

Monitoring Framework

Draft Test Valley Local Plan 2040 Regulation 18 Stage 2

January 2024

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1. Introduction

- 1.1 This document is the draft Local Plan Monitoring Framework (“LPMF”). It lists the draft monitoring indicators that will appear in the Council’s yearly Authority Monitoring Report (“AMR”) and replaces the current Monitoring Framework.

2. Mandatory monitoring requirements

- 2.1 Local Authorities are able to choose what targets and indicators to include in their monitoring whilst ensuring that they are prepared in accordance with relevant UK and ‘retained EU law’ which is now part of domestic legislation.
- 2.2 It is essential that planning policies are monitored and assessed, as this, along with the Sustainability Appraisal process in particular, provides data which allows us to consider whether policies are working properly and can identify those policies which could be reviewed. This is part of the plan making process. The sustainability appraisal is a tool for appraising policies to ensure they reflect sustainable development objectives (i.e. social, environmental and economic considerations). There is a requirement in the Planning and Compulsory Purchase Act 2004 that sustainability appraisals are undertaken for all Development Plan Documents.

3. Development of the Local Plan Monitoring Framework

- 3.1 This Local Plan Monitoring Framework (LPMF) has been produced to outline how policies in the Local Plan (LP) will be monitored following adoption of the draft Local Plan 2040.
- 3.2 As part of the review and update of indicators and targets, the policies in the new draft LP will be considered with appropriate performance measures against which to assess their successful implementation identified as shown in Table 2.

4. Structure of the LPMF

- 4.1 The Local Plan contains 10 Objectives that form the basis of the structure for the LPMF:

Objective 1: Climate Change

- 4.2 Tackling climate change through transition to a carbon neutral future, where new development and local environments are adaptable and resilient to the changing climate. To increase energy efficiency from new development,

facilitate more sustainable living, and manage the risks of flooding, whilst seeking to protect our water resources.

Objective 2: Our Communities

- 4.3 Deliver and strengthen sustainable, cohesive and healthy communities in our towns and villages. Secure lasting benefits for our communities, including enhancements to social, green, health, educational and other local infrastructure through new development in sustainable locations. Support the viability of the Borough's town and local village centres in meeting many of the daily needs of our communities and residents.

Objective 3: Town Centres

- 4.4 Create cultural, adaptable, diverse and vibrant town centres in Romsey and Andover, including through regeneration schemes, and by securing high quality design and accessible mixed-use development that will increase vitality, whilst protecting and enhancing their historic and green assets.

Objective 4: Built, Historic and Natural Environment

- 4.5 Conserve and enhance the built, historic and natural environment, including local character, identity, cultural heritage, the variety of local landscapes and the special landscape character of the Borough for everyone to enjoy.

Objective 5: Biodiversity and Ecology

- 4.6 Conserve and enhance biodiversity, by taking opportunities to promote, and secure clear and measurable improvements to habitats and biodiversity. Enhance the connectivity, quantity and quality of ecological and green infrastructure networks, to help maintain and enhance the condition of protected nature conservation sites, protected species and the resilience of biodiverse environments to the changing climate.

Objective 6: Health, Wellbeing, and Recreation

- 4.7 Encourage active lifestyles and enhance health and wellbeing, by providing opportunities for recreational, and community activities, through the provision of accessible open spaces, access to the countryside, sports, leisure and other community facilities and services. Work with the Council's partners to secure access to healthcare for all, including the Borough's most vulnerable residents.

Objective 7: Design

- 4.8 Deliver safe, attractive, integrated and well-designed environments that take account of and respond positively to local context and character. Strengthen the sense of belonging and identity within Test Valley by supporting enhancements to the distinctive towns and villages of the Borough. Place-making will be integral to our design approach, helping to strengthen our connections between people and place.

Objective 8: Housing

- 4.9 Provide a range of homes that are fit for purpose and designed to meet the needs and aspirations of different groups within the community, including a range of affordable housing and homes that meet the needs of an ageing population.

Objective 9: Economy, Prosperity and Skills

- 4.10 Promote a vibrant and resilient local economy, including the visitor economy, where future sustainable growth and innovation in green, high technology and other sectors can provide for a range of job opportunities and where businesses and individuals can thrive. Support a skilled and diverse workforce so that local people can access learning opportunities and jobs and benefit from greater prosperity.

