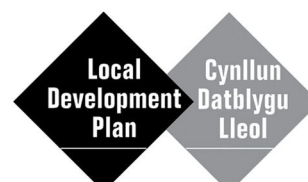


Hearing  
Session  
26B

# Monitoring Framework

26th January 2017

**Vale of Glamorgan Council Examination Statement**



**Hearing Session 26b: Monitoring Framework**  
**(Rearranged Hearing Session)**

**1. Welcome, Introduction and Procedural Matters**

**2. Monitoring Framework**

- ***Would the revised Monitoring Framework ensure that the Plan is sufficiently flexible to enable it to adapt to changing circumstances and does it provide sufficient guidance on implementation, milestones and triggers for review?***

- 2.1 Planning Policy Wales Edition 9 (November 2016) Chapter 2 (paragraph 2.2.1) directs that LDPs should include an effective monitoring framework in order to ensure delivery of the Plan. Monitoring the impact and consequences of a Plan is the primary mechanism through which its effectiveness can be measured. As required by PPW, the Deposit Vale of Glamorgan LDP included a monitoring framework (at Section 9) that set out the indicators, monitoring targets and trigger points that would be utilised to measure and monitor the plans performance and the effectiveness and delivery of the Plan's Strategy, policies and proposals. The Plan's monitoring framework has subsequently been reviewed following the Inspector's earlier request for further information and the publication of the Council's Action Point responses from Hearing Sessions 1 – 22 that were held between January to April 2016. The Monitoring and Implementation Hearing Session for the Vale of Glamorgan LDP was originally scheduled for Thursday 21<sup>st</sup> April 2016; however this session was postponed in view of the Action Points arising from hearing sessions 1 – 22. A revised LDP monitoring framework was prepared as part of Hearing Session 23, Action Point 1, and is also set out in the Matters Arranging Changes (MAC) Schedule (September 2016) under MAC numbers 103-158.
- 2.2 As required by Section 37 of the Town and Country Planning (Local Development Plan) Regulations 2005 the Plan will be monitored on an annual basis and the Council will prepare and submit an Annual Monitoring Report (AMR) to the Welsh Government by 31<sup>st</sup> October each year following adoption of the Plan. It is therefore anticipated that the first Vale of Glamorgan LDP AMR will be submitted by the 31<sup>st</sup> October 2018. The preparation of an AMR is fundamental to the assessment of the LDP and the progress being made in implementing the policies contained in the Plan. The AMR will also allow the Council the opportunity to assess the policies against the most up-to-date information available. However, the AMR should not just be about data collection, but should be about taking a forward looking 'action orientated' approach which may raise issues that need to be addressed. In addition to the AMR, the Plan will be subject to a full review every four years. Effective monitoring and review will therefore enable the Plan to remain relevant and up to date.
- 2.3 The revised LDP monitoring framework, which incorporates all of the Matters Arising Changes proposed through the submitted Action Points, includes up-to-date indicators, targets and trigger points in order to enable the effective monitoring of the Plan's progress which reflect the anticipated delivery of housing allocations, employment

land, transport schemes and other policies and proposals within the LDP. In doing so the Council has referred to the latest Welsh Government guidance set out in the Local Development Plan Manual – Edition 2 (August 2015) and includes the core indicators referenced at section 9.3.3.

- 2.4 In developing the monitoring framework the Council has sought to utilise best practise demonstrated in other recently adopted LDPs in Wales and in consultation with the Welsh Government has sought to ensure that the indicators and targets utilised are relevant, of value and contribute towards monitoring the effectiveness of the LDP (including delivery of its Strategy and Objectives) and national policy objectives. This has included ensuring the monitoring indicators and trigger points adopt the ‘SMART’ approach so that they are Specific, Measurable, Achievable, Realistic and related to Timescales wherever possible as suggested in section 3.9 of the LDP Manual.
- 2.5 In terms of layout, the monitoring indicators in the framework have been categorised under the Plan’s 10 social, economic and environmental objectives which are fundamental to the delivery of the LDP and which set the context for the LDP Strategy and its policies. Reference has also been included to the relevant SA/SEA Objectives in the framework for each indicator so that annual monitoring can be integrated as suggested in the LDP Manual (paragraph 9.1.4).
- 2.6 While the monitoring framework includes a number of ‘core’ indicators required to monitor and assess changes directly relevant to national policy objectives, such as housing land supply and affordable housing delivery, it also includes a range of ‘local’ indicators which relate to the local context of the Vale of Glamorgan and refer to the requirements of individual policies and proposals to assist in monitoring their implementation and delivery of the wider Plan. Local indicators include for example, the delivery of local transportation schemes, education or community facilities and criteria to monitor retail developments within local and neighbourhood centres, criteria to monitor policy thresholds in retail centres, or the approval of developments contrary to policy aims. The ‘core’ and ‘local’ indicators as are specified within the monitoring framework for ease of reference.
- 2.7 Each indicator is set against a monitoring target that is considered to represent realistic goals over the Plan period, the achievement of which correspond with key delivery targets set out in the Strategic Policies of the Plan or which contribute towards supporting and/or achieving the overall LDP Objective it is associated with. The monitoring targets have been set for levels of development either annually or at interim years throughout the remaining Plan period to 2026 and represent key milestones in terms of Plan delivery. Where appropriate, monitoring targets are based on background evidence prepared in support of the LDP e.g. from the Council’s housing supply trajectory paper (September 2016) or historic trends e.g. employment land uptake figures.
- 2.8 If monitoring targets are not achieved appropriate trigger points have been included in order to assess the level to which a policy may have deviated from the monitoring target. The trigger point will provide an early indication of whether parts of the plan are not achieving their desired outcomes for example, a significant deviation from the

monitoring target could indicate that a policy is failing to be implemented correctly or that the policy needs to be amended in order to meet the desired outcomes or Plan objective.

