

Response to Pre-Hearing Note 1

Appendix 1.1

1	Appendix 2 of the Council’s report on ‘Exceptional Circumstances for the Release of Green Belt’ is missing from the online version (Local Plan Working Party Report on the Distribution of Growth, as referenced in paragraph 3.10). It would be appreciated if you could you add it to the examination website and provide me with a printed copy.
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1.1.1 Noted.

1.1.2 The “Exceptional Circumstances Report for the release of Green Belt” EV09 should have had the Local Plan Working Party Paper “Distribution of Growth” from August 2016 as its Appendix 2. This was omitted in error.

1.1.3 The Appendix has been added to the original document and has been uploaded to the web-site to replace the document that was initially placed in the Examination Library. A date of February 28 2019 has been added to the document.

1.1.4 A hard copy of the complete revised document has been provided to the Inspector.

Response to Pre-Hearing Note 1

Appendix 1.2

2	Does the Council have any further supporting information available relating to the suitability, availability and deliverability of the proposed Garden Suburbs and other individual site allocations, which could be included in the examination library? For example, draft Masterplans, technical reports and other evidence?
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1.2.1 Development promoters have submitted documentation throughout the Local Plan preparation process in support of their sites. Not all sites have additional information, but where this is available it is being placed into the Examination Library in LP Site Number Order.

1.2.2 The full list of documents to be uploaded is set out in Annex A to this response below.

1.2.3 For the Garden Suburbs, ongoing work with the site promoters has produced some additional master planning, which is being added to the respective LP site number folders within the Examination Library. The process will take some little time but is underway with IT and the webteams.

ANNEX A: List of Sites with additional information for the Examination Library

LP0021	LP0814	LP1116	LP1398	LP1622
LP0046	LP0815	LP1123	LP1407	LP1648
LP0075	LP0968	LP1137	LP1412	
LP0353	LP0978	LP1180	LP1425	
LP0355	LP1000	LP1194	LP1429	
LP0509	LP1033	LP1216	LP1451	
LP0565	LP1077	LP1229	LP1463	
LP0568	LP1078	LP1232	LP1481	
LP0571	LP1088	LP1292	LP1503	
LP0640	LP1095	LP1391	LP1609	

Response to Pre-Hearing Note 1

Appendix 1.3

3	Can the Council confirm what progress has been made towards the production of a South-East Calderdale/North Huddersfield Delivery Plan, and the scope/purpose of the document?
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- 1.3.1 Since the publication of the Calderdale Local Plan in August 2018 significant progress has been made on actions towards delivery of development in South East Calderdale. These are summarised below. This information goes beyond the scope of that requested by the Inspector as it is considered important to put the South East Calderdale/North Huddersfield Delivery Plan in the context of the significant progress that is being made in a number of areas.
- 1.3.2 As noted in the Council's Duty to Cooperate Statement (Submission Document SD13 page 39) a Memorandum of Understanding has been signed between Calderdale and Kirklees Councils. This is not reattached here.
- 1.3.3 As will be noted from the MOU, Calderdale and Kirklees Councils are committed to South East Calderdale and North Huddersfield being designated as a Regional Spatial Priority Area (SPA) by the West Yorkshire Combined Authority and Leeds City Region Local Enterprise Partnership as part of its Strategic Economic Plan. This reflects our joint commitment to making a regionally significant contribution to the supply of housing and employment land. This aspiration is explained further in a report to the West Yorkshire Combined Authority's Directors of Development group which met on 9th March 2019. The report is attached as **Annex A** (called Agenda Item 3) and includes a Strategic Framework plan illustrating an indicative area encompassed by the proposed Regional SPA.
- 1.3.4 A formalised system of programme governance has also been established between Calderdale and Kirklees Councils to deliver the aspirations of the MOU. This is illustrated by the formal Governance arrangements agreed (**Annex B**) and the governance diagram attached at **Annex C** and the accompanying Terms of Reference agreed by both authorities. It will be noted that senior officers of both Councils are represented at the Steering Group level. It should also be noted that measures are in place to ensure appropriate political oversight.
- 1.3.5 Calderdale and Kirklees Councils made a successful joint bid to the MHCLG Planning Delivery Fund in 2018 and these monies are funding the delivery of the South East Calderdale/North Huddersfield programme, including the

aforementioned South East Calderdale/North Huddersfield Delivery Plan. Further to this, the Councils' have also recently submitted a joint bid pursuant to the MHCLG's Garden Communities Programme.

- 1.3.6 The outcome of the bid to the Garden Communities Programme is still pending at the time of writing. However, the bidding process has proved to be a useful process in terms of the development and refinement of the programme, including the development of a comprehensive, cross boundary Master Planning Framework and Delivery Plan covering South East Calderdale and North Huddersfield.
- 1.3.7 The draft brief for the South East Calderdale/North Huddersfield Delivery Plan is attached at **Annex D** and is currently in the process of being reviewed and refined by both authorities before the work is commissioned during Spring 2019 and delivered by Autumn 2019. The outcome of this work will be added to the Examination library and the Inspector informed.

Report to: Directors of Development

Date: 8 March 2019

Subject: **Designation of the South East Calderdale and North Huddersfield Regional Spatial Priority Area**

Directors: Mark Thompson Director Regeneration and Strategy, Calderdale Council
Naz Parkar Service Director Housing, Kirklees Council

Author: Richard Spensley Programme Manager, Calderdale Council

1 Purpose of this report

- 1.1 To update and invite comments from the Directors of Development on the proposed designation of a South East Calderdale and North Huddersfield Regional Spatial Priority Area centred on Junction 25 of the M62.
- 1.2 Subject to any comments, to seek endorsement to present this proposal to the LEP Board on 26 March 2019.

2 Information

Background

- 2.1 Calderdale and Kirklees have significant cross boundary relationships as recognised by the LEP in the Leeds City Region (LCR) Strategic Economic Plan 2016-2036 (SEP).
- 2.2 Calderdale and Kirklees share a boundary that runs broadly along the M62 motorway corridor. As well as forming a major strategic transport route across the LCR, the corridor also acts as a focus for economic activity that benefits the LCR as well as both authorities. The two Councils share a long standing ambition to deliver transformational change and an inclusive economy in this cross-boundary area that sits astride the M62 corridor and which is focused around Junction 25. Key to this transformation is the delivery of a substantial quantum of quality new homes (Garden Suburbs) and employment growth over the next 15 to 20 years, alongside major infrastructure improvements. The scale of this growth is unprecedented in the history of both districts.
- 2.3 The Kirklees Local Plan (deposit draft) identifies key sites in this growth area, including approximately 2000 houses at the proposed Garden Suburb in Bradley Park, also at Fixby (Huddersfield) and Moor Park (Mirfield).
- 2.4 Key employment sites in this area of Kirklees include the Moor Park Enterprise Zone and other sites located at Cooper Bridge and Bradley. The delivery of these employment

sites combined with other existing planning approvals elsewhere in the Kirklees portion of the growth area, are anticipated to deliver upwards of 1,450 new jobs. The Kirklees Local Plan Examination in Public (EIP) is now at an advanced stage and the Council has already consulted on modifications. The Inspector's report is imminent followed by the anticipated adoption of the Local Plan late February 2019 subject to the content of the Inspector's final letter.

- 2.5 The Calderdale Local Plan (deposit draft) identifies an equally broad range of key sites for delivery in the South East Calderdale portion of the growth area. These include two major Garden Suburb proposals at Thornhills (Brighouse) and Woodhouse (Rastrick) that combined will provide upwards of 3,300 new homes. Importantly, the significant quantum of new homes being planned for across the entire growth area will make a substantial contribution towards addressing the current housing supply gap and the substantial unmet housing demand across both districts.
- 2.6 Neighbouring the Garden Suburbs, the 25 ha Clifton Enterprise Zone site will deliver approx. 0.5 million sq/ft of new business floorspace providing in turn, an estimated 1,300 quality, new jobs. Along with the Kirklees employment proposals, this major development will build on the strong manufacturing presence in both districts whilst helping to address the historic loss of employment land to other uses and the ageing nature and generally poor condition of the existing employment stock. As well as attracting Growth Deal funding, the Clifton Enterprise Zone has also secured over £4.5m from the DfT National Productivity Investment Fund (NPIF).
- 2.7 In addition to the significant quantum of homes and employment development described above, both Councils have significant transport infrastructure projects planned for delivery in the growth area by 2026 as part of the Combined Authority's WY+TF programme. This entails significant investment in road corridors forming part of the LCR Key Route Network and also rail infrastructure improvements between the two districts. Key transport infrastructure improvements in the growth area include the £77m funded A62 to Cooper Bridge link road scheme that spans the Calderdale and Kirklees boundary and which amongst other aspects, is an integral part of the Bradley Park garden suburb development . Also, the circa £76m funded A641 Bradford to Huddersfield Corridor improvement scheme that runs through the heart of the growth area via Brighouse, aims to provide improved journey times, minimise congestion and improve air quality amongst other benefits. Other potential future schemes include a new M62 Junction 24a (which is now regarded as a high priority by key strategic partners such as Transport for the North), and other complementary schemes involving walking and cycling (e.g. ensuring the emerging Garden Suburbs have effective links to the existing urban area and emerging cross boundary options linking Brighouse and Cooper Bridge).
- 2.8 The opportunity for rail improvements in the area is also becoming greater as the planned Trans - Pennine Rail Upgrade (TRU) becomes increasingly focused on delivery.

- 2.9 It is only by comprehensively planning at the large scale and by focusing development and investment on a discrete number of strategic locations within the growth area, that the critical mass and scale can be achieved that is necessary to deliver the transformation across the whole Place. This approach aligns not only with LCR SEP policy objectives but also at a national level, including those set out in the National Infrastructure Delivery Plan (2016-2021).
- 2.10 To reflect the importance of their joint ambitions for the growth area, both Councils are championing the creation of a South East Calderdale and North Huddersfield Regional Spatial Priority Area (SPA). The Strategic Framework Plan shown in Appendix 1 illustrates the proposed SPA, including the main areas of development and investment.
- 2.11 Calderdale and Kirklees are places full of talent, enterprise and confidence, and whilst a great deal has been achieved over recent years, both Councils know that much more can still be accomplished through the joint delivery of an ambitious, forward looking vision for an inclusive economy; one that will not only transform the existing area encompassed by the SPA but whose transformational outcomes will also help ensure benefits are spread further afield across the LCR.
- 2.12 In this regard, the ambitious nature of the Councils' joint vision, fully aligns with the key economic, housing, environmental and sustainable transport priorities that underpin the delivery of 'good' inclusive growth as set out in the SEP and nationally in the UK Industrial Strategy.
- 2.13 Central to the delivery of this vision is the creation of a SPA covering the South East Calderdale and North Huddersfield growth area around Junction 25. In doing so, the SPA will act as focus for:
- Prioritising investment in the area;
 - Maximising the City Region's economic, housing and regeneration potential;
 - Accelerating the delivery of new homes;
 - Accelerating the delivery of employment growth and supporting infrastructure to facilitate sustainable job growth;
 - Delivering a comprehensive inward investment and marketing solution and;
 - Ensuring a co-ordinated approach to development delivery.
- 2.14 To this end, Calderdale and Kirklees Councils have recently signed a joint Memorandum of Understanding (Appendix 2) describing their joint working approach to championing the creation of the SPA and to fulfil their overall vision.
- 2.15 In support of this, both authorities now seek to designate the South East Calderdale and North Huddersfield growth area as a SPA and for this designation to be included in the next iteration of the SEP.

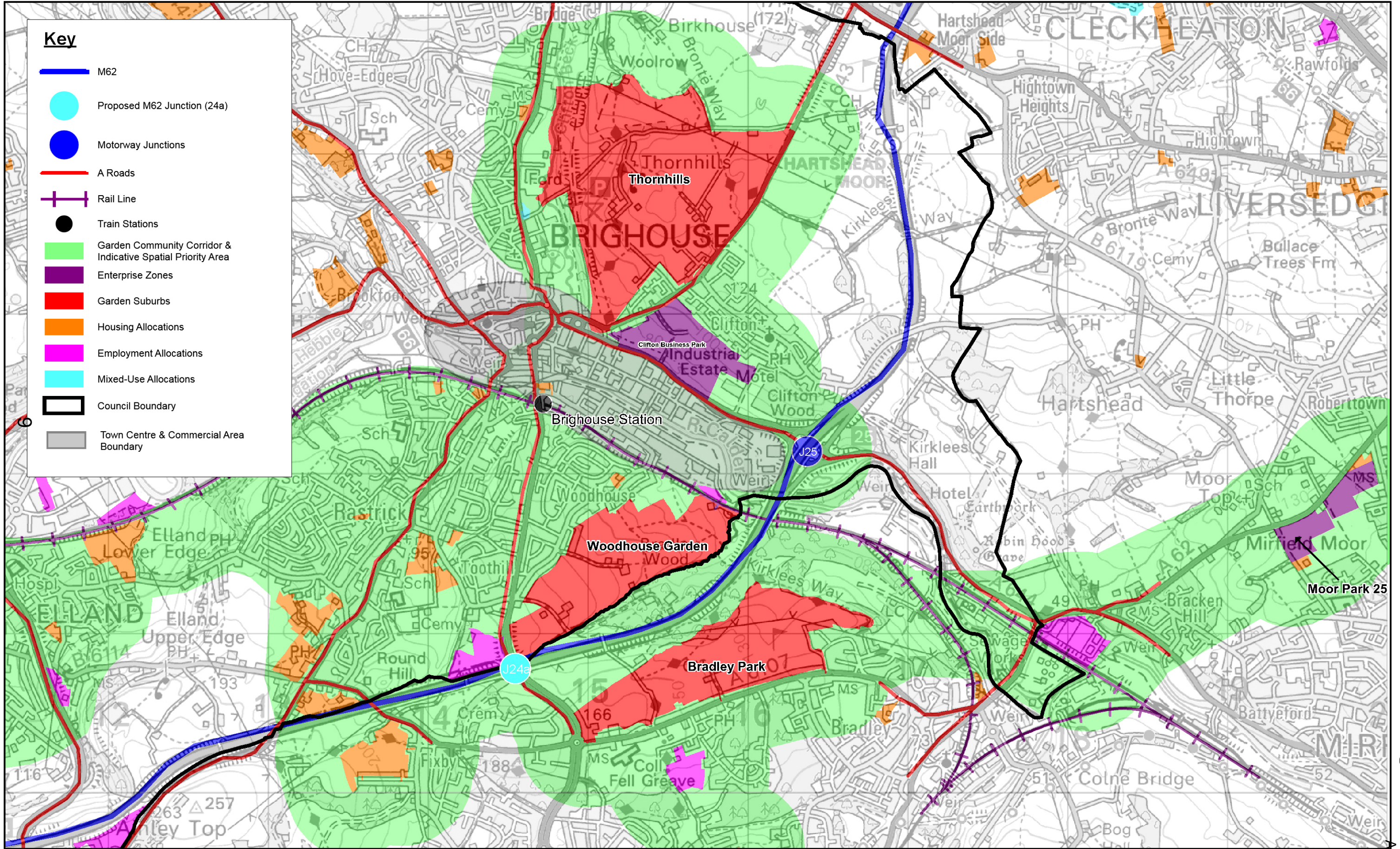
3 Recommendation

- 3.1 That the Directors of Development consider the proposal for designating the South East Calderdale and North Huddersfield growth area as a Regional Spatial Priority Area (SPA), and subject to their views;
- 3.2 That the proposed SPA is presented to the LEP Board on 26 March 2019 for consideration with a view to agreeing to its designation and inclusion in the next update of the SEP.

