Provide actual and perceived security in the scheme and its surroundings.
- ◆ Recognise and provide for a diversity of lifestyle choices.
- ◆ Provide a flexible offer of service that is built on positive presumptions about old age.
- ◆ Offer the best available financial arrangements on entry and for the future.

The Housing LIN produced an updated version of this toolkit, *Strategic Housing for Older People (2011)*. This strategy is consistent with the most recent Housing LIN guidance.

It is beyond the scope of this strategy to reference all the relevant sources of information through the Housing LIN in relation to extra care housing however the evidence from research and guidance regarding extra care housing, although in some areas contradictory, still overwhelmingly indicates many benefits from extra care housing. In a nutshell some key findings include:

- ◆ Residents value the independence, security and social interaction offered by extra care housing.
- ◆ Most residents feel well connected, value social activities and make new friends.
- ◆ Some residents can be socially isolated, particularly those in poorer health and receiving care.
- ◆ 'Village' schemes and smaller schemes have different benefits and limitations for different people.
- ◆ Some people have transferred from care homes to extra care housing and 'thrived' and people with nursing care needs successfully live in some schemes.
- ◆ In some places there has been tension between 'the fit' and 'the frail' residents within extra care housing.
- ◆ Most people live in extra care housing through to the end of their lives and there are examples of schemes that have been able to increase significantly the opportunity to end a person's life in an extra care scheme where that is the resident's choice.
- ◆ Extra care housing can support people with cognitive impairment such as dementia but it is advisable for people to move in before this has developed significantly.
- ◆ Extra care housing is particularly valuable for couples with different levels of need.

2.4. The changing public and private dimension

The environment in which commissioners and providers of housing, care and support services operate is changing substantially and rapidly.

- ◆ The NHS White Paper '*Equality and Excellence: Liberating the NHS*' proposes significant reform and different approaches for health care commissioning and delivery.
- ◆ Government policy is focussed towards decentralisation with increasing control placed into the hands of individuals and communities, whilst shifting power and responsibility away from the centre to local government.
- ◆ The public sector is expected to deliver more for less with an expectation that the focus of public resources will be on delivering improved outcomes for individuals and communities that promote self help, stronger communities and are financially sustainable in the longer term.
- ◆ Commissioners and service providers are being encouraged to think differently and to increasingly work across service boundaries.

- ◆ There is strong emphasis on bringing together public, private and voluntary resources and expertise in new and imaginative ways, to improve quality and productivity.

The key themes that are emerging from national policy and the impact of public spending reductions over the next five years are that:

- ◆ Individuals will be expected to take a greater responsibility for their own health and wellbeing. Extra care housing is likely to be one of the options that individuals may choose in relation to managing their own health and wellbeing.
- ◆ It is likely that a majority of individuals will need to fund or at least contribute to the cost of their future care needs; in the case of extra care housing this will be both the costs of purchasing a property as well as the costs of care.
- ◆ The role of local authorities will increasingly be that of a commissioning authority, rather than provider, with a stronger emphasis on, for example, providing information and facilitating access to appropriate advice for individuals to take decisions about purchasing an extra care property.

2.5. Policy and practice - summary

In summary, recent policy and practice in relation to extra care housing suggests that it can help to deliver the following key benefits:

- ◆ Providing quality housing and communities that are suitable for the needs of older people and some other vulnerable groups.
- ◆ Providing a wider range of housing and care choices.
- ◆ Freeing up properties in the housing chain through individuals moving to an extra care scheme.
- ◆ Promoting greater independence, choice and control.
- ◆ Reducing social isolation.
- ◆ Improving the health and wellbeing of people who use the service.
- ◆ Reducing the demand on community and acute health services.
- ◆ Providing an alternative to residential care for many people and nursing care for some.
- ◆ Keeping carers and the person they care for together.
- ◆ Providing most people who use the service with a 'home for life'.
- ◆ Providing an environment that can provide safety and promote dignity.
- ◆ Supporting people at their 'end of life'.

3. Need for Extra Care Housing

3.1. Introduction

This strategy draws on information that was collected from both primary and secondary sources for the Worcestershire Housing and Support Needs of Older Persons assessment (2009/10) as the starting point for establishing the need for types of extra care housing over the period 2011-2026. That assessment contained a large amount of data in relation to the demographic, income, housing and health profile of the older population in Worcestershire; only the data that is specifically relevant to extra care housing is drawn on from that assessment for this strategy.

Where appropriate, other data that is relevant to establishing the need for this type of housing, using other sources of local data, has been used, for example from commissioning strategies for older people and people with dementia.

3.2. Worcestershire older population – key features

From the Housing and Support Needs of Older Persons assessment (2009/10) the key features are:

- ◆ In Worcestershire by 2031 there will be a 42% increase in those over 60 and a 136% increase in those over 85. Rates of growth vary between Districts with higher growth in Wychavon and Malvern Hills. In absolute terms, Wychavon and Wyre Forest have the largest populations of older people.
- ◆ Although life expectancy has increased the period of poor health in later life when care may be needed has also risen, 4.3 years for men and 5.9 years for women. Those with dementia are likely to increase from 7,724 now to around 10,145 by 2020; a 31% increase.
- ◆ The number of people who need help with one or more daily activities like going to the toilet or getting out of bed is predicted to rise from 15,728 to 25,632 by 2025.
- ◆ Levels of owner occupation amongst older people in Worcestershire are very high at over 80% in the 55-74 age range underlining the importance of planning for all tenures but also the possible role of equity schemes.

3.3. Need for extra care housing - approach

This strategy takes the projections of need for types of extra care housing from the Housing and Support Needs of Older Persons assessment (2009/10). A refined version of the toolkit previously published by the Department of Communities and Local Government (CLG)³, for the purpose of local authorities producing accommodation strategies for older people, which includes guidance regarding estimating

³ More Choice, Greater Voice, CLG (2008).

need for extra care housing, is used to project the estimated need for extra care housing in Worcestershire. This is set out in more detail below in section 3.4.

The projected need for types of extra care housing for Worcestershire is broken down by District/Borough council area. The relevant demographic context and other factors that are likely to affect the need for extra care housing are set out below. To set the need for extra care housing in context, some key features of the older population of Worcestershire are set out below.

3.3.1. Worcestershire older population

In England, over the next 23 years alone those aged over 60 years will increase from 11.3 million in 2008 to 16.7 million in 2031, a 47% growth in this cohort of the overall population. Those aged 85 and over will more than double from 1.1 million to 2.4 million (114%). These trends are reflected in Worcestershire.

Table 3.1 below illustrates that there will be an increase of 42% in the number of people aged 60 and over and by 2031 the oldest group of those over 85 will have increased by 136%.

Table 3.1 - Population of Worcestershire Residents aged 60+, 2011-2031

Age Group	2011	2016	2021	2026	2031
60-84	135,800	146,800	157,800	170,400	178,200
85+	15,100	18,000	21,900	27,400	35,600
Total	150,900	164,800	179,700	197,800	213,800

Source: ONS 2008-based Subnational Population Projections

Table 3.2 below shows the number of people over 65 by District 2011 to 2031

Table 3.2 - Population aged 65+, by District, 2011-2031

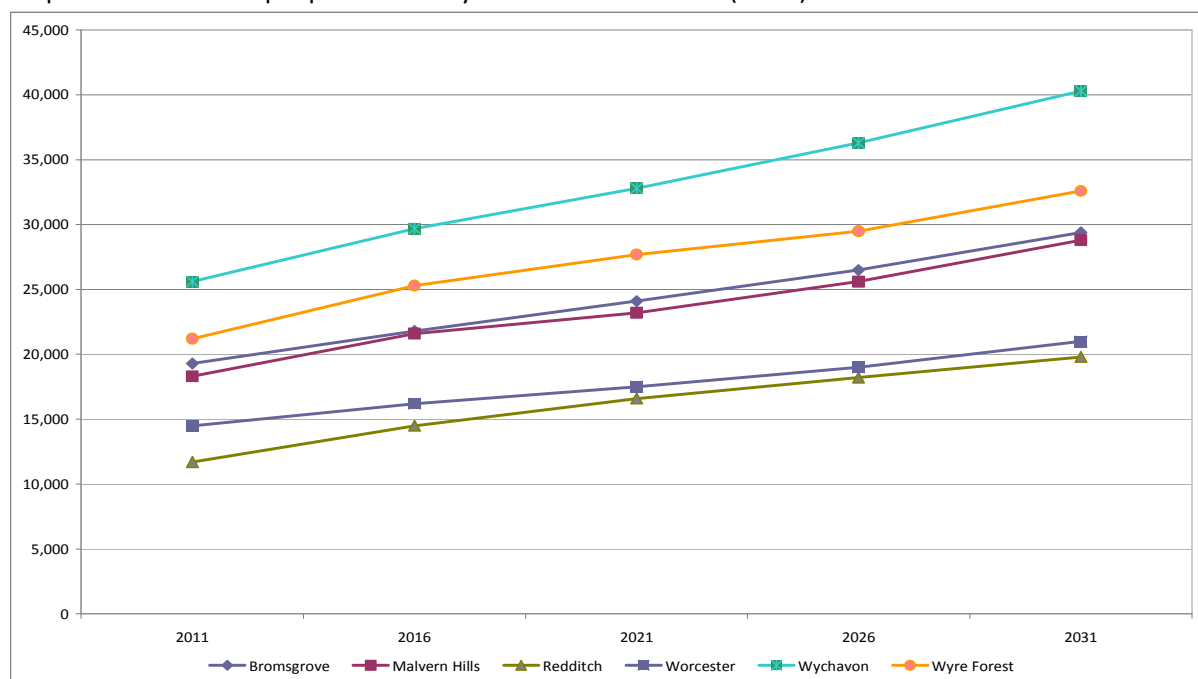
District	2011	2016	2021	2026	2031
Bromsgrove	19,300	21,800	24,100	26,500	29,400
Malvern Hills	18,300	21,600	23,200	25,600	28,800
Redditch	11,700	14,500	16,600	18,200	19,800
Worcester	14,500	16,200	17,500	19,000	21,000
Wychavon	25,600	29,700	32,800	36,300	40,300
Wyre Forest	21,200	25,300	27,700	29,500	32,600
Total	110,400	129,300	142,200	155,600	171,500

Note: Totals may not sum due to rounding

Source: ONS 2008-based Subnational Population Projections

While all Districts can expect significant increases, within this overall picture patterns of growth vary between the six authorities, see graph 3.3. below. Worcester, for example, shows significantly lower growth than Wychavon (the steeper the graph the higher the growth rate).

Graph 3.3: Number of people over 65 by District 2008 to 2031 ('000s)



The proportion of people needing services rises with age and it is the older age groups in particular which are set to increase. The numbers of people aged 75 and over are projected to increase by 88% between 2011 and 2031 across Worcestershire. Table 3.4. below shows the increase in the population aged 75 years and over by District.

Table 3.4. Number of people aged 75 years and over by District 2011-2031

District	2011	2016	2021	2026	2031
Bromsgrove	9,100	10,600	12,800	15,100	16,700
Malvern Hills	8,800	10,200	12,200	14,900	16,500
Redditch	5,100	5,900	7,300	9,400	10,800
Worcester	6,800	7,400	8,600	10,100	11,100
Wychavon	11,500	13,400	16,300	19,900	22,000
Wyre Forest	9,000	10,700	13,700	16,900	18,300
Total	50,700	58,400	71,000	86,400	95,300

Note: Totals may not sum due to rounding

Source: ONS 2008-based Subnational Population Projections

The numbers of people aged 85 years and over are projected to increase by 136% between 2011 and 2031 across Worcestershire. Table 3.5. below shows the increase in the population aged 85 years and over by District.

Table 3.5. Number of people aged over 85 years by District 2011 to 2031

District	2011	2016	2021	2026	2031
Bromsgrove	2,700	3,500	4,300	5,300	6,700
Malvern Hills	2,800	3,400	4,100	5,100	6,600
Redditch	1,400	1,800	2,000	2,600	3,500
Worcester	2,000	2,200	2,700	3,200	4,000
Wychavon	3,400	4,000	4,800	6,100	7,900
Wyre Forest	2,700	3,100	3,900	5,000	6,800
Total	15,100	18,000	21,900	27,400	35,600

Note: Totals may not sum due to rounding

Source: ONS 2008-based Subnational Population Projections

3.3.2. Worcestershire dementia prevalence

Worcestershire has the highest prevalence of dementia within the West Midlands (based on 2007/2008 figures). Prevalence of dementia is predicted to increase by three per cent per annum over the next 10 years so that by 2020 there will be an estimated 10,145 people with dementia in the county⁴. This increasing prevalence reflects the fact that the county has a higher proportion of older people than other counties and the longer life that this population enjoys.

Table 3.6. below shows the predicted increase in the numbers of people with dementia by District from 2011-2020.

Table 3.6 - Predicted prevalence of dementia by District for all ages, 2011-2020

District	2011	2020
Bromsgrove	1,372	1,795
Malvern Hills	1,376	1,776
Redditch	807	1,098
Worcester	1,049	1,262
Wychavon	1,695	2,307
Wyre Forest	1,425	1,907
Worcestershire	7,724	10,145

Source: NHS Worcestershire Public Health Information Team

3.3.3. Older people with learning disabilities

Some people with learning disabilities are likely to confront issues related to ageing at an earlier stage in their lives and their need for services is likely to increase as they age. Table 3.7 below shows the projected number of people aged 50 or over with a moderate or severe learning disability. These are the people most likely in this group to need support and care as they grow older.

⁴ Worcestershire Dementia Strategy 2011-2016

Table 3.7 - People aged 50+ in Worcestershire predicted to have a moderate or severe learning disability

Age Group	2010	2015	2020	2025	2030
People aged 55-64	377	360	389	416	389
People aged 65-74	203	243	250	240	262
People aged 75-84	73	83	99	121	123
People aged 85+	26	31	38	48	61
Total aged 55+	679	717	776	825	835

Prediction rates have been applied to ONS population projections of the 18 and over population in the years 2011 and 2021 and linear trends projected to give estimated numbers predicted to have a moderate or severe learning disability, and hence likely to be in receipt of services, to 2030.

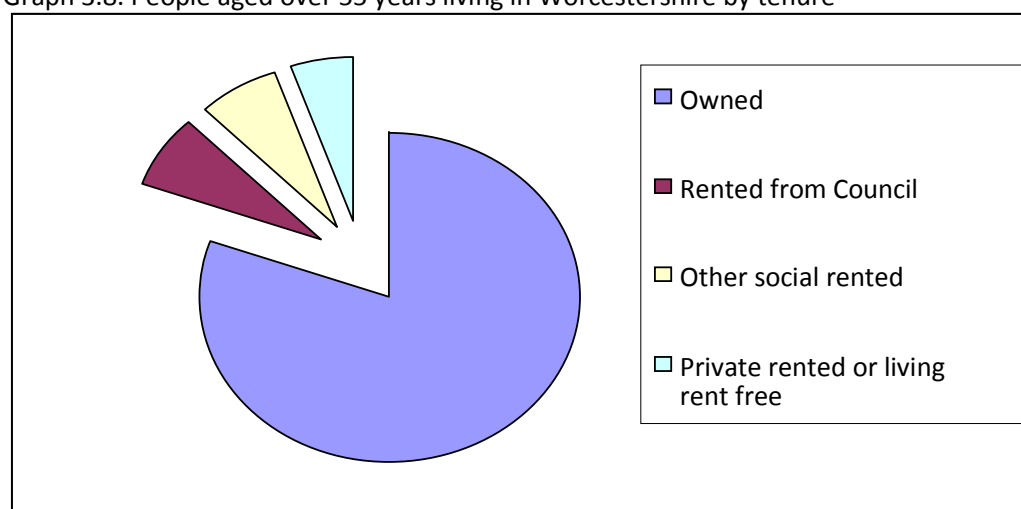
Source: These predictions are based on prevalence rates in the report Estimating Future Need/Demand for Supports for Adults with Learning Disabilities in England, June 2004.

