
**PROPOSED MASTERPLANNING GENERAL PRINCIPLES
LOCAL DEVELOPMENT PLAN – SCRUTINY TASK & FINISH GROUP**

Reason for the Report

1. To formally present the draft report of the cross committee scrutiny inquiry into the proposed Local Development Plan (LDP) Masterplanning General Principles Strategy, prior to their discussion by the Cabinet at its meeting on 9 May 2013.
2. To seek its endorsement by the Policy Review & Performance Scrutiny Committee.

Background

3. Following the deposit of Cardiff's LDP in April 2009, the Plan was submitted to the Welsh Assembly Government for Examination in November 2009. However in view of significant concerns raised by the Inspectors examining the Plan, and following agreement from the Welsh Assembly Government, the Council withdrew the LDP from the Examination in March 2010 and commenced work on preparing a new Plan following the Inspector's report.
4. Scrutiny has considered Council's progress towards securing an LDP at each stage of the Plan's development via a task and finish group of volunteers from all five scrutiny committees. The LDP Preferred Strategy was scrutinised by a representative and politically proportional task group including the five Scrutiny Chairs and Members from each of the scrutiny committees in summer and autumn 2012. The task group reported formally to the Policy Review & Performance Scrutiny Committee at its 3 October 2012 meeting.

5. The group was reconstituted in order to consider the proposed Masterplanning General Principles. The terms of reference for the inquiry were:

To scrutinise the proposed Masterplanning General Principles in the context of best practice elsewhere in the UK.

6. Members of the task and finish group were:

Community & Adult Services Scrutiny Committee

Councillor Ramesh Patel

Councillor Eleanor Sanders

Children & Young People Scrutiny Committee

Councillor Siobhan Corria

Councillor Chris Davis

Economy & Culture Scrutiny Committee

Councillor Craig Williams

Councillor Phil Hawkins

Environmental Scrutiny Committee

Councillor Bob Derbyshire (Joint Chair)

Councillor Gareth Aubrey

Councillor Rod McKerlich

Councillor Jacqueline Parry

Policy Review & Performance Scrutiny Committee

Councillor Elizabeth Clark (Joint Chair)

Councillor Gary Hunt

Councillor Paul Mitchell

Councillor Adrian Robson

7. Joint chairing arrangements had been established for the LDP Preferred Strategy. On this occasion, it was agreed that Councillor Clark would chair, while Councillor Derbyshire would chair the next stage of the LDP Scrutiny, to consider the LDP Deposit Plan in summer 2013.
8. The task and finish group undertook a whole-day inquiry on 20 March 2013, receiving evidence from a range of internal and external witnesses. Councillor

Ralph Cook - Cabinet Member Strategic Planning, Highways, Traffic & Transportation - was invited to attend, but unfortunately was taken ill so had to give his apologies. The Committee also received research from Scrutiny Services Research Team, comparing Cardiff's proposed Masterplanning General Principles with those put in place elsewhere.

Internal Witnesses:

- James Clemence - Operational Manager, Planning Policy
- Gareth Harcombe – Operational Manager, Regeneration

External Witnesses

- Richard Price - Planning and Policy Advisor – Wales, Homebuilders Federation
- Andrew Crompton - Regional Land Director, Persimmon
- Mark Hallett - Development Director, Igloo Regeneration/Commissioner for the Design Commission for Wales.

9. The Masterplanning Principles and scrutiny recommendations will be offered for Cabinet consideration on 9 May 2013. Work continues on the Deposit Local Development Plan, which is projected to be completed by October 2013. The Local Development Plan regulations require the Council to publish its pre-deposit proposals for public inspection and comment.

Way Forward

10. Attached at **Appendix A** is the final draft report of the task group. Members are particularly referred to the Context section of the report (page 9), Key Findings (pages 5-6), and the recommendations (pages 7-8). These are based on the evidence heard throughout the task and finish group Inquiry.
11. Members may wish to consider the report and agree whether to approve the report and refer it for consideration by the Cabinet.

Legal Implications

12. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf the Council must (a) be within the legal powers of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers of behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. Scrutiny Procedure Rules; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

Financial Implications

13. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct financial implications at this stage in relation to any of the work programme. However, financial implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any financial implications arising from those recommendations.

RECOMMENDATION

The Committee is recommended to endorse the task and finish group's report, subject to any comments or amendments the Committee wishes to make, for submission to the Cabinet.

MIKE DAVIES

Head of Scrutiny, Performance & Improvement
11 April 2013

s c r u t i n y



**A Report of:
Policy Review & Performance Scrutiny Committee**

Local Development Plan

Draft Masterplanning

General Principles

April 2013



County Council of The City and County of Cardiff

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CHAIR'S FOREWORD

[To be completed once report has been agreed.]

DRAFT

TERMS OF REFERENCE

This report presents the findings and recommendations of the task & finish scrutiny inquiry into the Draft Masterplanning General Principles for Cardiff's Local Development Plan (LDP) 2006-2026. The terms of reference for the Inquiry were:

To scrutinise the proposed Cardiff Local Development Plan Masterplanning General Principles in the context of best practice elsewhere in the UK.

Members of the task and finish group were:

Community & Adult Services Scrutiny Committee

Councillor Ramesh Patel

Councillor Eleanor Sanders

Children & Young People Scrutiny Committee

Councillor Siobhan Corria

Councillor Chris Davis

Economy & Culture Scrutiny Committee

Councillor Craig Williams

Councillor Phil Hawkins

Environmental Scrutiny Committee

Councillor Bob Derbyshire (Chair)

Councillor Gareth Aubrey

Councillor Rod McKerlich

Councillor Jacqueline Parry

Policy Review & Performance Scrutiny Committee

Councillor Elizabeth Clark (Chair)

Councillor Garry Hunt

Councillor Paul Mitchell

Councillor Adrian Robson

KEY FINDINGS

- KF1. As Cardiff is currently without a Local Development Plan, the Council is in a position of weakness when considering a planning application that results in a planning appeal.
- KF2. There is no agreed definition of the term 'masterplan'. In broad terms, it involves the creation of a "spatial masterplan" which deals with major change in a defined physical area. The masterplan illustrates how an area will be developed, specifying proposals for buildings, spaces, transport and land using three dimensional images. The masterplan can also describe how these proposals or aspirations will be delivered through an implementation strategy.
- KF3. Masterplans are site- and area-specific. They can range from a small scale development on the edge of a town, to a city centre urban regeneration scheme, to the building of a new community.
- KF4. Consultation in developing masterplans is vital. The process can provide an opportunity for all those who are involved to think about and help shape the future development of an area. The proposed Cardiff Masterplanning General Principles have been developed using the results of the LDP Preferred Strategy consultation as well as additional consultation specifically on the Principles.
- KF5. The status of Cardiff's proposed Masterplanning General Principles should not be overplayed and they cannot be said to have an equivalent status to a Deposit Local Development Plan. However, discussions with developers have demonstrated that they would prefer to have some certainty from the guidance contained within Masterplanning General Principles while the Deposit LDP is being drawn up.
- KF6. Masterplanning Principles must be balanced between being overly-prescriptive and therefore open to challenge, and setting down guidelines which are strong enough to ensure that future developments meet Cardiff's needs.