4 Appendices

Appendix 1 – Strategic Framework Plan

Appendix 2 – Memorandum of Understanding between Calderdale Council and Kirklees Council



Key

- M62
- Proposed M62 Junction (24a)
- Motorway Junctions
- A Roads
- + Rail Line
- Train Stations
- Garden Community Corridor & Indicative Spatial Priority Area
- Enterprise Zones
- Garden Suburbs
- Housing Allocations
- Employment Allocations
- Mixed-Use Allocations
- Council Boundary
- Town Centre & Commercial Area Boundary



Strategic Framework Plan
South East Calderdale & North Huddersfield
Spatial Priority Area



Town Hall, Crossley Street,
 Halifax, West Yorkshire, HX1 1UJ
 Telephone No. : 0845 245 6000
 Website: www.calderdale.gov.uk

Regeneration & Strategy
 Major Projects
 Drawn By: Yatin Mistry

Scale 1:22,000
 Date: 17/01/2019

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Memorandum of Understanding between Calderdale Council and Kirklees Council in relation to the proposed J25 Regional Spatial Priority Area (October 2018)

1. INTRODUCTION

This Memorandum of Understanding describes the joint working approach to be adopted by Calderdale Council ("Calderdale") and Kirklees Council ("Kirklees") with regards to:

- (i) The championing, designation and promotion of a South East Calderdale & Kirklees Regional Spatial Priority Area centred around Junction 25 of the M62, (as set out in Appendix 1), and
- (ii) The planning and delivery of all associated infrastructure, housing and economic activity within the Regional Spatial Priority Area as required to achieve the joint ambition of Calderdale and Kirklees Councils.

2. BACKGROUND

Kirklees and Calderdale have significant cross boundary relationships, as recognised in the Leeds City Region ("LCR") Strategic Economic Plan by the LEP.

Calderdale and Kirklees share a boundary broadly along the M62 motorway which forms a key strategic transport route across the region and provides a focus of economic activity for both authorities. Both Calderdale and Kirklees are currently preparing Local Plans proposing significant growth in the cross-boundary area astride the M62 motorway corridor which is mostly focused in the vicinity of Junction 25.

The emerging Kirklees Local Plan identifies key sites in this area including housing at Bradley and Fixby (Huddersfield) and Moor View (Mirfield) and key employment sites at Cooper Bridge, Moor View and Bradley. The emerging Calderdale Local Plan identifies key sites for delivery in the South East Calderdale area including Thornhill and Woodhouse garden suburb housing sites and employment sites at the regionally significant Clifton Enterprise Zone and also to the west of Huddersfield Road in Rastrick. The indicative diagram in Appendix 1 summarises the main areas of growth around junction 25 of the M62.

Both Councils have significant transport infrastructure pipeline projects for delivery by 2026 as part of the West Yorkshire Combined Authority's (WYCA) West Yorkshire Plus Transport Fund (WY+TF), which entail significant investment in road corridors forming part of the LCR Key Route Network and rail infrastructure improvements between the two districts. Key transport infrastructure improvements in this area (some of which require further funding) include the A62 to Cooper Bridge scheme (to be partially developed within Calderdale's boundary), A641 corridor improvements from Bradford to Huddersfield via Brighouse, a new Junction 24a and improvements to walking and cycling networks. Close-working will be required at the planning and operational level to achieve these improvements. To reflect the importance of the area around Junction 25 of the M62, a South East Calderdale and Kirklees Regional Spatial Priority Area has been proposed by both Councils which includes the major developments for housing and employment as well as significant planned transportation and other key infrastructure improvements.

Kirklees and Calderdale are seeking to work together to champion the ambitions of both Councils' economic and housing growth agenda in this proposed Regional Spatial Priority Area, promoting the role of the Area in meeting key objectives and ambitions within the LCR. This should facilitate the securing of further regional and national funding. In doing so, the Councils will work collaboratively together as far as is reasonably practicable. This includes developing a joint delivery programme, articulating the economic benefits of the Area, committing to joint working as named partners on

key infrastructure projects and ensuring funding from joint bids is spent in the Regional Spatial Priority Area in a way which benefits both parties.

This includes working collaboratively when liaising with key stakeholders such as WYCA, Highways England, Homes England, Historic England, Network Rail and others as deemed appropriate by the Programme Board and Steering Group. By working together, the Councils aim to promote the role of the Regional Spatial Priority Area within the LCR, expedite an increase in economic development and housing delivery, delivery of enhanced transport connectivity and other key infrastructure improvements between the two districts around J25 and to facilitate collaboration with other key stakeholders.

3. OBJECTIVES

The parties have agreed to co-operate on the terms set out in the schedule of this MOU with a view to achieving these Objectives. The parties confirm that they will act at all times in good faith towards the other to give effect to the spirit and intent of this MOU. If either party comes into the possession of any facts, knowledge or information that may assist in the satisfaction of the aspirations of either of them regarding the Objectives, it is to disclose such information to the other party, unless that information is already known to the other party or is commercially sensitive or is information which that party is bound to keep confidential.

If any circumstances arise during the term of this MOU that were not evident at the date of this MOU and not provided for in this MOU, each party agrees with the other that such circumstances are to be dealt with and resolved in such manner as operates between them for fairness and, so far as is possible, without detriment to the interests of either party. For the avoidance of doubt the parties agree not to do anything to ransom the other party in relation to their respective objectives.

4. NO PARTNERSHIP OR AGENCY

Nothing in this MOU is intended to constitute or may be interpreted as constituting a partnership between the parties or constitute one party the agent of the other party. The parties are not to do or allow anything to be done by which one party is or may be represented as the partner or agent of the other party unless this is agreed in writing by the parties.

5. CONFIDENTIALITY

Neither of the parties are, without the prior written consent of the other not to be unreasonably withheld or delayed, knowingly to disclose or publish or permit or cause to be disclosed or published any details of this MOU, provided that this provision shall not apply to any disclosures required under the Freedom of Information Act 2000 ("FOIA") and the Environmental Information Regulations 2004 (SI 2004/3391) ("EIRs").

6. FREEDOM OF INFORMATION

The parties acknowledge that each council is subject to the requirements of the FOIA and the EIRs and shall assist and co-operate with each other (at their own expense) to enable the parties to comply with their respective information disclosure requirements.

7. NON-FETTER

Nothing in this MOU shall in any way fetter or compromise or in any other way interfere with the exercise by the parties of their statutory functions, duties and powers and the Council's statutory obligations set out in Section 123(2) of the Local Government Act 1972 and Section 3(1) of the Local Government Act 1999, and other relevant enabling powers. Either party may terminate this MOU with immediate effect by service of written notice on the other party.

8. STATUS OF THIS MOU

Except for the provisions set out in clauses 4 – 7 (inclusive) this MOU is not intended to be legally binding and no legal obligations or legal rights shall arise between the parties from this MOU. The parties enter into this MOU intending to honour all their obligations.

9. CONTACT ARRANGEMENTS

- The officer point of contact for Calderdale shall be the Council's Assistant Director – Strategic Infrastructure or such other officer as shall be notified to Kirklees by Calderdale.
- The officer point of contact for Kirklees shall be the Head of Strategy and Design or such other officer as shall be notified to Calderdale by Kirklees.

SCHEDULE

The parties shall establish a Programme Board and Steering Group to oversee the delivery of the Objectives. Both parties shall be active members of the Programme Board and Steering Group and use reasonable endeavours to facilitate and provide relevant attendees. Through these and associated working groups including partnership with other stakeholders, the parties shall work to promote the South East Calderdale & Kirklees Regional Spatial Priority Area and facilitate development including:

Commitment to joint working

- Working collaboratively to champion the designation of the Regional Spatial Priority Area within the LCR Strategic Economic Plan, and promoting associated economic growth and inward investment (see Appendix 1)
- Establishing a detailed delivery programme including phasing information for development sites and planned infrastructure within the Regional Spatial Priority Area
- Commitment to undertaking work to ascertain the economic benefits of the Regional Spatial Priority Area and how this contributes to the LCR outcomes. This includes using this evidence to promote the Regional Spatial Priority Area and the joint ambition of Calderdale and Kirklees Councils to increase the Area's profile within LCR and beyond to assist in attracting inward investment.
- Co-ordination of political Portfolio Holder briefings to highlight the benefits of the Regional Spatial Priority Area at an early stage and ensure lead members are informed throughout the process.
- Working collaboratively to influence the forward work programmes of other bodies, including WYCA, Highways England, Homes England, Historic England, Network Rail and the Canals & Rivers Trust.
- Sharing new ideas for elements of the programme within the Regional Spatial Priority Area and exploring these collectively to enable constructive feedback and assess implications for the Regional Spatial Priority Area as a whole.

Commitment to infrastructure delivery

- Commitment to joint working to identify the optimal mix of infrastructure requirements necessary to facilitate the combined growth proposed in both Council's domains in the Regional Spatial Priority Area. This includes:
 - (1) Working together to actively pursue infrastructure improvements covering some or all of the following programme workstreams to facilitate the planning and delivery of key sites in the Regional Spatial Priority Area:
 - Education
 - Health
 - Housing
 - Workforce Development
 - Sustainable Urban Drainage/ Flooding
 - Utilities
 - Community/ Cultural Facilities
 - Stewardship
 - (2) Working together to actively pursue funding and working as named partners on jointly funded cross-boundary transport infrastructure schemes to facilitate the delivery of key sites in the Regional Spatial Priority Area including (amongst others):
 - A641 improvements along the Bradford to Huddersfield Corridor, including Brighouse, Bailiff Bridge
 - A62 Smart Corridor and A62 to Cooper Bridge improvements (with the latter included in both authorities' Infrastructure Delivery Plans)
 - Provision of a new M62 Junction (J24a)
 - Commitment to investigating improvements to walking and cycling network links between Calderdale and Kirklees within the Regional Spatial Priority Area, including Cooper Bridge to Brighouse and other improvements linking housing, jobs, retail and rail connections.
 - Support for rail infrastructure improvements
- Joint working to highlight the benefits of a collective approach to planning and delivery in this Area, including identifying funding gaps and presenting the scale and ambition of delivery to WYCA/LEP. This includes highlighting the importance of key infrastructure provision in the short, medium and longer term. This is particularly important where the delivery of the full capacity of the sites identified requires infrastructure improvements. Such work will also help to support the case for existing and future WY+TF schemes with cross-boundary implications in the Regional Spatial Priority Area.

Commitment to spending funding from joint bids in a way which has joint benefits

- Commitment to ensuring funding from joint bids is spent in a way which has benefits for both Calderdale and Kirklees and the communities in the Regional Spatial Priority Area and beyond.
- Although the marketing of the benefits of the development in this Area should take precedence, supporting detailed technical work in both districts where this contributes to meeting the other objectives set out in this MOU.
- Commitment to producing a rolling 12 month resource plan to determine the funding requirements in the Regional Spatial Priority Area.