Objective 10: Transport and Movement

- 4.11 Encourage active and sustainable modes of transport, that are accessible, safe and attractive to use, whilst also seeking to reduce the impact of travel in particular by private car. Ensure new development facilitates improvements to accessibility, safety and connectivity in our transport infrastructure.
- 4.12 Under each Objective there are strategic and non-strategic policies. Policies are grouped by objective and meeting development needs therefore indicators/targets are set out according to this structure.

5. Indicators Targets and Trends

- 5.2 For policies where clear outputs are required, such as those relating to housing delivery, specific targets have been included in the LPMF. Performance against such targets can inform whether Local Plan policies should be reviewed.
- 5.3 For policies where it is not possible to attach a clear target, a general trend has been included in the LPMF to identify whether a broad direction of travel is being met. This can include either an increase or a decrease in a recorded indicator.
- 5.4 For other indicators that provide helpful background data, neither a target nor a trend is appropriate.

6. Meeting targets

- 6.1 Where it would appear through monitoring that targets are not being met, it may be necessary to:

- **Review the policies** in the Local Plan to see if they need to be amended in order to deliver the Strategic Priorities
- Consider **alternative strategies**
- Take appropriate **management action** to remedy the cause of underperformance. This will be identified in the AMR.

6.2 The need to update policies or take appropriate management action will take into account evidence on likely future delivery, for example information on granting of planning permissions and feedback from developers on the prospects for the implementation of schemes.

Table 2: Local Plan Monitoring Framework

Policy	Strategic/Non Strategic	Indicator	Target
SS1: Settlement Hierarchy	Strategic	Development is sustainable within settlement boundaries, and in line with the settlement hierarchy and relevant policies.	That development within the settlement boundaries is sustainable and according to the relevant policies in the Local Plan and Neighbourhood Plans. Planning permissions granted in accordance with the settlement hierarchy's tier system.
SS2: Development in the Countryside	Strategic	Development is in line with relevant policies, or otherwise an essential need is justified, for its need to be located in the countryside	That development accords with relevant policies of the Local Plan and Neighbourhood Plans, or otherwise an essential need is justified, for its location in the countryside.
SS3: Housing requirement	Strategic	Meeting the minimum housing requirement through housing completions, commitments, strategic allocations and including through community led and rural housing. Housing Trajectory showing: i) Annual dwelling completions, ii) Annual average no. of additional dwellings required to meet housing targets	Neighbourhood Plans and Local Plan to cumulatively allocate 11,000 dwellings over the plan period. (6,720: NTV and 4,730: STV) based on 550 dwellings per annum (annual equivalent).
		Amount of land available that contributes to the 5-year housing land supply in both housing market area supply areas	To provide and maintain a 5-year housing land supply of deliverable sites.
SS4: Rural Housing Requirement	Strategic	Contributing to meeting the minimum housing requirement through the rural housing requirement (Neighbourhood Plans).	Deliver minimum of 542 homes Northern Test Valley Rural Housing Requirement: 260 homes Southern Test Valley Rural Housing Requirement: 282 homes
SS5: Neighbourhood Plan Numbers	Strategic	NDPs to Meet the minimum housing requirements	To ensure that NDPs meet the minimum housing requirements which have been set as follows;

Policy	Strategic/Non Strategic	Indicator	Target
			Northern Test valley Ampport:10 Grateley: 10 Longstock: 10 Nether Wallop:10 Southern Test Valley Kings Somborne:10 Wellow:20
SS6: Meeting the Housing Requirement	Strategic	To deliver the strategic housing allocations to meet the housing requirement	Number of dwellings permitted and delivered in accordance with Policies NA1, NA5-NA9 and SA1 and SA3 – SA7
SS7: Employment Land Requirement	Strategic	Total land permitted for employment by strategic site and allocation	To deliver 71.7 hectares of employment land over the plan period. (31.3 ha NTV and 40.3 ha STV)
SS8: Meeting the Employment Land Requirement	Strategic	To deliver the strategic employment allocations to meet the employment land requirement	Amount of employment land permitted and delivered in accordance with Policies NA10, NA11 and SA8-SA12
SS9: Delivery, Monitoring and Contingency	Strategic	Monitoring of how LP is delivering in accordance with the Monitoring Framework	Overall monitoring of LP policies in the Authority Monitoring Report.
Northern Test Valley			
Town centre Policies NA1: Andover Town Centre NA2: Delivering High Quality Development in Town centre NA3: Andover Town Centre Uses	Strategic	Status, type and amount of floorspace granted for retail and other uses.	Planning permissions granted for uses is in accordance with the Andover Town Centre zones.
Housing Allocation Policies NA5: Housing Allocation at Land South of London Road NA6: Housing Allocation: Land at Manor Farm, Andover NA7: Housing Allocation: Land at Bere Hill, Andover	Strategic	Number of dwellings permitted and completed to meet the housing requirement according to Policy SS6. Number of dwellings permitted and completed to meet the housing	To permit and deliver the number of dwellings planned for in the plan period