Recent commissioning data has identified that there are currently up to 244 individuals living in residential care services for whom alternative extra care types of housing may be an attractive alternative. These figures are relatively small and have not been included within the overall estimates of need for extra care housing however, they do indicate a clear need for a specialised form of extra care housing provision for older people with learning disabilities.

3.3.4. Older population tenure mix

There has been a significant growth in the proportion of people buying and owning their own home over the last few decades. About three out of four of those now retiring are home owners. Most own their property outright. This pattern changes amongst people as they grow older. Home ownership peaks amongst people in their fifties and early sixties. The tailing off of home ownership in later years is partly due to people relinquishing ownership as they move to different, often more institutional accommodation where ownership is not currently possible, e.g. residential and nursing care. These patterns are reflected in Worcestershire, where the majority of people aged 55 and over live in homes they have bought or are still buying with a mortgage.

Graph 3.8. People aged over 55 years living in Worcestershire by tenure



Source: 2001 census.

There is an expectation in Worcestershire, based on the key messages from a range of stakeholders, including older home owners, and the substantial reductions in public subsidy available for extra care housing development, that in the future a majority of older people moving to extra care will typically be purchasing outright or on a shared equity basis. The breakdown of the older population by tenure by District area is shown in table 3.9 below.

Table 3.9. Tenure by age group by District (%)

District	People aged:	65-74	75-84	85+
Bromsgrove	Owned	86.9	77.8	69.7
	Social rented (housing associations)	10.4	16.6	17.2
	Private rented or living rent free	2.8	5.6	13.1
District	People aged:	65-74	75-84	85+
Malvern Hills	Owned	84.1	77.1	70.7
	Social rented (housing associations)	10.4	16.1	18.3
	Private rented or living rent free	5.6	6.9	11.0
District	People aged:	65-74	75-84	85+
Redditch	Owned	73.8	62.5	50.6
	Rented from council	21.4	27.4	30.2
	Other social rented (housing associations)	1.8	2.6	3.8
	Private rented or living rent free	3.0	7.5	15.4
District	People aged:	65-74	75-84	85+
Worcester	Owned	79.0	72.2	66.4
	Social rented (housing associations)	16.4	20.7	23.5
	Private rented or living rent free	4.6	7.1	10.1
District	People aged:	65-74	75-84	85+
Wychavon	Owned	80.7	73.1	65.7
	Social rented (housing associations)	14.6	19.3	22.7
	Private rented or living rent free	4.7	7.5	11.7
District	People aged:	65-74	75-84	85+
Wyre Forest	Owned	81.7	72.2	66.6
	Social rented (housing associations)	14.1	20.7	21.7
	Private rented or living rent free	4.2	7.1	11.7

Source: 2001 census

The projected growth in the older population, combined with the increase in home ownership, means that more people will be able and most likely be expected to pay for their own care, in turn increasing the demand for privately purchased services and the use of equity release.

3.4. Estimating need for extra care housing

The toolkit used in *More Choice, Greater Voice*⁵ which accompanied the publication of the Housing Strategy for Older People (op cit), suggests that future ratios should be around 170 units of specialised accommodation (other than registered care home places) per thousand people over 75 years.

Breaking this down the toolkit suggests per thousand people over 75 years there should be:

- ◆ 50 conventional sheltered housing properties.
- ◆ 75 leasehold sheltered housing properties.
- ◆ 20 'enhanced' sheltered housing properties divided equally between ownership and renting.
- ◆ 25 extra care properties, again divided equally between ownership and renting.
- ◆ In addition around 10 housing based places for people with dementia.

These 'norms' were put forward on the basis of a pilot exercise and draw on thirty studies of current and future housing need to estimate requirements. They reflect the way provision and the market needs of older people have been developing rather than providing exact measures of need. They redress the balance between properties for ownership and renting, in line with the shift in tenure balance in recent years, and the picture in Worcestershire.

The term 'enhanced' sheltered housing is not a common one. It describes a form of housing (*More Choice, Greater Voice*) which extends facilities and care beyond traditional sheltered housing but is more limited than full extra care. It might not, for example, have the full range of communal and other facilities typically available within extra care. However, given that in Worcestershire a key message from some housing providers is that one of the ways they will seek to address the need for additional specialised housing for older people is to remodel some existing sheltered housing to extra care or, perhaps more accurately, to have some of the 'features' of extra care, this 'housing type' is included within the prediction of future need.

This strategy takes as a starting point the projections of countywide future housing need that was set out in the Housing and Support Needs of Older Persons assessment (2009/10), see table 3.10 below.

⁵ More Choice, Greater Voice, Housing LIN/CLG (2008)

Table 3.10 - Specialist Older Persons Housing Required in Worcestershire to 2026

Housing Type	Current provision	Suggested ratios (per 1000 population)	Resulting number of units	Increase/decrease
'Enhanced' sheltered housing	54	20	1,728	1,674
Extra care sheltered housing	348	25	2,160	1,812
Housing based provision for dementia	0	10	860	860

Source: Worcestershire Housing and Support Needs of Older Persons assessment (2009/10).

Note: Current provision is from EAC database

The figures in table 3.10 are based on a projected population of 86,400 people aged 75 and over by 2026 (table 3.4) for Worcestershire. These figures have been adjusted from the Housing and Support Needs of Older Persons assessment (2009/10) to reflect projections to 2026. The use of the ratio of the number of units per thousand of the population aged over 75 years is due to this being widely accepted as a 'threshold age' for entry to specialised housing (*More Choice Greater Voice*).

More Choice, Greater Voice assumes that provision of residential care could decline from around 75 places per thousand people over 75 to around 65 places per thousand over the next 10 years, i.e. a reduction of 13%. This reflects the growing capacity of extra care housing and increases in intensive support to people in their existing home. In Worcestershire the ratio of places in residential care per 1000 of population over 65 is 26.7 places (source: Housing and Support Needs of Older Persons assessment (2009/10)). This has been assumed to reduce by 13% by to 23.2 places by 2026 as an additional specific need 'driver' for extra care housing, i.e. an additional 3.5 units of extra care per 1000 population.

These overall projections are then refined as follows:

- ◆ The ratios for extra care housing/'enhanced' sheltered housing and dementia housing based places per 1000 of the population over 75 years by 2026 is shown for each District area (tables at Annexe 2) based on the population aged over 75 years in each District (table 3.4).
- ◆ An adjustment is then made for the specific additional *diversion* of older people from residential care to extra care housing based on an additional 3.5 units of extra care per 1000 population.
- ◆ The predicted requirements by tenure type are shown adjusted for the % breakdown between ownership and all rented tenures in the 75-84 years group by District area (table 3.8).

A number of caveats apply to the estimated need for extra care housing including:

- ◆ The use of the ratios for different types of specialised housing for older people reflect the way provision and the market needs of older people have been developing rather than providing exact measures of need.
- ◆ Although the use of the ratio of the number of units per thousand of the population aged over 75 years is widely accepted as a 'threshold age' for entry to specialised housing, the actual age of entry into extra care housing will vary and may be considerably younger than 75 years for some people.
- ◆ The ratio for the diversion of older people from residential care provision to extra care housing will be affected by a range of local factors such as the relative costs of care between residential and extra care and individual preferences.

- ◆ The ratio of 10 units per 1000 population for dementia based housing units used by the model is likely to be tentative and may well increase as these types of services become available in practice.
- ◆ As the supply of extra care housing increases over the period to 2026 then the predicted need would be assumed to be net of this additional supply, however as the model becomes more familiar to older citizens and their families demand may increase.
- ◆ Any significant changes in the migration of older people into or from Worcestershire over the period to 2026 may also affect the localised need for extra care housing.

Estimated need for extra care housing is shown separately for each District area in terms of the estimated number of units required by 2026 in tables at Annex 2.

The overall estimated need for additional extra care housing, including ‘enhanced’ sheltered housing and dementia housing based units, for Worcestershire by 2026 is summarised in table 3.11 below.

- ◆ Column 1 shows the estimated need for extra care/enhanced sheltered housing units based on the ratio of 45 units per 1000 population aged 75 years and over.
- ◆ Column 2 shows the estimated need for dementia housing based units based on the ratio of 10 units per 1000 population aged 75 years and over.
- ◆ Column 3 shows the specific additional *diversion* of older people from residential care to extra care housing based on an additional 3.5 units of extra care per 1000 population.
- ◆ Column 4 is the sub total of columns 1, 2 and 3.
- ◆ Column 5 shows current provision of extra care housing.
- ◆ Column 6 shows the total of units required, i.e. column 4 minus column 5.
- ◆ Columns 7 and 8 show the breakdown by tenure type, based on the percentage breakdown of tenure by ownership and renting amongst the 75-84 years population (tables at Annex 2) of the total number of units required.

Table 3.11 Estimated need for extra care housing in Worcestershire to 2026

District	1. Estimated need - Extra care/enhanced sheltered (units)	2. Estimated need - Dementia (units)	3. Estimated need - Diverted from residential care	4. Sub total	5. Current provision	6. Total estimated required (units)	7. Owned	8. Rented
Bromsgrove	680	151	53	884	92	792	616	176
Malvern Hills	671	149	52	872	0	872	672	200
Redditch	423	94	33	550	112	438	274	164
Worcester	455	101	35	591	0	591	427	164
Wychavon	896	199	70	1,165	47	1,118	817	301
Wyre Forest	761	169	59	989	97	892	644	248
Worcestershire	3,886	863	302	5,051	348	4,703	3,450	1,253

The total estimated number of units required across Worcestershire by 2026, taking into account current provision, is 4,703 units. Of these, 3,450 units are suggested as being required for sale (including shared ownership) and 1,253 units are suggested as being required for rent.

4. Stakeholder perspectives

The development of this strategy has involved a broad range of interested parties and ‘stakeholders’ including:

- ◆ The six local authorities with housing and planning responsibilities in Worcestershire.
- ◆ Providers of extra care housing.
- ◆ Commissioners from Worcestershire County Council with an interest in extra care housing.
- ◆ A group of senior citizens with an interest in extra care housing.

The feedback and views from these meetings has been used, in part, to develop the ‘vision’ and approach to extra care housing as set out in section 6. Detailed feedback from these stakeholders is shown at Annex 1. Examples of extra care developments were identified by stakeholders, principally the group of senior citizens, as attractive examples of extra care housing; these are listed at Annex 4. Summaries of the ‘key messages’ from each of these stakeholder groups is set out below.

4.1. Key messages from local authorities with housing and planning responsibilities

Meetings were held with relevant housing and planning staff at all District and Borough councils in Worcestershire to discuss the scope and nature of extra care housing provision required in Worcestershire. In summary the key messages from these meetings were:

- ◆ Extra care housing needs to be a part of broader ‘vision’ for housing, care and support for older people as part of wider ‘offer’ to the growing older persons population in Worcestershire, including ‘aspirational’ housing aimed at older people that is separate to extra care provision.
- ◆ Need to have mixed tenure schemes to reflect that in the future there will need to be a shift towards greater numbers of units for sale and/or shared ownership in order for schemes to be financially viable.
- ◆ Given the need for greater number of units for sale, there is recognition that local authorities have an interest in seeing future extra care being attractive to the full spectrum of older people.
- ◆ Within a countywide ‘vision’ for extra care, there will need to be flexibility in the scale and design of future extra care developments to reflect that potential sites within different local authority areas will affect development opportunities.
- ◆ Future extra care developments should include provision for people with dementia although the specification for this will need to be considered carefully.
- ◆ The quality and design of future schemes need to be of a sufficiently high quality to attract self funders, however this level of quality needs to be sustained across all tenures.
- ◆ In planning terms extra care housing should be classified as ‘C3’, rather than ‘C2’ to reflect that the housing units should be fully self contained including a kitchen and a bath/shower room.
- ◆ Housing delivery partners need to be drawn from across the housing association, charitable and private sectors, particularly given the significant reduction in capital funding available through the Homes and Communities Agency (HCA).

- ◆ There is recognition that partnerships with private sector developers/providers will be necessary and there is a need for dialogue with private providers regarding delivery of affordable rented units as part of new extra care developments.
- ◆ There needs to be a pragmatic approach to developing additional extra care provision, for example some existing sheltered schemes may be suitable for 'conversion' to extra care but may not meet an 'ideal' extra care specification.

4.2. Key messages from extra care housing providers

A focus group meeting was held with a range of providers of extra care housing and other types of housing. Attendees were from national housing associations, locally based housing associations and local authority housing providers. Telephone conversations were held with two private sector retirement homes providers unable to attend the focus group meeting.

The purpose of the focus groups and other discussions was in summary to:

- ◆ Determine the range of types or 'models' of extra care housing that providers either are, or may be interested in developing in Worcestershire.
- ◆ Identify and assess the most feasible and realistically deliverable extra care housing options and models, particularly capital and revenue funding options and models for paying for extra care housing in the future in the context of large scale reductions in public sector funding for social housing.
- ◆ Determine the content and nature of guidance and information required in relation to extra care housing ranging from information promoting extra care to older people through to guidance in relation to assisting planning officers

The key messages from the focus group and other discussions were in summary:

- ◆ The local authorities in Worcestershire need to provide a clear position to housing providers as to the 'vision' for extra care in Worcestershire and the level of need.
- ◆ The development of additional extra care capacity needs to include consideration of 'remodelling' some existing sheltered schemes to accommodate some extra care 'features' but possibly not to the same specification as new build development, however it needs to be attractive to a wide range of potential customers.
- ◆ New development needs to include a mix of types of units including bungalows where the size of the site allows for this.
- ◆ A majority of providers who were involved favoured a 'C3' rather than 'C2' planning designation for extra care housing, in part because this provides a better 'exit strategy' if that becomes necessary in the future, however a private provider consulted viewed a 'prescriptive' approach to defining extra care development as 'C3' as restrictive.
- ◆ Housing associations are planning future developments on a mixed tenure basis, in recognition that there is going to be significant reductions in the level of public subsidy available through the HCA. Most of the housing associations consulted expected their new developments to be based on between 60-70% of units being for outright sale or for sale on a shared equity basis to fund future developments.

- ◆ Housing providers, particularly housing associations, recognise that any new development will need to appeal to a much wider market than has historically been the case as the majority of residents will be purchasing either outright or through a shared equity route.
- ◆ Most providers are either considering or are interested in models of equity release that allow an older person to fund their care costs, or potential care costs. There is a need for the County Council to ensure that the communications it provides to the older persons population about eligibility for publicly funded or part funded care are linked with 'messages' about options for older people to self fund their care, such as through equity release.
- ◆ All housing providers consulted want to see a more flexible approach to the delivery and provision of housing and care, i.e. that a local authority does not insist on separate organisations providing the care and housing; this is viewed as increasingly less the prerogative of the local authority if future new developments will be predominantly for self funders.
- ◆ Most providers want to see a 'partnership' approach with the local housing and social care authorities from planning to scheme delivery and through to addressing 'selling' the concept of extra care more widely to the older persons population in Worcestershire.
- ◆ A majority view amongst providers was that if the local authorities want to maximise the proportion of affordable rented units within a scheme, where there is no or limited HCA grant subsidy, then the use of local authority land/sites at more favourable terms will need to be a part of the development 'mix'.
- ◆ Many providers see their current and future approach to the services provided within extra care as being based on a 'menu' type model, where there are a range of services as options for residents that they can purchase depending on their preferences and budget.
- ◆ New schemes need to be sufficiently large in scale to accommodate a mix of needs, including dementia although the specification for this needs to be carefully planned.
- ◆ For some providers essential features of extra care include catering/restaurant facilities, 24/7 on site staff including care provision and assisted bathing facilities.