Signed (Kirklees):

Peter McEneaney

Date:

24/1/19

Signed (Calderdale):

Randy Cotton

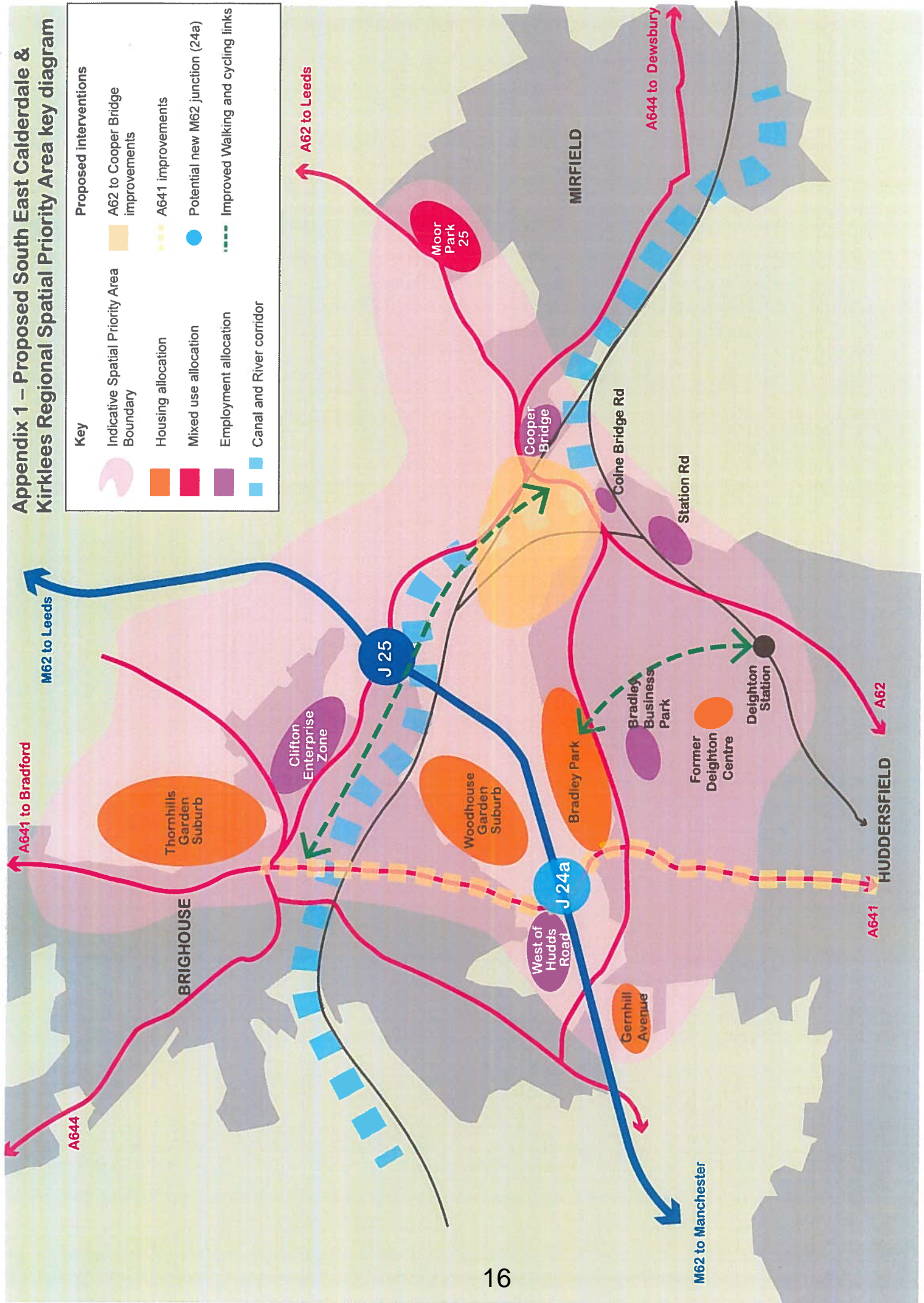
Date: 04-02-19

John V Thompson

Appendix 1 – Proposed South East Calderdale & Kirklees Regional Spatial Priority Area key diagram

Key

	Indicative Spatial Priority Area Boundary		Housing allocation		Mixed use allocation		Employment allocation		Canal and River corridor
	Proposed interventions		A62 to Cooper Bridge improvements		Potential new M62 junction (24a)		Improved Walking and cycling links		
			A641 improvements						





**CALDERDALE & KIRKLEES
REGIONAL SPATIAL PRIORITY AREA
PROGRAMME**

**Steering Group, Programme Board and Working
Groups**

Terms of Reference

Document Management – Governance Arrangements

Document Location

The source of the document will be found at this location: T:\Corporate Projects\SE Calderdale\ Programme Management Products

Revision History

Version	Date	Revision date	Summary of Changes
0.1	04/05/2018		Initial draft for CMBC comment
0.2	<i>tbc</i>		Draft version 0.2 for KMBC comment
0.3	31/01/2019		Final Draft for Steering Group approval

Reviewers

This document requires the review by the following people:

Reviewer name	Title/ Responsibility	Date	Version
Steven Lee	Assistant Director Strategic Infrastructure (CMBC)	04/05/18	0.1
Robert Summerfield	Corporate Lead for Major Projects (CMBC)	04/05/18	0.1
Richard Seaman	Corporate Lead for Development Management (CMBC)	04/05/18	0.1
Simon Taylor	Head of Strategic Investment	<i>tbc</i>	0.2
Mathias Franklin	Group Leader - Development Management	<i>tbc</i>	0.2

Approvals

This document must be approved by the following people:

Name	Title	Date	Version
Steven Lee	Assistant Director Strategic Infrastructure (CMBC)	31/01/2019	0.3
Paul Kemp (Simon Taylor deputy)	Service Director – Place, Economy and Culture (KMC)	31/01/2019	0.3

Document Control:

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Author:

Richard Spensley - Programme Manager
(Major Projects, Regeneration & Strategy Directorate, Calderdale Council)

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1. Purpose

The purpose of this document is to set out the respective Terms of Reference for the Calderdale and Kirklees Regional Spatial Priority Area (RSPA) Programme Steering Group, Programme Board and the subordinate Working Groups that separately cover South East Calderdale and Kirklees areas. Taken together, these three forums are designed to provide a cohesive framework for effective decision making, approvals, management, reporting and assurance within the Programme Environment domain (section 6 summarises), and will be set up in line with the Memorandum of Understanding between Calderdale Metropolitan Borough Council and Kirklees Metropolitan Council on cross-boundary activity.

The Terms of Reference will be approved by the Steering Group and disseminated to the Programme Board members and subordinate Working Groups.

2. Strategic Context

Calderdale and Kirklees share a significant geographical boundary bisected by the M62 motorway. The communities of the two districts regularly cross and re-cross this boundary for work, leisure and other commuting purposes.

A geographical area has been identified around Junction 25 of the M62 motorway which both authorities consider has the potential to become a significant provider of homes and jobs benefitting the Leeds City Region (LCR). The aim is to champion this area as a Spatial Priority Area within the City Region Strategic Economic Plan (SEP). Currently the area has a mixed character of existing residential communities, employment centres and under-utilised and undeveloped land.

To underpin this joint ambition and overarching strategic vision both emerging Local Plans identify significant housing and job growth within this future Regional Spatial Priority Area.

Kirklees Publication Draft Local Plan – is at a very advanced stage. The first stages Local Plan Examination in Public process have been completed with the adoption scheduled for later in 2018. Within the portion of the Kirklees geographic area identified as part of the future Regional Spatial Priority Area, there are two significant and adjoining housing sites planned to deliver 2000 new homes during the plan period. In addition in close proximity is a significant 45 hectares employment site which will deliver in excess of 3000 new jobs. Also, within the area is the Moor View mixed use site that contains further housing and an employment site. This has the benefit of planning permission and is also part of the Leeds City Region, West Yorkshire Enterprise Zone initiative.

Calderdale's Draft Local Plan – identifies an even large number of housing sites within the future Spatial Priority Area totalling in excess of 3300 houses together with 25 hectares of new employment land (which is also part of the Leeds City Region, West Yorkshire Enterprise Zone initiative) that is capable of delivering upwards of 1300 new jobs.

Within the future Regional Spatial Priority Area both Councils are working collaboratively but also in partnership with other key partners, stakeholders and funders including the Leeds City Region Local Economic Partnership (LEP), West Yorkshire Combined Authority (WYCA), Department of Transport/ Highways England and Historic England. This collaboration and partnership working will be instrumental to achieving the Programme's strategic vision through the realisation of associated benefits and outcomes via the delivery of a regionally significant quantum of housing and employment (one of the most significant 'offers' in the Leeds City Region and Yorkshire).

Key to this will include the promotion and marketing of the future Regional Spatial Priority Area as a key driver for economic growth, investment and housing across the Leeds City region. This work will be undertaken in partnership with the West Yorkshire Combined Authority (WYCA).

In parallel with this there is presently also a focus on the provision of new and improved strategic infrastructure, in particular a variety of transport interventions funded through the West Yorkshire Plus Transport Fund (WY+TF) initiative.

To this end, currently work is being progressed on various cross boundary infrastructure schemes including:

- A641
- A62 'Smart Corridor'
- A62 to Cooper Bridge Scheme

As well as supporting the release of the housing and employment opportunities, these schemes will also aim to manage and reduce traffic congestion, provide improved opportunities for public transport, improve air quality, enhance the public realm and facilitate improved infrastructure for active travel modes including the provision of associated facilities for pedestrians and cyclists.

Detailed feasibility work will inform the scope of the programme, including prioritised projects, phasing and other interventions that in turn will deliver the envisaged transformational change across the spatial priority area. The outputs of the feasibility work and described outcomes and benefits will be captured in a programme blue print and an associated projects dossier.

3. Steering Group - Terms of Reference

a. Role and Responsibilities

The Steering Group is the sponsoring forum for the programme. It comprises nominated political representatives and senior managers from both Calderdale and Kirklees Councils. As well as championing the programme, its primary role is to ensure the on-going, overall alignment of the programme with the strategic direction of the two sponsoring local authorities. This role includes making programme related investment decisions and providing top level endorsement of the rationale, objectives and benefits of the programme in relation to all other strategic initiatives that comprise both local authorities' broader business portfolios.

The key responsibilities of the Steering Group specifically include the following:

- Appointing, advising and supporting the Senior Responsible Officer (SRO) role which is a member of the Steering Group, and who will chair the Programme Board. The SRO is accountable for the programme, ensuring that it meets its objectives and realises the expected benefits. For the purposes of this programme, the SRO role will be vested in two senior managers representing each of the sponsoring local authorities
- Providing and ensuring the continuing organisational context for the programme, including resolving any strategic or directional issues
- Providing continued commitment and endorsement in support of the programme at the strategic/ corporate level and also publically
- Authorising the programme mandate and subsequently authorising the programme definition. This will variously include the Programme Vision, Blue Print/ Target

Operating Model, associated Projects Dossier and any relevant business cases that may be required throughout the programme lifecycle

- Participating in end of stage reviews and approving progression to subsequent programme stages. This includes authorising the continued progress of the programme against the strategic objectives and expected benefits
- Authorising delivery and sign off at the closure of the programme
- Authorising funding for the programme

b. Accountabilities

The Programme Steering Group interfaces with and reports into established Calderdale and Kirklees Councils' governance arrangements, as well as other Leeds City Region Enterprise Partnership (LEP)/ West Yorkshire Combined Authority governance arrangements, all of which comprise the Operating Environment. This interface is summarised in Section 6 (Governance Arrangements – Schematic). In this respect, whilst each member of the Steering Group will be individually accountable to the Chair of the Steering Group in the context of their involvement in the strategic direction and delivery of the programme, individual members will also be accountable to their respective decision making bodies that sit within the Operating Environment. That is to say, either Calderdale or Kirklees Councils, and where relevant also to the LEP/ WYCA in terms of the governance roles that Steering Group members may also have in relation to these organisations.

c. Membership – illustrative tbc

Job Title	Organisation	Area of Responsibility/ Role
Assistant Director - Strategic Infrastructure Steven Lee	Calderdale Council	SRO/ Steering Group Joint Chair
Service Director for Housing Naz Parker	Kirklees Council	SRO/ Steering Group Joint Chair
Assistant Director – Economy, Housing and Investment Karen Lythe	Calderdale Council	Calderdale Council officer representative
Head of Strategic Investment Simon Taylor	Kirklees Council	Kirklees Council officer representative
Operations Manager WY+TF Keith Bloomfield	Kirklees Council	Kirklees Council officer representative
Programme Manager – Major Projects Richard Spensley	Calderdale Council	Programme Manager
Principal Planning Officer – Investment and Regeneration Service Steven Wright	Kirklees Council	Programme Manager
Administrative Support	Calderdale and/ or Kirklees	Administrative Support

d. Meeting

- i. **Frequency** – Steering Group meetings will be held as a minimum every 3 months alternating between the Calderdale and Kirklees Council offices in Halifax and Huddersfield. More frequent meetings may also be held from time to time depending on programme requirements at the time and in line with fulfilling its main responsibilities. The Chair in consultation with the SRO role will determine when any additional meetings may occur.
- ii. **Agenda** – An agenda will be approved by the Chair (or whomever he/she delegates this to) and distributed as a minimum 3 days prior to the meeting. The standing agenda for the meeting is attached in sub-section e. below. The meeting will be minuted and actions and decisions recorded for tracking purposes. When the Chair is unable to attend the meeting, the meeting will either be re-scheduled or the Chair will nominate a deputy for that meeting.
- iii. **Quorum** – The Steering Group will be quorate when it is attended by the Chair (or his/her nominated deputy) and X members of the total membership, which must include at least X members each from Calderdale and Kirklees Councils.
- iv. **Tenure** – The role and composition of the Steering Group will be reviewed annually, or at significant events or stages in the programme lifecycle/ sponsoring organisations' governance structures.
- v. **Inputs** – The Programme Manager will produce consolidated status/ highlight reports that will be distributed as a minimum 3 days prior to the meeting along with any other papers for discussion at the meeting. There will also be a process in place to enable any escalated issues, risks or any other matters arising to be raised at the Steering Group for discussion. The Chair, in consultation with the SRO role, will determine what issues or matters arising will be discussed at the Steering Group meeting.
- vi. **Outputs** – The minutes, actions/ decisions of the meeting, once approved by the Chair, will be distributed to Steering Group members and stored in the programme document management system (Calderdale Council's Major Projects T:\ corporate network folder). Actions from the meetings will be allocated to named individuals and the progress and status of them tracked by the Programme Manager. Action owners (or a nominated representative) will be expected to report back on the actions at the Steering Group meetings where required by the Chair.
- vii. **Openness and Confidentiality** – Through continual review and approval of a programme stakeholder engagement and communications strategy, the Steering Group will ensure wider involvement from the stakeholder community of the key business items being considered by the Steering Group.