- KF7. Masterplanning presents the opportunity to improve community facilities in existing neighbourhoods, as well as ensuring adequate provision for new communities. Masterplans can aid in creating sustainable communities, tackling issues such as anti-social behaviour, sustainable transport options and the protection of biodiversity and open spaces.
- KF8. There are a number of examples of neighbourhoods around Cardiff which were developed without sustainable communities in mind. There is a need to ‘future-proof’ new developments to ensure that communities are more sustainable and have access to suitable facilities.
- KF9. In providing appropriate community facilities for new communities, phasing of developments is vital. However, the Council’s control in this area is limited. Developers strike a balance between the financial viability of a scheme and the need to provide community facilities, particularly at an early stage.
- KF10. The proposed Cardiff Masterplanning General Principles are largely similar to those which have been put into practice elsewhere.
- KF11. Ongoing dialogue with developers is key if the aims set out in the Masterplanning General Principles are to be achieved.
- KF12. There is an appetite from developers to work with the Council, and they are eager for certainty and guidance from the Council.
- KF13. If the Masterplanning General Principles are to be effective in practice, it is critical that proposed developments can be measured against them objectively.
- KF14. A number of specific comments regarding the content of the proposed Masterplanning Principles can be found at paragraphs 49 – 59 of the report, which should be taken into account when considering the recommendations below.

RECOMMENDATIONS

R1. The Cabinet is recommended to approve the proposed Masterplanning General Principles, subject to their amendment to reflect the comments at paragraphs 49 - 59/Key Finding 14, and the recommendations set out below.

(supported by Key Finding 14)

R2. Particular attention should be paid to ensuring that the Masterplanning General Principles are phrased in Plain English to ensure that they are comprehensible and unambiguous to both communities and developers.

(supported by Key Finding 14)

R3. A clear set of criteria must be drawn up against which proposed developments can be objectively measured. This will make clear to developers that the Council is serious in its intention to apply these principles, and will give developers greater certainty. This should make it more likely that the laudable aspirations contained within the Principles become reality. The igloo Footprint ® policy is a useful point of reference.

(supported by Key Finding 13)

R4. The Cabinet is urged to continue its engagement with residents in existing communities in order to ensure that they fully understand the Principles set out within the Masterplanning Framework and that the Principles present an opportunity to rectify issues with existing communities or deficiencies in available community facilities.

(supported by Key Findings 4, 7, 8)

R5. Further consideration should be given to how the Masterplanning Principles can ensure that the phasing of developments is carried out to ensure that new communities have access to facilities in a timely manner.

(supported by Key Finding 9)

R6. The Cabinet is recommended to ensure that open and robust dialogue is undertaken with developers as the further outputs of the Masterplanning Framework are fleshed out. Cardiff must be open enough to bring developers “through the door” whilst retaining a strong stance to ensure that developments meet the citizens’ requirements.

(supported by Key Findings 10, 11)

R7. Further consideration should be given to how the Masterplanning Principles can ensure that existing and new communities are connected.

(supported by Key finding 14)

DRAFT

CONTEXT

1. The Welsh Government (WG)¹ requires all councils to have a Local Development Plan (LDP). The document is the Council's key land use planning document, which sets out policies and proposals for future development and use of land in Cardiff between 2006 - 2026, in line with legislative requirements. Once adopted, the LDP will replace the existing structure and local plans for the city and will form the basis for decisions on individual planning applications.
2. The LDP is a statutory requirement which identifies opportunities for investment and regeneration including the provision of new homes, jobs, community facilities and transport infrastructure. The Plan also identifies land that requires protection for its conservation importance and measures necessary for safeguarding our environment. It needs to balance sustainable development and conservation, whilst delivering the community's vision for the future of Cardiff.
3. The Scrutiny Inquiry final report will be considered by the Policy Review and Performance Scrutiny Committee at its meeting on 17 April 2013 and submitted for Cabinet consideration at its 9 May 2013 meeting, at the same time as the Cabinet considers the proposed Masterplanning General Principles for approval.
4. Work continues on developing the Deposit Local Development Plan, which is projected to be completed by September 2013. As part of the ongoing Scrutiny engagement in the development of the LDP, it is anticipated that the Inquiry group will be reconstituted in the summer of 2013 to consider the Deposit LDP in considerable depth prior to its presentation to Full Council in September 2013.

¹ The Planning & Compulsory Order Act 2004

KEY EVIDENCE

5. At the outset Members of the Inquiry were asked to concentrate their scrutiny on the very specific task of considering the draft Masterplanning General Principles in terms of best practice elsewhere and in terms of whether they are fit for their intended purpose. The Inquiry group will have a further opportunity to consider the Deposit LDP in depth in the coming months, prior to its presentation to Full Council in September 2013.
6. The Inquiry group heard during its consideration of the Draft LDP Preferred Strategy that, as the Council is currently without an LDP, it is in a position of weakness when considering a planning application that results in a planning appeal.
7. The group heard from the Council's Operational Manager for Planning Policy that the Masterplanning General Principles are intended to provide greater certainty to developers, the public and other interested parties by setting out the Council's approach to the development of new areas. It is considered that guidance in this area should be clarified as soon as possible, in view of the likelihood that developers may submit planning applications prior to the Deposit LDP having been completed. A number of planning applications for Greenfield sites have been lodged in recent weeks.

What is a Masterplan?

8. There is no agreed definition of the term 'masterplan'. In broad terms, it involves the creation of a 'spatial masterplan' which deals with major change in a defined physical area. It illustrates how an area will be developed, specifying proposals for buildings, spaces, transport and land using three dimensional images. The masterplan can also describe how these proposals or aspirations will be delivered through an implementation strategy.