4.3. Key messages from Commissioners from Worcestershire County Council

Meetings were held with relevant commissioning staff within the County Council and Joint Commissioning Unit (JCU), including commissioners for older people, people with physical disabilities, people with learning disabilities and Supporting People commissioners. The purpose of these meetings was to identify the role of and potential 'models' of extra care housing that may benefit specific groups of people with other support/care needs, specifically for people with dementia and for people with learning disabilities

In relation to people with dementia, the Dementia Strategy, identifies a requirement for supported accommodation options available to people with dementia including extra care housing:

- ◆ The role of supported accommodation in relation to dementia is seen as one part of an approach to 'living well' and being an option within 'pathways' of care that enable people with dementia to live well.
- ◆ Extra care is viewed as being a potential 'step up' for a person with mild/moderate dementia as a planned move, perhaps from a family home.
- ◆ A key aim of the dementia strategy is to promote early diagnosis and subsequent early intervention to promote better quality of life in relation to living with dementia, which should include access to extra care housing.

- ◆ There is a requirement to make clear to individuals who will need to self fund their care that they should have access to good quality advice, such as through an Independent Financial Advisor, to help them to plan how to meet both their housing and care needs and costs.

In relation to people with learning disabilities the role of extra care housing is seen as a positive housing option but that living within 'mainstream' extra care housing may not always be a viable option for some people with learning disabilities.

- ◆ Extra care housing is a core part of the learning disability strategy as part of a wider objective to reduce the use of residential care services by 50% over the next 3 years.
- ◆ There are currently up to 244 individuals living in residential care services for whom alternative extra care types of housing may be an attractive alternative.
- ◆ The JCU is seeking to commission extra care housing specifically for people with learning disabilities but most likely separately from extra care provision for other older people.
- ◆ There is interest in a range of potential models of extra care housing that may be suitable for people with learning disabilities. Current commissioning intentions are towards schemes with up to 30 units but without the 'full range' of services and amenities found in extra care, such as restaurants.
- ◆ The key components include the provision of 24/7 support with some of the support being a minimum 'baseline' level with additional support personalised to individual's requirements.
- ◆ There is interest in identifying whether current sheltered housing units can be suitably adapted to provide extra care housing specifically for people with learning disabilities.

4.4. Key messages from Senior Citizens

The Worcestershire Housing and Support Needs of Older Persons assessment (2009/10) included 7 focus groups held with older people across the county. This provided considerable relevant information about the future desirability of extra care housing as well as a wide range of other issues related to housing, care and support for older people.

To support the development of this strategy, individual discussions and one focus group were held with a sample of older people (over 60 years) who are currently owner occupiers to test out in more detail the desirability of different types of extra care housing and the willingness of these individuals to make the shift from their current owned housing to purchase an extra care housing option, including shared ownership and full ownership options, and to identify the type of information, advice and assistance that older people require to make this shift.

The key messages from this group are summarised below.

- ◆ There is a need for 1, 2 and 3 bed apartments within any extra care scheme development.
- ◆ Schemes need to allow for some apartments that are designed and built to full wheelchair accessibility standards, i.e. suitable for an individual who needs to use a wheelchair to mobilise, including for example people who have been paralysed through accidents or illness.
- ◆ Some apartments need to have 2 bathrooms; one suitable for a disabled person who is a full time wheelchair user and one bathroom for a partner/carer.
- ◆ There is a need for mixed tenure extra care developments (as opposed to wholly social rented and wholly private schemes) which provide a mix of options from rented apartments at social

rents through to 'shared ownership' and outright (leasehold) ownership units for sale. Within this spectrum of types of accommodation there is a big market for larger apartments and bungalows for some private purchasers.

- ◆ In relation to the mix of residents and the level of their needs for care, there should be a balance of residents with differing levels of need for care.
- ◆ The availability of a range of facilities within an extra care scheme is one of the 'components' that makes extra care housing an attractive proposition.
- ◆ Extra care schemes need to have sufficient car parking space available in relation to the likely needs of the potential residents. The loss of a car can be the biggest loss of independence and this must be considered as important.
- ◆ The senior community in Worcestershire need to be informed about extra care and the many benefits arising. Many people have no knowledge of extra care and its usage. Extra care needs to be publicised in community and Local Authority newsletters.
- ◆ The people who are the 'target market' for extra care housing schemes need to be made aware of the full up-front and on-going costs. Specifically this will need to cover purchase costs, service charges, personal apartment heating and lighting costs, ground rent, car parking/storage, costs of storage facility, and the cost of care (even if an individual does not currently need or have a significant need for care). Potential residents need to be able to understand and plan for the future costs of care and a point at which they may 'run out' of private means to fund their own care and may become eligible for state funded care
- ◆ Providers of extra care housing need to address any inequality or variations in service charges that are levied on residents who fund their own care and residents who have their care funded by the local authority.
- ◆ There is a need to ensure that local Councillors are fully supportive of the reasons for needing to develop extra care schemes and the subsequent delivery of such schemes to ensure there is a range of housing with care options available to older and disabled residents in Worcestershire in the future.

5. Extra Care Housing for Worcestershire

Extra care housing has no statutory definition. There are no nationally agreed standards or regulations as there are for residential care homes or nursing care. This section sets out:

- ◆ The kind of extra care housing that would be appropriate for Worcestershire - a vision for extra care housing that reflects current contemporary practice and the views of local people and stakeholders.
- ◆ From this description and specification of extra care, guidance in relation to developing extra care housing and planning applications.

An objective of developing this strategy was to seek a consensus on what extra care should mean in Worcestershire. What models would make sense for the different parties? These include:

- ◆ Older people seeking new housing with support – whether to own or rent.
- ◆ Worcestershire County Council Adult and Community Services that frequently has to fund or arrange care or support in different settings.
- ◆ District and Borough Councils that have both a strategic housing and planning responsibility.
- ◆ Housing providers in the social housing, charitable and private sectors.
- ◆ Care providers in both public and private sectors.

5.1. Definitions of extra care housing – what is it?

There are a wide range of models of housing with associated care in existence and being developed. Forms of supported housing for older people in purpose built, self-contained accommodation are variously described as ‘very sheltered housing’, ‘frail elderly housing’, Category 2.5 (as an extension of Category 1 and Category 2 sheltered housing), ‘enhanced sheltered housing’, ‘housing with care’ (a term probably first used by Anchor Housing Trust 25 years ago), ‘assisted living’ (a more modern term used mostly by private developers), ‘close care’ (most often associated with housing adjacent to a private sector residential care home), ‘flexicare’ (a new invention) and numerous other descriptions.

The term ‘extra care housing’ has become one of the most widely used and adopted as the generic term for purpose designed, self-contained, housing for older and disabled people with care and support. It is the term adopted and promoted by the Department of Health (DH) for example in their previous grant giving programme for extra care housing. The DH toolkit describes extra care as:

“Purpose built accommodation in which varying amount of care and support can be offered and where some services are shared⁶”

In practice schemes described as extra care vary considerably in size, facilities, nature of accommodation, care provided, management arrangements, funding and staffing, how they relate to

⁶ More Choice, Greater Voice Toolkit DH (2008)

the wider community. What are described as Continuing Care Retirement Communities (CCRC) may incorporate some accommodation identified as 'extra care housing' alongside a residential care home.

The role and purpose of extra care as seen by care commissioners and providers also varies. Some local authorities in particular see extra care as essentially a better and possibly (but not necessarily) cheaper alternative to residential care. At the other end of the spectrum some conceive of extra care as simply a more modern and contemporary version of traditional sheltered housing simply responding to the shifting demographics whereby people enter sheltered housing at a much later point in their lives than they did 30-40 years ago when sheltered housing had just started to be built on any scale.

There is also a perspective where extra care is conceived of as a potential option for all. A comprehensive alternative embracing both those who simply want more suitable housing in a sheltered setting through to those who need high levels of personal care including even nursing care. In this model it is usual to specify that lettings or sales are made in a controlled way in order to maintain a balanced community. For example, this is often expressed in terms of the mix of needs accommodated within a scheme (although the definitions of levels of need may vary):

- ◆ One third people with little or no support needs.
- ◆ One third to people in a 'medium' need category.
- ◆ One third to people with 'high' needs.

In order to maintain a balance it is necessary to have a system to oversee lettings/sales and the person with the highest assessed needs does not necessarily get the next vacancy. This is in order to:

- ◆ Maintain a vibrant community – a common complaint by residents in older schemes is that activities fall off as residents age and are no longer able to organise things themselves. They need an influx of new, younger residents.
- ◆ Keep staffing at a manageable level.

This is the kind of model generally preferred and operated in Worcestershire at present, at least in the public and social housing sector.

It becomes harder to sustain this approach when more properties in each development are for sale and can be re-sold on the open market. Sales cannot be so easily controlled as lettings can through a panel. It is also more likely owners will be self funding, at least in initial years. Older owners or their executors are unlikely to tolerate long delays in a sale in order to maintain a balance and leases normally have to provide for the owner having reasonable freedom to re-sell otherwise the initial sale is likely to be difficult to achieve unless the landlord is willing.

5.2. Characteristics of extra care

How do we recognise extra care housing? What are the characteristic features? These are:

- ◆ Self contained accommodation incorporating design features to facilitate independence and safety.
- ◆ Provision of care and support in the individuals own home if required.
- ◆ Meals available.

- ◆ 24 hour care and domestic support available and an alarm system.
- ◆ Extensive communal facilities.
- ◆ Staff offices and facilities.
- ◆ Specialist equipment to help meet needs of more frail or disabled residents such as assisted bathing.
- ◆ Social activities on site and/ or arranged.

Key features that distinguish extra care from residential care homes are:

- ◆ Self contained accommodation not simply a room (including en-suite rooms).
- ◆ Provision of care can be separated from provision of housing.
- ◆ Care can be more easily be based and delivered on an individual basis.
- ◆ Occupiers can be assured tenants or owners with degree of security not licensees.

5.3. Planning considerations

One of the issues raised by District Council Planning staff has been planning applications to build a variant of extra care housing by private sector developers. This enthusiasm for meeting the needs of older people in this way is welcome if it leads to new sustainable and suitable provision. However at both a district planning level and in relation to long term social care some concerns were expressed:

- ◆ Proposals are not always well informed or well conceived as modern 'extra care'.
- ◆ Details are often vague.
- ◆ The nature of the relationship with an experienced social housing provider or care provider is often unclear or absent.
- ◆ Where a Registered Provider partner is identified it is not always clear they have the necessary expertise or track record specifically in extra care.
- ◆ Discussion with Adult Social Care may similarly be limited or have not taken place at all.
- ◆ In turn Adult Social Care has concerns about the possible long term implications of a variety of schemes being developed, on different basis, where eventually the responsibility for funding or arranging care may fall on the local authority.

An underlying concern is how these applications are to be assessed by planners. The location of some sites being bought forward, for example, was said often not to be the most suitable for extra care and the conception of what constitutes 'extra care' varies considerably.

The best source of planning guidance specifically on extra care has been provided by the Royal Town Planning Institute (RTPI)⁷. In assessing proposals RTPI guidance sets out a series of questions for planners to consider under these headings:

- ◆ Benefit to local housing and care provision of individual schemes.
- ◆ Involvement of local stakeholder organisations in formulating proposals and subsequently funding/lettings places.
- ◆ Tenure mix.

⁷ Extra care housing: development planning, control and management, RTPI, (www.RTPI.org.uk/download/3054/GPN8.PDF)

- ◆ Characteristics and amenities of the model of extra care proposed.
- ◆ Impact on the local area.
- ◆ Is the design and layout of the scheme appropriate for frail residents.

A key issue for District Council planners is the 'designation' of planning applications for extra care housing:

- ◆ C2 is planning for 'residential institutions'.
- ◆ C3 is planning for 'dwelling houses'.

Private developers and social housing providers have different business models and drivers. In planning terms some private developers may occasionally seek C2 planning consent for higher care projects. This is because as this is not 'housing', no section 106 agreement comes into play consequently there is no requirement to include social housing in the development nor any financial contribution to the local authority.

The social housing sector (and other developers who see schemes as primarily housing) on the other hand will normally provide what is clearly self-contained 'housing' and thus C3.

In practical terms some hybrid private sector schemes may go so far as to omit a kitchen in order to be classed as C2 developments while appearing in most other respects to be extra care housing. A restaurant is provided in which people can eat or from which meals are delivered to residents. The philosophy more characteristic of social care authorities (and national policy) is that extra care is intended to offer people life style choices and foster and promote continued independence. Omissions or facilities which appear instead to remove an opportunity for self-sufficiency are somewhat at odds with this.

5.4. Extra care housing typology and specification for Worcestershire

Easy categorisation of extra care is not really possible or indeed very helpful. Extra care can be more usefully thought of in terms of the *key variables* that make up a development and then the operational management and delivery of care services. Although neither providers nor commissioners may explicitly consider the variables, what they are doing in settling on any particular type of extra care is taking decisions about where to place a scheme in relation to a set of options.

Some of the alternatives are discrete categories so schemes may be for sale, rent or a mixture of tenures. In other cases there is a continuum or range, for example, developments varying in size from a scheme of six dwellings to large villages of 600 dwellings.

Our approach has been to:

- ◆ Set out the key features of extra care developments so making clear what the main decisions are.
- ◆ Provide a brief commentary on these to explain current practice.
- ◆ Where possible say what is expected on each variable for developments in Worcestershire. We have done this by saying what is essential, highly desirable or desirable.
- ◆ This then forms the basis of broad specification for extra care across the county.

The guidance is based on:

- ◆ Evidence from developments across the UK.
- ◆ Interviews and discussions with each District/Borough Council and with County Council officers.
- ◆ Discussions with housing and care providers.
- ◆ Studies of extra care and aspirations of older people including focus groups with older people in Worcestershire as part of the Housing and Support Needs of Older Persons assessment (2009/10) and a focus group with senior citizens who are owner occupiers held specifically to inform this strategy.

5.4.1. Tensions and flexibility in specification of extra care

There are a series of constraints on what it is possible for local authorities whether County or District to determine strategically. Some are new and arise from changes in central Government regulations, benefits and funding. Others flow from demographic and related changes detailed earlier. These constraints and tensions are set out here in order to better appreciate the reasons for the kind of extra care model(s) proposed.

Commissioning vs. individual control

Until recently it has been Adult and Community Services in conjunction with Supporting People who largely determined how care and support are arranged and delivered in an extra care setting. They could choose how and with whom to contract. Commissioners have been able to significantly shape extra care provision. In the decade we are planning for this control will be much more limited because:

- ◆ A shift to ownership by residents (or their relatives) is likely to also mean a shift to a higher proportion of self funders.
- ◆ The move to 'personal budgets' and direct payments for social care implies even those for whom the County Council is financially responsible following an assessment of care needs will be able to act much more like individual customers. They may or may not buy the service available from an onsite care team if they are free to choose.
- ◆ It is also much harder for a Council through nomination rights or other arrangements to control who properties are resold to. Leases which put unreasonable hurdles in the way of owners' (or their executors') rights to re-sell on the open market will be unsalable or have a heavily depressed value thus in part defeating the object of sales as far as raising finance for developments is concerned. There are arrangements whereby the landlord re-purchases properties at the time of re-sale. This does require more control to the provider and through them the local authority. For this to work the provider must have the funds available to re-purchase and be willing to take a risk on movements in property values.

Capital vs. revenue

There can be a tension between minimising initial capital costs and long term running costs. Poor standards, low quality fittings, low space standards, restrictions on facilities can save money initially for the developer. There is a high risk however these compromises will push long term running costs up like maintenance and service charges. Some of this will fall on residents who may or may not be in a position to meet escalating charges. This in turn can impact on letability and sales. They may also depress long-term saleability and thus values.

Public vs. private

Local authorities have tended to work with social landlords (Registered Providers) to obtain extra care housing. It is only in quite recent years the private sector has embraced the concept of extra care and extra care villages with enthusiasm. It is still however the case that the private sector is concentrating on housing for sale with Registered Providers being the primary source of extra care housing for rent. The tensions here are first, the proliferation of mono-tenure developments. Second, in order to make new developments economically viable, particularly in the absence of grant from the Homes and Communities Agency (HCA) or Department of Health (DH) on any significant scale, Registered Providers must increasingly move into developing housing for sale.