Where appropriate, an agreed summary of the meeting minutes may be published.

For reasons of probity and commercial sensitivity, members are required to treat all documents as confidential where appropriate and lawful. The status of all documents circulated will be clearly indicated in line with established classification protocols.

e. Standing Agenda Items

Item	Content	Lead	Paper Ref	Status	Guide Time
1	Welcome and Introduction	Chair			
2	Minutes and Actions from previous Steering Group meeting	Chair	tbc	For approval	tbc
3	Matters arising/ issues	Chair	Verbal	For discussion	tbc
4	Operating Environment Update	SRO	Verbal	For information	tbc
5	Calderdale Highlight update	SRO (or Programme Manager)	tbc	For discussion	tbc
6	Kirklees Highlight update	SRO (or Programme Manager)	tbc	For discussion	tbc
7	Programme Controls: escalated risks/ issues, consolidated programme plan	SRO (or Programme Manager)	tbc	For discussion	tbc
8	Any other business	All	Verbal	Verbal	tbc
9	Date, time/ location of next meeting	Chair	Verbal		

4. Programme Board – Terms of Reference

a. Role and Responsibilities

The prime role of the respective South East Calderdale and Kirklees Programme Boards is to drive the programme forward and ensure the delivery of stated outcomes and benefits. Its members will provide resource and specific commitment to support the SRO role that is accountable for the successful delivery of the programme. The Programme Boards report to the SRO role who may in turn delegate some responsibilities and actions to Programme Board members whilst maintaining overall accountability. Programme Board members will take the lead in supporting the authority and control of the SRO role over the programme as a whole, including ensuring the appropriate co-ordination across the work streams, projects and any other activities that comprise the programme.

Members of the Programme Boards are individually answerable to the SRO role for their areas of responsibility and delivery within the programme, which are likely to include the following:

- Ensuring the programme delivers within its agreed boundaries ie. stated benefits, outcomes and associated programme outputs/ deliverables. This will include assuring the continuing integrity of the benefits realisation plan
- Reviewing programme direction to ensure it remains aligned with the strategic/ corporate objectives that pertain to organisations functioning within the overarching Operating Environment
- Resolving strategic and directional issues between projects, which need the input and agreement of senior stakeholders to ensure the progress of the programme
- Maintaining focus on the development, maintenance/ alignment and achievement of the Programme Blue Print/ Target Operating Model and other associated key programme products, including the Projects Dossier
- Approving any relevant business case/s throughout the programme life cycle
- Reviewing status/ highlight reports and monitoring progress against a consolidated Programme Plan and subordinate area based plans/ schedules (including any associated critical path/ dependencies), to ensure that the programme is delivering within agreed time, quality, risk and cost requirements
- Approving any changes or exception plans
- Defining acceptable risk threshold/s, assessing and managing programme level risks and issues, specifically any rated at red/amber and ensuring mitigation plans are in place and being actively progressed. In this regard, ensuring best practice programme controls have been established and the programme is managing risks and issues that will minimise the impact on the delivery of the programme
- Agreeing a programme stakeholder engagement and communications strategy, thereby ensuring a broad stakeholder involvement into the programme
- Ensuring that appropriate assurance is performed on the programme and any associated work streams or projects

b. Accountabilities

The Programme Boards interface with the Steering Group through the SRO role who is also a member of that Group. The SRO role has overall accountability for the programme and its success by providing clear leadership and direction throughout its life, and by creating and consistently communicating the programme's Vision. In line with the SRO's overall accountability, other key responsibilities include securing investment, maintaining the interface with key stakeholders, monitoring key strategic risks facing the programme, instigating assurance and other audit reviews where necessary, and maintaining alignment of the programme with the strategic direction of both Calderdale and Kirklees Councils.

Given the SRO's high level of accountability, those selected to be Programme Board members must be able to contribute and support the programme with comparable levels of authority, commitment and ability.

The Programme Boards interface with and reports into established Calderdale and Kirklees Councils' governance arrangements, as well as other Leeds City Region Partnership (LEP)/ West Yorkshire Combined Authority governance arrangements, all of which comprise the Operating Environment. This interface is illustrated in Section 6 (Governance Arrangements – Schematic). In this respect, whilst each member of the Programme Board will be individually

accountable to the SRO role (who is also Chair of the Programme Board), individual members will nevertheless also be accountable to their respective decision making bodies that sit within the Operating Environment. That is to say, either Calderdale or Kirklees Councils, and where relevant also to the LEP/ WYCA in terms of the governance roles that Programme Board members may also have in relation to these organisations.

c. Membership – South East Calderdale illustrative tbc

Job Title	Organisation	Area of Responsibility/ Role
Assistant Director - Strategic Infrastructure	Calderdale Council	SRO/ Programme Board Joint Chair
Assistant Director – Economy, Housing & Investment	Calderdale Council	Calderdale Council officer representative
Corporate Lead Major Projects	Calderdale Council	Calderdale Council officer representative
Corporate Lead Planning	Calderdale Council	Calderdale Council officer representative
Programme Manager – Major Projects	Calderdale Council	Programme Manager
Administrative Support	Calderdale Council	Meeting administration/ minutes

d. Meeting

- i. **Frequency** – Programme Board meetings will be held as a minimum every month alternating between the Calderdale and Kirklees Council offices in Halifax and Huddersfield. Due to the interface with the Steering Group, including the upwards reporting of programme status highlights and any escalations, the timing of Programme Board meetings should be carefully co-ordinated and take place prior to Steering Group meetings. More frequent meetings of the Board may also be held from time to time depending on programme requirements at the time. The Chair (who is also the SRO) will determine when any additional meetings may occur.
- ii. **Agenda** – An agenda will be approved by the Chair (or whomever he/she delegates this to) and distributed as a minimum 3 days prior to the meeting. The standing agenda for the meeting is attached in sub-section e. below. The meeting will be minuted and actions and decisions recorded for tracking purposes. When the Chair is unable to attend the meeting, the meeting will either be re-scheduled or the Chair will nominate a deputy for that meeting.
- iii. **Quorum** – The Programme Board will be quorate when it is attended by the Chair (or his/her nominated deputy) and X members of the total membership, which must include at least X members each from Calderdale and Kirklees Councils.

- iv. **Tenure** – The role and composition of the Programme Board will be reviewed annually, or at significant events or stages in the programme lifecycle/ sponsoring organisations' governance structures.
- v. **Inputs** – The Programme Manager will produce consolidated status/ highlight reports that will be distributed as a minimum 3 days prior to the meeting along with any other papers for discussion at the meeting, including risk and issues logs, and a consolidated programme plan/ schedule. There will also be a process in place to enable any escalated issues or any other matters arising to be raised at the Programme Board for discussion. The Chair will determine what issues or matters arising will be discussed at the Programme Board meeting.
- vi. **Outputs** – The minutes, actions/ decisions of the meeting, once approved by the Chair, will be distributed to Programme Board members and stored in the programme document management system (Calderdale Council's Major Projects T:\ corporate network folder). Actions from the meetings will be allocated to named individuals and the progress and status them tracked by the Programme Manager. Action owners (or a nominated representative) will be expected to report back on the actions at the Programme Board meetings where required by the Chair.
- vii. **Openness and Confidentiality** – Through review and approval of a programme stakeholder engagement and communications strategy, the Programme Board will ensure wider involvement from the stakeholder community of the key business items being considered by the Programme Board.

For reasons of probity and commercial sensitivity, members are required to treat all documents as confidential where appropriate and lawful. The status of all documents circulated will be clearly indicated in line with established classification protocols.

e. Standing Agenda Items

Item	Content	Lead	Paper Ref	Status	Guide Time
1	Welcome and Introduction	Chair			
2	Minutes and Actions from previous Programme Board meeting	Chair	tbc	For approval	tbc
3	Matters arising/ issues	Chair	Verbal	For discussion	tbc
4	Operating Environment Update	Chair	Verbal	For information	tbc
5	South East Calderdale Highlight update	Programme Manager	tbc	For discussion	Tbc
6	Programme Controls: Risks/ issues, consolidated Programme Plan	Programme Manager	Tbc	For discussion	tbc

7	Proposed items for next Programme Board	Chair	Verbal	For approval	tbc
8	Any other business	All	Verbal	Verbal	tbc
9	Date, time/ location of next meeting	Chair	Verbal		

5. Working Groups – Terms of Reference

a. Role and Responsibilities

As well as considering any issues concerning strategic dependencies and interfaces with the programme's overarching Operating Environment, the Programme Steering Group and respective Programme Boards are concerned primarily with programme-wide aspects that cut across the geographical areas of both sponsoring local authorities.

In contrast, the primary role of each of the two Working Groups will be to operate as forums designed to consider any programme, work stream/ project or other technical issues that specifically relate to their own geographical areas of interest. In this regard, the two Working Groups are not specifically designed to function as Project Boards providing governance and decision making at a sub-programme/ project level. Working Groups will however be focused on ensuring the outputs and activities specified in the associated Projects Dossier are being proactively delivered in order that the new capabilities set out in the Programme Blue Print are achieved.

There will be a discrete Working Group covering South East Calderdale and a separate Working Group covering Kirklees areas.

Although the two Working Groups cover discrete areas within the boundaries of the sponsoring local authorities, both Groups will be required to interface with each other on a regular basis depending on programme circumstances, particularly where there are work stream issues or other project related, technical activities that require cross boundary working and consideration.

Key responsibilities of the Working Groups are likely to include the following:

- Inputting into the preparation of feasibility and any related technical studies that will inform (i) the production of a Programme Blue Print/ Target Operating Model that clearly described the new capabilities to be achieved by the programme, and related outcomes and benefits, and (ii) the production of an associated Projects Dossier setting out key programme outputs/ projects
- Commissioning and monitoring the delivery of new projects to ensure alignment with the outputs specified in the Projects Dossier and associated Programme Plan/ schedules (including any interdependencies/ impacts on critical path)
- Reviewing any existing projects/ activities to ensure they are fully aligned with the emergent programme
- Monitoring project delivery and closure, ensuring projects deliver the capability in alignment with stated benefits and the dependencies with other projects

- Co-ordinating lessons learned exercises and ensuring lessons are disseminated across the programme at regular intervals/ programme stages
- Identifying potential new funding sources, co-ordinating the preparation and submission of funding bids, and monitoring the delivery of any successful bids against spending targets/ agreed outputs/ milestones
- Monitoring any risks and issues that impact the programme in respect of agreed or emerging projects, and ensuring effective management plans are in place
- Identifying and reporting upwards any project related exceptions (cost, resources, funding, quality, time, scope and benefits)
- Communicating and maintaining the engagement of stakeholders, ensuring their involvement where necessary and keeping them informed of progress and issues

b. Accountabilities

Although the two Working Groups cover discrete geographical areas in South East Calderdale and Kirklees, both will be required to interface with each other on a regular basis depending on programme circumstances; particularly where there are work stream issues or other project related, technical activities that require cross boundary working and consideration.

The Working Groups interface with the Programme Board where specific outputs will be presented for discussion, action or decision. Similarly, issues or risks identified by Working Groups may from time to time also be required to be escalated to the Board.

Depending on future circumstances, Working Groups may also consider it necessary that any specific (and subordinate) project groups should also be set up. If so, it is expected that the activities of any such project groups will be required to report upwards into the programme, initially at the Working Group level, in order that activities can be monitored in line with the Working Group key responsibilities outlined earlier.

c. Membership – tbc

South East Calderdale Working Group

Job Title	Organisation	Area of Responsibility/ Role

Kirklees Working Group - tbc

Job Title	Organisation	Area of Responsibility/ Role

d. Meeting

- i. **Frequency** – Working Group meetings will be held as a minimum every two weeks. Due to the interface with the Programme Board, including the upwards reporting of programme status highlights and any escalations, the timing of Working Group meetings should be co-ordinated to take place prior to Programme Board meetings. More frequent Working Group meetings may also be required depending on programme and project circumstances. The frequency and timing of these meetings will be at the discretion of the Chair of each of the Working Groups.
- ii. **Agenda** – An agenda will be approved by the Chair (or whomever he/she delegates this to) and distributed prior to the meeting. However, in order to avoid unduly restricting discussions at each of the Working Groups given the varying circumstances and broad range of issues and projects in each of the local authority areas, a standing agenda is not currently proposed for the meeting. Actions and decisions will nevertheless be recorded for monitoring, tracking and auditing purposes. When the Chair is unable to attend the meeting, the meeting will either be re-scheduled or preferably the Chair will nominate a deputy for that meeting.
- iii. **Quorum** – not applicable.
- iv. **Tenure** – The role of the Working Groups will be reviewed annually, or at significant events or stages in the programme lifecycle/ sponsoring organisations’ governance structures to ensure it remains fit for purpose. The composition of the two Working Groups will vary reflecting the differing circumstances between the two local authority areas and also the nature of issues and projects being delivered at any one time in the programme lifecycle.
- v. **Inputs** – The Chair, in consultation with the Programme Manager, will determine what issues and projects will be discussed at the Working Group meeting. As a minimum and in line with the key responsibilities of the Working Group, updates will be required with regard to alignment with the programme plan/ schedule, and any project level risks and issues that are impacting on the programme. Any other papers or documents required for discussion at the meeting will be agreed by the Chair in advance.
- vi. **Outputs** – The actions/ decisions of the Working Group meeting, once approved by the Chair, will be distributed to Working Group members and stored in the programme document management system (Calderdale Council’s Major Projects T:\ corporate network folder). Actions from the meetings will be allocated to named individuals and the progress and status then tracked by the Programme Manager. Action owners (or a nominated representative) will be expected to report back on the actions at subsequent Working Group meetings with a clear expectation that progress has been made to close out the action. Programme highlight/ status reports will be prepared and programme level risk and issues logs updated by the Programme Manager following Working Group meetings for upwards reporting to Programme Board in line with the meeting schedule.

vii. **Openness and Confidentiality** – For reasons of probity and commercial sensitivity, Working Group members are required to treat all documents as confidential where appropriate and lawful. The status of all documents circulated will be clearly indicated in line with established classification protocols.

e. **Standing Agenda Items** – not applicable

6. Governance Arrangements - Schematic

The schematic diagram below illustrates the key working and decision making fora to support the programme.