9. Masterplans are site- and area-specific. They can range from a small scale development on the edge of a town, to a city centre urban regeneration scheme, to the building of a new community.
10. A masterplan can be created for any site; however it is generally required for areas where there is going to be large-scale or significant change. Some examples of sites or circumstances where a masterplan would be appropriate are:
- areas of large-scale change such as town extensions, regeneration projects, town and city centres and housing developments;
 - sensitive areas where significant environmental assets need to be protected;
 - certain small scale developments where the cumulative effect of many small developments can have a significant impact e.g. on the landscape, or in the setting of small town or villages.
11. Overall the process can help to create general standards of urban design and create spaces or places where people will want to live. A Communities and Local Government paper explains that a masterplan can avoid the pitfalls of the large-scale building programmes of the 1960s and 1970s.²
12. The process and creation of a masterplan can bring many and significant benefits to all those who are involved.³ The preparation of a masterplan provides a means to identify and address issues in areas where significant development or change will be implemented. The process also provides an opportunity for all those who are involved to think about and help shape the future development of an area. It gives an opportunity for various stakeholders including the local community to be engaged in the process. The Commission for Architecture and the Built Environment (CABE) suggests that the masterplan process should bring together various stakeholders to explain how it is a mechanism for getting people together, balancing professional expertise and local knowledge, and arriving at a shared view of how a place could change for the better in the future.

² Communities and Local Government, 2008: *Devising and Delivering Masterplanning at Neighbourhood Level - Some Lessons From the New Deal for Communities Programme*

³ Commission for Architecture and the Built Environment (CABE). *Creating Successful Masterplans a guide for clients*, p. 4. CABE was subsumed into the Design Council in 2011.

Cardiff Local Development Plan Preferred Strategy Consultation

13. The development of an overall Masterplanning Framework in Cardiff, under which the proposed Masterplanning General Principles sit, has been influenced by consultation which has been undertaken regarding the draft Preferred Strategy. Over 1,400 responses have been received from two sources: responses from the Council's Citizens' Panel, which is made up of a cross-section of local residents, and from a wider LDP consultation.

14. There were noticeably divergent trends from the two sources of feedback. Those responses from the Citizens' Panel (which is a more representative sample), showed quite strong support for the use of Greenfield sites. This was in contrast to the wider LDP consultation feedback which tended to oppose it. A disproportionate number, for example, tended to come from particular geographic areas close to proposed sites, such as Creigiau and Lisvane. While those from the Citizens' Panel answered the majority of questions, the wider LDP consultation responses were less comprehensive, with many only answering specific questions. The Citizens' Panel could be considered as a quasi-control group, given that it is a more representative sample.

15. Most objections received as part of the consultation referenced an adverse impact on transportation or on social or community infrastructure. The consultation responses showed strong public support for the Sustainable Neighbourhoods policy.

Overall Local Development Plan Masterplanning Framework

16. The Inquiry heard that the Masterplanning Framework approach, under which the proposed Masterplanning General Principles sit, is intended to set a high-level framework for development, rather than a street-by-street blueprint. It has to provide a sustainable response to the issues raised during the Preferred Strategy consultation. The Operational Manager for Planning Policy emphasised, however, that the status of the Masterplanning Principles should not be overplayed. They cannot be said to have equivalent status to a Deposit Local Development Plan. Discussions with developers have shown that they would prefer to have some

certainty from guidance contained within the Principles, while the Deposit Plan is being drawn up, even if they may not agree with some of the specific content. There is, however, a need for balance in setting out the Principles, between being overly-prescriptive and therefore open to challenge, and setting down guidelines which are strong enough to ensure developments meet Cardiff's needs.

17. The overall Masterplanning Framework is made up of four key outputs:

- i. The **10 General Principles**, which this inquiry is considering in detail. These are based on a number of themes which are considered essential to creating new sustainable neighbourhoods. These will apply to all sites: Greenfield or Brownfield, big or small.
- ii. A **Strategic Schematic Framework**, giving three county-wide overlays which depict in broad spatial terms the following themes: landscape, movement and neighbourhood. The Inquiry heard that this Framework had been included on the advice of the Design Commission for Wales, in order to provide a county-wide visual context, showing, for example, how the transport context would work under the Framework.
- iii. An **Area-based Schematic Framework**, including site-specific principles. This will give further detail under the 10 General Principles as well a visual schematic, showing for example where it is intended that transport links or community facilities should be placed.
- iv. **Area-based Masterplans**, which should be drawn up by developers or landowners within the context of the above.

18. The first three of these outputs will be produced by the Council and will be available with the LDP Deposit Plan in September 2013.

19. The ten Masterplanning General Principles considered by the Inquiry are based on a number of key themes. The Inquiry was informed by the Operational Manager for Planning Policy that they have not been drawn up in order of priority, but the service

has tried to ensure that they are in a logical order. The themes of the draft Principles as presented to the Inquiry are set out below:

- i. **Masterplanning Approach:** Development Schemes that are planned in a comprehensive and integrated manner reflecting partnership working and setting out the phasing of development along with timely provision of supporting infrastructure;
- ii. **Development Density:** High density residential and mixed-use development is focused along public transport corridors and neighbourhood centres with a gradient of densities provided elsewhere to deliver an overall range and choice to meet different needs;
- iii. **Sustainable Transport Corridors:** Dedicated sustainable transport corridors including provision for public transport, cycling and walking which will form key elements of the overall masterplan and effectively link into the wider network;
- iv. **Sustainable Travel Choices:** Walking, cycling and public transport will be attractive, practical and convenient travel choices for all;
- v. **Neighbourhood Centres:** Provision of a full range of social and community facilities will be concentrated within mixed use, distinctive neighbourhood centres located along public transport corridors and easily accessed walking and cycling;
- vi. **High Quality Sustainable Design and Distinctive Character:** The masterplanning process effectively responds to the local context and the context of climate change, to create new well designed neighbourhoods with a distinctive character which residents will be proud of;
- vii. **Integration with Neighbouring Areas:** New development responds to local deficiencies, provides good connectivity to adjoining areas and is informed by feedback from existing communities;
- viii. **Strategic green open space corridors:** Multi-functional and connected green open spaces form strategically important links to the surrounding area to provide routes for people and wildlife and open spaces for sports, recreation and play;
- ix. **Resource Efficiency:** Innovative and creative energy, water and waste management solutions are adopted to make new developments more environmentally sustainable;

- x. **Landscape, biodiversity and historic features:** Sympathetically integrate existing landscape, biodiversity and historic features of the site into the development taking opportunities to protect, enhance and manage important features along with mitigation and enhancement measures to provide satisfactory compensatory measures.

20. Members discussed the development of neighbourhoods around Cardiff in recent decades. It was noted that there had been too many examples of unsustainable neighbourhoods where, for example, community facilities had not been put in place to support growing communities. Areas where public transport links had not been considered at the outset of their development were cited as examples. During discussions with Cardiff Bus, it had been found that use of bus services in the north of the city, where journeys into the centre may take up to an hour, and be relatively infrequent, are relatively low. Cardiff Bus is looking to experiment with 'express' services which follow more direct routes in order to improve take-up.