Policy	Strategic/Non Strategic	Indicator	Target
NA8: Housing Allocation: Land east of Ludgershall NA9: Housing Allocation: Land Southeast of Ludgershall		requirement according to each allocation.	
Employment Land Policies NA10: Employment Allocation: Land south of Thrupton Aerodrome NA11: Thrupton Aerodrome	Strategic	Amount of employment land permitted and completed to meet employment requirement according to Policy SS8. Amount of employment land permitted and completed to meet employment requirement according to each allocation. Amount of employment land permitted and completed to meet employment requirement according to each allocation.	To permit and deliver the strategic employment allocation. Development and redevelopment of employment uses at Thrupton Aerodrome.
Southern Test valley			
Town Centre Policies SA1: Romsey Town Centre SA2: Delivering High Quality Development in Town Centres SA3: Romsey Town Centre Uses SA17: Stockbridge Local Centre	Strategic	Status, type and amount of floorspace granted for retail and other uses. Development in Stockbridge fronting the High Street is appropriate to the scale, function and character of the local centre.	Planning permissions granted for uses is in accordance with the Romsey Town Centre zones. Planning permissions fronting Stockbridge High Street in compliance with Policy NA4.
Housing Allocation Policies SA4: Housing Allocation: Land South of Ganger Farm SA5: Housing Allocation: Land South of Bypass, Romsey	Strategic	Number of dwellings permitted and completed to meet the housing requirement according to Policy SS6. Number of dwellings permitted and completed to meet the housing	To permit and deliver the number of dwellings planned for in the plan period

Policy	Strategic/Non Strategic	Indicator	Target
SA6: Housing Allocation: Land at Velmore Farm, Valley Park SA7: Housing Allocation: Land to north of King Edward Park		requirement according to each allocation.	
Employment Land Policies SA8: Land at Upton Lane SA9: Land Adj to Abbey Park (both sites) SA10, Land South of Botley Road, Romsey SA11: Land at Test Valley Business Park, North Baddesley SA12: Kennels Farm, Science Park Extension SA13: University of Southampton Science Park SA14: Land at Adanac, Nursling SA15: Nursling Estate	Strategic	Amount of employment land permitted and completed to meet employment requirement according to Policy SS8. Amount of employment land permitted and completed to meet employment requirement according to each allocation. Amount of employment land permitted and completed to meet	To permit and deliver the strategic employment allocation
SA16: Forest Park	Strategic	Delivery of the Forest Park with safe highway access and linkages to public rights of way network and existing pedestrian and cycle access.	Delivery of the Forest Park.
Development Management Policies			
Climate Change Policies CL1: Countering Climate Change CL2: Flood Risk CL3: Sustainable Buildings and Energy Use CL4: Water Use and Management	Strategic Non-Strategic	Number of planning permissions granted contrary to advice from the Environment Agency on flooding and water quality.	To significantly reduce greenhouse emissions (referred to as mitigation) but also to ensure we adapt, counter and are resilient to future conditions.