Large scale vs. domestic feel

It is thought that the minimum economic size of extra care developments is now around 50-60 dwellings; for larger 'village' type developments this can be up to 150 dwellings. This to an extent conflicts with:

- ◆ Brownfield sites available particularly in a good location for extra care near town centres.
- ◆ A desire to have smaller more "domestic" scale developments which are perceived as more friendly and less daunting particularly for those whose mobility is limited or who have some level of dementia. To some extent the latter is being dealt with by incorporating separate dementia care "units" within bigger developments. There is still a debate as to how appropriate or valuable extra care settings are to those who already have a degree of dementia at the time they take up occupation.

Personal vs. collective/shared services

The ideal for many and often the ambition of policy makers is to have more personalised services, i.e. for older people to exercise control over how they are supported and cared for, what they do. This is exemplified in the introduction of personal budgets for social care.

This, to an extent, however conflicts with having sufficient volume of demand for a service to make extra care services economically viable. Thus in extra care it is thought highly desirable to have an on-site care team available 24 hours a day. This is one economic way to deliver care.

On-site care provides for rapid response to crisis or illness like strokes which can be critical for recovery. It avoids costs of travel inherent in other models like visiting domiciliary care works and helps to ensure consistency and quality. It seeks to avoid the annoyance and security risk of many domestic carers coming and going.

However a permanent 24 hour care team is only possible if sufficient residents choose to use it, if they have the choice policy suggests they should, and are also prepared to contribute collectively to that element of the service which is the 'emergency' element to be available for the time they may need it; the 'insurance' element.

The conclusion from considering these tensions is that to have an effective strategy that encourages both public and private sector development of extra care is that:

- ◆ Local authorities at both County and District level need to be prepared to have the minimum level of 'prescription' of extra care.
- ◆ It is desirable to encourage further innovation – there is a lot of change to adapt to and a wide range of circumstances to meet. No one model will meet every situation. Thus a degree of flexibility is required around acceptable models.

5.4.2. Extra care housing models – key variables

The key variables on which decisions are required in each extra care scheme are considered below.

Variables in extra care housing	Considerations
Built form	<ul style="list-style-type: none"> ◆ Scale - max and minimum ◆ Facilities – what are essential, what desirable ◆ Dwelling type – any restrictions or preferences ◆ Dwelling features – any must haves or avoid such as kitchens; design or space standards ◆ Building standards – none, mobility/wheelchair, Lifetime Homes
Tenure	<ul style="list-style-type: none"> ◆ For sale, ◆ Shared ownership/equity, ◆ Rent, ◆ Mixed tenure
Allocation and eligibility criteria	<ul style="list-style-type: none"> ◆ Level of need to be catered for; sheltered to residential and nursing care. ◆ To include dementia care or not. ◆ Learning disabilities and functional mental health needs or not. ◆ Aim to maintain balanced community or not? If so how?
Provision of meals	<ul style="list-style-type: none"> ◆ What level if any? ◆ Is a catering kitchen an essential feature? ◆ Is a restaurant/ café essential?
Telecare/assistive technology	<ul style="list-style-type: none"> ◆ What level and type? ◆ Hardwired alarm only, dispersed alarms, environmental sensors only, personal sensors
Emergency response	<ul style="list-style-type: none"> ◆ What level and type? ◆ Control centre only, mobile off site, onsite day, on site 24 hour
Housing and support provider model	<ul style="list-style-type: none"> ◆ Housing and care organisation same, ◆ One housing provider ◆ Separate care provider ◆ Multiple care providers
Availability of communal facilities and services	<ul style="list-style-type: none"> ◆ Residents only ◆ Residents and local community on demand ◆ Active outreach service to local community e.g. hub and spoke model ◆ Zones of privacy model
Ethos	<ul style="list-style-type: none"> ◆ Culture that promotes independent living

It would be possible to extend the list. It is not exhaustive. Providers, in particular, may suggest additional features which they emphasise or are part of their 'brand'.

However in the discussions with local authorities, providers and older citizens of this approach to specifying extra care housing, most participants felt these enabled a reasonable analysis of different

alternatives to be made. The next step has been to use these variables to build up a template for Worcestershire. Each of these variables is considered in detail identifying key essential and desirable features along with explanatory commentary. Detailed guidance in the form of templates for each variable is shown at Annex 3.

5.4.3. Extra care housing specification

The strategic approach taken has deliberately not been overly prescriptive. Instead the desire is to encourage imaginative and innovative approaches as a way of responding to the challenging economic climate, decline in availability of grants for social housing on one side but substantial increases in projected need driven by demographic changes and a tenure mismatch in most districts. An outline specification has been formed as a basis of guiding housing and care providers, planners and interested agencies based on the detailed consideration of the extra care key variables (Annex 3).

Overarching principles to guide developments

- ◆ Extra care is seen as an option for a wide range of needs stretching from older or disabled people who need more suitable accommodation, in which to continue to live independently in the company of others through to those who need very high levels of care equivalent to residential or even dementia care.
- ◆ For the vast majority it should not be necessary to move again simply because more care or support is needed.
- ◆ Extra care developments can provide a base to serve a wider community with staff providing an outreach service to a locality while residents 'in-reach' to use communal facilities.
- ◆ Mixed tenure rather than mono-tenure schemes are preferred in which case leases and tenancy agreements should, as far as possible, convey similar rights and obligations. Services, service charges and dwellings should also be as similar as possible. Because there are some differences in the legal position and rights of leaseholders and tenants generally the (stronger) rights, for example consultation on service charges of leaseholders should apply to all.
- ◆ Space, design, environmental and other standards should be as high as possible in order to ensure long term letability and saleability.
- ◆ Extra care development will include 'village' type developments and individual 'schemes'.
- ◆ Continuing Care Retirement Communities in which different buildings, some of which may be consistent with the key variables of extra care, are devoted to meeting different types of need are acceptable.

Typical features of extra care housing development

On the basis of a simple typology extra care should provide:

- ◆ Self-contained dwellings of a minimum of 50m² for 1 bed apartment, 60m² for 2 bed. Larger dwellings are desirable. They should include a kitchen and bath/shower room.
- ◆ Design should reflect the restricted mobility, mental health and other needs of residents. Lifetime Home Standards are desirable.

- ◆ Designs need to be dementia friendly. There needs to be provision for people with severe disabilities requiring full wheelchair accessibility specification and tracking for hoists. Some provision will need to be suitable for older people with learning disabilities.
- ◆ For economic reasons the minimum size of a financially viable development is about 50-60 properties.
- ◆ Developments should have a range of communal facilities that go beyond those of traditional sheltered housing but are commensurate with size. Communal areas can make up 30% of the floor area but are not directly saleable nor produce much rented income.
- ◆ Mixed tenure rather than mono-tenure developments are preferred. It is thought that the minimum for sale element will be about 60-70% and ideally will include some shared ownership or shared equity.
- ◆ Lettings and sales should be managed and aim to provide for a balance of levels of need. The mix will be set scheme by scheme. It is recognised that it is harder to impose a quota in developments with a substantial for sale element.
- ◆ Arrangements between the care and housing provider will vary. The strategy does not prevent the landlord also being the care and support provider where they win a care tender or where chosen by occupiers with personal budgets or who are self-funders.
- ◆ As a minimum all schemes, as in normal sheltered housing, should have an alarm system and remote door entry. It is desirable that a range of environmental sensors and personal assistive technology is easily available on an individual basis. This helps ensure safety and security but also assists in the economic provision of some aspects of care.
- ◆ Care should in the first place be based on on-site care and support team available 24 hours a day. In bigger 'village' or continuing care retirement communities. Ideally this should be a flexible multi-disciplinary team. Adequate staff facilities commensurate with the scale are necessary. This is likely to include changing room, sleep in, office space and equipment storage.
- ◆ The provision of meals is essential as is some form of restaurant/café. A catering kitchen is highly desirable but it is recognised particularly in smaller schemes that fresh cooked meals on site may be financially unrealistic.
- ◆ Communal facilities should generally be available to the wider community. In the case of a restaurant this helps aid viability. It is anticipated that most extra care schemes will provide a base for social care staff to provide outreach services to the locality.
- ◆ The culture of schemes should generally be such as to promote independence and healthy, active ageing and avoid creating unnecessary or premature ageing. Social and health activities are seen as an essential part of this ethos in extra care.

6. Funding and Feasibility

Much of the recent development of extra care housing, certainly by Registered Providers, has been made possible by considerable public funding invested through the Homes and Communities Agency (HCA) and the Department of Health (DH). Public funding to subsidise the capital costs of extra care housing development has been significantly reduced or possibly withdrawn completely. In addition it is anticipated that local authority budgets for care and support will be reduced in real terms over the next few years. To have a credible, realistic strategy and delivery plan for extra care housing it will be necessary to identify how it can be funded in practice.

In this section the focus is on the changes to the financial landscape setting out approaches to:

- ◆ Funding the capital development costs of delivering extra care housing ‘models’ anticipating a shift from public funding investment towards private funding, e.g. in terms of a change in the balance between rented units and leasehold units.
- ◆ The revenue funding implications of reducing public funding to pay for care and support needs and, for example, how an increasing number of older people may need to meet these costs from their own resources, and the impact of personal budgets for those older people who will continue to be eligible for public funding towards care costs.

6.1 Capital funding

6.1.1. How funding has worked

The core capital finance for most extra care housing schemes, at least where there is a large social rental element, are in the main a combination of Homes and Communities Agency (HCA) grant, Department of Health (DH) grant (to Adult Social Services authorities), private finance in the form of a mortgage (or similar loan mechanism) and contribution of land and/or buildings from one of the partners involved in the development.

Considering each:

- ◆ Social Housing Grant – available to Registered Providers through the HCA. Allocations are now made on a four year cycle in accordance with the HCA ‘investment framework’. HCA programme funding will continue but has halved, from £8.4 billion to £4.5 billion, and in this planning period about half the £4.5 billion programme is already committed so it will be harder to get capital funding for new, major extra care schemes.
- ◆ Department of Health Grant – this grant programme has ceased.
- ◆ Mortgages – the developer borrows part of the capital required. The mortgage will be repaid from the net rental stream (after allowing for management and maintenance) over a period of years or from the sales receipts. Interest rates have been at historically low levels for several

years. The issues, certainly for housing associations, have become first, the availability of finance from banks following the banking crisis and second the terms of lending with rates creeping up but also lenders seeking to re-negotiate terms on overall borrowing in return for additional funding. One response in recent years has been for major housing associations to return to the bond market to raise substantial funds. The rates achieved in recent issues have been a little over 5%. The implication for Worcestershire is that there may be fewer housing associations able to raise finance on the large scale required for any significant programme of extra care on competitive terms.

- ◆ Free or low cost land – it has become almost axiomatic that the local Housing or Adult Social Services authority will effectively subsidise developments by making land available cheaply. Sometimes the land (or buildings) comes from the housing association as a result of re-developing a sheltered scheme, or Adult Social Services re-providing a redundant residential care home facility.

These four sources commonly provide the basic funding in varying proportions. There are a number of additional funding possibilities but these mostly play a secondary role such as:

- ◆ Charitable funding – usually to a charitable organisation for a particular purpose or facility have come from established charities, wealthy benefactors and legacies.
- ◆ Developers own resources – often limited in scope.
- ◆ Section 106 agreements – not so much a source of capital as a mechanism whereby an element of social housing can be assured on what would otherwise be purely private developments for outright sale.
- ◆ Primary Care Trusts – occasionally fund health related facilities such as consultation or treatment room, intermediate care provision or a GP surgery and, in some of the more go-ahead, tele-medicine. PCTs have tended to prefer to lease facilities. PCTs are currently proposed to be abolished.

The catalyst for a shift to extra care housing over the last ten years has undoubtedly been through social housing providers in conjunction with local authority Adult Social Services with a key role played by leading charities such as the Joseph Rowntree Foundation Housing Trust (JRFHT) and the Extra Care Charitable Trust (ECCT). The availability of a capital grant from the DH to assist the viability of schemes has helped to get programmes started.

JRFHT developed Hartrigg Oaks as one of the first developments of a modern Continuing Care Retirement Community (CCRC) in the UK demonstrating, on a 20 acre site, how a residential care home, bungalows for independent living, mixed tenure, a flexible care service, and extensive leisure and other facilities could work together. They also tested a wide range of financial options for residents running from self funded 'care insurance' type products through to offering to rent or buy combined with care packages through the local authority.

ECCT began the process of demonstrating the market for care villages but with a model whereby care to almost any level was provided in the persons own home from an on-site care team. There was little or no need for separate building to meet different levels of need. They demonstrated how to continually improve quality and evolve designs (and services) incorporating subtle forms of assistive technology. On the financial front they have showed it was possible to attract significant charitable donations to help aid the quality and range of facilities.

Having observed the success of these, more recently the private sector has entered the market in a much more significant way. In Worcestershire companies like the Aspen and Richmond Villages associated with the CCRC and larger scale projects are active. These help to demonstrate it is possible for extra care to be developed without significant subsidy, at least for the owner occupied market. They also show the value of offering a choice of financial arrangements to occupiers to meet different circumstances.

6.1.2. How funding is shifting – future funding options

Housing providers in Worcestershire consulted for this project were aware of the funding challenge they would face in delivering further extra care housing. Participants at the providers' discussion however remained positive about the principles and desirability of extra care. Their views and proposals are inform the future funding options and considerations below.

A shift to selling dwellings

In accordance with the earlier analysis of an undersupply of suitable extra care housing for the owner occupier market, housing providers reported a very high level of demand from purchasers:

“It only took 6 weeks to sell 86 units in Gloucestershire” and “In Bromsgrove we only have 9 shared ownership units within 90 units and our waiting list is increasing by 5 per week” (housing association representatives)

One local provider said on a new development they planned to sell 60% of the properties. A shift to selling properties outright or on shared ownership/equity terms is accepted as one element in delivering financial viability but also to meet need from older owner occupiers. Assessment of the proportion to be sold will be required scheme by scheme and the market unit price achievable will be influenced by location but as a generalisation providers thought selling 60-70% of properties in a scheme would be typically required to ensure viability based on current HCA frameworks.

It is clear from the discussions with housing and extra care providers that many of them are currently developing 'grant free' models of developing extra care housing schemes, with the shift to selling dwellings the key component in those strategies.

Local authority land and planning

Housing providers considered the provision of free or low cost land to be necessary if a social housing for rent element was to continue in the future. Similarly they did not feel it right to be asked for financial contributions under Section 106 agreements *“planners and politicians need to recognise the task is to close the financial gap and not widen it”*.

Extra care housing of a good quality can have a role in freeing up larger general needs housing which can itself be of value to a district/ borough council.

Housing benefit

The rents Registered Provider can charge are constrained by HCA regulation. Even on shared ownership there has been a ceiling in the rental charge on the part of the equity retained by the association of 2.75% on the overall programme and 3% on any particular property. Even if there was not a rent regime for Registered Providers or if schemes are developed without subsidy, housing benefit regulations would tend to limit what a claimant could receive and thus what the landlord could charge that would be eligible under housing benefit regulations.

Although recognising this is beyond the scope of the councils in Worcestershire to control, clearly providers would like to see some flexibility to charge higher rents in extra care housing commensurate with the extensive facilities and much higher and wider levels of services and thus service charges inherent in extra care. The current Department for Work and Pensions (DWP) consultation paper *Supported Housing and Housing Benefit (2011)*, may have implications for the extent to which housing benefit can fund higher rent and service charges within extra care housing in the future.

Scale of development

Costs per dwelling are high in extra care housing schemes because communal areas and facilities can take up to 30% of the building. These costs have to be recouped from rents or sales of a correspondingly smaller number of properties than would be produced in an ordinary block of general needs flats or even a traditional sheltered housing scheme. Effort of housing providers, in conjunction with planners, Adult Social Services and other interested parties is going into:

- ◆ Designs which reduce unsalable/unlettable floor area without significantly compromising the range of facilities and activities.
- ◆ Maximising the density – number of dwellings on the site. This also helps achieve a more economic operating cost per property.