21. It was noted that blame does not necessarily lie with previous generations. Issues of sustainability were not as strong; culture has shifted. Previous generations would not have prioritised access to public transport over ease of use of a private car. It is hoped that this plan and the Masterplanning Principles will ensure that any new communities built are 'future-proofed' in terms of any further shifts in culture. The Council's Operational Manager for Regeneration emphasised that the period of developing the Masterplanning Framework was partly about gathering evidence to create more detailed schematics to put the Masterplanning Principles into practice. It is clear that the Council cannot simply build a new Albany Road with its facilities and sense of community, but it needs to ensure that future developments leave open the possibility for such a community hub to come into being one day.

22. Members queried how far it is possible to future-proof new developments and ensure that the errors of previous developments, where community facilities were not sufficient, are not repeated. The Operational Manager for Planning Policy informed the group that the Masterplanning approach would be the best way to ensure this. For example, Principle Five addresses the need for communities to

have ready access to suitable facilities, and the co-location of facilities where possible aims to ensure that this is financially viable to achieve.

23. The Inquiry group questioned whether issues in existing areas could be addressed by the Masterplanning Principles, given that they apply to new developments. They were informed that Principle Seven, which covers integration with neighbouring areas, opens up the opportunity to tackle issues with existing neighbourhoods, for example in terms of improving transport links. Members noted that in some circumstances the lack of 'permeability' of some neighbourhoods had been influenced by comments from existing surrounding communities; often residents do not want to lose the sense of community in their own areas and as a result may not want new developments near them. The Inquiry questioned how this kind of pressure could be resisted. Members considered that it may be difficult to persuade communities that new developments near them could be beneficial.

24. Members queried how the Council can control the phasing of developments across the city to ensure that homes are provided with the necessary community facilities. The Operational Manager for Planning Policy informed them that it is very hard for the Council to be prescriptive about which areas of the city are developed first. Within specific sites it is easier to control phasing in order to ensure that facilities are available as early as reasonably possible. However, a level of pragmatism is also necessary; it is impossible to ensure all facilities are in place prior to housing being occupied.

25. Members of the Inquiry also questioned how much control the Council has in areas where it is dealing with a number of landowners. They were informed that as far as possible the Council is aiming to ensure that dialogue with key developers, landowners and stakeholders such as the South East Wales Transport Alliance (SEWTA) is opened up early on to mitigate potentially difficult situations. The drive is to ensure that at least some community facilities and infrastructure is in place at the early stage of new developments. The Council recognises, for example, that it is better to avoid the establishment of 'bad' transport habits early on in a new community, simply because sustainable transport options have not been made available.

26. Members asked the developer witnesses how they can respond to the need to phase the building of homes with the provision of infrastructure and community facilities. They were informed by Andrew Crompton (Regional Land Director at Persimmon Homes Ltd) that the issue returns to cashflow. Developers must factor in the difficulty in obtaining funding; they must also balance in such things as site conditions and front end costs against the expenditure on infrastructure and facilities at an early point. The Operational Manager for Regeneration stressed there is a strong theme in the Masterplanning Principles around co-location of facilities such as schools, leisure and libraries, in order to reduce some of the up-front costs. Significant work is ongoing to ensure that the provision of community facilities is within the realms of affordability.

Development of the Masterplanning Principles

27. The service area has examined best practice and national guidance in the development of the Masterplanning Principles. Workshops have been held within the Council, with City Development and Strategic Planning officers. In addition, a full day workshop was held with the Design Commission for Wales. The initial feedback to the Masterplanning Principles from the Design Commission for Wales was very positive. They had asked for some additional work, including the development of context maps, which have now been developed. Initial feedback from the Inspectors has also been favourable.

28. The Operational Manager for Planning Policy informed the group that in addition to the overall Preferred Strategy Consultation, further public workshops have been held regarding the Masterplanning Framework. Around 220 people attended the public engagement events and another 60 attended the stakeholder events. Feedback had largely been positive in terms of the Council trying to take a more assertive stance. While there are objections to specific development sites, there is a general recognition that development is needed.

Proposed Masterplanning General Principles

29. Councillors queried how the specifics of the Principles would work in practice. For example, would it be definite that each new home built would be within a ten minute walk of community facilities (Principle Five), and if so how it would be determined which facilities were essential to each community? The Operational Manager for Planning Policy informed the group that an evidence base is under development to establish what the needs of communities would be in order to decide which facilities were needed. His team is working with the Council's Education service, for example, as well as a number of other stakeholders. Detail regarding specific community facility requirements will be included in the Area-Based Schematic Framework.

30. Members were of the opinion that creating a community and a 'sense' of community is more complicated than ensuring that community facilities are available. The design and layout of streets can influence or create an insular mentality.

31. The Operational Manager for Regeneration told the group that schemes across the country and abroad had been investigated in terms of how the densities set out in the Principles could be achieved without sacrificing quality of life or community facilities. He stressed the need for dialogue with developers so that innovative schemes can be achieved, even where this may result in a higher build cost. The Homebuilders Federation emphasised that innovation should be put in the context of the other financial pressures on developers, such as the need to meet Part L of the Building Regulations.

32. Members queried whether the protection of biodiversity and historic woodlands was given sufficient prominence within the Principles. The Operational Manager for Planning Policy emphasised the need for balance in the Principles, to create guidance that was sufficiently strong to achieve their intended aim without being so prescriptive as to be constantly challenged by developers.

33. Members questioned how much emphasis the Principles placed on the creation of employment. They were informed that the Principles applied to all development sites, not just residential ones, for example in terms of improving connectivity and

sustainable transport options. There are obvious examples, such as Cardiff Gate, where the opportunity exists to improve transport links to an existing site if new sites are developed nearby.

34. The Inquiry heard from Andrew Crompton that the draft Masterplanning Principles were largely on a par with similar frameworks which he had dealt with elsewhere. He is quite familiar with working within this kind of masterplanning framework and was positive about the proposal from that point of view. His experience includes large scale developments in Swansea, Bridgend and Cardiff, in terms of affordable, 'standard' and 'executive' housing.

35. Mark Hallett, Development Director at the igloo Regeneration Partnership and a Commissioner for the Design Commission for Wales, informed the group that in his work for igloo he had also worked within a number of masterplanning frameworks. The igloo Regeneration Partnership is unique worldwide in its status as a 'socially responsible' sustainable developer. In his work in Cardiff's Porth Teigr, he worked with masterplanners from schemes such as those in Malmo and Copenhagen, which are considered to be best practice examples of sustainable development.