Governance arrangements have been grouped into two interfacing domains:

- The Operating Environment – typically associated with strategic decision making and approvals, this is where the Programme interfaces with and reports into established Calderdale and Kirklees Councils' governance arrangements, and other Leeds City Region (LCR) Partnership/ West Yorkshire Combined Authority governance arrangements
- The Calderdale and Kirklees Regional Spatial Priority Area (RSPA) Programme – where the governance arrangements are dedicated to supporting the delivery of the Programme

a. The Operating Environment

The Operating Environment domain comprises three interfacing elements: Calderdale Council, Kirklees Council and Leeds City Region Enterprise Partnership/ West Yorkshire Combined Authority functions.

- (i) *Calderdale and Kirklees Councils* – are the programme's sponsoring bodies and are ultimately accountable for the delivery and direction of the Calderdale and Kirklees Regional Spatial Priority Area Programme.
- (ii) *Leeds City Region Enterprise Partnership (LEP)* – is the enabling strategic partner with the overall aim of transforming the City Region by supporting growing businesses, developing a skilled workforce, increasing energy efficiency and improving infrastructure within the City Region. The LEP's Infrastructure Investment Framework is a key driver for the championing and establishment of a Calderdale and Kirklees Regional Spatial Priority Area as a focus for prioritising investment to maximise economic, housing and regeneration potential.

West Yorkshire Combined Authority (WYCA) – is the accountable body for the LEP and representing all City Region authorities. It ensures the focused delivery of the LEP's Strategic Economic Plan (SEP) and Growth Deal investment.

b. The Calderdale and Kirklees Regional Spatial Priority Area (RSPA) Programme

The Calderdale and Kirklees RSPA Programme related domain comprises two interfacing elements: programme governance and, programme and project management.

- (i) *Programme Governance* – High level programme direction, decision making and assurance functions ensuring the Programme delivers to time, cost and quality. Accountable to the Senior Responsible Officer (SRO) role, this element incorporates the overarching Programme Steering Group and subordinate Programme Board with prime responsibilities for driving the programme forward and ensuring its delivery within agreed programme boundaries.
- (ii) *Programme and Project Management* – Responsible for the delivery of component programme workstreams, projects and other technical activities, and ensuring all projects are delivered to agreed time, cost, quality and scope. This element incorporates two interfacing Working Groups (separately covering South East Calderdale and Kirklees). If required, subordinate project level groups may also be set up that report into the Working Groups.

c. Programme Assurance

Cutting across both the Operating Environment and Programme Environment domains, a number of bodies, groups and teams currently exist that are independent from the programme and which could potentially provide assurance level functions. Some or all of these may be used for example, at key stages in the programme lifecycle, at major decision points or focused on areas of greatest risk, to assure whether the correct standards, processes and procedures, quality and fit for purpose solutions are being achieved by the programme. It is anticipated that the SRO will consult with the Steering Group on the correct approach to programme assurance and ensure that an adequate assurance regime is in place.

The schematic diagram below illustrates some of the assurance functions that currently exist.

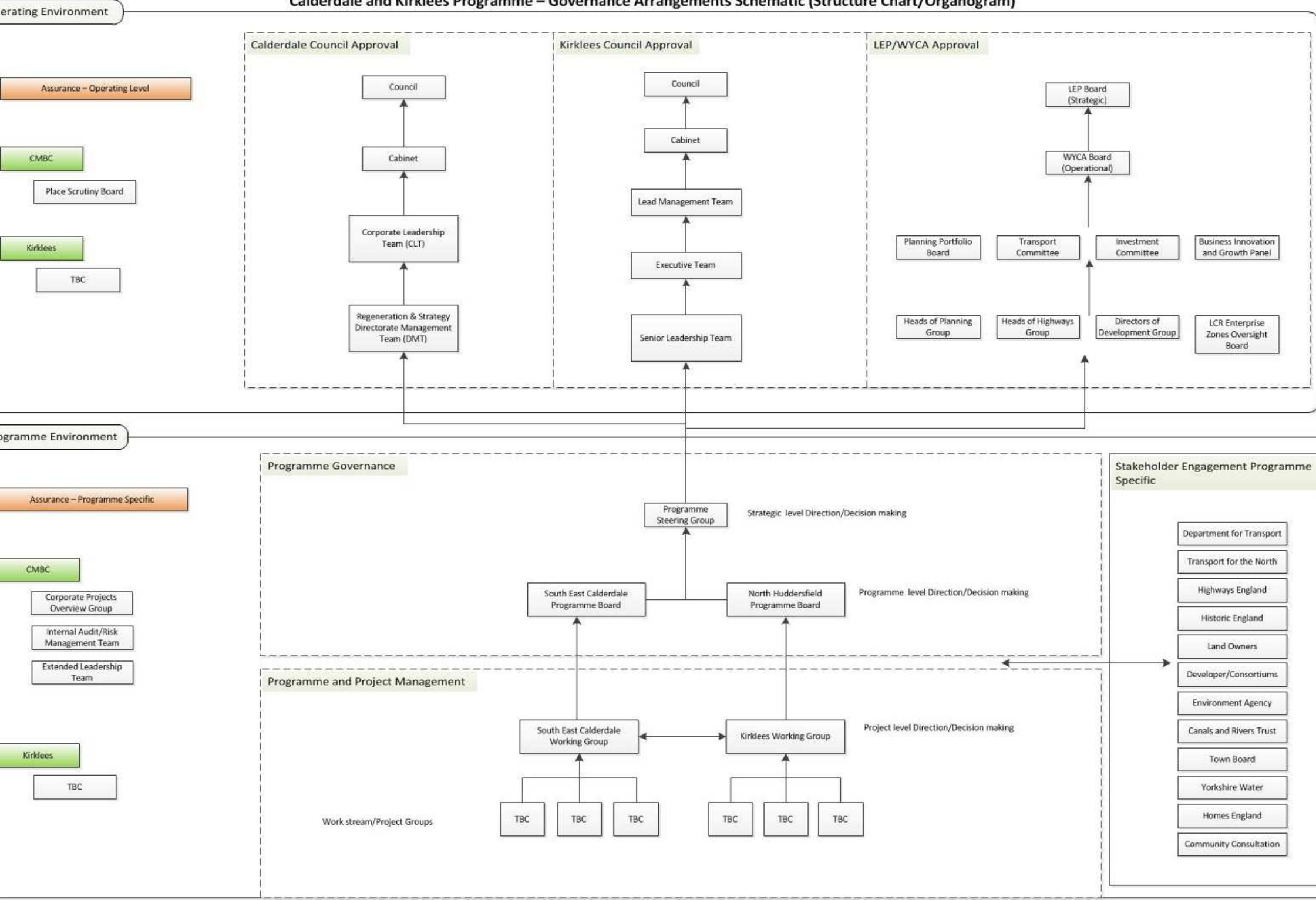
d. Stakeholder Engagement

Amongst others, key external stakeholders will include Historic England and Highways England. Major landowners and developers/ consortiums are also expected to be included within this element. Other key stakeholders will be identified by the Programme.

The nature and frequency of meetings and other fora for engaging stakeholders will be refined in due course as part of the development of a programme level Stakeholder Engagement and Communications Management Strategy. In the meantime, existing meeting arrangements will continue to be used and will be informed by amongst others, the Calderdale 'Next Chapter' communications plan and brand.

Governance Structure Schematic – the structure illustrates programme governance arrangements

Calderdale and Kirklees Programme – Governance Arrangements Schematic (Structure Chart/Organogram)



South East Calderdale & Kirklees Master Plan Framework – Brief (Draft)

A Master Plan is required for the full area encompassed by the South East Calderdale/ Kirklees J24a Garden Community Corridor (Regional Spatial Priority Area) proposal.

The masterplan will be crucial in achieving the vision and objectives for the garden community corridor. It will ensure the co-ordination of development, the timely delivery of supporting infrastructure and good quality, forward looking standards of design. It will form the basis of subsequent outline planning applications for the new settlements and if necessary site assembly. The Framework will assist in the development of new neighbourhoods that are successful and popular, and offer residents and businesses a good quality of life. Crucially, the Master Plan Framework will provide certainty and clarity to local; communities, landowners and developers. In order to achieve this, a three dimensional plan is required setting out the aspirations for the development of the garden communities in some detail. It will not be required to include building designs except where it is necessary to indicate concepts or particular design solutions.

The Master Plan Framework will be an important strategic plan that will need to have the full support from landowners, stakeholders and the Councils. The Master Plan Framework will comprehensively review, bring together and develop our concept master plans and other infrastructure and associated project work streams that are currently being progressed. This 'single lens' approach will not only inform the scope and details of our overall Programme but will strengthen existing project synergies and dependencies, whilst identifying any new important opportunities.

In order to achieve support and give the masterplan status it is anticipated that it will be guided by stakeholder and public consultation at two stages:

- Initial consultation setting out the vision and objectives, constraints and opportunities
- Consultation on the draft masterplan

The consultation will be managed by the master planning consultant with assistance from staff of the two local authorities. The masterplan will also be required to be adopted by both Calderdale and Kirklees Councils. The necessary reports will be prepared by staff from each Council but the consultant may be expected to provide support in the form of presentations etc.

It is anticipated that the work on the Masterplan Framework will be facilitated by existing programme resources within Calderdale and Kirklees Council, together with specialist support provided by Homes England, working closely with our major landowners and their developer consortium/s where these exist.

Key components of the Masterplan Framework are likely to be:

- Introduction (purpose and status of the Masterplan Framework, the process undertaken and who has been involved in its preparation)
- Baseline Review/Understanding the Place (synthesis of site constraints and opportunities)

- Assessment of the housing needs and housing market of the area including the need for affordable housing
- Design Evolution (testing and evolution of design proposals)
- Constraints, Opportunities and Infrastructure This chapter will set out the existing constraints on development and the location of existing and proposed infrastructure e.g. existing utilities and drainage routes. It will use this information to develop the arrangements for access into the development areas and the basic development blocks.
- Movement Framework. This will set out the street network incorporating current proposals for new motorway junctions and strategic routes. This will set out the basic functions of access routes within the development areas including routes/street hierarchy, role and function of routes and design principles. It should also indicate public transport routes and stops serving the development. The aim should be to produce walkable neighbourhoods that also provide connections to facilities in nearby settlements
- Land Use Plan This will set out the disposition, quantity and mix of uses and facilities across the sites (including capacity plans for housing areas indicating preferred housing densities). It will also indicate location and quantities of affordable housing, self and custom build housing and specialist housing.
- Blue Green Space Framework – This will provide further details on the disposition, role and function of open spaces, space typology, design and landscape principles, blue green corridors, SUDS areas and interfaces with the strategic drainage and flood mitigation network.
- Sustainability Strategy This will indicate approaches to environmental standards, solar design, heat networks, renewable energy, low carbon initiatives, sustainable transport, local food growing and water conservation to be built into the development.
- Urban Design Principles This will set out key principles for creating legible and permeable development (for example, the location of potential landmarks, gateways, focal points, edges, views and vistas to be protected). It will also address the principles for development affecting the setting of listed buildings on the sites.
- Strategic Design Code The Strategic Design Code will apply the principles set out in the Urban Design Principles to provide 3-dimensional guidance for each component of the development down to the scale of the development block but not the plots themselves (although the masterplan may indicate where it would be advantageous to include smaller or larger grain development). The code will establish the how the character and sense of place of individual garden suburbs and neighbourhoods within them will be

created This will include guidance for the key place-making elements, for example;

- Maximum and minimum heights,
- Scale and massing of development
- Building lines.
- Street and public realm design and parking standards
- Treatment of the settings of listed buildings
- Minimum internal sizes and servicing requirements for housing
- How the blocks of development will relate to the proposed green spaces, green routes and movement network.

The Masterplan Framework will form the 'regulating plan' for the coding of specific strategic design components. This will largely focus on the key place-making and unifying elements that will support the building of a connected, coherent but distinctive place. This will ensure that individual planning applications come together to achieve the wider vision.

- Delivery Plan This should set out a critical path for how development will be implemented including an infrastructure delivery plan based on an updated site-wide viability appraisal. It will confirm the infrastructure requirements, their costs and sets out how the required infrastructure can realistically be financed and delivered, including engaging with potential public sector funding sponsors.
- Site-Wide Financial Appraisal This will be an appraisal of the financial viability of the proposal to demonstrate that the proposed development and infrastructure requirements remain deliverable and, where a viability gap may exist, to indicate alternative funding sources. This appraisal will inform decision-making by Calderdale and Kirklees Council in relation to future potential such as the ability to pool financial contributions to specific infrastructure types and projects under CIL regulations, or in relation to future potential s106 obligations, for example. The appraisal will serve the following objectives:
 - Assess the financial viability of each individual land ownership parcels for the proposed use, taking into account the existing land value and the projected value of the development as set out in the masterplan. This will include assessment of all the development costs and reasonable profit return together with likely S106 and CIL requirements.
 - Highlight any viability gap if one exists and the factors contributing to this and;
 - Test alternative scenarios to reduce the viability gap and improve viability;
 - Identify savings and alternative sources of funding to be explored to work towards meeting any gap in financial viability.