Housing providers considered the minimum economic size for an extra care development in Worcestershire was around 50-60 properties.

Sales, viability and operational issues

For providers consulted it was seen as both necessary and desirable to develop and offer a larger volume of extra care for sale:

- ◆ For demographic reasons
- ◆ To create a balanced community
- ◆ Meet demand
- ◆ Meet needs of asset rich, cash poor older owners
- ◆ Offer a choice

But critically this is necessary both to achieve financial viability in terms of capital costs but also operating costs. The effect of selling some properties is two-fold:

- ◆ The receipt from properties sold reduces the amount of borrowing required.
- ◆ To the extent the market value of dwellings sold exceeds the cost of provision the 'profit' element can be used to subsidise the provision of dwellings for rent. How some developers view this is that sales in effect provide a means of funding or part funding extensive communal facilities of extra care.

Sales may be outright or on shared ownership terms or shared equity. Shared ownership allows sales to be tailored to the financial circumstances of individuals. For less well off owner occupiers, for example, moving from a poor condition property, the attraction of purchase over renting is that if the proceeds from the sale of their property are invested in new property this does not count as an asset for the purposes of either Income Support/Pensioner Guarantee or housing benefit thresholds. Providers were aware that prospective purchasers needed good advice on how much equity to purchase initially. They also argued this meant they would need flexibility in the equity shares sold. Offering the widest choice of purchase models, from 100% to small equity shares of 25%, was seen as one way of widening choice, making extra care affordable in a wider range of circumstances and making a move to extra care attractive and achievable for more older people.

Shared ownership properties are sold on a lease and there is some scope in extra care for using the terms of the lease as part of the financial equation. For example:

- ◆ Shared equity arrangements under which no rent is charged on a proportion of the equity (at present usually 25%) are unattractive to providers and essentially cost more in grant subsidy than equivalent schemes which are like normal new build homebuy and a rent is charged
- ◆ A leading charitable provider that is acknowledged to offer high quality dwellings and services has sold properties on the basis that they will repurchase properties at the point of resale at the original purchase price. This has not, in their case, deterred buyers and historically as long as values have risen has effectively produced additional income.
- ◆ A fundamental clause required by the HCA in grant funded schemes is a right to staircase up in 10% tranches to the point of outright ownership. There is no equivalent right to staircase down although in hardship cases and very occasionally as a matter of policy Registered Providers have offered to re-purchase equity ultimately allowing a shared owner to become a tenant. The possible role for provisions like this is considered in the next section on revenue

Other operational issues related to a shift to a much higher proportion of extra care units being for sale include:

- ◆ There is a role for extra care housing in freeing up larger family housing. It is recognised by all organisations that to persuade people to move late in life extra care must be attractive. This means not only offering spacious apartments of good quality that are better and easier to manage it means having the services people want. As one extra care provider noted "*the biggest selling factor in shared ownership was 24 hour on site care*"; the essence of the product is security.
- ◆ With a much larger proportion of properties being purchased and subsequently resold it will become much harder to enforce strict quotas in order to maintain a balanced community. Nomination agreements are not really workable in what has to a large extent be a free market. It is possible to put minimum age restrictions in leases and give priority to people with a local connection but purchasers (and their executors) must ultimately have the right to sell their

property unless it is a non-assignable lease under which the landlord guarantees to re-purchase the property on some agreed basis set out in the lease.

Other funding options

There has been some interest recently in whether institutional investors may provide a mechanism for funding extra care housing development. A recent paper published by the Housing LIN⁸ examined the challenges facing developers and operators of schemes that require external financing to bring them from conception to design, development and long term stable operation.

The starting point for this approach is the recognition that larger housing organisations have for many years raised funding from the well established corporate bond market however these opportunities are only available to those individually or collectively raising very substantial sums, organisations only wanting to raise a few million have not traditionally been able to take this route. However there has been considerable interest more recently in the mechanisms or ‘tools’ necessary to allow investment funds to flow between private funds backing philanthropy, wealthy individuals and institutional investors directly into social enterprise. It is argued that there should be opportunities for extra care housing developments to take advantage of these funding opportunities when operating on their (relatively) small scale.

The Housing LIN paper sets out a case study of how the potential future financing model for extra care housing could be developed to meet the requirements of both investors and extra care developers. The discussions with extra care housing providers indicated that some Registered Providers were currently looking at a range of private financing options to fund the development costs of extra care schemes.

6.2. Revenue funding

Revenue refers to the costs of running extra care schemes including the provision of care. As with the discussion of capital finance the present position is outlined and then the future revenue funding options are considered.

6.2.1. How funding has worked

The financial art of good extra care housing is in combining disparate sources and types of revenue stream to deliver a well co-ordinated cohesive service to the customer who ideally is left untroubled by disputes over which budget a particular service comes from.

The elements to be funded include:

- ◆ The housing
- ◆ The associated leisure, social and health activities

⁸ Can extra care housing funding needs be met with funding from institutional investors? Bailey and Rich. Housing LIN 2010.

- ◆ Management and maintenance
- ◆ Support – include domestic assistance in the dwelling
- ◆ Care
- ◆ Meals

Sources of financing include:

- ◆ Own resources – self funders meet all the costs themselves at least until savings are largely eliminated.
- ◆ Housing benefit towards eligible rent and service charges.
- ◆ Adult Social Services funded care packages.
- ◆ Local authority Supporting People grant for support charges.
- ◆ Individual benefits including in particular the non-means tested Attendance Allowance.

Bringing these strands together, how different aspects of extra care are typically funded for someone who is income poor and thus eligible for benefits is shown below.

Table 6.1. Cost and funding sources

COSTS	FUNDING
Rent (including some services)	—————▶ Housing Benefit
Council Tax	—————▶ Council Tax Benefit
HomeCare/Domestic assistance	—————▶ Attendance Allowance/Disability Premiums
Support to maintain tenancy/lease	—————▶ Supporting People funding
Personal Care	—————▶ Care funded by Adult Services
Heat, light and power within dwelling	—————▶ Pension or other income
Living expenses	—————▶ Pension/ benefits/ savings

As discussed, one of the shifts expected is more dwellings offered for sale and mixed tenure.

The next table sets out the range of costs and related financial assistance available for both tenants and owner-occupiers.

Table 6.2. The cost components in extra care housing – tenants and owners

COSTS	TENANTS	OWNER OCCUPIERS
Property and property maintenance/management costs	Rent and some non Supporting People eligible service charges – paid by the individual but may be covered wholly or partly by (means tested) housing benefit	Individual responsibility to be met from pension/other personal resources. A shared owner eligible for housing benefit can get management and maintenance costs met by HB provided the lease is correctly drawn
Individual heat, lighting, power, water charges	To be met from pension/other personal resources	
Council tax	To be met from pension/other personal resources – means tested council tax benefit may apply. Single person rebate and disability reduction will apply as appropriate	
Housing related support	Means tested Supporting People grant. Otherwise from pension/own resources	In theory Supporting People Grant available to owners who are eligible but in practice seldom figures in extra care funding for owners
Personal care and support	Care contract funded by Adult Services but subject to prevailing charging policy and criteria and personal budgets policy	Dependent on eligibility for local authority care funding otherwise to be met from pension/other personal resources plus any attendance allowance/disability premiums.
Help with housework	May be included within care package for more disabled people. Otherwise to be purchased from pension/other personal resources which could include Attendance Allowance.	
Additional services	Self purchase arrangements and/or subsidized through wider community use e.g. leisure and sports facilities, shops, pub.	

6.2.2. How funding is shifting – future funding options and considerations

Changes impacting on strategic thinking and the arrangements local authorities and extra care providers will need to make include:

- ◆ Shift to personal budgets for individuals eligible for local authority social care funding.
- ◆ Increase in owners and self funders of care.
- ◆ Possible loss or at least changes to Attendance Allowance. Increasingly providers are looking to Attendance Allowance (for which the majority of residents in extra care are likely to be eligible) as a building block in revenue funding. Some operate a pooling system which helps underpin the flexible care required.

- ◆ An increase in the economic power of the resident who becomes much more of a real and direct customer whether tenant, owner or part owner. An expectation that this will increase demands on providers for accountability and value for money in a similar way to that found in sheltered housing for sale. In turn it is suggested housing providers in mixed tenure schemes will need to adopt the same practices as found in leasehold housing with regard, for example, to consultation on service charges irrespective of the tenure of the resident. This might be a bit different in CRCC where different buildings or groups of buildings are based on different tenures. It is considered desirable as far as possible to align leases and tenancies.
- ◆ There may be a corresponding reduction in the ability of local authorities, whether at district or county level, to determine terms and conditions of contracts at a scheme level. Providers will become much more directly accountable to occupiers. It will be less often the case that a local authority can insist on their own model of service provision or be able to micro-manage delivery. Local authorities will need to shift to outcome focused measures of results.
- ◆ There is an unresolved tension between individuals having their own care budget (from the local authority) or self funding, able to commission a service from an on-site care provider or not, and the economic viability of an on-site care team. It is argued that if significant numbers are able to employ their own care staff/domestic workers this could undermine the provision of care for all and thus one of the fundamental attractions of extra care. It is also argued arrangements based on large numbers of domiciliary care workers coming and going are disruptive and carry a security threat.

It is suggested that the key choice is in deciding to take up an apartment in extra care or not. Different approaches are being taken including those whereby Adult Social Services are continuing to commission at least a minimum care service all occupiers are obliged to have in order to sustain an on-site care team and guarantee an emergency response but with some freedom for individuals to purchase additional hours or services from their own personal budgets beyond this.

6.2.3. Equity release and funding care and support

One implication of a shift to housing more owner occupiers in extra care developments is that a greater proportion of older residents will have substantial equity. It has been appreciated for many years that for many (around 70%) of this generation of retirees a large part of their wealth will be in the form of housing equity. For some investing in property has been a deliberate strategy to create a pension.

Downsizing is one way to release equity and for some this may be the step into extra care purchasing a slightly cheaper and more suitable apartment or living alone.

Already some private sector providers of forms of extra care in Worcestershire are beginning to offer equity release arrangements. This is much less common in schemes provided by Registered Providers. One further shift is to expand the mechanism that would allow older residents in social housing to draw on equity to fund service (this was examined in *Aspiration Age*⁹).

⁹ *Aspiration Age: delivering capital solutions to promote a greater choice and independence for older people*, One Housing Group, 2009

Equity release means unlocking some of the market value of the property without moving house. One possibility for older owners is simply to use commercial equity release products. There are two distinct types of commercial equity release 'product'; lifetime mortgages and home reversion schemes.

A lifetime mortgage involves releasing part of the value of a property as a cash sum. The customer borrows from the mortgage provider. Normally, the borrower does not pay interest on the loan. Interest rolls up on the mortgage until the home owner dies (or moves into a care home). At this point the capital and interest are repaid in full using the proceeds of the property sale. Lifetime mortgages have tended to be based on taking a lump sum but more recently it has become possible with some lenders to 'drawdown' money in stages. Lifetime mortgages are by far the most popular form of equity release.

With home reversion the home owner sells all or a share of their property to a home reversion company in exchange for a cash lump sum. On death the property is sold and the company receives the value of the share they are entitled to. As an example a customer sells 50% of their home worth £100,000 and receives £20,000 cash. The cash the provider offers is less than half the market value. The amount depends on their view of how house prices will move, market rates of interest and the life expectancy of the home owner.

This is a simple starting point. In practice there are many variants and permutations. So with a Home Income Plan a person may get income for life rather than a lump sum or a bit of both.

There are advantages and disadvantages of the different forms of equity release but as a generalisation:

- ◆ Equity release has had a poor press and is frequently still viewed with suspicion by older people who might otherwise find it helpful to swap some of their capital for income. Most products are now regulated by the FSA and the Safe Homes Income Plan (SHIP) scheme has done a lot to establish good practice.
- ◆ They can look like poor value for money particularly for the 'younger, older' and couples. This is because in lifetime mortgages, where the interest rolls up, the debt builds up at a compound rate so the amount owed can grow quickly. So a £20,000 loan doubles in just 10 years at a rate of 7.5%. In the case of a reversion the owner only gets a percentage of the value of the property – not the market value. This is because the occupier has the right to continue to live in their home for the rest of their lives. The percentage is based on age and sex i.e. life expectancy. All this is understandable and not unfair but tends to inhibit the use of equity release.
- ◆ Equity release companies have to build in a profit margin thus in effect reducing the value of the equity released to the owner.
- ◆ Schemes which pay a monthly income will reduce or eliminate means tested welfare benefits for those who might otherwise be eligible claimants.

There are also some more fundamental problem in utilising commercial equity release products to meet costs specifically in extra care housing. Schemes vary but they tend to exclude:

- ◆ Leasehold properties.
- ◆ Schemes in sheltered (or similar) housing with significant service charges.
- ◆ Shared ownership.

One answer in the social housing sector would be for housing associations to allow owners to 'staircase' down releasing equity in tranches in order to fund care and support and/or service charges. This is an

obvious solution that could particularly benefit the less well off owner who has some savings and who wishes to retain control over their own affairs and remain independent. It is more likely to be attractive to single people (who are in fact the vast majority of extra care occupiers), older residents, those less well and those less concerned with leaving property to relatives.

The proposition is to have a provision which is a mirror of the right to staircase up. The main stumbling block, from a Registered Providers perspective, is the need to raise the funds to buy back the equity in stages. In practice in one formulation what they would be doing is defer collection of some charges until the property is sold. There is no fund to meet this cost. If the housing provider is also the care provider there may be an added incentive to consider staircasing down arrangements. The risks could also be managed or reduced by restricting availability to certain circumstances – for example after a certain age or in receipt of care over a set level.

Some modelling has been undertaken to test the scope for using equity in this way in Worcestershire. The assumptions made in this model are:

- ◆ The initial equity held is £173,000 – the average price of a semi-detached property in Worcestershire (June 2011).
- ◆ An annual property service charge of £1500 per annum is paid – this does not include contributions to a sinking fund for long term major repairs.
- ◆ House price inflation runs at 2.5% per annum.
- ◆ Service charge inflation is higher at 3.5% per annum.
- ◆ Interest on the debt which accumulates because payments are deferred is 6%. This is a little higher than long term bank rates being obtained by larger Registered Providers who have been able to raise money at a little over 5% in recent issues.
- ◆ Care costs which are largely driven by wage rates rise faster than house prices at 5% per annum.
- ◆ Rather than include the sinking fund contribution to fund long term major repairs and replacements in a monthly service charge this element is calculated on the basis of a small percentage of the purchase price (value) and also deferred. The advantage of this approach, irrespective of any equity release model, is that the eventual contribution can come from the capital proceeds on the eventual sale of the property rather than from limited disposable income of the resident. This requires the appropriate clause in the lease. If properly assessed using life cycle costing the major repairs contribution can be a significant cost.
- ◆ The modelling is based on a domiciliary care costing residents £16 per hour. This is the current Worcestershire County Council rate. The assumptions are listed in Table 6.3 below.

Table 6.3. Service charge equity release model.

Initial equity	£173,000	Care hours per week	21
Full initial service charge	£1,500	Hourly rate	£16
House price inflation	2.5%	Chargeable weeks	52
Service charge inflation	3.5%	Weekly care cost year 1	336
Interest	6.00%	Full annual care charge	£17,472
Service charge deferred by	100%		
Care charge deferred by	100%		
Care charge inflation	5.00%		
Sinking fund	0.80%		

The modelling assumes all charges are deferred to be eventually repaid from the proceeds of sale i.e. from equity. The housing provider (who may or may not also be the care provider) charges interest on the debt which builds up. Over the long-term this is a key risk factor for the resident as interest would build up at a compound rate. However from work done for the *Aspiration Age* project, the typical period of residence in extra care is 7 years or less.

