



# Planning and Economic Development Overview and Scrutiny Panel

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## REPORT

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### R2 FUNDS: ACTION PLAN

#### 1.0 Report Summary

The following report summarises to members a range of action points raised at the Planning and Economic Development Overview and Scrutiny Panel held on 22<sup>nd</sup> November 2003. Interim updates were given on 16<sup>th</sup> February 2004 and 14<sup>th</sup> June 2004.

#### 2.0 Background

At the meeting of the Planning and Economic Development Overview and Scrutiny Panel held on 22<sup>nd</sup> November 2003, members were presented with a report, which considered the achievements of Local Plan policy R2 in delivering improvements to outdoor recreation facilities in the district. The report also went on to consider areas where the current policy (and procedures) could be improved to reflect changing demands and improve management efficiency. Following the presentation a wide ranging debate highlighted a number of areas which Officers were asked to investigate.

#### 3.0 Points raised and proposed action

The attached table is an update on progress since the June 2004 meeting. It includes the original minuted point, summary of the issue raised along with progress to date and any actions that may be required.

#### Recommendation

It is recommended that members note the action plan attached to this report and that a review of its progress be reported back to the Panel at an appropriate future date.

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#### Background Papers:

Salisbury District Local Plan Adopted 2003 Policy R2  
Assessing needs and opportunities: PPG17 Companion Guide.

#### Implications:

**Legal:** Comments contained in the associated Action Plan.

**Financial:** None

**Personnel:** None

**Environmental:** None

**Human Rights:** None

**Council's Core values:** Excellent Service; Fairness and Equality; open, learning Council and a willing partner; Communicating with the public; Supporting the disadvantaged.

**Consultation Undertaken:**

**Parish Affected:** All

## Update of Progress on R2 Action Points

Minuted Point from 22/11/03	Summary of Issue	Progress at November 2004
1. The need to extend the period within which 'R2' funds must be used, from 5 years (The current 'use within period') to 10 years	Small Parishes find it difficult to accrue enough funds within 5 years to deliver any sort of outdoor recreation scheme.	<p>Officers and Legal Services have drafted a new Section 106 agreement, which is now being used. Although it does not extend the time period to 10 years, it puts the onus on the developer to contact the council within 6 months of the date of expiry for a refund. If no request is made within this time period, the money can be kept indefinitely. Development Contributions Officer will make periodic checks of the database to see whether any requests for return have been made and if not, will update database to reflect this.</p> <p>The wording of the Section 106 agreement has also been changed so that if a specific project has been identified and allocated by resolution of a Parish Council/Committee or delegated officer, the money can be retained for that project.</p> <p><b>ACTION: New Section 106 agreement in place therefore no further action required.</b></p>
2. The need for a scheme to allow for 'R2' funds to be spent within a progressively widening geographical area (up to a point) from the designated village should that village not be able to utilize the funds allocated	There needs to be more flexibility about how funds can be spent, particularly to deliver larger scale facilities which may serve a group of rural parishes	<p>The new Developer Contributions Officer will be commissioning community area studies in Spring 2005 to identify any ways of delivering larger and better facilities, which meet the needs of a wider catchment area using R2 funds from a number of parishes.</p> <p><b>ACTION: Development Contributions Officer to undertake survey next Spring 2005.</b></p>
3. The need for the new Local Development Framework to widen the scope of R2 enabling the collection of contributions for the funding of internal recreational facilities (and not just external facilities, as at present).	Small Parishes have found that they have now exhausted expenditure on outdoor recreation facilities but felt that they would appreciate assistance with indoor recreation facilities (e.g. badminton nets for the village hall)	<p>The whole issue of community infrastructure has been identified as one of the first areas for the new LDF to examine. Following the approval of the Councils Local Development Scheme in the new year, formal work will begin. In the mean time officers will continue to investigate and consult which areas of need should be brought within the scope of any new policy and instances of best practice from other authorities.</p> <p><b>ACTION: Development Contributions Officer to consult with stakeholders (PC's members, etc) and undertake survey to inform the LDF next Spring 2005.</b></p>
4. The current practice of determining the funding split (for child, youth, /or adult facilities) of any funds according to the number of bedrooms existing within a new dwelling (or dwellings) should be discontinued. Instead, the recipient parish/ward should be able to determine the use (including target age group) of any funds allocated.	Parishes have found that often they would like to implement either a child's play scheme or a youth/adult scheme but have found that due to the funding split there are not the relevant funds available.	<p>The NPFA 6 Acre Standard is the nationally recognized standard and therefore we need to continue to measure ourselves against this standard to justify requesting the entire R2 sum. For example; if a Parish Council, for instance, believed that it could only provide adult facilities, it would be difficult for the planning department to justify that the entire R2 sum requested is actually required.</p> <p><b>ACTION: No further action can be committed to.</b></p>
5. The need to reconsider (according to prevailing market conditions) the sums requested from developers as a result of the granting of a	Members were concerned that maybe contributions were not keeping abreast of price inflation	<p>The amounts collected have been benchmarked against other authority areas and have been found to be entirely consistent with the cost of equipment. Officers could not justify a recommendation to increase R2 charges over and above inflation.</p>