The Masterplan Framework will need to ensure that our Vision, Outcomes and Place-making Objectives are clearly translated into the development. Future development proposals will be assessed against these Objectives to ensure they contribute to a high standard of development for a whole place transformation.

Response to Pre-Hearing Note 1

Appendix 1.4

4	Can the Council explain the basis of the local housing need figure of 840 dwellings per annum, and how this was calculated? Detailed workings should be provided as part of this response.
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1.4.1 The Council has used the new Standard Methodology for the identification of Local Housing Needs introduced by the Government. This makes use of the Household Projections released by the Office of National Statistics and the Affordability Ratio

HOUSEHOLD PROJECTIONS:

1.4.2 <https://www.gov.uk/government/collections/household-projections> Live Tables No 406

PROJECTED HOUSEHOLD FIGURES FOR CALDERDALE: 2014 and 2016 Based Projections

	2014	2016	2021	2026	2031	2033	2036
2014	91,074	92,634	96,707	100,509	103,979	105,238	107,027
2016*	90,303	91,533	94,754	97,276	99,552	100,415	101,636

* The 2016 Based Projections have been withdrawn by the Government.

1.4.3 The Government have established a standard methodology for assessing Local Housing needs to form the basis of Local Plan preparation. This is based on the use of the ONS Sub-National Household Projections 2014 Based released in 2016, which is then amended by the use of an affordability factor determined in accordance with the standard methodology .

AFFORDABILITY RATIOS:

1.4.4(<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoworkplacebasedearningslowerquartileandmedian> Table 5c)

Note regarding the Affordability Ratios

1.4.5 The Affordability Ratio used for the LHN in the Publication Local Plan is **5.07** as found in February 2018. Please note this figure is no longer to be found in the live Tables published on line. This was queried with ONS in February 2019 and their response is set out below.

From: Better Info [<mailto:Better.Info@ons.gov.uk>]

Sent: 15 February 2019 14:04

Subject: RE: Ratio of house price to workplace-based earnings (lower quartile and median)
The affordability dataset you are using is updated once a year, and as well as adding an extra years data point the back-series can also change slightly following revisions to the underlying data.

The previously published affordability data (released in 2017) had a 2016 ratio in Calderdale of 5.07. This is in-between the 2016 and 2017 figures for Calderdale in the latest release, which you attached to your query. I think this is probably the figure that your colleague used? - You can find this previous version through the dataset download page

(<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoworkplacebasedearningslowerquartileandmedian/current>) by clicking on the 'previous versions' link at the bottom of the page.

So I suspect this is a version issue rather than a rounding issue, but if you wanted to check the rounding the data the affordability figure is derived from are published alongside the ratio (data in sheets 5a and 5b were used to derive the ratio in sheet 5c) – so you could use these to calculate an unrounded figure to test your theory.

For information, in case it is of interest, the affordability data are due for their annual update on 28th March this year, which will introduce a 2018 figure and potentially revise figures for 2017 and 2016.

I hope this helps?

Kind Regards

Housing Analysis Team, Public Policy Analysis Directorate

Office for National Statistics | Swyddfa Ystadegau Gwladol

STANDARD METHODOLOGY FOR CALCULATING LOCAL HOUSING NEEDS FOR LOCAL PLANS

1.4.6 Setting the Baseline:

1. 10 consecutive years... current year being yr 1: average projected growth in households;
2. Use Median workplace-based affordability ratios;

$$\text{Adjustment Factor} = \frac{(\text{Local Affordability ratio} - 4)}{4} \times 0.25$$

4

3. Calculation:

$$\text{Minimum Annual Local Housing need} = (1 + \text{adjustment factor}) \times \text{projected housing growth}$$

Table 1 below shows how the calculation for the Local Housing Needs (LHN) using the Standard Methodology works through for Calderdale.

The data is the 2014 Based ONS Household Projections released in 2016 and the Median Workplace Based Affordability Ratio from 2016.

WORKED EQUATION

- 1.4.7 Working through the Calculation derives the 840 dwellings per year used within the Publication Calderdale Local Plan as shown below. It is these figures that the Inspector has asked to be verified.

TABLE 1: STANDARD METHODOLOGY AS ESTABLISHED FOR THE PUBLICATION/SUBMISSION LOCAL PLAN

	Households – 2014 Based Published 2016	Calculations
2016	92,634	7,875 growth. Giving annual average of 787
2026	100,509	
Affordability Ratio		5.07 = 2016 (Please see Note Above)
	7,875 / 10 yrs = 787	5.07-4 = 1.07/4 = 0.2675 x 0.25 = 0.066875
		Minimum Annual Figure: 1 + 0.066875 x 787 = 840 (839.63) Overall Requirement = 15 x 840 = 12,600

1.4.8 Table 2 reassesses the Local Housing Needs against the amended Affordability Ratio for 2017 released in March 2018. This was not taken into account in the Council’s working of the new Standard Methodology.

Table 2: Standard Methodology as Established for the Publication/Submission Local Plan using the 2017 Affordability Ratio

	Households – 2014 Based Published 2016	Calculations
2016	92,634	7,875 growth. Giving annual average of 787
2026	100,509	
Affordability Ratio 2017		5.01 = 2017 (Please see Note Above)
	$7,875 / 10 \text{ yrs} = 787$	$5.01 - 4 = 1.01 / 4 = 0.2525 \times 0.25 = 0.63125$
		Minimum Annual Figure: $1 + 0.063125 \times 787 = \mathbf{837}$ Overall Requirement = $15 \times 837 = \mathbf{12,555}$

1.4.9 Table 3 considers the effect of the updated Affordability Ratio available for 2016, verifiable from the Tables available through the links above.

Table 3: Standard Methodology as Established for the Publication/Submission Local Plan using the 2016 Affordability Ratio as stated in the Live Tables.

	Households – 2014 Based Published 2016	Calculations
2016	92,634	7,875 growth. Giving annual average of 787
2026	100,509	
Affordability Ratio 2016 from Live Tables		5.14 = 2016 (Please see Note Above)
	$7,875 / 10 \text{ yrs} = 787$	$5.14 - 4 = 1.14 / 4 = 0.285 \times 0.25 = 0.7125$
		Minimum Annual Figure: $1 + 0.07125 \times 787 = \mathbf{843}$ Overall Requirement = $15 \times 837 = \mathbf{12,646}$

THE WITHDRAWN HOUSEHOLD PROJECTIONS 2018 (2016 BASED)

1.4.10 Table 4 provides information relating to the use of the 2016 Based Household Projections which have been withdrawn by the Government. No account of these figures have been taken in the preparation of the Publication Local Plan.

(This table is on the next page)

Table 4: Standard Methodology as Established using the 2016 Based Household Projections

	<i>Households – 2016 Based Published 2018 – since withdrawn</i>	<i>Calculations</i>
2016	91,533	5,743 Growth
2026	97,276	Giving annual average of 574
Affordability Ratio 2017		5.01 = 2017
	5,743 Growth = 574	$5.01 - 4 = 1.01 / 4 = 0.2525 \times 0.25 = 0.063125$
		Minimum Annual Figure: $1 + 0.063125 \times 574 = \mathbf{610}$ Overall Requirement = $15 \times 610 = \mathbf{9,150}$

Response to Pre-Hearing Note 1

Appendix 1.5

5	Can the Council confirm why it has elected to use the standard method to determine local housing need, rather than objectively assessed needs identified in the Strategic Housing Market Assessment (SHMA) 2018?
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1.5.1 The chronology of events is important in the context of question 5. The Council had been progressing the Local Plan on the basis of the Objectively Assessed Needs (OAN) identified through a Strategic Housing Market Assessment (SHMA) required by NPPF 2012 and supporting Planning Practice Guidance. The outcomes of this approach increased housing requirements from those established within the Replacement Calderdale Unitary Development Plan (RCUDP) 2006) and the Regional Strategy for Yorkshire and the Humber (revoked in 2013) as may be seen in the Table below). The 2015 SHMA (EV35) (used ONS 2012 Based statistics released in 2014) recommended that 946 be used as the annual housing requirement.

1.5.2 The initial Draft of the CLP (2017) used the SHMA 2015 recommended requirement of 946 dwellings per annum. Taking account of undersupply (from 2012 to 2016), this gave a housing requirement of 18,920 over the plan period to the plan period 2017 to 2032, which was 1,261 dwellings per year. Taking account of net completions and permissions the number of dwellings required to be allocated was 13,286, equating to 886 dwellings per year.

1.5.3 The SHMA 2018 (EV36) reworked the 2015 SHMA to take account of the 2014 Based ONS Household Statistics released in 2016). It recommended 1,001 additional dwellings per year to be the appropriate figure. It was received after the Council agreed to make use of the Standard Methodology on 12th February 2018 (See the Cabinet Report and Minutes attached at the end of this response and also in the Examination Library as BP01). The 2018 SHMA update (received in May 2018) therefore has had a limited effect on the Publication Local Plan.

Table of Housing requirements for Calderdale expressed in different Plans and Documents

Document	Overall Total	Annual Requirement
RCUDP: 2006	6,750 (15yrs)	450
Y&H RSS: 2008	14,060 (22yrs)	500 (4yrs) 670 (18yrs)
SHMA: 2015	14,190 (15yrs) OAN	946

Document	Overall Total	Annual Requirement
SHMA: 2018	15,015 (15yrs) OAN	1,001
Standard Methodology used in Publication Local Plan using 2016 Affordability factor	12,600 (15yrs) LHN	840
Standard Methodology used in Publication Local Plan using 2017 Affordability Factor)	12,555 (15yrs) LHN	837
Standard Methodology used using 2017 Affordability Factor	12,636	843
<i>Standard Methodology – using withdrawn ONS Household Projections</i>	<i>9,150 (15yrs) LHN</i>	<i>610</i>

1.5.4 From the above Table it can be seen that there is a wide range of possible futures derived from the housing statistics that have been identified over the years. The range of figures and the Council’s response to this uncertainty implied by the large range led to significant tensions particularly regarding the ability of the district to accommodate the identified requirements in a sustainable manner. These tensions were only resolved when the Government indicated the introduction of the Standard Methodology to assess housing requirements, called Local Housing Needs(LHNs).

1.5.5 The Government signalled their intention to move to a standard methodology for the calculation of LHNs in the Housing White Paper and consultation in 2017. The Government’s consultation was at the same time as consultation was being undertaken on the Initial Draft of the CLP. The Council were aware of the changing national direction of planning policy and also the tensions that were inherent in the OAN process with its ever increasing housing needs. In late 2017/early 2018 the Council was anxious to progress to publication of the Plan, in face of potential intervention from the Secretary of State and an uncertain and evolving national policy context. In order to provide the certainty required to finalise the Plan for publication, it was necessary for us to take a formal decision that would structure the approach going forward.

1.5.6 The Council’s Cabinet therefore considered various options on 12th February 2018. (The Cabinet Report is included in the Examination Library as Background Paper BP 01). Cabinet resolved to set our housing requirements in accordance with what was then emerging national planning policy. (The Resolution of Cabinet is included in the Examination

Library as Background Paper BP 02). This reflected our wish to align ourselves with the Government's direction of travel and also took on board the fact that Calderdale's urban areas are tightly constrained by Green Belt and the district also has physical constraints which limit the ability of the area to accommodate new development in a sustainable manner.

- 1.5.7 In all other respects we continued to prepare the Plan in accordance with NPPF 2012 because the Draft text for consultation was not published until March 2018, followed by the final Revised NPPF with its transitional arrangements in July 2018. The publication of the Revised NPPF did not therefore occur until after the Council took the formal decision in June 2018 to publish the Plan in August of that year.
- 1.5.8 We carefully considered the merits of submitting before or after 24 January, and concluded that delaying submission presented more policy tensions on account of the fact that the greater part of the Plan had been predicated on the NPPF 2012. Re-working the Plan as a whole to bring it in line with NPPF 2018 would have been a sizeable task, requiring further political governance and consultation, and as such it would have taken us outside the timeframe for submission stated in our LDS, which was itself updated and approved by the Council following the threat of intervention at the end of 2017.
- 1.5.9 It has also been noted by the Council that the transitional arrangements in the Revised NPPF differed from the Draft text for consultation. In this respect paragraph 209 of the Draft text stated that:

"The policies in the previous Framework will apply for the purpose of examining plans, where those plans are submitted on or before [] [this will be the date which is six months after the date of the final Framework's publication]. In these cases the examination will take no account of the new Framework." [our underlining]

Whereas paragraph 214 of the Revised text states that:

"The policies in the previous Framework will apply for the purpose of examining plans, where those plans are submitted on or before 24 January 2019. Where such plans are withdrawn or otherwise do not proceed to become part of the development plan, the policies contained in this Framework will apply to any subsequent plan produced for the area concerned."

- 1.5.10 The deletion of the explicit statement that no account will be taken of the new NPPF appeared to the Council to signal the opportunity to take a more realistic and practical approach to reconciling the issues. In relation to this whilst, there obviously needed to be transitional arrangements, there can be no logical reason why an approach to housing

requirements based on new government policy should be inherently unsound just because the Plan was submitted before rather than after 24 January 2019.

1.5.11 This is particularly the case because the Plan embodies a very thorough approach to housing requirements and allocations, reflecting long analysis of supply, demand, household generation and affordability data together with extensive local knowledge of the Borough and its potential to accommodate development.