36. In his role as a Design Commissioner, Mark Hallett worked closely alongside Cardiff Council in developing the draft Masterplanning Framework and accompanying Principles, and so has had an input from an early stage. He is therefore largely positive about them and the inclusive process used to develop them. As Development Director at igloo, he works across the 'top 20' cities in the United Kingdom, and has experience of similar exercises which have remained at a 'visioning' stage, without resulting in concrete implementation. His belief is that Cardiff has already gone beyond that stage, having developed quite sound principles, as well as having referred to a number of the best practice examples of masterplanning across Europe. He recognised some cynicism in the industry about the financial implications of applying such principles. Developers could not be forced to come to Cardiff and there must be a balance to ensure that market forces are recognised. However, he also counselled that there could not be a 'free for all'. There must be a balance between the strength of the guidance and its potential effect on the viability of any new developments.

37. Mark Hallett was positive about the content of the Principles, stating that developers largely recognise the necessity to deliver some elements within a scheme which do not on the surface contribute to their profitability. He stressed that it is key to start selling the benefits of these other elements, such as the long-term advantage of having a school or open space close to dwellings and the role of a vibrant public realm. The most important issue is the link between design quality/sustainability and enhanced value. He emphasised however that, while there was nothing negative contained within the Principles, his key message was that they had to be balanced with financial viability.

38. Igloo has worked to develop a sustainable investment policy, 'Footprint'®. This policy includes a number of specific socially responsible indicators, based on four key sustainable investment themes. Igloo's contention is that the Partnership's investments will perform better if they contribute to the regeneration of the area they are in. The themes are:

- i. Health, happiness and wellbeing;
- ii. Regeneration;
- iii. Environmental Sustainability; and
- iv. Urban Design.

39. The Partnership's developments must still respond to financial pressures; the Partnership controls a £300M pension fund under Aviva, and undertakes significant financial appraisal, sensitivity and risk analysis on their developments.

40. The Inquiry members questioned how the Council can ensure that the aspirations contained within the Masterplanning General Principles could be brought to fruition. Mark Hallett stated that proposed igloo developments are audited against the four themes identified above. The Footprint® policy sets out clearly measurable requirements under each theme. For example development blocks must have a break every 100m and a door every 10m; principal rooms within homes must overlook either 'green' or 'blue' space, rather than other buildings. In addition, the Policy contains a community consultation element which insists that developments demonstrate that consultation has taken place and that its impact can be proven.

Making the General Principles clearly measurable would be one way to ensure that the vision is made concrete. Other options could be asking the Design Commission for Wales to undertake a peer review on development proposals to determine whether they match the Principles. He stated that if developers know that Cardiff is serious about the Principles and that if there is an objective way for schemes to be judged against them, then they are achievable. The criteria and the way in which developments are judged against them must be credible.

41. The Operational Manager for Regeneration stated that the Council is considering how the Masterplanning Principles can be made measurable. Officers have examined the Footprint® policy as well as the design requirements laid out for Poundbury. The development of a criteria-based approach is something with which the Council is starting to grapple.

42. Richard Price, Planning and Policy Advisor – Wales, for the Home Builders Federation, informed Members that developers need to take into account a number of different factors when putting principles such as these into practice when developing a site-specific developer masterplan. Not least of these were the particular constraints a site poses, for example in terms of the topography of the land, any contamination which must be remediated, or other similar factors. These must be taken into account when calculating the ‘net’ developable land which a site offers and therefore how financially viable a site is. This can make minimum numbers of dwellings per acre, such as those included in the draft Principles, difficult to achieve. Although the local authority is seeking some high-density development, this is often not what the market demands, and therefore may not be financially viable for a developer. Members queried whether higher density dwellings would result in lower costs in terms of creating community facilities; for example there may be a requirement to build less supporting infrastructure. Andrew Crompton informed the group that the structural costs of higher density dwellings could negate this.

43. Members queried developers’ views of affordable housing, given that the Principles stress the need for mixed developments. Richard Price informed the group that the Home Builders Federation understands the need for all types of housing and are therefore supportive. However, any targets per development must be considered

achievable or they risk putting off developers. There must be an open dialogue and a perceived flexibility in order to 'get developers through the door'.

44. The Inquiry sought to understand whether the Principles would support the agenda to 'design out' crime, and create a sense of 'community' and whether developers would respond to this agenda. Andrew Crompton informed the group that development masterplanning has moved on considerably in the last decade and that developers were supportive in this area. Developers are addressing a number of the issues that had been encountered previously, often working with the Police at the detailed design stage to create schemes where, for example, houses overlook open space and street lighting is sufficient.

45. Members were informed by Andrew Crompton that sustainable building regulations which are coming forward could make it very difficult for developers to create financially viable schemes. Welsh Government is pushing this agenda harder than other parts of the United Kingdom, which could result in higher development costs in Wales than elsewhere. There is a concern from some developers that financial viability could be lost. Any additional Principles put in place in Cardiff must take care to balance financial viability with other priorities. Otherwise developers could be pushed outside Cardiff, which could place different pressures on the city, in terms of traffic congestion. The group was informed by the Operational Manager for Regeneration that there was no desire to create new policy; the Principles are considered to bring together a number of strands of existing policy and interpret them as appropriate to Cardiff's circumstances.

46. Mark Hallett commented that developers have complained in the past about the potential costs of other issues, such as Part M of the Building Regulations' accessibility guidance. This guidance seems par for the course now and has not resulted in a great increase in development costs. He contended that future attitudes to sustainability measures would be similar. In fact their implementation could be a positive way to distinguish Cardiff from other cities.

47. The Operational Manager for Regeneration circulated some 'draft – no status' representations of how the Principles could be put into practice in terms of a

'preferred' layout in terms of transport. The plan showed Members that the intention is to ensure easy access to sustainable transport options for the entirety of a new community. Andrew Crompton commented that the plan was very similar to layouts which Persimmon would design.

Scrutiny Services Research - Masterplanning

48. Members were presented with research which had been carried out by the Scrutiny Research Team, to consider how the proposed Masterplanning General Principles matched those which have been implemented in other areas. The draft Principles largely correspond to those put in place elsewhere, although the Cardiff Principles are generally more comprehensive in the areas they cover. Further details can be found in the report attached at Appendix 1. At Appendix 2 is an additional Research report which considers examples of processes used elsewhere to put masterplans in place.

Members' Views of Proposed Masterplanning General Principles

49. Following receipt of the evidence above, Members discussed the content of the proposed Masterplanning Principles in detail. Overall it was considered that the Principles were positive. Few featured criteria against which developments could be objectively measured. While in agreement with the ethos of the principles, there were some details which the Inquiry group felt were lacking, as follows.