Table 6.4. gives the results for someone who requires a little over 2 hours of care every day (15 hours per week). The seventh column shows the value of property equity remaining at the end of the year having met the care and other costs. The final column shows what percentage of equity is used up at the end of each year after all the charges are met. In this case equity would be exhausted in the ninth year.

Table 6.4. Annual costs and equity – moderate care (£s)

Equity	Service charge	Care Costs	Interest	Acc S/C & Care debt	Sinking Fund	Equity Remaining	SF & SC Debt % Equity
177,325	1,500	12,480	524	14,504	1,384	148,957	16.00%
181,758	1,553	13,104	1,420	30,581	2,768	135,306	25.56%
186,302	1,607	13,759	2,411	48,358	4,152	120,033	35.57%
190,960	1,663	14,447	3,506	67,974	5,536	103,003	46.06%
195,734	1,721	15,170	4,712	89,576	6,920	84,068	57.05%
200,627	1,782	15,928	6,039	113,324	8,304	63,071	68.56%
205,643	1,844	16,724	7,496	139,388	9,688	39,842	80.63%
210,784	1,908	17,561	9,093	167,951	11,072	14,200	93.26%
216,053	1,975	18,439	10,843	199,207	12,456	-14,049	106.50%

For someone who needs very high levels of care from the outset of 21¹⁰ hours per week, equivalent to residential care, equity could meet the costs for about 7 years, see table 6.5 below.

Table 6.5 Annual costs and equity – high care (£s)

Equity	Service charge	Care Costs	Interest	Acc S/C & Care debt	Sinking Fund	Equity Remaining	SF & SC Debt % Equity
177,325	1,500	17,472	711	19,683	1,384	138,786	21.73%
181,758	1,553	18,346	1,927	41,509	2,768	119,136	34.45%
186,302	1,607	19,263	3,273	65,652	4,152	97,236	47.81%
190,960	1,663	20,226	4,760	92,301	5,536	72,897	61.83%
195,734	1,721	21,237	6,399	121,658	6,920	45,918	76.54%
200,627	1,782	22,299	8,203	153,941	8,304	16,082	91.98%
205,643	1,844	23,414	10,184	189,383	9,688	-16,843	108.19%

It is of course possible to debate or alter assumptions made. In any particular case the initial value of equity may be higher or lower. It is taken that all the equity available, from the previous property which is sold, is reinvested in an extra care dwelling. It is assumed that the individuals day to day living expenses will continue to be met from their own resources if self payers or from benefits if not. No

¹⁰ 21 hours is commonly used as a guide to the point at which someone needs a residential care placement.

account has been taken of any other resources or receipt of attendance allowance, which should be common place in this cohort.

The modelling does however demonstrate – on the assumptions made – that if suitable, not for profit, mechanisms for releasing equity were available the ‘typical’ home owning extra care residents in Worcestershire should be able to afford most of the revenue cost of living by drawing on capital if they wish.

6.3. Funding Summary

- ◆ Public funding to subsidise the capital costs of extra care housing development will be significantly reduced or possibly withdrawn completely.
- ◆ In order for extra care development to be viable a much greater proportion of the units developed will need to be for leasehold sale, either outright or through some form of shared equity.
- ◆ In order for this to happen older people who are currently owner occupiers will need to find new extra care developments sufficiently attractive to want to purchase an apartment.
- ◆ Housing and extra care providers involved in the development of this strategy thought selling 60-70% of properties in a scheme would be typically required to ensure viability.
- ◆ Provision of affordable rented units in new extra care development, in the absence of grant, will need to be funded through subsidy from units for sale and/or contributions of land at below market value.
- ◆ It is anticipated that local authority budgets for care and support will be constrained in real terms over the next few years.
- ◆ The majority of older people entering extra care in the future are likely to have to fund their care from their own resources; the proportion of older people who can expect to have their care costs funded by Worcestershire County Council Adult and Community Services is likely to reduce.
- ◆ In order to fund their care many older people may need to use some form of equity release product or ‘mechanism’ to release funds from their existing home or extra care apartment.

7. Delivery programme

This section summarises how the strategy will be delivered.

7.1. Development options

There are a number of ways in which extra care housing will be developed and delivered including:

- ◆ Identifying existing sheltered housing schemes that could be upgraded through capital investment to enhance the building to provide the necessary infrastructure to deliver extra care, or a more limited form of extra care.
- ◆ Identifying suitable development sites for new build of both extra care schemes and ‘village’ type development.
- ◆ Encouraging private development of extra care housing.
- ◆ Identifying the potential for ‘core and cluster’ models of service delivery in the vicinity of existing extra care schemes, potentially providing care to the wider local community and making the catering and social activity provision within extra care available to the wider local community.

The local authorities will work actively with developers, extra care providers, and housing organisations, both social and private; to identify potential sites that are suitable and viable for extra care schemes and village type developments particularly as some of these types of schemes will only be viable on larger sites.

7.2. Delivery programme

An extra care delivery programme will be developed with every District/Borough Council to support the delivery of the extra care strategy covering:

- ◆ A local delivery programme for the next 3-5 years with specific actions identified for the next 1-2 years.
- ◆ Identifying specific opportunities in relation to the use of local sites and existing services, for example current sheltered housing services that may be suitable for remodelling; publicly owned sites that may be suitable for extra care housing development.
- ◆ Setting out the types and ‘models’ of extra care housing that are most appropriate and suitable for the identified needs in their area.
- ◆ The level of extra care housing required in relation to the estimated need and what can realistically be delivered locally.
- ◆ The funding options that are most feasible to deliver the proposed types of extra care housing.
- ◆ Identify the key delivery partners, both Registered Providers and private developers.

At a County level the Joint Commissioning Unit will:

- ◆ Oversee an overall delivery programme based on the agreed extra care housing strategy and an aggregation of the local District/Borough delivery plans.
- ◆ Develop service specifications for proposed extra care housing models (based on local delivery plans).
- ◆ Produce any changes to specifications to existing extra care schemes.
- ◆ Support development of 'specialist' specifications, e.g. for people with dementia and people with learning disabilities and oversee the delivery of different types of extra care housing that are appropriate to these more specialised requirements.
- ◆ Facilitate with the Districts an initial event for extra care providers (countywide or at District level) to promote the extra care strategy.
- ◆ Hold/facilitate meetings with individual housing and extra care providers to promote delivery of the strategy.
- ◆ Work with colleagues at the County Council, the Districts and the NHS to consider the possibilities of releasing public sector land at reduced value where the overall cost benefit in doing so can be demonstrated.
- ◆ Develop a model for cost comparison and the potential for savings between care provided within extra care housing and alternative models of care, including residential care.
- ◆ Develop a revenue funding approach for new extra care development based on a majority of older people funding their own care/support costs and using a proposed care cost 'comparison model'.
- ◆ Develop with Districts an extra care information and resource guide for local older people and their families that could be published jointly by all the local authorities in Worcestershire. This to be part of the JCU's overall approach to information and advice provision.
- ◆ Work with extra care housing providers to develop an effective extra care marketing approach to owner occupiers.
- ◆ Establish an extra care 'reference group' to include local older citizens with a strong interest in extra care housing to help 'reality test' development proposals and funding models.

Annex 1 Key Messages from Stakeholders

Key messages from local authorities with housing and planning responsibilities

- ◆ There needs to be the potential for co-location of health/social care services within some larger extra care developments
- ◆ There will need to be a mix of dwelling types, including flats and some bungalows
- ◆ The specification will need to include 2 bed units and in some cases a few 3 bed units
- ◆ Need to have mixed tenure schemes to reflect that in the future there will need to be a shift towards greater numbers of units for sale and/or shared ownership in order for schemes to be financially viable.
- ◆ Given the need for greater number of units for sale, there is recognition that local authorities have an interest in seeing future extra care being attractive to the full spectrum of older people.
- ◆ Future extra care developments should include provision for people with dementia although the specification for this will need to be considered carefully.
- ◆ In relation to creating facilities within schemes/developments there should at least be some provision, e.g. café-style provision as a minimum.
- ◆ The provision of 24 hour care is an essential component.
- ◆ Schemes need to have sufficient communal space.
- ◆ There needs to be a pragmatic approach to whether the provision of housing and care should be separate within extra care, i.e. it is not necessarily helpful to insist on housing and care being provided by different organisations.
- ◆ Within a countywide 'vision' for extra care, there will need to be flexibility in the scale and design of future extra care developments to reflect that potential sites within different local authority areas will affect development opportunities.
- ◆ Extra care housing needs to be a part of broader 'vision' for housing, care and support for older people as part of wider 'offer' to the growing older persons population in Worcestershire, including 'aspirational' housing aimed at older people that is separate to extra care provision.
- ◆ Extra care schemes can be of benefit to other members of the local community, e.g. in terms of use of the facilities and care services, but this needs to be considered carefully in terms of being acceptable to residents.
- ◆ There will need to be a good range of information and advice available to all older citizens and their relatives as well as effective marketing by extra care providers.
- ◆ The quality and design of future schemes need to be of a sufficiently high quality to attract self funders, however this level of quality needs to be sustained across all tenures.
- ◆ In planning terms extra care housing should be classified as 'C3', rather than 'C2' to reflect that the housing units should be fully self contained including a kitchen and a bath/shower room.
- ◆ Housing delivery partners need to be drawn from across the housing association, charitable and private sectors, particularly given the significant reduction in capital funding available through the Homes and Communities Agency (HCA).
- ◆ There is recognition that partnerships with private sector developers/providers will be necessary and there is a need for dialogue with private providers regarding delivery of affordable rented units as part of new extra care developments.

- ◆ There needs to be a pragmatic approach to developing additional extra care provision, for example some existing sheltered schemes may be suitable for 'conversion' to extra care but may not meet an 'ideal' extra care specification.
- ◆ As far as possible extra care housing should be a 'home for life' for those individuals who want that.
- ◆ Need to be pragmatic about the types of schemes developed linked to the availability of sites; issues include the availability of land/sites of sufficient size for larger scale extra care developments and how to provide in rural areas.
- ◆ There is need for a clear and detailed definition of what is meant by 'extra care housing' in Worcestershire which can then be used and referred to by all the local authorities and providers.

Key messages from extra care housing providers

- ◆ The local authorities in Worcestershire need to provide a clear position to housing providers as to the 'vision' for extra care in Worcestershire and the level of need.
- ◆ New schemes need to be sufficiently large in scale to accommodate a mix of needs, including dementia although the specification for this needs to be carefully planned.
- ◆ The development of additional extra care capacity needs to include consideration of 'remodelling' some existing sheltered schemes to accommodate some extra care 'features' but possibly not to the same specification as new build development, however it needs to be attractive to a wide range of potential customers.
- ◆ Some providers currently considering whether some existing sheltered schemes can be converted to have a 'hotel' feel with communal facilities created through conversion of some of the existing units.
- ◆ For some providers essential features of extra care include catering/restaurant facilities, 24/7 on site staff including care provision and assisted bathing facilities.
- ◆ However, there is concern that having a very wide range of facilities can lead to high service charges and subsequent affordability issues for some customers, both self funders and customers receiving benefits.
- ◆ On site restaurant facilities are a particular issue for providers in terms of being a financially viable element of the service and an assessment of how this element of any scheme needs to be carefully considered in advance, for example will 'external' use of restaurant facilities be required in order to achieve financial viability.
- ◆ New development needs to include a mix of types of units including bungalows where the size of the site allows for this.
- ◆ Most providers favour a 'C3' rather than 'C2' planning designation for extra care housing, in part because this provides a better 'exit strategy' if that becomes necessary in the future, however a private provider consulted viewed a 'prescriptive' approach to defining extra care development as 'C3' as restrictive.
- ◆ Many providers see their current and future approach to the services provided within extra care as being based on a 'menu' type model, where there are a range of services as options for residents that they can purchase depending on their preferences and budget.
- ◆ Care services increasingly need to be 'person centred' and able to be tailored to individualised requirements.
- ◆ Housing associations are planning future developments on a mixed tenure basis, in recognition that there is going to be significant reductions in the level of public subsidy available through the

HCA. Most of the housing associations consulted expected their new developments to be based on between 60-70% of units being for outright sale or for sale on a shared equity basis to fund future developments.

- ◆ Housing providers, particularly housing associations, recognise that any new development will need to appeal to a much wider market than has historically been the case as the majority of residents will be purchasing either outright or through a shared equity route.
- ◆ Most providers are either considering or are interested in models of equity release that allow an older person to fund their care costs, or potential care costs. There is a need for the County Council to ensure that the communications it provides to the older persons population about eligibility for publicly funded or part funded care are linked with 'messages' about options for older people to self fund their care, such as through equity release.
- ◆ There is a need for the County Council to be realistic about the level of funding provided to fund the support and care costs of lower income older people who currently or may in the future live in extra care housing, i.e. there needs to be discussion between the local authority and providers about the realistic level of costs for support and care so that these services are viable for lower income older people.
- ◆ Most providers want to see a 'partnership' approach with the local housing and social care authorities from planning to scheme delivery and through to addressing 'selling' the concept of extra care more widely to the older persons population in Worcestershire.
- ◆ There is a need for the local authorities in Worcestershire to act in a more coordinated way in relation to extra care development, with the County Council in particular taking a more strategic role. Local authorities also need to capacity build with Councillors in relation to promoting the role of extra care housing.
- ◆ A majority view amongst providers was that if the local authorities want to maximise the proportion of affordable rented units within a scheme, where there is no or limited HCA grant subsidy, then the use of local authority land/sites at more favourable terms will need to be a part of the development 'mix'.
- ◆ Most providers believe that for an extra care scheme to be viable from a management perspective there needs to be a mix of needs from no to higher care needs.
- ◆ The County Council needs to have a clear policy on what they expect from extra care housing in relation to 'diverting' people away from residential care services.
- ◆ All housing providers consulted want to see a more flexible approach to the delivery and provision of housing and care, i.e. that a local authority does not insist on separate organisations providing the care and housing; this is viewed as increasingly less the prerogative of the local authority if future new developments will be predominantly for self funders.
- ◆ There needs to be a clear delivery plan for developing extra care housing at both a county level and a district level.

Key messages from Senior Citizens

- ◆ There is a need for 1, 2 and 3 bed apartments within any extra care scheme development.
- ◆ Schemes need to allow for some apartments that are designed and built to full wheelchair accessibility standards, i.e. suitable for an individual who needs to use a wheelchair to mobilise.
- ◆ Some apartments need to have 2 bathrooms; one suitable for a disabled person who is a full time wheelchair user and one bathroom for a partner/carer.
- ◆ The design and specification of fixtures and fittings within extra care apartments need to be well thought out so that an individual can exercise the maximum degree of control and thus maintain

total independence for as long as practically possible, e.g. remote control devices to operate a shower could be included to allow the carer to use the controls but this staff control should not be at the expense of the user control. This example was provided by a participant based on one of the schemes he had visited. It was thought that the shower control had been fitted outside the reach of the resident in order to maximise the income for the care package.