Policy	Strategic/Non Strategic	Indicator	Target
CL5: Renewable Energy and Low Carbon Energy			
Our Communities COM1: Delivering Infrastructure COM2: Community Services and Facilities	Strategic	Progress of provision of other strategic infrastructure items such as the necessary on-site infrastructure and where appropriate off-site infrastructure requirements. Changes in market conditions and viability Changes in the requirement of infrastructure providers.	To ensure the timely delivery of appropriate infrastructure. To deliver strategic infrastructure items in accordance with the timeframes identified within the Infrastructure Delivery Plan to mitigate the impact of development.
TC1: Main Town Centre Uses	Strategic	Number of permissions granted for main town centre uses outside the town centre boundaries of Andover and Romsey with a gross floorspace exceeding 280sqm. Number of permissions granted for retail and leisure developments with a gross floorspace exceeding 1,000sqm, outside the town centre boundaries of Andover and Romsey, but within settlement boundary.	To ensure all planning permissions granted for main town centre uses outside the settlement boundary of Andover and Romsey to satisfactorily comply with a Sequential Test. To ensure all planning permissions granted with a gross floorspace exceeding 1,000sqm, outside the town centre boundaries of Andover and Romsey, but within settlement boundary are accompanied by an impact assessment.
Built, Historic and Natural Environment ENV1: Historic Environment ENV2: Development Affecting Heritage Assets ENV3: Landscape Character ENV4: Local Gaps	Strategic	Number of planning permissions granted contrary to technical advice	To ensure all planning permissions are granted in accordance with the policy and technical advice for the protection and enhancement of the Borough's environment including our landscape, and countryside.

Policy	Strategic/Non Strategic	Indicator	Target
ENV5: Pollution ENV6: Lighting ENV7: Amenity			
Ecology and Biodiversity BIO1: Conservation and Enhancement of Biodiversity and Geological Interest BIO2: International Nature Conservation Designations BIO3: Biodiversity Net Gain BIO4: Green Infrastructure BIO5: Trees and Hedgerows	Strategic Non- Strategic	Change in areas and populations of biodiversity importance including:(i) Change in priority habitats and species (by type); and (ii) Change in areas designated for conservation and enhancement of Biodiversity and geological importance. Mitigation delivered by permitted development.	No habitats and species of importance to biodiversity and sites of geological interest to be lost to permitted development without appropriate mitigation. To ensure that development that is likely to have a significant effect, either alone or in-combination, on an international nature conservation designation, trees and hedgerows or areas of biodiversity importance is fully mitigated.
Health, Wellbeing and Recreation HE1: Open Space and Recreation HE2: Existing Open Space HE3: Access to the Countryside	Non- Strategic	Amount of open space lost, replacement of open space provision secured, and contributions secured towards Public Rights of Way or other routes within the countryside. Deficits and surpluses of the amount of open space lost or replaced which has been secured through direct provision or financial contributions.	To ensure appropriate open space provision with development as set out in standards of the policy. To protect against the loss of open spaces. To enable access to the countryside and local green spaces through the network of paths and Public Rights of Way (PRoW).
Design DES1: Delivering of Sustainable and High-Quality Design	Strategic	Number of permissions granted for major development supported by an appropriate masterplan and design and access statement. Number of planning permissions granted contrary to the policy.	To ensure all relevant planning permissions are granted in accordance with the policy.

Policy	Strategic/Non Strategic	Indicator	Target
DES2: Design Detail and Considerations DES3: Residential Areas of Special Character	Non- Strategic		To ensure design excellence and promote high quality sustainable design. To ensure all major development is accompanied by a masterplan, design code or design and access statement.
HOU1: Affordable Housing	Strategic	Affordable housing delivered Within the Undesignated Area; <ul style="list-style-type: none"> • 15 or more dwellings (site of 0.5ha or more)=40% target • 10-14 dwellings (0.34-0.49 ha) 30% target Within the Designated Rural Area; <ul style="list-style-type: none"> • 15 or more dwellings (site of 0.5ha or more) =40% target • 10-14 dwellings (0.34-0.49 ha) 30% target • 6-9 dwellings (0.22-0.29ha) =20% target as financial contribution 	To ensure planning permissions are in accordance with policy and achieve affordable housing targets set out in the policy.
HOU2: Community Led Development	Non- Strategic	Amount of community led developments permitted and delivered.	To permit and deliver community-led developments.
HOU3: Rural Exception Affordable Housing	Non- Strategic	Number of schemes and homes permitted and delivered through for rural exceptions sites.	To permit and deliver Rural Exception Affordable Housing Sites to meet rural affordable housing needs.
HOU4: First Homes Exception Affordable Housing	Non- Strategic	Number of schemes and homes delivered as First Homes.	To permit and deliver First Homes Exception Affordable Housing Sites where in accordance with the policy.
HOU5: Provision of Housing to meet our needs	Non- Strategic	Mix of homes permitted and delivered by size, type and tenures providing a range of accommodation which	To permit and deliver a range of a mix of homes by: size (including number of bedrooms), type and tenure to meet local needs.