50. **Principle 1** was considered to reflect the need for developments to be effectively phased to ensure that community facilities are provided in a timely manner, as well as the need for strong community involvement. Elements of the Principles were considered to be somewhat technically worded, and should be re-phrased in Plain English).

51. **Principle 2.** The aim to ensure that higher-density development was sited closer to neighbourhood centres and public transport corridors was again felt to be positive. However the wording of the Principle does not make it clear enough that the

minimum density targets apply to these 'central' neighbourhood areas, rather than to an entire development site.

52. **Principle 3.** Again Members were supportive of the sustainable transport aims contained within the Principle. However, the wording was often not clear (for example "reduce and minimise"). The Principle also seemed to place insufficient emphasis on links around the city, rather than simply into the city centre.

53. **Principle 4.** Members were again supportive of the sustainable transport aims contained within the Principle. However, the Principle seemed to contradict the aims of Principle 2. Principle 2 stated that homes within the higher-density areas of development sites should be within 800m of community facilities, while Principle 3 states that *all* homes should be within 800m of such facilities, the wording was often verbose and not clear (for example "reduce *and* minimise"). However, the Principle seems to concentrate on links between neighbourhoods and the city centre, rather than connectivity around the city

54. **Principle 5.** Members were wholly in favour of ensuring that new developments have appropriate community facilities and of the principle of co-location in order to ensure that the provision of facilities in developments is more financially viable.

55. **Principle 6.** While supportive of the general ethos contained in the Principle, Members felt that insufficient emphasis was placed on using design to create safer communities. The first bullet point under 'What this means...' was not explicit enough.

56. **Principle 7** contains a positive attempt to use development to address issues in existing communities, but Members considered that it may be difficult to persuade communities that new developments near them could be beneficial, given the response to the LDP Preferred Strategy consultation.

57. **Principle 8** does not give sufficient emphasis to biodiversity, green corridors and the protection of woodlands. While Members were glad to see a requirement for 'varied'

open spaces, they would like to see emphasis placed on larger spaces and more specific requirements as far as possible.

58. **Principle 9.** Members did not feel that sufficient emphasis was placed on mitigating flood risk. There was also no mention of designing developments to minimise future disruption due to servicing/maintenance of energy and drainage connections.

59. **Principle 10.** Members of the Inquiry were content with this Principle.

DRAFT

PROCESS FOR SCRUTINY OF THE DRAFT MASTERPLANNING GENERAL PRINCIPLES

As part of the Policy Review and Performance Scrutiny Committee's ongoing scrutiny of the Local Development Plan, it was agreed:

- I. To reconstitute the task and finish group which had considered the draft Preferred Strategy of the Local Development Plan, comprising of the Chairpersons of the Council's five Scrutiny Committees, plus volunteers from each Committee;
- II. That the report will be published by the Policy Review and Performance Scrutiny Committee.

The task and finish group is broadly representative of the Council's overall political composition. It was agreed that, while the joint Charing arrangement of the Inquiry would continue, the Chair of Policy Review and Performance Scrutiny Committee would chair this session, while the Chair of the Environmental Scrutiny Committee would chair the Deposit Plan stage.

The task and finish group set out to test whether the proposed Masterplanning Principles match best practice across the United Kingdom, and whether they were fit for purpose.

In order to support the group's investigation, research was carried out by the Scrutiny Services Research Team to establish how masterplans are used and the process used to develop them. The Research Team also undertook a comparative review of the proposed Cardiff Masterplanning General Principles and those which have been put in place by other selected local authorities, including Stevenage Borough Council and Harlow Council.

The scrutiny of the Masterplanning General Principles took place over the course of a day and received evidence from the following witnesses:

Internal Witnesses

- Cabinet Member, Councillor Ralph Cook was invited to attend, but was unfortunately unable to do so due to illness
- James Clemence, Operational Manager, Planning Policy
- Gareth Harcombe, Operational Manager, Regeneration

External Witnesses

- Richard Price, Planning and Policy Advisor – Wales, Home Builders Federation
- Andrew Crompton , Regional Land Director, Persimmon
- Mark Hallett, Development Director, igloo Regeneration / Commissioner for the Design Commission for Wales.

Details of all evidence considered by the task group and used in the preparation of this report are contained within a record of evidence that is available for inspection upon request to the Operational Manager Scrutiny Services.

REFERENCES / BACKGROUND PAPERS

- Cardiff Council, 2013: *Draft Masterplanning General Principles*
- Cardiff Council Scrutiny Research Team, 2013: *Masterplans and the Masterplanning Process*
- Cardiff Council Scrutiny Research Team, 2013: *A Comparison of Masterplanning Principles of selected local authorities*
- Cardiff Council Scrutiny Research Team, 2013: *Masterplanning Process Examples*
- Commission for Architecture and the Built Environment: *Creating Successful Masterplans – A Guide for Clients*
- Design Commission for Wales, 2012: *Good Housing Design Contributes to Better Neighbourhoods*
- Cardiff Council, 2008: *Cardiff Residential Design Guide - Supplementary Planning Guidance*
- Communities and Local Government, 2008: *Devising and Delivering Masterplanning at Neighbourhood Level - Some Lessons From the New Deal for Communities Programme*
- Cardiff Council, 2006: *Supplementary Planning Guidance - Dumballs Road Area Planning Brief*
- igloo Regeneration: *Footprint® Policy*

LEGAL IMPLICATIONS

The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without modification. Any report with recommendations for decision that goes to Executive / Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal power of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. standing orders and financial regulations; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

FINANCIAL IMPLICATIONS

The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct financial implications at this stage in relation to any of the work programme. However, financial implications may arise if and when the matters under review are implemented with or without any modifications.

POLICY REVIEW & PERFORMANCE SCRUTINY COMMITTEE



Councillor Elizabeth Clark

(Chairperson)



Councillor Phil Bale



Councillor Garry Hunt



Councillor Keith Jones



Councillor Sam Knight



Councillor Kathryn Lloyd



Councillor Paul Mitchell



Councillor Adrian Robson



Councillor David Walker

POLICY REVIEW & PERFORMANCE SCRUTINY COMMITTEE TERMS OF REFERENCE

To scrutinise, monitor and review the overall operation of the Cardiff Programme for Improvement and the effectiveness of the general implementation of the Council's policies, aims and objectives, including:

To scrutinise, monitor and review the effectiveness of the Council's systems of financial control and administration and use of human resources.

To report to an appropriate Cabinet or Council meeting on its findings and to make recommendations on measures, which may enhance Council performance in this area.

~~DRAFT~~

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Scrutiny Research Team

A Comparison of Masterplanning Principles of selected local authorities

**Prepared for the
Policy Review and Performance Committee
March 2013**



County Council of The City and County of Cardiff

Part 1.