- ◆ There needs to be sufficient storage provided within an extra care development to enable residents to be able to store personal belongings, such as suitcases and other small items that cannot be accommodated within an extra care apartment.
- ◆ The availability of a range of facilities within an extra care scheme is one of the 'components' that makes extra care housing an attractive proposition. These can vary widely between different types of schemes; typically within an extra care 'village' type development the range of facilities can be extensive such as a silver service Chef managed restaurant, gym and leisure facilities, craft, IT and woodwork rooms and a shop, a pub, a hairdresser a well-being surgery. Smaller extra care schemes will typically have far fewer of these types of facilities and amenities. All of the schemes should have an activity co-ordinator member of Staff. Greater the activities list, the lower the isolation and loneliness which in turn will reduce on the costs of the care and ill health.
- ◆ There is a need for mixed tenure extra care developments (as opposed to wholly social rented and wholly private schemes) which provide a mix of options from rented apartments at social rents through to 'shared ownership' and outright (leasehold) ownership units for sale. Within this spectrum of types of accommodation there is a big market for larger apartments and bungalows for some private purchasers.
- ◆ In any mixed tenure extra care development it is important that this is clearly explained to potential residents (both potential tenants and leaseholders) at the outset. That the scheme is for all comers with varying amounts of funds and that living together in later life in this way will become a new experience.
- ◆ In relation to the mix of residents and the level of their needs for care, there should be a balance of residents with differing levels of need for care. An often quoted 'rule of thumb' for some extra care schemes (typically those that are run by housing associations and with the care funded, at least in part, by the local authority Adult Services), for a one third/one third/one third split between the number of residents with lower, moderate and higher levels of care requirements
- ◆ Extra care schemes need to have sufficient car parking space available in relation to the likely needs of the potential residents, i.e. some couples may have two vehicles and may not wish to 'downsize' their vehicle requirements simply because they move to an extra care apartment. The loss of a car can be the biggest loss of independence and this must be considered as important.
- ◆ Extra care providers need to have a clear policy in place in relation to the sale/disposal of an extra care apartment where a leaseholder has died without a will or an up to date will. The apartment must be made available for reuse within a short time.
- ◆ The senior community in Worcestershire need to be informed about extra care and the many benefits arising. Many people have no knowledge of extra care and its usage. Extra care needs to be publicised in community and Local Authority newsletters.
- ◆ The people who are the 'target market' for extra care housing schemes need to be made aware of the full up-front and on-going costs. Specifically this will need to cover purchase costs, service charges, personal apartment heating and lighting costs, ground rent, car parking/storage, costs of storage facility, and the cost of care (even if an individual does not currently need or have a significant need for care). Potential residents need to be able to understand and plan for the

future costs of care and a point at which they may 'run out' of private means to fund their own care and may become eligible for state funded care

- ◆ Providers of extra care housing need to address any inequality or variations in service charges that are levied on residents who fund their own care and residents who have their care funded by the local authority.
- ◆ The local authorities need, with housing organisations, to promote the development of 'aspirational' housing for older people; i.e. housing that an older person or couple would consider purchasing as an attractive alternative to their current home (which may not be suited to their needs in the longer term). The local authorities in Worcestershire, both those with responsibility for strategic housing and Adult Services, have a clear vision for the role of extra care and retirement housing for older people.
- ◆ Local authorities need to have a proactive, helpful and constructive approach to 'enabling' the development of extra care housing development and avoid putting any barriers in the way of potential (suitable) developments.
- ◆ One participant articulately summed up the case for extra care housing development as follows:

"Extra care is very much a 'Cross Cutting Theme' because it, helps protect older people, creates a safe and secure environment, helps maintain independence, removes isolation, cuts health care costs, reduces on care staff downtime for travel, eases care staff training because it can be achieved in-house, can reduce hospital admission and facilitate early discharge thus reduces bed blocking, extends life, creates lifetime homes, increases confidence, new social network, regenerates communication skills, highlights dementia issues, frees up housing down the line, creates employment and creates so many other benefits for our community that It makes one ask why we do not already have such facilities."

- ◆ There is a need for some provision that is fully usable by permanent wheelchair users, for example people who have been paralysed through accidents or illness. Coupled to needing the assistive bathroom and lifts large enough for a stretcher style shower tray there is a real need for a small percentage, say 5% of the units in any extra care scheme for use by severely disabled resident. In addition to the area needed in the apartment for wheelchair turning etc such an apartment should have ceiling hoists for use by Carers to convey residents from bed to bathroom, shower/bath, toilet and into wheelchair after dressing on the bed.
- ◆ There is a need to ensure that local Councillors are fully supportive of the reasons for needing to develop extra care schemes and the subsequent delivery of such schemes to ensure there is a range of housing with care options available to older and disabled residents in Worcestershire in the future.

Annex 2 Need for Extra Care Housing by District

Estimated need for extra care housing is shown separately for each District area in terms of the estimated number of units required by 2026 in tables below. This is based on data contained within section 3.

Bromsgrove: Estimated need for extra care housing to 2026

Older population 75 years and over (2026)	15,100
Units of extra care/enhanced sheltered housing (45 units/1000 pop.)	680
Units of dementia based housing (10 units/1000 pop.)	151
Diversion of older persons from residential care (3.5 units per 1000 pop.)	53
Sub Total	884
Current provision	92
Total required	792
Required units by tenure:	
Owned (77.8%)	616
Rented (22.2%)	176

Malvern Hills: Estimated need for extra care housing to 2026

Older population 75 years and over (2026)	14,900
Units of extra care/enhanced sheltered housing (45 units/1000 pop.)	671
Units of dementia based housing (10 units/1000 pop.)	149
Diversion of older persons from residential care (3.5 units per 1000 pop.)	52
Sub Total	872
Current provision	0
Total required	872
Required units by tenure:	
Owned (77.1%)	672
Rented (22.9%)	200

Redditch: Estimated need for extra care housing to 2026

Older population 75 years and over (2026)	9,400
Units of extra care/enhanced sheltered housing (45 units/1000 pop.)	423
Units of dementia based housing (10 units/1000 pop.)	94
Diversion of older persons from residential care (3.5 units per 1000 pop.)	33
Sub Total	550
Current provision	112
Total required	438
Required units by tenure:	
Owned (62.5%)	274
Rented (37.5%)	164

Worcester: Estimated need for extra care housing to 2026

Older population 75 years and over (2026)	10,100
Units of extra care/enhanced sheltered housing (45 units/1000 pop.)	455
Units of dementia based housing (10 units/1000 pop.)	101
Diversion of older persons from residential care (3.5 units per 1000 pop.)	35
Sub Total	591
Current provision	0
Total required	591
Required units by tenure:	
Owned (72.2%)	427
Rented (27.8%)	164

Wychavon: Estimated need for extra care housing to 2026

Older population 75 years and over (2026)	19,900
Units of extra care/enhanced sheltered housing (45 units/1000 pop.)	896
Units of dementia based housing (10 units/1000 pop.)	199
Diversion of older persons from residential care (3.5 units per 1000 pop.)	70
Sub Total	1,165
Current provision	47
Total required	1,118
Required units by tenure:	
Owned (73.1%)	817
Rented (26.8%)	301

Wyre Forest: Estimated need for extra care housing to 2026

Older population 75 years and over (2026)	16,900
Units of extra care/enhanced sheltered housing (45 units/1000 pop.)	761
Units of dementia based housing (10 units/1000 pop.)	169
Diversion of older persons from residential care (3.5 units per 1000 pop.)	59
Sub Total	989
Current provision	97
Total required	892
Required units by tenure:	
Owned (72.2%)	644
Rented (27.8%)	248

Annex 3 Extra Care Housing Guidance - Key Variables

1. Dwellings	Essential	Desirable	Commentary
Minimum size of dwellings:			<p>When purpose built sheltered housing was first developed in the 1960s and 1970s, bedsits of less than 30m² and even shared facilities were acceptable. This is no longer the case. By the 1990s the minimum size for a one bed apartment was around 40m². Today, only another 20 years on it is around 50m² for a one bed apartment and 60m² for two beds. Expectation and standards have risen steadily. More people now need 2 bedrooms or even 3. To be sufficiently attractive to encourage retired couples to move from a larger house and free up family housing schemes have to offer:</p> <ul style="list-style-type: none"> ◆ Dwellings of an acceptable size ◆ More, larger apartments <p>Evidence from the last 50 years is clear that properties that are too small simply become unlettable and unsalable.</p> <p>The desirable dwelling size standard is based on 'Design principles for extra care' (Housing LIN factsheet 6) and they are those adopted by some of the leading Registered Providers of extra care. The absolute minimums reflect current standards in some private sector retirement schemes. The overall scale of development is based on evidence of the cost of running extra care housing and capital cost of providing a minimum set of facilities. Care providers interviewed varied slightly in scale they thought essential but there is a consensus that around 50-60 is now about the smallest.</p>
1Bed	50m ²	54+m ²	
2Bed	60m ²	68+m ²	
Mix of 1 and 2 bed properties	x		
Some 3 bed properties		X	
Minimum scale 45-50 dwellings		X	
Must be self-contained	x		
Including a usable kitchen	x		

			<p>The minimum scale of the 50-60 range is however marked as desirable rather than essential as it is possible that some very small schemes, that share most of the characteristics of extra care and are necessary to meet a particular need can be supported and funded. This might apply for example to small developments designed to cater for older people who also have a learning disability.</p> <p>The evidence gathered for this strategy indicates that up to 5% of the apartments within a scheme may need to be sufficiently large to accommodate a hospital standard bed and space to allow two carers with hoists to support individuals who, for example, also require space to store medical and wheelchair equipment.</p>
2. Standards	Essential	Desirable	Commentary
Registered Provider follow HCA standards	x		<p>The Care Standards Act 2000 and the National Minimum Standards for Care Homes for Older People produced by the DH under that Act do NOT apply to extra care buildings. It will not be registered as a care home although:</p> <ul style="list-style-type: none"> ◆ The provider of domiciliary care has to register with CQC ◆ In retirement villages where there is a separate care home on the site as part of the village this will have to be regulated under the Act and therefore conform to the minimum standards <p>Registered Providers must follow the standards set out by the HCA. Extra care falls in the category 'Housing for older People (all special design features)' Strictly speaking these only apply where a grant is provided however we would expect all developments to adhere to these standards as far as possible.</p> <p>It is desirable for all developments in the public or private sector</p>
Lifetime Home standards		x	
Design Principles for extra care (Housing LIN factsheet No 6)		x	

			<p>to achieve Lifetime Home Standards. This should help to make dwellings both usable and flexible and thus sustainable as housing in the future. (www.lifetimehomes.org.uk) All building regulations and other statutory standards of course apply.</p> <p>It is desirable all developments, public or private also follow the guidance Design Principles for Extra Care’ particularly in relation to:</p> <ul style="list-style-type: none"> ◆ Space standards for communal facilities ◆ Dementia care provision within extra care housing ◆ Interior design and supporting frailty and impairments including way finding and lighting
3. Facilities	Essential	Consider	Commentary
<i>Communal:</i>	x		<p>Broadly the range of shared facilities will be more extensive the larger the development. The cost of facilities has to be spread over all the dwellings, rented or sold, and are unaffordable in smaller developments. Local circumstances will also play a part so for example if a purpose built facility is already available adjacent to the scheme there is may be no point in replicating the service.</p> <p>We have therefore indicated those facilities which are normally considered an integral part of extra care housing as ‘essential’. The larger list of facilities form a checklist to prompt consideration of additional features which may be relevant and desirable if affordable but would not always be routinely provided. The list is not intended to be exhaustive but represents the most common facilities.</p>
Communal lounges	x		
Dining area	x		
Residents tea kitchen	x		
Activity/ hobby rooms		x	
Communal WCs	x		
Assisted bathroom	x		
Hairdressing/ beauty therapy	x		
Informal seating space		x	
Scooter store	x		
Car parking	x		
<i>Staff and ancillary accommodation</i>			
Manager’s office	x		
Care staff office		x	
Photocopy area		x	
Staff overnight room with ensuite		x	

Staff rest room		x	
Staff changing and lockers		x	
Guest room with ensuite		x	
Laundry (if no washing machines in apartments)	x		
Main catering kitchen		x	
Cleaners storage	x		
General storage		x	
Lift/ motor room		x	
Refuse store	x		
<i>Other spaces</i>			
Shop		x	
Library		x	
Therapy room		x	
Treatment room		x	
IT room		x	
Health suite/ gym / pool		x	
Greenhouse		x	
Bowling green/ extra activities		x	
Cinema		x	
4. Availability of facilities			
	Essential	Desirable	Commentary
To wider community		x	Some extra care schemes such as those described as ‘hub and spoke’ are deliberately designed and run to serve not only a population resident in the scheme but a wider community nearby. The extra care scheme provides a base for care staff to outreach to surrounding areas while local people can also come into the development to use facilities like assisted bathing, have a meal or join social activities. The gains are: <ul style="list-style-type: none"> ◆ More economic care services for all
Zones of privacy		x	

			<ul style="list-style-type: none"> ◆ More vibrant community in the scheme and viable activities ◆ Helps sustain a restaurant <p>Other extra care schemes involve local people in a more peripheral way perhaps encouraging them to use a gym or a bowling green but do not actually provide a base for social care or health staff.</p> <p>We consider it desirable for extra care facilities (at least) to be made available to the wider community, particularly where public grant funding is helping to finance facilities. We cannot however make it an essential requirement as this may not always be acceptable to private developers.</p> <p>Where facilities are to be made available then it is equally desirable that the concept of ‘zones of privacy’ is incorporated in the design and running of the scheme in order to ensure sufficient privacy and security for occupiers</p>
5. Care and support	Essential	Desirable	Commentary
24 hour on site care	x		<p>Care is by definition an essential ingredient. Care and support can be provided in different ways which range from an on-site care team able to provide personal domiciliary care around the clock and respond personally to emergencies through to entirely individual arrangements made with a multiplicity of individuals and domiciliary care agencies. The kind of arrangements commonly found in practice in traditional sheltered housing.</p> <p>We believe it is essential that for modern extra care of good quality there is:</p> <ul style="list-style-type: none"> ◆ An on-site care team ◆ Able to provide care and support whenever required
Emergency alarm	x		
Door opening and CCTV	x		
Telecare personalised		x	
Environmental sensor	x		

		<ul style="list-style-type: none"> ◆ Including responding to emergencies at night <p>Telecare is now common place. An emergency alarm system has long been a defining feature of sheltered housing and must be provided in extra care. A range of ways of triggering an alarm should be available to residents to meet individual preferences including pendants and wrist devices. In blocks of flats it is essential that the front door can be opened from the apartment and that the entry system incorporates a camera.</p> <p>A range of environmental sensors must be incorporated in buildings as a minimum, smoke and fire, but a wider range should be made available according to risks and preferences such as flood alarms. Other assistive technology commonly found in SMART homes should also be considered but is not essential for everyone.</p> <p>In addition it is desirable to make available a range of extra devices to help meet individual needs. These range from fall detectors to things like pressure mats or movement sensors designed either to function as alerts or to operate switches, for example pressure mats to go by a bed linked to lights to illuminate a path to the toilet at night.</p> <p>It is usual for extra care and sheltered schemes to incorporate hard wired alarms and door entry systems and commonly the ability for a control centre to remotely open the front door to schemes for emergency and other services. Some of this may be less essential in extra care where there is 24 hours staffing.</p> <p>In some situations there may be merit in considering dispersed alarm units as economic, with the facility to monitor and operate a large number of wireless devices with some additional capabilities relevant to extra care settings such as to give audible prompts and reminders or monitor/ dispense medication.</p>
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6. Meals	Essential	Desirable	Commentary
Meals provision	x		<p>Economic provision of meals in extra care is a struggle. This is particularly true in smaller schemes and when residents are entirely free to choose whether or not to eat in the restaurant. Provision of meals is however an essential in extra care for both physical health and social reasons. Some residents may simply be unable to prepare meals themselves. Housing LIN factsheet 22 covers options for catering in extra care housing.</p> <p>While it is highly desirable to have fresh food cooked on site this may not be economically practical in every case. It must be demonstrable that arrangements for adequate meals has been made.</p> <p>There is a very strong case for a commercial standard of catering arrangements in ‘village’ scale developments, CCRC and in schemes where the plan is to extend services to the wider community on a ‘hub and spoke’ or similar configuration.</p>
Catering standard kitchen		x	
7. Landlord and Care Provider Arrangements	No essential requirement		Commentary
All arrangements acceptable			<p>Extra care requires two types of service; care/support and housing management and maintenance. This in turn often requires formal, contractual arrangements between two organisations. In addition various health, fitness and social activities have to be initiated and arranged. There are three main options:</p> <ul style="list-style-type: none"> ◆ Landlord to also be the care provider – a ‘seamless service’ ◆ Landlord and a separate, single care provider, which in the past might have been Adult Social Care in-house staff ◆ Landlord and multiple care providers – Adult Social Care contract with many different agencies or residents paying for domiciliary care or personal assistants on an individual