Policy	Strategic/Non Strategic	Indicator	Target
		reflects local needs, for both market and affordable housing.	
HOU6: Residential Space Standards	Non- Strategic	Number of residential homes (including conversions) provided to Part M4(2) standard (accessibility) and Nationally Described Space Standards (NDSS) (size) or the Building Control space standard.	Homes to meet space and accessibility standards in accordance with the policy.
HOU7: Self Build and Custom Build Housing	Non-Strategic	Number of plots permitted and delivered for Self and Custom Build.	To permit and deliver self-build and custom build housebuilding
Meeting the Needs of Gypsies, Travellers and Travelling Showpeople HOU8: Meeting the needs of Gypsies, Travellers and Travelling Showpeople HOU9: Gypsies, Travellers and Travelling Showpeople	Strategic Non- Strategic	Net additional pitches and sites for gypsy and travellers. Five-year supply of pitches.	To meet the need of 44 pitches for gypsies and travellers and 25 plots for travelling showpeople. To maintain a five-year supply of pitches.
Housing Policies HOU10: Occupational Accommodation for Rural Workers in the Countryside HOU11: Existing Dwellings and Ancillary Domestic Buildings in the Countryside HOU12: Replacement Dwellings in the Countryside	Non- Strategic	Number permissions for rural worker dwellings, extensions, replacements and ancillary residential development in the countryside.	To provide for housing for rural workers in the countryside where an essential operational requirement. To ensure that the impacts of extensions and replacement dwellings in the countryside are minimised regarding their impact upon their surroundings, the wider landscape and the character of the countryside.

Policy	Strategic/Non Strategic	Indicator	Target
EC1: Retention of Employment Land and Strategic Employment Sites	Strategic	Amount of employment land lost to other uses.	To ensure that existing employment land and strategic employment sites are retained for employment uses.
EC2: Re-Use of Buildings in the Countryside	Non- Strategic	Re-use of building permissions in the countryside.	To enable appropriate re-use of buildings in the countryside.
EC3: Rural Diversification and Employment Sites in the Countryside	Non- Strategic	Permissions relating to rural diversification and employment sites in the countryside.	To enable employment development and rural diversification on existing employment sites in the countryside, where appropriate.
EC4: Tourism	Non- Strategic	Permissions granted for tourism developments and loss of tourist accommodation.	To enable tourism development including tourist accommodation whilst protecting the high quality environmental, historic and cultural assets of the Borough.
EC5: Skills and Training	Non- Strategic	Permissions which include an Employment and Skills Plan and number of apprenticeships and amount of financial contributions towards skills and training.	To ensure that an Employment Skills Plan is secured on development of 50 or more dwellings or 1000sqm of commercial floorspace.
Transport Policies TR1: Active and Sustainable Travel	Strategic	Funding, travel plans or planning obligations secured towards sustainable transport schemes.	To ensure the delivery of sustainable development through support for sustainable transport schemes and travel plans.
TR2: Assessing Transport Impacts TR3: Parking Standards	Non- Strategic		To ensure the delivery of parking provision for development in line with parking standards. .

7. Reviewing the Local Plan Monitoring Framework

- 7.1 It is anticipated that the LPMF will be reviewed periodically, using the latest AMR as a starting point. The following activities could trigger the need for an update to the LPMF:
- the adoption or revision of a Local Plan document
 - the discontinuing of an existing data source for providing indicator information
 - the availability of a new data source that could improve Local Plan policy monitoring
 - changes in legal or national policy expectations for monitoring of Local Plans
- 7.2 This LPMF is being published at the same time as the Regulation 18 Stage 2 Test Valley Local Plan 2040. The LPMF may be subject to further revision as the LP is progressed and undergoes an examination in public (expected to take place in early-mid 2024) and its subsequent steps leading to adoption. Any revisions to the LPMF resulting from revisions to the LP policies or the other influences referred to above will be set out in a future version of this document.