How do Cardiff Council's Masterplanning principles compare with other local authorities?

Masterplanning Framework document

This briefing paper will illustrate a comparison of Cardiff Council's Masterplanning principles with the masterplanning principles of selected local authorities. From the limited number of local authorities that were reviewed, there are some local authorities which have produced a broad framework document similar to what Cardiff Council has formulated (i.e. Cardiff Council's working draft of General Masterplanning Principles) which outline the key masterplanning principles that should guide planned large scale developments in a particular area or should be considered in the creation of sustainable neighbourhoods.

Cardiff Council Masterplanning Principles

Cardiff Council has produced ten key General Masterplanning Principles for the Local Development Plan which are outlined in Table 1 below. These key principles are based on the different themes that are considered essential in planning and creating new sustainable communities. It is intended that these general principles are applicable to all sites considered for development whether big or small, Greenfield or Brownfield. The key principles outlined in this document include a general Masterplanning approach principle and specific principles relating to the following: development density; transport and travel, neighbourhood centres, sustainable design, connectivity or integration with neighbouring areas, green open space, resource efficiency and landscape and biodiversity and historic features.

Harlow Council

Harlow Council specifies eight overarching objectives which cover four core systems: environmental system, social system, economic and integration. Attached to each of these key objectives are a set of sustainability criteria. Generic and specific Masterplanning principles are prescribed to achieve these criteria.

Stevenage Borough Council

Stevenage Borough Council adopted their Masterplanning principles in year 2000 as part of supplementary planning guidance. There are five key Masterplanning principles which cover the following aspects: design and urban form; transport and transport infrastructure; community infrastructure; physical infrastructure and environment. It is intended that these Masterplanning principles help new developments to achieve the highest possible standards of environmental, social and economic sustainability.

Table 1 – Examples of Masterplanning principles by local authority

Cardiff Council	Harlow	Stevenage
<p>1. Masterplanning Approach</p> <p>Development schemes that are planned in a comprehensive and integrated manner reflecting partnership working and setting out the phasing of development along with timely provision of supporting infrastructure</p>		<p>Principle 1 - Key Developments</p> <p>This principle ensures that any new development in Stevenage is of the highest possible standards of environmental, social and economic sustainability.</p>
<p>2. Development Density</p> <p>High density residential and mixed-use development is focused along public transport corridors and neighbourhood centres with a gradient of densities provided elsewhere to deliver an overall range and choice to meet different needs.</p>		
<p>3. Sustainable Transport Corridors</p> <p>Dedicated sustainable transport corridors including provision for public transport, cycling and walking which will form key elements of the overall master plan and effectively link into the wider network.</p>		<p>Principle 2 – Transport and Transport Infrastructure</p> <p>This principle recommends the provision of key facilities that will reduce the need for travel alongside the provision of necessary and safe transport.</p>
<p>4. Sustainable Travel Choices</p> <p>Walking, cycling and public transport will be attractive, practical and convenient travel choices for all.</p>		

Cardiff Council	Harlow	Stevenage
<p data-bbox="147 233 551 264">5. Neighbourhood Centres</p> <p data-bbox="147 308 837 488">Provision of a full range of social and community facilities will be concentrated within mixed use, distinctive neighbourhood centres located along public transport corridors and easily accessed walking and cycling.</p>	<p data-bbox="880 233 1420 300">Objective 4 – Enable a High Quality of Life to be Achieved</p>	<p data-bbox="1480 233 1980 300">Principle 1 - Design and Urban Form Master Planning Principles</p> <p data-bbox="1480 344 2002 967">This principle recommends the efficient use of land, the urban form and how new development will take the form of a series of inter-linked urban villages. That the development will have land use pattern and urban form that will reduce the need for non renewable energy and potential for pollution. The development should also aim to blend with existing landscape character and ensure that the urban form, buildings and environment addresses accessibility issues. The principle also looks at layout and the alternative method to the car as a means of travel.</p>
<p data-bbox="147 1048 741 1115">6. High Quality Sustainable Design and Distinctive Character</p> <p data-bbox="147 1160 853 1339">The Masterplanning process effectively responds to the local context and the context of climate change, to create new well designed neighbourhoods with a distinctive character which residents will be proud of.</p>	<p data-bbox="880 1048 1397 1115">Objective 3 – Ensure High Design Quality</p>	

Cardiff Council	Harlow	Stevenage
<p>7. Integration with Neighbouring Areas</p> <p>New development responds to local deficiencies, provides good connectivity to adjoining areas and is informed by feedback from existing communities.</p>		<p>Principle 3 - Community Infrastructure Master Planning Principles</p> <p>The principle of community infrastructure recommends the provision of appropriate housing for the community, sufficient scale of employment areas to provide employment opportunities, provision for convenience and comparison shopping; provision of sufficient numbers of school spaces , provision for emergency services facilities, a health centre provision as well as a multi purpose community centre, childcare and youth facilities and leisure facilities</p>
<p>8. Strategic green open space corridors</p> <p>Multi-functional and connected green open spaces form strategically important links to the surrounding area to provide routes for people and wildlife and open spaces for sports, recreation and play.</p>	<p>Objective 1 – Minimise Consumption of Environmental Resources</p>	

Cardiff Council	Harlow	Stevenage
<p>9. Resource Efficiency</p> <p>Innovative and creative energy, water and waste management solutions are adopted to make new developments more environmentally sustainable</p>	<p>Objective 8 – Living Well with Less Resource Consumption</p>	<p>Principle 4 – Physical Infrastructure Master Planning Principles.</p> <p>This principle recommends the efficient use of water and energy resources, and sustainable drainage, provision of opportunities’ to maximise recycling and efficient waste disposal, address resource efficiency issues in design and adopt necessary telecommunications technology.</p>
<p>10. Landscape, biodiversity and historic features</p> <p>Sympathetically integrate existing landscape, biodiversity and historic features of the site into the development taking opportunities to protect, enhance and manage important features along with mitigation and enhancement measures to provide satisfactory compensatory measures.</p>	<p>Objective 2 – Maximise Environmental Benefit</p>	<p>Principle 5 – Environment Masterplanning Principles</p> <p>The scope of this principle covers all aspects of the environment, to include the assessment of the importance of existing natural and historic features, and how these can be retained or enhanced. It also recommends increasing opportunities for biodiversity and the creation of green links, the maintenance of rights of ways and avoidance of light and noise pollution.</p>

Part 2

Examples site specific Masterplans and their Masterplanning principles

The examples of from Brighton and Liverpool below illustrate site-specific Masterplans outlining site specific Masterplanning principles rather than over-arching Masterplanning principles.