1.5.12 Indeed, the latest 2016 based ONS household projections (now withdrawn) only serve to demonstrate the volatility of a purely mechanistic approach. Whilst acknowledging that these projections should not be used to justify a lower housing requirement, they do add weight to the pragmatic approach that incorporates local knowledge and experience that the Council has employed.

1.5.13 The Council fully appreciates that, as with all Local Plans, there are, naturally, competing policy tensions; however, we believe that our Plan is both ambitious and transformational greatly increasing the requirement established by the Plan over those of the former RCUDP (2006) or the Regional Strategy (2008), with which it previously had to be in conformity. The Council is cognisant of significant Green Belt constraints, the existence of the internationally protected wildlife habitats, severe flood risks and highways capacity issues which constrain development options. It is therefore the Council's position that a housing requirement predicated on the SHMA (2018) would have increased the tensions, making it more difficult to accommodate the housing requirements.

Response to Pre-Hearing Note 1

Appendix 1.6

6	Can the Council confirm when housing and employment monitoring data for 2018/19 is due to be published, and how it intends to deal with this during the examination process?
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- 1.6.1 Housing and employment monitoring data for the previous financial year is normally published in December as part of the Authority's Monitoring Report (AMR). Whilst this has not always been achieved in recent years due to other work priorities, it remains the Council's intention to continue with the existing format and timetable.
- 1.6.2 The AMR for 2018/19 will be released when it is available and will be placed into the Examination Library and the Inspector informed.
- 1.6.3 The Council is not intending to rework the strategic sources of housing and employment land supply during the examination process as a result of the AMR process. This will form part of the annual monitoring of the Plan once adopted.

Response to Pre-Hearing Note 1

Appendix 1.7

7	<p>Can the Council confirm how the employment-based housing need of 1001 dwellings in the SHMA 2018 was derived (as set out in chapter 5 and table 5.3)?</p> <p><i>[the response should include detailed workings of how the Experian baseline jobs growth figure of 9,430 (496 jobs per year) was used to identify a housing need figure of 1001 dwellings. This should confirm the demographic scenario used.]</i></p>
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1.7.1 The Council has commissioned Turley (who undertook the SHMA 2015 and 2018) to provide the response to this question. Their response is the Annex to this Appendix.

Technical Briefing Note

Inspector's Question: Employment-led scenario

March 2019

Introduction

1. This briefing note has been prepared for Calderdale Council to assist them in drafting a response to a question posed by the Inspector with regards the 2018 SHMA, which Turley prepared, in advance of the Local Plan Examination in Public (EiP).
2. The question posed by the Inspector is set out below:

Can the Council confirm how the employment-based housing need of 1,001 dwellings in the SHMA 2018 was derived (as set out in chapter 5 and table 5.3)?

[the response should include detailed workings of how the Experian baseline jobs growth figure of 9,430 (496 jobs per year) was used to identify a housing need figure of 1,001 dwellings. This should confirm the demographic scenario used.]

Answer

3. In accordance with relevant Planning Practice Guidance (PPG), the 2018 SHMA considered the potential implications of likely employment trends in Calderdale on the need for housing¹.
4. In order to understand the future relationship between growing employment and changing demographics, the 2018 SHMA drew upon modelling prepared by Edge Analytics using the POPGROUP suite of software². POPGROUP is a recognised forecasting product which incorporates an industry-standard methodology (a cohort component model) and has been widely used in the preparation of Local Plan housing need evidence by Councils across England. This includes numerous Local Plans which have been found sound and subsequently adopted under the 2012 NPPF.
5. This use of the POPGROUP suite of software in this manner was consistent with both the 2015 SHMA and 2008 SHMA, albeit input modelling assumptions were varied to ensure they reflected up-to-demographic and labour-force datasets.
6. All of the POPGROUP scenarios presented in the 2018 SHMA were underpinned by the 2014-based sub-national population projections (SNPP) and the 2014-based household projections. These datasets represented the most up-to-date official demographic projections at the time, and were treated as the 'starting point' in line with the relevant PPG. It is of note that despite the subsequent publication of the 2016-based datasets, the Government has retained the use of the

¹¹ PPG Reference ID 2a-018-20140306

² A full technical explanation of the POPGROUP suite of software and the methodology it uses to produce demographic and labour-force forecasts is included at Appendix 1 of the 2018 SHMA Update. This technical appendix also includes full details on the input assumptions used for the specific employment scenario referenced in the Inspector's question as well as the other scenarios used in the report to underpin the analysis of Calderdale's housing OAN.

2014-based projections within the revised PPG for the purposes of calculating local housing need in the context of the new standard method³.

7. The employment scenario referenced in the Inspector's question was presented to illustrate the scale of population growth that was likely to be required to support a forecast growth of 9,430 jobs over the period from 2016 to 2035⁴. The associated household formation, and subsequent housing need, generated through such a level of population growth was also determined.
8. The employment forecast from which this level of job growth was extracted was sourced by the Council from the West Yorkshire Combined Authority (WYCA) in 2018. The forecast represented the latest iteration of the Regional Economic Model (REM) which has consistently been used by the West Yorkshire authorities as a tool to inform Local Plan and Economic Strategy development for a number of years. As referenced in the 2018 SHMA, the REM is prepared by Experian, one of three economic forecasting houses in the UK that are widely used for the purpose of procuring long-term economic forecasts⁵. The REM is a bespoke forecast, intended to draw upon Experian's respected national and regional forecasts while taking account of local economic information. As the 2018 SHMA referenced, the same forecast was also being used as part of the analysis within the Employment Land Study (ELS) which was being prepared simultaneously. Its then-emerging findings indicated that the REM represented an appropriate baseline forecast of employment growth⁶.
9. In modelling the impact of employment growth on the demographic projection for Calderdale, the POPGROUP model determines the growth in population likely to be required to satisfy the growth in job numbers on an annual basis by matching the available labour-force to jobs.
10. This requires forward assumptions to be made around labour-force behaviours of people in Calderdale. As set out within the 2018 SHMA⁷, assumptions are specifically required with regards to four labour-force behaviours that collectively determine the changing size of the labour-force related to a demographic projection; economic activity rates, commuting ratios, unemployment rates and the rate of "double jobbing" (whereby one person is recognised as being able to have more than one job).
11. For clarity and transparency, the 2018 SHMA set out the assumptions applied for each of these labour-force factors at paragraph 5.7, with additional technical detail included at Appendix 1 to the report. Explanation was provided for each where new data had led to changes to the assumption applied from that used in the 2015 SHMA to assist in enabling comparison with the forecasting outputs. For reference and simplicity, the explanations for each are replicated below:
 - **Unemployment** is assumed to remain fixed at the rate (4.4%) recorded in Calderdale in 2016, which is lower than the pre-recession average (4.6%; 2004 – 2007) following a

³ PPG Reference ID: 2a-005-20190220

⁴ This was referred to as the 'baseline' forecast of job growth in the 2018 SHMA and is shown at Table 5.2.

⁵ The others most commonly referenced being Oxford Economics and Cambridge Econometrics

⁶ 2018 SHMA Update, paragraph 5.11. Paragraphs 5.13 and 5.14 also reference that the iteration of the REM used had included a 'correction' to account for an error in the historic employment datasets which had not been picked up in earlier iterations of the forecast, including those used in the 2015 SHMA. It is of note that the employment forecast figures drawn from the REM in the Employment Land Study (2018) are presented over a different time period (2016 -2032) and are presented as full-time-equivalent (FTE) jobs rather than the total employment figures used within the 2018 SHMA.

⁷ Paragraph 5.7

marked recent reduction. This improving position had yet to materialise when the modelling produced to inform the 2015 SHMA was prepared, and a more cautious approach was therefore adopted in allowing for a gradual recovery from recessionary trend⁸;

- **Economic activity** rates amongst Calderdale residents aged 16 to 89 are initially derived from the 2011 Census, and are thereafter assumed to change in line with the latest national forecasts produced by the Office for Budget Responsibility⁹ (OBR). The 2015 SHMA largely held economic activity rates constant at the rate recorded by the Census, but applied some modifications for those aged 60 to 69 to take account of planned changes to the state pension age. The use of OBR rates has since been accepted by a number of Local Plan and S78 Inspectors¹⁰ and therefore captures the impacts of wider changes anticipated across the working age population;
- **Double jobbing** allows for a fixed proportion of employed people to occupy more than one job, based on the long-term average recorded over ten years in Calderdale by the Annual Population Survey¹¹. This recognises the changing nature of work and the national rise in the proportion of people occupying more than one job, but was not taken into account in the 2015 SHMA; and
- **Commuting** has been held fixed at the rate recorded in Calderdale by the 2011 Census, consistent with the approach taken in the 2015 SHMA. This has been widely considered appropriate in establishing the OAN, given that the PPG states that policy factors should not be taken into account.

12. The POPGROUP model therefore calculates the size of the population required each year to support the input assumption of jobs created over the preceding year as set by the REM. The POPGROUP model assumes that such “gaps” in the labour force are reconciled through higher levels of net migration, which provide the required number of residents of working age on the basis that they are attracted to or retained within the borough¹².
13. The scenario therefore uses age-specific assumptions around fertility and mortality rates from the 2014-based SNPP, as well as projected counts of international migration, but calculates its own internal migration assumption (i.e. inflows and outflows of people of different ages) from the base year of 2016. A higher level of net internal migration will occur if there is insufficient population and resident labour-force in the model in a given year to meet the forecast change in employment. The age profile of internal migrants is derived from the 2014-based SNPP.
14. As shown at Table 5.3 (as referenced in the question and replicated below), the model calculates that in order to support an increase of 9,430 jobs, the population in Calderdale would need to

⁸ The average unemployment rate recorded in Calderdale during the recession (7.8%; 2008 – 2012) was assumed to gradually recover to the nine year average of 6.2% (2004 – 2012) by 2018, remaining fixed at this level thereafter

⁹ OBR (2017) Fiscal Sustainability Report

¹⁰ The use of OBR economic activity rates in preference to the rates applied by individual forecasting houses was recently supported by an Inspector in a S78 Inquiry. Specific reference was made to the fact that it is ‘*updated annually and government endorsed*’ (APP/D2320/W/17/3173275, paragraph 20). The Inspector examining the Telford and Wrekin Local Plan also endorsed the use of OBR rates within a note dated 30 March 2017

¹¹ An average of 3.7% of employed residents in Calderdale hold more than one job, based on APS responses recorded over the past ten years (2007 – 2017)

¹² Paragraph 5.21 of the 2018 SHMA

grow by in the order of 26,088 persons (12.5%). This level of growth in the population of Calderdale represents in the order of an additional 3,000 persons from the upper end of the demographic projections presented in the SHMA over the projection period. Acknowledging the more modest projected growth in the population under the 2014-based SNPP, it would approximately represent an additional 7,500 persons over the same period. As Table 5.3, shows the main reason for the higher levels of population growth is an assumed higher net annual rate of in-migration, which is required to ensure that the labour-force (including the working age population) is increased to offset the ageing trend within the demographic projections¹³.

Table 1: Replicated Table 5.3 - Supporting Likely Employment Growth in Calderdale (2016 – 2035)

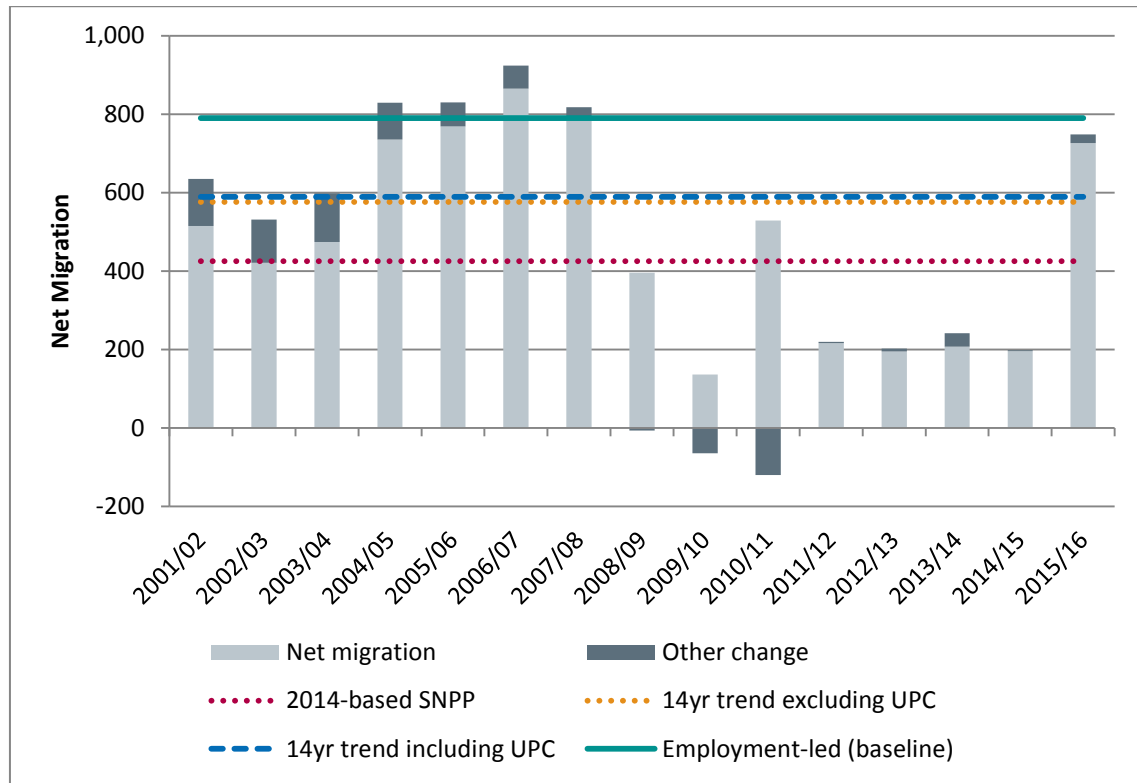
	Change 2016 – 2035				Average per year	
	Population change	%	Households change	%	Net migration	Dwellings ↓
Policy-on	31,725	15.2%	20,628	22.4%	1,044	1,129
Baseline	26,088	12.5%	18,279	19.8%	790	1,001
14yr (UPC)	23,059	11.0%	16,886	18.3%	589	924
14yr trend	22,222	10.6%	15,671	17.0%	576	858
SNPP 2014	18,585	8.9%	14,957	16.1%	436	819

Source: Edge Analytics, 2018

- The 2018 SHMA proceeds to compare the implied level of net migration associated with the employment-based need (Employment-led Baseline) with historic levels. A simplified version of Figure 5.2 of the SHMA is included below. As the 2018 SHMA observes, the modelling suggests that supporting baseline job growth in Calderdale will require a sustained net inflow of migrants at a level only slightly higher than recorded in the then-latest available year (2015/16). This departs from the trend recently seen since the recession, but remains slightly lower than the levels recorded in the borough when housing development peaked prior to the recession.