Minuted Point from 22/11/03	Summary of Issue	Progress at November 2004
permission	of play equipment and sport facilities.	<b>ACTION: No further action required.</b>
6. The need to allow for the Scheme to provide for the ongoing maintenance (and, possibly, upgrading) of facilities installed using 'R2' funding	Members were concerned that once facilities were provided there was no or little funds available for ongoing maintenance /repair of equipment.	R2 funds can already be used for maintenance costs. Clearly justified requests, which demonstrate that value for money will be gained will normally be favourably considered. <b>ACTION: No further action required.</b>
7. The need to reduce the current administrative burden of the Scheme on the Council. For example, by reducing the number of Officers/Service Units involved in the Scheme and/or levying an administration charge on developers involved in the Scheme	Officers highlighted the increasing time burden on planning staff in administering the policy, especially with the growth of the monies contributed with the increasing level of house build.	The new fund administration database now enables the production of reports, statements and other information far more quickly and the process of releasing funds is as a result far more simple and quick. As an added dimension the database has been designed to link into more general housing monitoring work, which the Council will be required to undertake for the LDF process.  In March 2004, an administration charge was introduced on all R2 legal agreements, which has enabled the appointment of a Developer Contributions Officer. This post is self-funding and will be responsible for processing the receipt of payments as well as being more proactive in advising parishes about the uses of funds and when funds are nearing expiry.  Development Contributions Officer was appointed in early Summer and since that time has taken on all R2 responsibilities and associated dealings with other units. <b>ACTION: No further action required.</b>
8. In addition to point 7, above; the need to allocate a 'Lead Officer' with the responsibility of overseeing the operation and ongoing updating of the Scheme		The Lead Officer for the scheme is the Team Leader, Forward Planning and Conservation. However, the day to day running of R2 is the responsibility of the Development Contributions Officer. His appointment has promoted consistency and is a valuable resource to advise parishes and organise more focused spending arrangements in consultation with stakeholders. <b>ACTION: No further action required.</b>
9. Support for the need to upgrade the current ICT system used for tracking the payment, take up and spend of funds. Such an upgrade should allow for Parishes to be updated, at least twice a year, of the status of their existing/remaining 'R2' funds	Officers highlighted that the ICT system currently used was developed some years ago. The data in the system is not arranged in a user friendly format and was not developed in order to benefit from the strengths of the software used.	The fund-monitoring database is now up and running. The new system allows for statements to be run off at the touch of a button and will free up time for the Developer Contributions Officer to undertake new surveys and expenditure strategies. Now the new system is up and running, it has been possible to advise the relevant Parish Councils of monies due to expire within the next year. This has given the Parish Councils concerned time to implement a spending strategy. <b>ACTION: Statements will be prepared and sent out twice a year.</b>
10. With reference to any amendments made to the existing Scheme, the need to consider the legal implications of these amendments on any funds	Members would like to know if the future changes proposed can be legally applied to R2 sums	Applicants have signed individual legal agreements which would all require revision to enable new uses, etc. to be permitted. There would be little enthusiasm by applicants unless they were particularly community minded, and that may also depend upon whether the individuals

Minuted Point from 22/11/03	Summary of Issue	Progress at November 2004
collected but not yet utilised	previously collected from developers. (e.g. time of return of monies and child/youth adult splits could also be implemented to sums already contributed by developers)	<p>can be located. No retrospective changes can be made without the original signatories authorization.</p> <p><b>ACTION: Under the current system, no further action can be taken. However this will be reviewed when the LDF process comes into force.</b></p>