		<p>basis using Personal Budgets or Direct Payments or own resources</p> <p>In residential care, accommodation and care are provided together but in extra care separation between housing and care is possible.</p> <p>The landlord/property management function normally involves:</p> <ul style="list-style-type: none"> ◆ Intensive housing management ◆ Low level support/ preventative and liaison services (warden or estate management type help) ◆ Property maintenance service ◆ Resident involvement and participation ◆ Social activities <p>The care provider provides:</p> <ul style="list-style-type: none"> ◆ Domiciliary care ◆ High level personal care ◆ Possible nursing care/ specialist services <p>In practice there is a continuum so the landlord's/property manager's responsibilities may extend into providing social activities and domiciliary care but stop short of providing personal care. Alternatively, the landlord may delegate some traditional housing management tasks to the care provider.</p> <p>The advantage of separating care from housing are:</p> <ul style="list-style-type: none"> ◆ A good housing developer or housing manager may not be the best, most expert care provider and vice versa ◆ In most models it is possible to change the care provider without moving – something not possible in a care home. <p>The disadvantages of separating housing from care are:</p> <ul style="list-style-type: none"> ◆ Difficulty in providing an integrated, 'seamless' service to
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			<p>residents</p> <ul style="list-style-type: none"> ◆ Added cost of liaison and co-ordination for both commissioners and providers. Offices and posts overlap or are even being duplicated. ◆ Where there are multiple care providers it becomes harder to guarantee a consistent level and quality of service to all. There are also increased security and safe guarding risks while residents often complain of the noise and disruption of many different people coming and going and comment on how inefficient this must be. <p>Supporting People arrangements over the last few years have preferred a clear separation of support from housing functions. This is however a policy preference and there is no statutory basis to require a separation. It is often observed that in the most lively and dynamic extra care developments there is no visible distinction between landlord and care provider function.</p> <p>Our policy in extra care is to permit all arrangements, including those where the landlord is also the care provider, where it wins the care and support tender, in order to get:</p> <ul style="list-style-type: none"> ◆ The best outcomes for occupiers ◆ The most economic and least wasteful organisational arrangements
8. Allocation and eligibility criteria	Essential	Desirable	Commentary
Managed lettings/ sales to maintain mixed community		x	Extra care is used in different ways, particularly in the context of purchase of funding of places by Adult Social Care. There is a spectrum which runs from seeing extra care as a direct alternative to residential care through to extra care as simply modern sheltered housing available for older and disabled people able to

		<p>live independently with little or no assistance. In Worcestershire the preferred model has been to manage lettings to achieve and if possible maintain a balanced community. CCRC in Worcestershire are also based on this model and may incorporate for example three types of accommodation:</p> <ul style="list-style-type: none"> ◆ Care bedrooms in a registered care home ◆ Care suites ◆ Care apartments – for the most independent (see for example Richmond Villages) <p>Anticipating greater levels of owner occupation it is harder to actually ‘manage’ sales. To a large extent this is a market activity particularly in the case of outright rather than shared ownership sales. However leases should require some assessment of suitability with the landlord/property manager alternatively having the power to veto a sale.</p> <p>In the case of shared ownership where there is an element of public subsidy and social housing our preference is to see sales and lettings arranged by a panel involving Adult Social Care (as a key funder of care), the district/borough council, care provider and landlord in order to maintain some level of balance.</p> <p>The target mix of levels of resident need should be agreed scheme by scheme. It is recognised, (indeed desirable) in order to extend choice, schemes will have different resident profiles according to the needs they are intended to meet. We propose three bands of need are used:</p> <ul style="list-style-type: none"> ◆ Those with no regular needs for care ◆ People with moderate needs for domiciliary care of less than 10 hours/ 6 visits per week ◆ People who meet high levels of care of more than 11 hours/ 7 visits a week
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			Those who need 21 plus hours of care per week would normally be considered as candidates for residential care which might include living in a CCRC.
9. Tenure	Essential	Desirable	Commentary
For sale		x	<p>The analysis presented shows a shift to properties being sold rather than simply rented in the social housing sector. It is highly desirable that most developments offer the widest range of methods of entry including outright purchase, purchase on shared ownership terms or renting. These would be mixed tenure, there are also other financial models on which occupancy can be based to meet other circumstances and preferences.</p> <p>There may however be locations or cost where outright sales may be unrealistic. It is also recognised that some private developers who traditionally build for sale are unenthusiastic about mixing rental and for sale accommodation. There are practical operational challenges in managing mixed tenure schemes. Thus while there is a presumption against mono-tenure developments and a preference for more mixed tenure housing in order to increase the supply of extra care housing to purchase building for outright sale only has to remain acceptable.</p>
For rent		X	
Shared ownership/ equity		X	
Mixed tenure		x	
10. Ethos	Essential	Desirable	Commentary
Culture that promotes independent living	x		<p>For many, a distinguishing feature of extra care housing is the culture or ethos of the development. This will be evidenced in values and practices that promote independence. This would be apparent in for example:</p> <ul style="list-style-type: none"> ◆ Sufficient support and care being available but not

			<p>excessive levels of support</p> <ul style="list-style-type: none"> ◆ Philosophy of 'working with' residents ◆ Wide range of social activities ◆ Continuing links with wider community ◆ Relatives' active participation in provision of support and care encouraged not discouraged. ◆ Residents participating in running scheme or activities ◆ Support to prepare meal is available ◆ Having own self contained accommodation; tenants or owners ◆ Barrier free environments and design which is enabling
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Annex 4 Extra Care Housing – Examples of schemes identified by stakeholders

The following extra care developments were identified by stakeholders, principally the group of senior citizens as attractive examples of extra care housing

Sandford Station retirement village, North Somerset, (St Monica Trust - charity)

St Oswald's village, Gloucester (Extra Care Charitable Trust/Rooftop Housing Group)

The Rose Garden, Hereford (Extra Care Charitable Trust/Festival Housing)

Oscott Village, Birmingham (Extra Care Charitable Trust/City of Birmingham)

Hartrigg Oaks, York (Joseph Rowntree Housing Trust)

Larkhill Village, Nottinghamshire (Nottingham City Council, Nottingham City Primary Care Trust and the Extra Care Charitable Trust)

Denham Garden Village Buckinghamshire (Anchor Housing Association)

Annex 5 Glossary

Aspirational housing	A generic term that is used by housing providers to describe housing, in this context, that is specifically attractive to older persons, particularly in relation to individuals who are buying a property; it may refer to both extra care housing and other types of housing.
Continuing Care Retirement Community (CCRC)	A development where different buildings or groups of buildings are based on different tenures, e.g. extra care housing and nursing care home on the same site/development
Core and cluster/hub and spoke 'models'	Descriptions typically used by organisations that provide extra care housing to describe an extra care scheme as a 'hub' or 'core' from which care and other services are provided to local people living in the community near to an extra care housing scheme.
Equity release	Equity release means unlocking some of the market value of the property without moving house
Mixed tenure	An extra care housing scheme that includes housing for rent and for sale.
Nursing care home	A home registered for nursing will provide personal care (help with washing, dressing and giving medication), and will also have a qualified nurse on duty twenty-four hours a day to carry out nursing tasks. These homes are for people who need regular attention from a nurse. Some homes, registered either for personal care or nursing care, can be registered for a specific care need, for example dementia or terminal illness.
Residential care home	A care home is a residential setting where a number of older people live, usually in single rooms, and have access to on-site care services. A home registered simply as a care home will provide personal care only - help with washing, dressing and giving medication. Some care homes are registered to meet a specific care need, for example dementia or terminal illness.
Service 'remodelling'	A term typically used by providers of housing and care services to describe changing an existing service, typically in terms of the building, design, features and services so that it is better suited to

	the requirements of older people in the future.
Shared ownership	Shared ownership is a way of buying a stake in a property if you cannot afford to buy it outright. You have sole occupancy rights, that is you do not have to share your home with anyone else. Shared ownership properties are usually offered for sale by housing associations but also by some private organisations. You buy a share of a property, and pay rent to the housing association for the remainder. Your monthly outgoings will include repayments on any mortgage you have taken out, plus rent on the part of the property retained by the housing association.
Telecare	Telecare and Assistive technology are alarm systems and monitoring devices that can help support vulnerable people to continue living independently in their own homes.

This Strategy has been developed by the Housing and Support Partnership on behalf of Worcestershire County Council and the Housing Authorities in Worcestershire.

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The following pages provide a report for all corporate performance indicators which are contained in the Council Plan, for which data was expected and provided in quarter 3 (September - December) 2011/12 and where there is comparative data available; the data relates to a year to date (April - December) comparison.

	Finance & Corporate Resources (FR)		Leisure, Environmental & Community Services (LEC)		Area of Highest Need (AOHN)		Policy, Performance & Partnerships (PPP)		Planning, Regeneration, Regulatory & Housing Svcs (PRRH)		Total	
	3	%	8	%	0	%	0	%	4	%	15	%
Total number of corporate performance indicators providing outturn data for quarter 3 where comparative data is available	3		8		0		0		4		15	
Total number of indicators showing improvement compared to the same period last year	3	100.0%	5	62.5%	NO		NO		0	0.0%	8	53.3%
Total number of indicators showing a decline compared to the same period last year	0	0.0%	3	37.5%	DATA		EXPECTED		4	100.0%	7	46.7%
Total number of indicators showing no change compared to the same period last year	0	0.0%	0	0.0%	FOR THESE		THIS		0	0.0%	0	0.0%
					PI'S		QUARTER					

Key Findings for Quarter 3

This report shows that of the 15 indicators reported this quarter, 53.30% have improved when compared to the same period last year. By way of example, the length of time taken to process Housing Benefit / Council Tax Benefit new claims and change events has fallen from 12.5 days to 8.9 days, and the number of people using BURT (Bromsgrove Urban Regional Transport) and the Shopmobility service has continued to rise. However there are indicators which give rise to some concern; for example, the number of households requiring temporary accommodation has risen from 19 to 26 when compared with the same period last year.

The table below shows a key to terms and symbols used throughout this report.

<u>Key to Terms and Symbols</u>	
Improving performance compared to same period last year	☺ +ve
Worsening performance compared to same period last year	☹ -ve
No change in performance compared to same period last year	☺ TBC
No data available for the period	# (WVP)
Not applicable for this indicator/period	NA CSC
Data is provisional	* DFG's

Indicator Description	Current			History - Year End (where available)		Comments
	1 Apr 2010 - 31 Dec 2010	1 Apr 2011 - 31 Dec 2011	Direction of Travel (where applicable)	2009/10	2010/11	
Time taken to process Housing Benefit / Council Tax Benefit new claims and change events (days)	12.5	8.9	☺	TBC	TBC	Face to face contact is having a positive impact on the time taken to process new claims and change events, plus fewer new claims were made during the period.
% of invoices paid by the Council within 30 days of receipt	98.15%	98.55%	☺	98.18%	99.06%	Performance has remained consistent for a number of quarters showing our processes are effective.
Number of working days / shifts lost to the local authority due to sickness absence per FTE staff members (days)	6.37	5.72	☺	TBC	10.77	There is a decrease in sickness in Q3 (falling from 2.23 days in Q2, to 2.02 days in Q3), this was as a direct result of active sickness management of long term sickness cases previously identified.
% of complaints handled within the agreed time frames	69.18%	74.58%	Contextual	NA	71.51%	Performance slightly better than last year. The number of complaints received for waste and planning have increased.

Indicator Description	Current			History - Year End (where available)		Comments
	1 Apr 2010 - 31 Dec 2010	1 Apr 2011 - 31 Dec 2011	Direction of Travel (where applicable)	2009/10	2010/11	
Number of affordable homes delivered	55	121	Contextual	80	56	Delivery of affordable housing continues to be steady with no unexpected delays affecting performance.
Number of British Crime Survey comparator crimes reported	TBC	TBC		2,808	2,595	Data for this indicator is collected from iQuanta and won't be available until 24/01/12
Number of people using the BURT service	1,432	1,599	😊	NA	2,007	Christmas clubs/day centre closedsowns have reduced the monthly total, however there has been an increase in usage when compared with the same year to date period last year.
Number of people using the Shopmobility service	1,611	1,865	😊	TBC	2,157	The number of Shopmobility users has increased by 16% when compared to the same period last year, due to opening on Saturdays. In addition, weather conditions were significantly better than quarter 3 in 2010/11.
Artrix usage (community use)	51,005	59,854	😊	60,250	69,561	The in-service year to date target of 48,370 has been exceeded. The Artrix has exceeded expectations due to a consistent record in cinema attendance and a stronger increase in live performances. Workshop attendance needs to be improved and the management are looking at ways to address this.
Visitors to Dolphin Centre	274,509	294,624	😊	415,407	369,521	There has been an increase of 20,115 visitors to the Dolphin Centre primarily due to an increase in the number of gym members which has exceeded, 1000 for the first time. The numbers of swimmers has also increased and additional classes have been added.
Household waste collection (kg per head)	95.59	91.49	😊	NA	88.18	There has been a reduction of 4.1 kilograms of waste collected per head when compared to the same period last year. However, this needs to be seen in context with the following two indicators around residual waste and recycling.
Residual waste per household (kgs)	403.82	406.69	😞	581.00	539.15*	There has been a slight increase of 2.87kgs of waste collected per household.
% of household waste re-used, recycled or composted	44.71%	42.60%	😞	37.40%	42.54%	The amount of re-used, recycled or composted waste has decreased by 2.11 percentage points compared to the same period last year.
Town centre car park usage (avg per month)	1,141,631	1,095,879	😞	TBC	1,503,562	Free parking weekends were closer to Christmas than in previous years showing a 4% decrease on year to date car park usage, and a 0.6% decrease when compared to the same quarter last year.

Indicator Description	Current			Direction of Travel (where applicable)	History - Year End (where available)		Comments
	1 Apr 2010 - 31 Dec 2010	1 Apr 2011 - 31 Dec 2011			2009/10	2010/11	
Number of households living in temporary accommodation (Snapshot)	19	26		☹️	TBC	31	Although there is an increase in the amount of households living in temporary accommodation when compared to the same period last year, there has been a 30% decrease in the use of temporary accommodation when compared to quarter 2, 2011/12 (falling from 37 to 26).
Processing of major planning applications determined within 13 weeks	70.37%	64.29%		☹️	TBC	68.57%	2 applications went over time subject to committee decisions resulting in a slight reduction in performance when compared to the same year to date period last year. There has been reduced staff numbers over this quarter (sickness and secondment) and an increasing number of pre - application enquiries, meaning that it has taken longer to determine planning applications than we would like. Managers are now holding weekly meetings to support officers around their decisions on applications to allow early identification of possible issues which could result in last minute or out of time decisions. There has also been an improvement of communications with the Chair of committee.
Processing of minor planning applications determined within 8 weeks	89.19%	80.68%		☹️	TBC	89.69%	There has been a reduction in performance as 1 application was subject to committee decision. This is the lowest performance level on record for this category. There has been reduced staff numbers over this quarter (sickness and secondment) and an increasing number of pre - application enquiries, meaning that it has taken longer to determine planning applications than we would like. Managers are now holding weekly meetings to support officers around their decisions on applications to allow early identification of possible issues which could result in last minute or out of time decisions. There has also been an improvement of communications with the Chair of committee.
Processing of other planning applications determined within 8 weeks	94.24%	82.71%		☹️	TBC	93.61%	The number of applications received is 14% less than the equivalent quarter of previous year. However performance was nearly 23% lower during the current year. Compared to the previous quarter of the current year, where the number of application received was the same, performance has fallen 12.24%. There has been reduced staff numbers over this quarter (sickness and secondment) and an increasing number of pre - application enquiries, meaning that it has taken longer to determine weekly meetings to support officers around their decisions on applications to allow early identification of possible issues which could result in last minute or out of time decisions. There has also been an improvement of communications with the Chair of committee.

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