¹³ Figure 5.1 of the SHMA, for example, confirms that under the official 2014-based SNPP the 16-64 age population is projected to fall between 2016 and 2035.

Figure 2: Benchmarking Net Migration Required to Support Employment Growth in Calderdale (2016 – 2035)



Source: ONS; Edge Analytics (simplified version of Figure 5.2 of the SHMA with the ‘policy-on’ scenario removed)

- In accommodating the higher level of population growth, a higher level of household growth is also anticipated within the modelling. In translating population into household growth, the modelling drew upon official 2014-based headship, albeit with a positive adjustment applied to all of the scenarios presented in Table 5.3 of the 2018 SHMA (replicated above) to allow for an improvement in historically suppressed younger household formation rates¹⁴. The scenario then applies a vacancy rate of 3.9%¹⁵ to generate the calculated need for 1,001 dwellings per annum.

March 2019

CALM2001

¹⁴ Section 4 of the 2018 SHMA details this adjustment at paragraphs 4.34 to 4.39, and notes that a comparable adjustment was also made in the previous 2015 SHMA. The adjustment serves to increase projected household growth, and housing need, by circa 8%

¹⁵ This vacancy rate was consistently applied to all of the scenarios in the 2018 SHMA, including the 2014-based SNPP. A similar approach was also taken in the 2015 SHMA, based on the 2011 Census (footnote 13 of the 2018 SHMA)

Response to Pre-Hearing Note 1

Appendix 1.8

8	Can the Council confirm the total estimated supply of housing likely to come forward over the Plan period from housing allocations and mixed use allocations?
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1.8.1 The total supply of housing accounted for by the housing and mixed use allocations in the Local Plan and is 9,460 dwellings (Calderdale Local Plan Submission Document SD01.1) Table 6.10 and Housing Technical Paper (Evidence Document EV 33 page 62) Appendix 3 Total Row.

1.8.2 The housing allocations produce 8,921 dwellings whilst the Mixed Use allocations supply an additional 539 dwellings.

1.8.3 Table 6.2 (Sources of Housing Land Supply) in the Publication Draft Local Plan states that the number of dwellings required on new land allocations is 9,418.

1.8.4 The difference in the numbers relates to the capacity of allocated sites, which do not exactly replicate the figure for new land allocations required in Table 6.2. The allocated sites therefore provide slightly more than the identified requirement.

Response to Pre-Hearing Note 1

Appendix 1.9

9	Can the Council clarify whether the Plan proposes a stepped housing trajectory or an average annual housing requirement? A stepped trajectory is referred to in paragraph 6.7 and illustrated in Table 6.3, but does not appear to be reflected in the Council's five year supply position in Table 6.4.
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- 1.9.1 The Local Plan Trajectory of deliverable housing sites is stepped (Calderdale Local Plan - paragraph 6.7 and Table 6.3/Picture 6.1 - *Submission Document SD01.1*) and (Housing Technical Paper - paragraph 10.10 - *Evidence Document EV 33*). The requirement associated with the Local Housing Needs (LHN) is an annual average over the plan period.
- 1.9.2 A 5 year housing land supply (including a 20% buffer) is considered deliverable in the first 5 years of the Plan and is achieved with the inclusion of new land allocations, many of which are only likely to be delivered after adoption. It includes sites brought forward from later in the Plan period as these are available and deliverable but may have been positioned in the Local Plan Trajectory to reflect other factors such as the proximity of sites. This is a separate assessment to that of the Local Plan Trajectory.
- 1.9.3 The Local Plan Trajectory takes into account a number of factors such as the lead in times and delivery rate assumptions as well as the significant step change in delivery rates required to meet the housing requirement figure in the Local Plan. The Council therefore decided to follow an approach which staggers delivery over the early years of the Plan with delivery lower in the first 3 years and rising over the remainder of the Plan period. The Council considers this to be a pragmatic approach. It does not preclude other sites coming forward earlier.
- 1.9.4 Therefore, in essence, the Local Plan Trajectory (Figure 6.1/Table 6.3) and the 5 Year Housing Land Supply Position (Table 6.4) represent two separate assessments and are not comparable. As the row entitled "Annual Five Year Supply Requirement" in Table 6.3 and the line in Picture 6.1 (derived from this data) are potentially confusing the Council recognises the need for a minor modification to the Local Plan to delete this information.

Response to Pre-Hearing Note 1

Appendix 1.10

10	The Council is requested to provide further information on all potential sources of employment land supply over the Plan period, including completions since 2016, outstanding commitments, potential intensification on Primary Employment Areas, supply from employment allocations and supply from mixed use allocations (in hectares) – and to confirm the total estimated supply figure between 2016 and 2032.
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1.10.1 The information requested is indicated in the Table below, and the total supply figure is estimated to be 111.73ha.

Potential sources of Employment Land Supply

Local Plan area	New Employment Allocations (ha)	New Mixed use Allocations footnote ¹	Completions 2016/2018	Planning Permissions Not commenced and under construction ²	Intensification in Primary Employment areas ³	Total
Halifax	29.31	2.03	0.11	2.33	1.0	34.78
Brighouse	35.7	0.2	0	1.95	0	37.85
Elland	18.6	1.74	0	2.05	0	22.39
Sowerby Bridge	3.98	0	1.9	0.12	0	6.0
Hebden Bridge	0	0.19	0	0	0	0.19
Todmorden	0	0	0	0.36	0	0.36
Mytholmroyd	8.38	0	0	0.32	0	8.70
Northowram and Shelf	0	0	0	0	0.13	0.13
Ripponden	1.33	0		0	0	1.33
TOTALS	97.3	4.16	2.01	7.13	1.13	111.73

Notes.

1. Mixed Use Allocations

A standard indicative assessment of 50/50 division of site area to provide employment and other uses has generally been applied, except in circumstances where more detailed work has been undertaken (e.g. in the context of other studies).

There are 11 Mixed use sites that will contain an element of commercial/industrial development and six of these are unlikely to have more than 0.25 developable land available for such development.

2. Planning permissions

Planning permission for extensions to existing premises, ancillary development within the curtilage of a business, and replacement buildings are not included. Similarly, permissions for development on sites of less than 0.1ha are excluded as the likely number of jobs created is not significant.

3. Opportunities for Intensification of land within Primary employment Areas.

The potential for intensification of land use within the Primary Employment Areas was considered as in the Employment Land Study, and as part of the Local Plan potential sites assessment.

The Employment Land Study (evidence Document EV01) assessed 133 sites, and recommended that 18 of these should retain their Designation as Primary Employment Area. After further consideration a limited potential for intensification has been identifies in five of these, comprising a total of 1.13has.

The potential site assessment process filtered 39 sites from further consideration where a major factors was the wish to retain the land and/or buildings in their current employment. These sites comprised a total of 44.4ha

Response to Pre-Hearing Note 1

Appendix 1.11

11	<p>The Council is requested to provide further information on the distribution of growth over the Plan period. This should include:</p> <ul style="list-style-type: none"> • A table setting out the distribution of housing growth by settlement (in addition to Table 6.10 which is broken down by 'area'). • A table which shows employment growth by area, which is broken down by the various sources of supply (building on Table 6.11 in the Plan, and reflecting the approach in Table 6.10). • A table which sets out the distribution of employment growth by settlement.
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Calderdale Local Plan (Submission Document SD 01.01): Alternative versions of Tables 6.10 and 6.11 Showing the Distribution of Housing and Employment Growth by Settlement

Local Plan Table 6.10: Distribution of Housing Growth by Settlement

Settlement	New Housing Allocations	Planning Permissions	Windfalls	Total
Ainley Top				
Bank Top	66	2		68
Barkisland	12	3		15
Blackshawhead				
Bradshaw		6		6
Brearley Bridge		-		
Brighouse	4,633	159	152	4,944
Callis Bridge				
Charlestown		1		1
Chiserley & Old Town		2		2
Eastwood				
Elland	442	96	158	696
Elland Lower Edge		1		1
Elland Upper Edge				
Halifax	2,801	732	599	4,132
Harvelin Park				
Hebden Bridge	67	35	24	126
Heptonstall		1		1
Holywell Green & Stainland	42	10	5	57
Jagger Green				
Luddenden & Luddendenfoot	74	9	5	88
Midgley		2		2
Mill Bank		1		1
Mount Tabor		3		3
Mytholmroyd		8	15	23
Northowram	61	20	9	90
Norwood Green				
Outlane				

Pecket Well				
Portsmouth & Cornholme		61		61
Ripponden and Rishworth	58	37	157	252
Shelf	534	52	10	596
Slack		2		2
Southowram	9	1	5	15
Sowerby Bridge	350	201	18	569
Sowood Green		4		4
Soyland Town				
Todmorden	311	160	137	608
Triangle				
Wainsgate				
Wainstalls		1		1
Warley				
Outside Settlement		283		283
TOTALS	9,460	1,893*	1,294	12,647

*Figure does not equal that in published Table 6.10 due to rounding when discounting

Local Plan Table 6.11 Distribution of Employment Land Supply by Settlement

Settlement	New Employment Allocations ¹ (ha)	New Mixed use Allocations footnote ²	Completions 2016/2018	Planning Permissions Not commenced and under construction ³	Intensification in Primary Employment areas ⁴	Total
Ainley Top						
Bank Top						
Barkisland						
Blackshawhead						
Bradshaw						
Brearley Bridge						
Brighouse	28.70	0.20		1.95		30.85
Callis Bridge						
Charlestown						
Chiserley & Old Town						
Eastwood						
Elland	12.01	1.74		2.05		15.80
Elland Lower Edge						
Elland Upper Edge						
Halifax	28.00	2.03	0.11	2.33	1.0	33.47
Harvelin Park						
Hebden Bridge		0.19				0.19
Heptonstall						
Holywell Green & Stainland						
Jagger Green						
Luddenden &						

Luddendenfoot						
Midgley						
Mill Bank						
Mount Tabor						
Mytholmroyd				0.32		0.32
Northowram					0.13	0.13
Norwood Green						
Outlane						
Pecket Well						
Portsmouth & Cornholme						
Ripponden and Rishworth						
Shelf						
Slack						
Southowram						
Sowerby Bridge	5.31		1.9	0.12		7.33
Sowood Green						
Soyland Town						
Todmorden				0.36		0.36
Triangle						
Wainsgate						
Wainstalls						
Outside Ainley Top	4.60					4.60
Outside Brighouse	7.00					7.00
Outside Elland	1.99					1.99
Outside Halifax	1.31					1.31
Outside Mytholmroyd	8.38					8.38
TOTALS	97.3	4.16	2.01	7.13	1.13	111.73

Notes

1. Employment Allocations

Sites indicated as 'Outside' a settlement are located on the settlement boundary.

2. Mixed Use Allocations

A standard indicative assessment of 50/50 division of site area to provide employment and other uses has generally been applied, except in circumstances where more detailed work has been undertaken (e.g. in the context of other studies).

There are 11 Mixed use sites that will contain an element of commercial/industrial development and six of these are unlikely to have more than 0.25 developable land available for such development.

3. Planning permissions

Planning permission for extensions to existing premises, ancillary development within the curtilage of a business, and replacement buildings are not included. Similarly, permissions for development on sites of less than 0.1ha are excluded as the likely number of jobs created is not significant.

4. Potential for Intensification of Land Use in Primary Employment Areas

The potential for intensification of land use within the Primary Employment Areas was considered as in the Employment Land Study, and as part of the Local Plan potential sites assessment.

The Employment Land Study assessed 133 sites, and recommended that 18 of these should retain their Designation as Primary Employment Area. After further consideration a limited potential for intensification has been identified in five of these, comprising a total of 1.13 ha.

The potential site assessment process filtered 39 sites from further consideration where a major factor was the wish to retain the land and/or buildings in their current employment. These sites comprised a total of 44.4ha

Response to Pre-Hearing Note 1

Appendix 1.12

12	The Council is requested to clarify the number of dwellings and extent of employment land that could be accommodated on non-Green Belt land, and the amount that would be provided on land released from the Green Belt.
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1.12.1 Figures in the following tables relate to the Allocations for Housing and the Mixed Use and Employment Allocations in the Calderdale Local Plan as submitted (Examination Library Submission Document SD01.1).

Housing Allocations	Non-Green Belt Land	Green Belt	Total
Dwellings (Number)	3986*	5,474	9,460
*Includes 539 dwellings on mixed use sites			

Employment and Mixed-Use Allocations	Non-Green Belt Land	Green Belt
Employment Land	74.03ha	23.27ha
Mixed Use Land	15.36ha*	0
*This includes land for Employment and 539 dwellings.		