Brighton

Brighton and Hove City Council has produced a site-specific masterplan with regards to the development of its Marina. Brighton outlines six key masterplan objectives which any new development proposals that come forward for the masterplan area will be evaluated against.

Liverpool

Liverpool City Council in conjunction with a number of partners produced four site specific Masterplanning principles for the Kings Waterfront development.

Table 2 – Site specific Masterplanning principles

Brighton	Liverpool
<p>Objective 1 – Regeneration</p> <p>This first objective seeks to ensure that the regeneration of the Marina is comprehensive and conforms to the Masterplan to avoid piecemeal development.</p>	
<p>Objective 2 – Transport</p> <p>The second objective is with regard to transport. The principle seeks to ensure there is a significant enhancement of the transport infrastructure and general accessibility to the marina</p>	<p>Site Access</p> <p>The aim is to minimise conflict by giving priority to pedestrians, cyclists and public transport by restricting vehicular movement to the southern entrance of the site across Queens Wharf.</p>
<p>Objective 3 – Land Use</p> <p>This objective aims to protect and enhance the character of the marina whilst also securing a balanced mix of land uses with the emphasis on boating, leisure, tourism, retail and commercial uses.</p>	<p>Land Use</p> <p>It is proposed that buildings on the northern part of the site will be a complex of ‘Civic Facilities’ and two hotels. Commercial uses will be concentrated to the east of the site, close to public transport. Residential and community uses will form the majority of development on the southern part of the site.</p>
<p>Objective 4 – Ecological</p> <p>The ecological objectives look to protect and enhance the environment of Brighton Marina and in particular Sites of Special Scientific Interest.</p>	

Brighton	Liverpool
<p>Objective 5 – Environmental</p> <p>This objective seeks to ensure environmental sustainability is at the forefront of the masterplan for Brighton Marina. The objective aims to ensure sustainable use of resources such as construction materials, on-site renewable energy and limit emissions from developments.</p>	
<p>Objective 6 – Linkages</p> <p>The final objective is regarding linkages to improve pedestrian, cycle and public transport between Brighton’s city centre and the Marina.</p>	<p>Circulation</p> <p>The internal movement strategy is focused on creating high quality pedestrian environments that provide permeability and clarity to the sequence of public open spaces. The scale of the streets is reflective of those found in the city centre with a clear definition of primary and secondary roads.</p>
	<p>Site Access</p> <p>The aim is to minimise conflict by giving priority to pedestrians, cyclists and public transport by restricting vehicular movement to the southern entrance of the site across Queens Wharf.</p>



March 2013

Masterplanning Process Examples

Introduction

As part of the Scrutiny Task and Finish of Cardiff Council's masterplanning principles, this briefing paper will look at the process of masterplanning and how some best practice masterplan developments have followed these processes.

The process of creating a masterplan

There are a number of processes to follow in order to create a successful masterplan and this section will look at these processes as defined in the Communities and Local Government (CLG) paper *Devising and delivering masterplanning at neighbourhood level*. The paper considers four case study New Deal for Communities areas (Bristol, Lewisham, Plymouth and Salford), in terms of the policy and practical issues they have face through their involvement in masterplanning.

Community Engagement

The CLG document sees consultation and community engagement as being at the heart of the New Deal for Communities (NDC) programme and is given due emphasis in the masterplanning process.

Using a range of consultation methods

A number of examples are presented in the CLG document:

Salford NDC had an extensive two day consultation event involving 20 members of the local community. The process led to significant changes being made to the plan.

Bristol produced a number of posters about forthcoming events which were produced in Somali and a Somali interpreter was present at the events. Neutral venues were chosen to avoid conflict; these included not staging events in pubs or religious establishments.

In Lewisham a masterplan questionnaire was produced to gauge respondents' views and to inform the analysis phase of the project. Views were sought on issues such as safety, transport, where respondents live and improvements needed to facilities.

Ensure consultation is effective

In Plymouth, a steering group was set up to agree the methodology for consultation, monitor progress of the consultation and engage representatives of the local community in planning the consultation process.

Community Development should be present from the outset

The masterplanning process can often be complex and time consuming and it is therefore important that the community and stakeholders understand from the outset the goals and aspirations of the masterplan.

According to the CLG document, residents are being asked to get to grips with complex planning processes which they need to learn to use to their advantage. The skills and opportunities need to be there to help that happen, and to build community capacity, making residents more capable of liaising and negotiating with local representatives and stakeholders.

Realise that consensus may be difficult to secure

It is important to recognise that not everyone will agree with a proposal all the time but it is imperative to reach some kind of consensus and expect that compromises will have to be made in order to reach this stage

Phases of Engagement

The CLG document recognises the importance of the continuation of community engagement throughout all stages of development.

In Salford, for example, a schedule of properties to be demolished was released which prompted extensive resident consultation. This then prompted a delay between discussion of the demolition proposals and the likely completion of the new homes replacing them.

“Early Wins”

There is a pressure to deliver on visible issues of immediate local concern with the requirement to take on a longer term strategic view point.

Drawing on the example of Salford, early wins were crucial to win over a community which had been badly let down in the past through delays and disappointments. This was overcome by the erection of a secondary school for the area, which helped to bring about a marked improvement in educational performance.

Convening Partners and Stakeholders

According to the CLG document, relationships with stakeholders can be fostered through the masterplanning structures that are put in place, such as a steering group and through the consultation and communication strategy. It is felt that the development of positive working relationships between all those involved in the process is essential.

In Bristol for example, the main agencies working alongside the NDC in the masterplanning process were the city council (the neighbourhoods and Housing and Planning departments), Solon/Sovereign Housing Association consortium and consultants were also used along various different stages of the process.

Working with Developers

The likelihood is that developers will have differing priorities and concerns to public agencies. This could be in terms of balancing quality against cost or ensuring timetables are adhered to.

In the case of Lewisham, the NDC has commissioned various consultants to develop masterplans meeting their own specifications. There is an Annual Programme prepared showing quarterly milestones and the Board receives general updates from the Capital Programme Manager showing progress, barriers and difficulties.

Emerging Lessons

The CLG document identifies a number of lessons which can be learned from the four case study areas:

- Invest time and resources into developing a shared understanding of the definition and purpose of the masterplan document;
- Have a clearly set out process which is communicated with clear objectives and explicit roles and responsibilities;
- Political support is crucial and a partnership approach from the outset helps foster ownership more than an episodic series of links;
- Select any consultants used in the masterplanning process with care;
- Select developer partners with care and with community input, and work with them closely throughout the process;
- Use creative approaches to joint working ;
- Quick, effective and continuous communication with residents is essential;
- Harness the benefit of local knowledge to ensure a spread of expertise among the key partners.