- 2.9 In identifying trigger points for core and local indicators the Council has used both specific triggers, i.e. failure to prepare an SPG or approval of developments contrary to policy, and flexible triggers, e.g. 10% or more reduction in the affordable housing target over 2 consecutive years (monitoring indicator 7.2). The 10% flexible trigger point has been used in a number of recently adopted LDPs in Wales and is considered to strike an appropriate balance between the need for clear trigger points and flexibility when monitoring statistics on an annual basis. This allows for any significant trends or patterns to be considered in Annual Monitoring Reports. In this instance, the trigger point would be reached where the observed figure fails to reach the annual target by 10% for two consecutive years (i.e. the percentage reduction is not a cumulative one but relates to the percentage reduction for that year).
- 2.10 If any of the trigger points are reached, the AMR will consider the necessary actions which could or should be taken. In considering any appropriate action the Council will be mindful of all available monitoring data and any relevant external factors or influences outside the scope of the LDP which may have contributed to the failure of meeting the specific monitoring targets set.
- 2.11 In this regard, the monitoring framework includes a range of possible actions available to the Council (under paragraph 9.10 of the Plan) as set out in the table below.

<b>Continue Monitoring (Green)</b>
Where indicators are suggesting the LDP Policies are being implemented effectively and there is no cause for review.
<b>Training Required (Blue)</b>
Where indicators are suggesting that LDP Policies are not being implemented as intended and further officer or Member training is required.
<b>Supplementary Planning Guidance or Development Briefs Required (Purple)</b>
Indicators may suggest the need for further guidance to be provided in addition to those already identified in the Plan. Additionally, should sites not be coming forward as envisaged; the Council will actively engage with developers / landowners to bring forward Development Briefs on key sites to help commence the development process.
<b>Policy Research (Yellow)</b>
Where indicators are suggesting the LDP Policies are not being effective as they should further research and investigation is required. This may also include the use of contextual indicators and comparisons with other local authorities and national statistics where appropriate may be required.
<b>Policy Review (Amber)</b>
Where indicators are suggesting the LDP Policies are failing to implement the strategy a formal review of the Policy is required. Further investigation and research may be required before a decision to formally review is confirmed.
<b>Plan Review (Red)</b>
Where indicators are suggesting the LDP strategy is failing and a formal review of the Plan is required. This option to fully review the Plan will need to be fully investigated and undertaken following serious consideration.

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- 2.12 Regular monitoring of the plan will be a key tool in providing flexibility, and will measure progress in delivering the LDP. It will identify any aspects that are not being achieved as planned and any changing circumstances that affects its implementation. This will allow the application of policies to be adjusted where appropriate or indeed to bring forward alternative policies or approaches through a partial or full Plan review.
- 2.13 The Council therefore considers that the core and local monitoring indicators and targets within the LDP monitoring framework set against the LDP Objectives are sufficiently detailed to provide a clear indication of the overall aspirations of the LDP. The indicators and targets identified are considered to be meaningful and measurable and direct the monitoring framework towards the delivery of the key elements of the Plan's Strategy. In this respect, the monitoring targets provide detailed milestones and/or scheme completion dates which are considered to be deliverable and are key to meeting the overall social, economic and environmental Objectives of the Plan. In this respect, the revised monitoring framework includes appropriate trigger points and thresholds which, in association with the detailed action table above, provide a clear indication of when intervention may be required.
- 2.14 With regards to the monitoring indicators under Objective 7 (relating to housing needs) it should be noted that the Council's Hearing Statement for Hearing Session 25 (Gypsy and Travellers (2)) proposes amendments to the monitoring framework in order to clarify how and when the identified medium to long term accommodation needs of gypsy and travellers will be met. The following text has been prepared in consultation with Welsh Government and is proposed to be inserted under the monitoring indicators for Objective 7:

Ref No.	Indicator – Core / Local	Monitoring Target	Trigger Point	Relevant Policies/SA Objectives	Data Source
7.5	LOCAL: Meeting the identified future need for authorised Gypsy and Traveller Accommodation.	Establish a Gypsy and Traveller Accommodation Project Board	By June 2016	Strategic Policies: SP1 Managing Growth / Development Policies: MG5 MD18	VOGC / GTAA.
		Agree project management arrangements including reporting structure.	By end of June 2016.		
		Make initial contact and maintain contact with the Hayes Road occupiers.	July, 2016 to May, 2018.		
		Agree methodology for undertaking site search and assessment.	By end of December 2016.		
		Undertake a site search and assessment and secure approval of findings including identification of an	By end of December 2016.		

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		appropriate site or sites.			
		Secure planning permission and, if appropriate, funding (including any grant funding from Welsh Government) for the identified site.	By end of May 2018.		

2.15 The Council considers that the revised monitoring framework, together with the inclusion of the proposed text above, provides a robust and appropriate mechanism for monitoring the delivery and implementation of the Vale of Glamorgan LDP. It will enable the early identification of whether the Plan or individual policies need to be reviewed following consideration of the available monitoring actions. Consequently, the monitoring framework ensures that the Plan is sufficiently flexible to adapt to changing circumstances.

### 3. Any Other Matters

3.1 The Council has no further matters to rise.